

# Annual Investment Plan 2022-23



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# Introduction

**This *Annual Investment Plan (AIP)* has been developed to inform levy payers, peak industry councils, the Australian Government and the wider industry about MLA’s planned work program in 2022–23.**

Meat & Livestock Australia (MLA) is a research, development and marketing service provider to the Australian red meat and livestock industry. MLA’s purpose is to foster the long-term prosperity of the Australian red meat and livestock industry, by collaborating with stakeholders to invest in research, development and marketing initiatives that contribute to producer profitability, sustainability and global competitiveness. It is funded by levy payers, the Australian Government and value chain partners.

MLA prepares an AIP each financial year to guide the practical delivery of MLA’s long-term investment priorities and outcomes, which are set out in MLA’s *Strategic Plan 2025* and align with the Australian Government’s science and research priorities, and its rural research, development and extension priorities.

MLA has taken its strategic direction from *Strategic Plan 2025*, the Australian Government priorities mentioned above and the six priorities that the Australian red meat industry has set through its own strategic plan, *Red Meat 2030* (see Figure 1). *Red Meat 2030* also describes a shared vision and direction for the industry through two objectives:

- **to help double the value of Australian red meat sales**, product must meet or exceed consumer needs and the focus be on where we have a competitive advantage
- **to become the trusted source of the highest quality protein**, the focus should be on product quality and product attributes, including animal health, welfare and environmental credentials.

The alignment of the *Strategic Plan 2025* and *Red Meat 2030* is shown in Figure 2.

Figure 1: The six industry priorities outlined in *Red Meat 2030*



Figure 2: Alignment between *Red Meat 2030*, MLA's *Strategic Plan 2025* and MLA's *Annual Investment Plan*



This AIP outlines the programs, sub-programs, product groups, key performance indicators and budgets that will guide MLA's activities in 2022–23. Successful delivery of this plan will act as a stepping-stone towards achieving MLA's *Strategic Plan 2025*.

This *Annual Investment Plan* also denotes the sub-programs and product groups carried out by MLA's subsidiaries, MLA Donor Company (MDC) and Integrity Systems Company (ISC).



# Aligning MLA's programs to the six strategic focus areas

MLA's *Strategic Plan 2025* contains six strategic focus areas:

1

Decisions informed through data and insights



2

Targeted investment to address the industry's big, complex challenges



3

Enabling new sources of revenue



4

Developing new, high value products that allow us to maximise the whole carcass



5

Beyond today's farm gate



6

Strengthening our core



Table 1 shows the alignment of these six areas to MLA's programs.



**Table 1: Alignment of MLA's programs to strategic focus areas**

Program	Strategic focus areas					
	Decisions informed through data and insights	Targeted investment to address the industry's big, complex challenges	Enabling new sources of revenue	Developing new, high value products that allow us to maximise the whole carcass	Beyond today's farm gate	Strengthening our core
Animal wellbeing		●				
Domestic market	●					●
International markets						●
Eating quality	●		●	●		●
Environmental sustainability	●	●	●		●	
Feedlot	●	●				
Integrity systems	●					●
Objective measurement	●	●		●		
Producer adoption	●	●	●			
Product and packaging innovation		●		●		
Value chain information and efficiency	●	●				
Productivity (off-farm)	●	●		●		
Productivity (on-farm)	●	●				●
Capability building		●				●
Communication	●	●	●	●	●	●
Corporate services					●	●

## Decisions informed through data and insights

MLA will focus on transitioning to a culture that captures and shares data across every point in the supply chain. This will enable the identification of the highest value opportunities and a shared understanding of challenges that need addressing. Collectively, we can then make more informed, strategic decisions and align responses for greatest impact.

### This means MLA will:

- prioritise investments that allow for the seamless transfer of information through a national data platform
- invest in our people, providing them with the skills and confidence to interpret and use integrated data to drive their decision making.

### By 2025, success will be:

- more producers with access to data and feedback on animal performance to inform production decisions
- industry has a data culture, with supply chain decisions based on data capture and analysis.



## Targeted investment to address the industry's big, complex challenges

MLA will focus on prioritising which challenges to address by the impact they could deliver for the industry. MLA's starting point will be exploring mechanisms to optimise resources and address seasonal and climate variability. MLA will also continue its focus on meeting the expectations of customers, consumers and the community around animal health, animal welfare and environmental stewardship.

### This means MLA will:

- have a focused and targeted investment portfolio
- increase investment in and explore new approaches to producer adoption around areas such as adaption to climate variability, reproduction, mortality and objective measurement
- invest in the strengthening of our integrity systems, demonstrating the important role of red meat in a sustainable food system.

### By 2025, success will be:

- producers have the capability to adopt R&D outcomes that directly improve their productivity and profitability
- improved market specification compliance across defined quality, animal health and other value-based pricing dimensions
- objective measurement of animal welfare for live export, feedlot and extensive production systems implemented, with an increase in practice change
- progress towards net zero carbon emissions goal by 2030
- strengthened perception of Australian production practices, across domestic and international markets.



## Enabling new sources of revenue

MLA will focus on identifying new sources of revenue to capture value and increase profitability, alongside red meat production.

This means MLA will:

- identify opportunities and explore business models around the provision of services and reward mechanisms for good environmental stewardship
  - invest in partnerships across the supply chain and across sectors, to identify high value opportunities for the conversion of production waste into valuable products.
- By 2025, success will be:
- across the supply chain, additional sources of revenue through new business models have been enabled
  - more producers have diversified their revenue to include service offerings.



## Developing new, high value products that allow us to maximise the whole carcass

MLA will focus on diversifying products to drive growth through new usages and occasions for red meat. Currently 20% of the carcass delivers 80% of the value and we need to shift this balance, including by transforming what is currently considered waste, attracting little or no value into high value products or ingredients.

This means MLA will:

- identify opportunities to capture value and increase producer profitability through product and market diversification.
- By 2025, success will be:
- more producers and brand owners diversify revenue earned from commodity to higher value products
  - customers and consumers globally value Australian red meat as a quality ingredient.



## Beyond today's farm gate

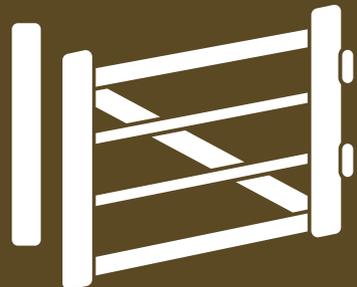
MLA will focus on balancing the current 'known' challenges and opportunities and anticipating the future issues industry will face. MLA needs to foster a culture that looks both to the future and to adjacent industries to inform today's decision making.

### This means MLA will:

- capture and apply valuable insights from beyond the farm gate and outside food in order to mitigate risks and enhance sustainability and global competitiveness
- strengthen collaboration with current and new partners to achieve efficiencies and impact.

### By 2025, success will be:

- improvement in the rate of return to total capital for beef and sheep farms
- cross-sectoral projects and projects funded by external investment account for a growing share of MLA's investment portfolio
- enhanced project management and milestone delivery.



## Strengthening our core

MLA will focus on continuing to invest in the essential services which underpin the competitiveness of our industry, specifically our integrity systems, market access, nutrition, and domestic and international marketing and promotion activities.

### This means MLA will:

- continue to invest in the development and delivery of our essential services and seek to achieve efficiencies in these activities to maximise our return on investment
- support market growth and market diversification with investments prioritised by market, channel and segment attractiveness
- support market access, including alleviation of technical trade barriers
- share knowledge with commercial supply chain participants to support development of branded and high value products.

### By 2025, success will be:

- Australian red meat occupies preferred status amongst customers, consumers and governments
- contribution towards red meat sales value growth and 2030 industry target
- contribution to improving preferential access to key markets and to the industry 2030 target of a \$1 billion reduction in technical trade barriers
- integrity systems are globally competitive, easy to use, and valued by industry, with increased rates of compliance
- producers are confident in the MLA *Strategic Plan 2025* and understand the social, environmental and economic impact and value of MLA investments.



# Budget summary

In 2022–23, MLA plans to invest \$320.2 million in research, development and marketing activities across 16 program areas.



Tables 2–4: Projected 2022–23 investment by (\$ million\*)

\*Total may not add up due to rounding

Pillar	Total \$320.2 million
Our people	24.0
Our customers, consumers and community	74.6
Our livestock	86.6
Our environment	47.4
Our markets	32.9
Our systems	36.8
Essential services	17.9

Funding source	Total \$320.2 million
Sheep levies	40.4
Grainfed cattle levies	13.8
Grassfed cattle levies	62.4
Goat levies	0.5
Government	103.9
Australian Meat Processor Corporation	34.4
LiveCorp	1.1
External	63.7

Program	Total \$320.2 million
Animal wellbeing	5.0
Capability building	22.8
Communication	9.2
Corporate services	17.9
Domestic market	26.2
Eating quality	5.1
Environmental sustainability	38.2
Feedlot	6.7
Integrity systems	30.5
International markets	45.3
Objective measurement	7.9
Producer adoption	20.1
Product and packaging innovation	3.3
Productivity (off-farm)	35.3
Productivity (on-farm)	39.0
Value chain information and efficiency	7.7

# Funding by industry priority

Tables 5–11: Red Meat 2030 objectives, projected 2022–23 investment by funding source (\$ million\*)

\*Total may not add up due to rounding



## Our people

People see being part of the Australian red meat and livestock industry as attractive now and into the future.

Sheep levies	3.2	Goat levies	0.1	LiveCorp	0.0
Grainfed cattle levies	0.9	Government	9.2	External	4.3
Grassfed cattle levies	3.4	AMPC	3.1	Total \$24.0 million	

## Our customers, consumers and communities

People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.

Sheep levies	17.1	Goat levies	0.1	LiveCorp	0.2
Grainfed cattle levies	4.8	Government	9.4	External	8.0
Grassfed cattle levies	31.2	AMPC	3.9	Total \$74.6 million	

## Our livestock

We set the standard for world class animal health, welfare, biosecurity and production practices.

Sheep levies	5.5	Goat levies	0.2	LiveCorp	0.2
Grainfed cattle levies	2.4	Government	38.9	External	22.9
Grassfed cattle levies	6.4	AMPC	10.1	Total \$86.6 million	

## Our environment

We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.

Sheep levies	3.0	Goat levies	0.1	LiveCorp	0.0
Grainfed cattle levies	1.3	Government	21.3	External	14.6
Grassfed cattle levies	3.3	AMPC	3.8	Total \$47.4 million	

## Our markets

We improve the economic resilience for our industry by increasing access to, and the performance of, existing and new markets.

Sheep levies	4.6	Goat levies	0.0	LiveCorp	0.4
Grainfed cattle levies	1.6	Government	8.9	External	3.1
Grassfed cattle levies	7.0	AMPC	7.2	Total \$32.9 million	

## Our systems

We are a trusted brand because of our integrity systems, built on trust and respect that supports strong partnerships and sharing of information, reducing unnecessary industry and government regulation.

Sheep levies	2.7	Goat levies	0.1	LiveCorp	0.2
Grainfed cattle levies	1.3	Government	13.3	External	8.7
Grassfed cattle levies	4.3	AMPC	6.3	Total \$36.8 million	

## Our essential services

We continue to invest in the essential services which underpin the competitiveness of our industry, specifically our integrity systems, market access, nutrition and domestic and international marketing and promotion activities.

Sheep levies	4.4	Goat levies	0.1	LiveCorp	0.0
Grainfed cattle levies	1.5	Government	2.9	External	2.2
Grassfed cattle levies	6.9	AMPC	0.0	Total \$17.9 million	

# Operating environment – opportunities and challenges

**The Australian red meat industry continues to demonstrate its strength and resilience. In early 2020 widespread rain occurred across southern and eastern Australia, breaking Australia's worst drought on record. Welcome rain fell again at the beginning of 2022, further improving seasonal conditions across much of eastern Australia. While COVID-19 has had a significant impact on economies and supply chains over the past two years, industry has weathered these challenges to thrive into 2022. The industry is now in better shape than anyone could have ever imagined.**

Young cattle prices hit record highs in January 2022, over 200% above 2019 levels. The rise in cattle, sheep and lamb prices as a result of improved seasonal conditions and increased global demand for Australian red meat has generated a level of optimism that is driving producers to invest in the future of their livestock.

With these high prices for livestock, heavier carcase weights and a herd and flock rebuild now underway, Australian cattle, sheep and goat producers can all reap the benefits of years of hard work and investment.

MLA is committed to continuing to foster the prosperity of our Australian red meat industry. For a full list of MLA's programs and investment priorities, see Table 1 on page 6.

## Opportunities

### International markets and trade reform

Australia currently exports about 70% of its beef and 65% of its lamb production, a figure that has increased over time along with population and household wealth, especially in Asia. This positive trend in demand has also been boosted by African Swine Fever's impact on the global pig herd and the resultant global shortage in quality protein.

The investment made by the red meat industry over the past 20 years in trade reform is also now delivering significant dividends.

The recent signing of the Australia-United Kingdom Free Trade Agreement has given our industry the opportunity to unlock immediate access to a high-value export market. The Australia-India Economic Cooperation and Trade Agreement will liberalise sheepmeat access into India, while negotiations continue with the European Union and will soon commence with the United Arab Emirates.

Close to 90% of Australian red meat exports are now destined for countries with which Australia has a preferential trade agreement including key, high value trading partners such as the United States, Japan, Korea and China.

### Herd and flock rebuild

As generally positive seasonal conditions persisted throughout 2021, the flock and herd rebuild is continuing while production and slaughter levels are expected to return to pre-pandemic levels later in 2022. The high prices and availability of pasture is translating into heavier animals – allowing more beef and lamb to be produced from fewer animals.

This rebuild will allow Australia to meet the demand for Australian red meat in the future as the global population grows and Australia's free trade agreements expand.

### Carcase weights

Driven by large volumes of quality grazing pastures over the past two years, carcase weights are forecast to reach record levels in 2022, at 311kg/head. This is a 9% increase on the 283kg/head levels which were recorded in 2019 at the height of the drought – an improvement of 28kg/head in the space of three years. An increase in the use of lot fed programs is also expected to be driving these higher carcase weights.

### Food security and traceability

Food security is expected to rise in importance, presenting market, channel and segment risks and opportunities. In Australia, this may present an opportunity to strengthen the importance of agriculture and food production to community and government.

Communication of Australian red meat's benefits to customers and consumers will continue to increase in importance, supported by verified country of origin, provenance and nutrition claims as well as Australia's robust red meat integrity system, which ensures livestock produced is safe to eat, fully traceable and in demand.

### Adoption of new research, development, technologies and systems

Industry-wide adoption of research and development outcomes, technology and objective carcase measurement and assurance systems is likely to prompt a transition from price averaging systems to pricing based on defined quality, yield and integrity attributes. These improvements will support an increase in productivity and will reduce the costs of production.

## **Animal welfare**

The industry continues to demonstrate its commitment to animal welfare through policies and practices that meet community expectations and maximise the health and welfare of livestock. As industry continues to make investments to enhance its animal health and welfare management and communicate these commitments to the public, community confidence in the industry is only expected to increase.

## **Sustainability**

The industry continues to demonstrate its environmental credentials through the sustainability of its production systems, while working to capture productivity gains while further reducing emissions. Through pursuing the carbon neutral by 2030 (CN30) target using this productivity-led approach, producers can look forward to continued consumer support of red meat due to its environmental credentials as well as long-term on-farm productivity, profitability and sustainability.

## **Challenges**

### **Labour shortages**

In 2022, labour shortages are expected to be an area of concern for the red meat industry across the entire supply chain. The shortages that industry will face will affect the availability of farm hands and managers, truck drivers and boning room staff in processing plants. New government visa programs are a welcome development, as well as the reopening of borders to vaccinated tourists, which is expected to provide red meat businesses with access to a larger employee pool and improve labour shortages from the farm gate through to the processing sector and beyond.

## **Supply chain disruptions**

Supply chain challenges – especially freight delays, labour shortages and escalating costs – have had a significant impact on trade both domestically and within Australia’s key global meat markets. Compounding this have been natural disasters, as well as political instability and military events in some parts of the world. Despite these challenges, stability is expected to return to the red meat supply chain, resulting in an overall positive market outlook.

## **Foodservice and consumption**

The impact of COVID-19 caused seismic changes in consumption patterns, both in Australia and in some of our major trading partners. Social distancing measures and restrictions on hospitality venues’ capacity around the world meant foodservice consumption dropped significantly. However, retail sales growth, which accelerated through the height of the pandemic, has stabilised in many markets, although consumers choosing to eat more at home is expected to remain an ongoing trend.

COVID-19 also changed the way consumers buy their food products, with ready-to-eat meals, delivery services and online ordering all rising. Successful vaccine rollouts in Australia’s key global meat markets have largely seen foodservice channels restored and recovering, leading to increasing demand for higher-value beef and lamb cuts. However, it may be some time before the foodservice channel fully returns to pre-pandemic levels.

## **Market access and live export**

While Australia enjoys favourable market access for its red meat products, several non-tariff measures continue to impede trade flows. A total of 777,931 cattle were exported in 2021 – 26% less than 2020. Tight supply and record high cattle prices in Australia have been the main factors behind reduced import demand for Australian live cattle in virtually all export markets. Chinese demand for Australian breeder cattle fell 20% in 2021 on 2020. This was largely the result of high Australian cattle prices, with China increasing its total cattle imports 32% year-on-year up to October 2021 by sourcing higher numbers from Uruguay and New Zealand.

If cattle prices begin to ease in the latter half of 2022 as supply improves, live export trade should begin to trend up again quickly to meet demand. Additionally, industry can look forward to enhanced market access in the later part of 2022 when the Australia-UK Free Trade Agreement (A-UK FTA) enters into force.

## **Input costs**

Australian red meat processing costs are consistently higher than all of our major competitors and energy prices continue to escalate. Inflation jumped in 2021 on the back of supply and demand mismatches and will continue to drive upward pressure on costs through to mid-term, potentially impacting profit margins.

## **Environment**

The role of red meat as part of a sustainable, environmentally friendly food system is continuing to be challenged. Policy makers, customers, consumers and community members are seeking evidence of the industry’s commitment to sustainable practices and industry. This is an area of ongoing focus for MLA across the business and is reflected in a large number of our investments.

# Programs

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17  Domestic market

22  International markets

28  Eating quality

32  Environmental sustainability

36  Feedlot

40  Integrity systems

44  Objective measurement

48  Producer adoption

52  Product and packaging innovation

56  Value chain information and efficiency

58  Productivity (off-farm)

60  Productivity (on-farm)

68  Capability building

71  Communication

76  Corporate services



# Program

## Animal wellbeing



MLA's investment in animal wellbeing research, development, extension and adoption (RDEA) aims to safeguard Australia's livestock biosecurity and to ensure proper care of our livestock. Consideration of health and welfare are inextricably linked in defining livestock wellbeing.

### Sub-programs

- Animal wellbeing

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

The community has high and increasing expectations about the way livestock is treated. These expectations encompass the management of animal health, the application of animal welfare standards, the maintenance of Australia's freedom from exotic diseases and minimising the impact of endemic diseases.

There are significant productivity gains for the industry as it continues to improve the health and welfare of livestock by enhancing husbandry practices, diagnosis testing and commercialising preventative treatment options including the reduction of livestock mortality and the impacts of parasitic disease.

MLA's investment works towards minimising the impact of disease, environmental factors and human intervention, and by ensuring the continued support and trust of the community. Minimising the impact of animal diseases requires a multipronged approach, comprising early recognition (diagnosis), containment (preventing entry and/or spread), prevention, and treatment.

# Animal wellbeing

The animal wellbeing sub-program works to reduce the impacts of animal disease through improved (fast, affordable and accessible) diagnosis; preventative measures which rely less on chemicals and more on exploiting a host’s resilience and immunity; and novel treatment options.

The adverse impacts of environmental factors and human interventions will be reduced through research that demonstrates to the community the continuous improvement of the welfare of Australian livestock.

Further investments will contribute tools and enablers for reducing the impact of disease including disease surveys, decision support tools and epidemiological investigations.

## Key performance indicators in 2022–23

1. Fifteen large-enterprise producers adopt one of three wellbeing-associated activities, including transition to a polled herd, adoption of an effective vaccine strategy and use of integrated tick management.
2. Establish a *Trichomonas* vaccine commercialisation pathway via an animal health company.
3. Determine the value proposition to industry of a lifetime wellbeing index.

Product group	Core activities
Animal wellbeing research, development and adoption	<p>The ‘animal wellbeing research, development and adoption’ product group includes the following initiatives:</p> <ul style="list-style-type: none"> <li>■ the development of safe, effective, long-acting vaccines – the investments in this pillar include development of vaccines utilising modern technology (novel delivery systems/antigens, sustained release formulations) with a focus on immuno-contraception vaccine for cattle and scour worm vaccine for sheep</li> <li>■ use of on and off animal objective measures to facilitate the improvement of on-farm welfare at an individual animal level – the investments include scoping the development of a <i>Lifetime Animal Wellbeing Index</i>, biomarkers for positive welfare state, on and off animal measures of mortality, and line-speed measures of chronic pain</li> </ul> <ul style="list-style-type: none"> <li>■ the mitigation of the impact of, and need to perform, surgical husbandry procedures</li> <li>■ integration of effective extension and adoption of outcomes and benefits of investments through continuous monitoring and evaluation and on-farm demonstration of program objectives</li> <li>■ management of invasive animals (foxes, wild dogs, cats, feral pigs) to minimise their impacts through collaboration with other programs as well as the Centre for Invasive Species Solutions</li> <li>■ large-scale Producer Demonstration Site (PDS) and integrated PDS activity to facilitate translation of science into impact: transition to a polled herd; broad uptake of effective vaccines; use of integrated tick management strategies to maximum effect.</li> </ul>

Table 14: Projected 2022–23 investment by funding source – animal wellbeing (\$ ‘000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External M			
Animal wellbeing			29		378		148								1,950	2,504		5,008		5,008
<b>Total</b>			<b>29</b>		<b>378</b>		<b>148</b>								<b>1,950</b>	<b>2,504</b>		<b>5,008</b>		<b>5,008</b>



# Program

## Domestic market

**MLA’s domestic market program assists MLA to foster the prosperity of the Australian red meat and livestock industry by demonstrating the value of red meat to consumers and customers.**

This is achieved by generating insights into the drivers of preference and choice amongst both consumers and customers, and then leveraging these insights to promote the relevant benefits of red meat and addressing the barriers that limit consumption, such as value for money (relative to other proteins), cooking confidence, and health perceptions.

By addressing these opportunities and barriers, MLA seeks to maintain and enhance the value of domestic red meat sales and slow the historic long-term decline in consumption.

### Sub-programs

- Market knowledge (domestic)
- Nutrition
- Marketing and promotion (domestic)

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

Red meat continues to be a staple of Australian main meals, enjoyed by 94% of households, with beef and lamb combined being served on average three times per week. Red meat is a favourite due to its choice of cuts, versatility for different meals and cuisines, and its range of price points to suit most household budgets.

Consumers are becoming increasingly budget conscious as inflation increases and household costs rise, making it important we continue to promote both the premium eating quality benefits as well as the functional health benefits of beef and lamb, to ensure consumers continue their already high willingness to pay more for Australian red meat.

As consumers transition to living with Covid, the focus on health and wellness continues to gain momentum. Understanding the impact of food and lifestyle choices ranks as one of Australians’ key concerns, with many looking for more guidance on how to eat in a more sustainable way for themselves, their family and the planet.

A combination of generational change and the impact of social media has steered the healthy eating conversation away from disease prevention to life maximisation. Demonstrating how red meat can play a role in a balanced approach to eating will be key for its long-term consideration as a protein of choice.

Within Australian grocery categories, fresh meat continues to be one of the largest categories and is a key driver of store preference for shoppers. As such, all retailers compete heavily on price, quality cues and availability to drive foot traffic and support total store sales. The major grocery retailers, Woolworths and Coles, are further strengthening their market share of fresh meat sales, as well as significantly developing their online offerings off the back of pandemic lockdowns. Butchers and other independent retailers have struggled to hold onto share gains won during the pandemic when customers shopped local, as people return to the convenience and value offered by the major supermarkets.

Environmental sustainability has become a key battlefield for retailers, with ethical and sustainable sourcing of ingredients and products across all categories a high priority as they seek to drive competitive advantage.

Foodservice has bounced back strongly following the COVID pandemic, with customers seeking new experiences as well as being supported by government stimulus. The return of international tourism, business travel and students will also contribute to increasing demand in the leisure and institutional sectors. Growth is currently being hampered in some sectors by the lack of available labour and trained staff in front and back of house, which has led to many operators focusing on core menu items in preference to new menu innovation. This, combined with rising costs, is putting foodservice operators under margin pressure and therefore the opportunity for red meat is to leverage our variety of cuts and our premium position as a driver of foot traffic.



# Market knowledge (domestic)

MLA's market knowledge (domestic) sub-program collects, analyses and interprets signals into insights. The insights allow the red meat industry to anticipate and respond to future opportunities and disruption.

## Key performance indicators in 2022–23

1. High levels of satisfaction (above 85%) by industry stakeholders with MLA's market information services.
2. NLRS transformation completed, including transition to digital reporting and expansion of the range of sources from which livestock data is collected.
3. Generate at least one incremental market indicator as indicated in the indicator review.

Product group	Core activities
National Livestock Reporting Service (NLRS)	<p>The 'NLRS' product group captures and produces timely, accurate and independent Australian livestock price data. Initiatives include:</p> <ul style="list-style-type: none"> <li>■ physical assessment of sheep and cattle at saleyards is reported with pricing data across major saleyards to cover throughput in line with the saleyard strategy</li> <li>■ reporting livestock pricing data across all selling methods</li> </ul>
Market information	<p>The 'market information' product group interprets livestock production data from the National Livestock Reporting Service (NLRS) and other sources into insights to assist stakeholders in making informed business decisions. Ongoing improvements seek to improve the transparency of livestock (goat, sheep, and cattle) markets via the following initiatives:</p> <ul style="list-style-type: none"> <li>■ transform current process through improving the market transparency of livestock (cattle, sheep and goats) by providing a greater breadth of quality transactions reporting, supporting the development of innovative supply-chain data connectivity, and transforming how the industry accesses industry reporting and insights.</li> </ul>
Domestic market and consumer insights	<p>The 'domestic market and consumer insights' product group collects, analyses and interprets data and signals into insights from the end of the supply chain, focusing on consumers and those who purchase red meat (shoppers). Initiatives include:</p> <ul style="list-style-type: none"> <li>■ Creation of a new online auction indicator</li> <li>■ Development of an automated sheep projections model</li> <li>■ Continuous upgrades of existing indicators to ensure continued relevance and reflect new market trends.</li> <li>■ market insights: channel (retail and foodservice) insights</li> <li>■ consumer insights: shopper insights and consumer tracking</li> <li>■ collaboration: cross-functional collaboration of all domestic market research.</li> </ul>

# Nutrition

MLA's nutrition sub-program incorporates research and communication activities to promote the consumption of Australian red meat as part of a healthy and sustainable diet.

## Key performance indicators in 2022–23

1. Increase the percentage of GPs and dietitians who claim recommending red meat three to four times a week to ≥40%.
2. Increase the percentage of main grocery buyers who agree beef makes healthy meals to ≥51%.
3. Increase the percentage of main grocery buyers who agree beef is an important part of a healthy diet and lifestyle to ≥55%.

Product group	Core activities
Nutrition research	<p>The 'nutrition research' product group generates and connects data and insights to understand and explain the role of Australian red meat in a healthy and sustainable diet.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> <li>■ publication of research reports on MLA Healthy Meals website that provide key stakeholders with directions on nutrition communications that support the sustainable consumption of Australian red meat in a healthy diet</li> <li>■ engagement with key stakeholders to identify adoption pathways for nutrition communications that align consumers' wants and needs with public health priorities which industry stakeholders can implement.</li> </ul>
Nutrition communications	<p>The 'nutrition communications' product group provides key stakeholders, including health professionals and relevant MLA programs, with information and resources to deliver credible and relevant messages about consumption of Australian red meat in a healthy diet.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> <li>■ the MLA Healthy Meals website</li> <li>■ health professional campaigns, distributing nutrition resources to support healthy eating by GPs and dietitians</li> <li>■ effective integration of nutrition messaging in MLA marketing and communications programs that target consumers in retail and consumer media.</li> </ul>

# Marketing and promotion (domestic)

MLA's marketing and promotion (domestic) sub-program delivers initiatives aimed at improving consumer preference for Australian red meat, and ensuring retail and foodservice customers are actively engaged and supported in the promotion of red meat, as part of a healthy balanced diet.

## Key performance indicators in 2022–23

1. Year-on-year increase in main grocery buyer endorsement of the statement 'willing to pay more for beef/lamb' to 27% (beef) and 27% (lamb).
2. Maintain mean number of serves per week at 1.7 for beef and 0.7 for lamb.
3. Decrease the percentage of main grocery buyers who claim to be limiting red meat for health reasons below 23% for beef.
4. 70% of all CoMarketing participants believe their branded program delivers a higher price over unbranded product and delivers a livestock price premium to producers (as evidenced from CoMarketing participant feedback).

Product group	Core activities	
Domestic business development	<p>Initiatives within the ‘domestic business development’ product group include:</p> <ul style="list-style-type: none"> <li>ensuring marketing activities are supported by retailer/trade partners</li> <li>collaborating with retailers and industry on insight-led growth initiatives as part of the Category Management Playbook</li> </ul>	<ul style="list-style-type: none"> <li>developing and implementing bespoke key foodservice and retail customer plans</li> <li>setting appropriate targets for promotional activities and conduct post evaluations.</li> </ul>
Domestic brand building	<p>Initiatives within the ‘domestic brand building’ product group include:</p> <ul style="list-style-type: none"> <li>ensuring marketing activities are targeted against consumer purchase drivers and focused on building long-term relevance of Australian red meat with domestic consumers</li> <li>leveraging MLA nutrition and sustainability programs, resources and subject matter experts to contribute to the positive consumer and customer perception of red meat’s sustainable role in a healthy diet</li> </ul>	<ul style="list-style-type: none"> <li>delivering consumer-focused activities along the entire ‘path to purchase’ to build awareness and engagement</li> <li>evaluating the impacts of marketing activity, sharing the results and taking corrective action as required.</li> </ul>
Domestic CoMarketing program	<p>The ‘domestic CoMarketing program’ product group provides support to brand owners to develop their own brand propositions. Initiatives include:</p>	<ul style="list-style-type: none"> <li>building awareness of key brand attributes</li> <li>building preference among target customers.</li> </ul>

**Table 15: Projected 2022–23 investment by funding source – domestic market (\$ ‘000\*)**

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R				External M
Market knowledge (domestic)	8	5	43	36	250	794	474	1,351	162	303	390	434	2	7		1,330	541	2,661	3,472	6,132
Marketing and promotion (domestic)		14		59		7,370		8,768		1,329		1,146							18,685	18,685
Nutrition	3	1	15	12	86	100	162	164	55	57	124	136	1	2		445		890	472	1,362
<b>Total</b>	<b>11</b>	<b>20</b>	<b>57</b>	<b>106</b>	<b>336</b>	<b>8,263</b>	<b>637</b>	<b>10,283</b>	<b>217</b>	<b>1,689</b>	<b>514</b>	<b>1,716</b>	<b>3</b>	<b>10</b>		<b>1,776</b>	<b>541</b>	<b>3,551</b>	<b>22,629</b>	<b>26,180</b>



# Program

## International markets

MLA's international markets program fosters prosperity for the Australian red meat and livestock industry by measurably improving economic and technical market access and helping make Australian red meat the preferred choice of customers and consumers globally.

### Sub-programs

- Market access
- Market knowledge (international)
- Marketing and promotion (international)
- Livestock export market activities
- Livestock export (research and development)

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

Australian red meat has earned a well-deserved and hard-won reputation among consumers, customers and governments around the world. In recent years, our industry has made significant strides in market access through successful negotiation of free trade agreements with most of our key markets. Australia currently exports about 70% of its beef and 65% of its lamb production, a figure that has increased over time along with population and household wealth, especially in Asia.

The overall demand outlook remains positive despite ongoing logistical challenges posed by COVID-19 and an unstable geopolitical climate. To achieve ambitious industry growth goals we must successfully position Australia as the preferred choice amongst red meat

customers and consumers globally, and measurably improve economic and technical market access. To do so MLA will focus on:

- Building brand equity for Australian products amongst targeted consumers
- Increasing the 'physical availability' of Australian beef, lamb and goatmeat products
- Developing 'educated ambassadors' to advocate for Australian products/industry
- Coordinating industry input into improving market access
- Cultivating commercial investment to grow overall sales and marketing presence
- Delivering trusted insights up and down the supply chain.

## Market access

MLA's market access sub-program aims to defend existing favourable access conditions, position Australia favourably in trade negotiations and alleviate technical trade barriers.

### Key performance indicators in 2022–23

1. Industry positions/submissions on priority trade reform issues (in particular the A-EUFTA, A-I CECA, Middle East free trade agreement negotiations) are acknowledged and acted on by government and support future delivery of import regime reform.
2. MLA makes a significant contribution to the joint industry effort of alleviating an additional \$100 million of the impact of non-tariff barriers in 2022–23.

Product group	Core activities
Economic access	<p>Initiatives within the 'economic access' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting industry to defend existing favourable market access conditions</li> <li>■ reducing economic barriers to trade through the delivery of targeted advocacy strategies.</li> </ul>
Technical access	<p>Initiatives within the 'technical access' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting industry to mitigate access risks through monitoring access conditions</li> <li>■ prioritising initiatives in conjunction with AMIC and government to avoid/alleviate/reduce non-tariff barriers to trade.</li> </ul>

## Market knowledge (international)

MLA's market knowledge (international) sub-program collects, analyses and interprets signals into insights. The insights allow the red meat industry to anticipate and respond to future opportunities and disruption.

### Key performance indicators in 2022–23

1. At least 20% uplift in usage of new Global Market Resources Hub (vs current).
2. At least two case studies to demonstrate impact via use of Global Market Resources Hub tools and additional market insights.
3. Category growth drivers and market snapshots updated for each major market (UK, US, SEA, MENA, China) and incorporated in the Japan category playbook.
4. UK Market Knowledge (Consumer & Market Insights) pack to be made available for exporters.

Product group	Core activities	
International market insights	Initiatives within the 'international market insights' product group include: <ul style="list-style-type: none"> <li>■ monitoring market trends</li> </ul>	<ul style="list-style-type: none"> <li>■ monitoring competitors</li> <li>■ monitoring media.</li> </ul>
International consumer insights	Initiatives within the 'international consumer insights' product group include: <ul style="list-style-type: none"> <li>■ translating market signals and data into insights that positively influence the supply chain</li> <li>■ market research: consumer, shopper, trade, retail and foodservice (as agreed with stakeholders in key Australian red meat markets)</li> <li>■ translating insights from across both product groups (market insights and consumer insights) and from across other MLA programs' market research into strategic growth drivers</li> </ul>	<ul style="list-style-type: none"> <li>■ identifying opportunities to contribute to doubling the value of Australian red meat</li> <li>■ Global Market Research Hub to enable greater adoption of Market Classification &amp; Category Growth Driver tools</li> <li>■ Annual Global Beef/Sheep industry and trade reports (including competitor analysis) and annual Goat snapshot</li> <li>■ developing MLA's global market strategic portfolio model</li> <li>■ MLA market research library: collaborating across MLA to house all market research in the one area for expanded use and value.</li> </ul>

## Marketing and promotion (international)

**MLA's marketing and promotion (international) sub-program aims to position Australian red meat as a protein of choice for global customers and consumers.**

### Key performance indicators in 2022–23

1. Build or maintain customer awareness and preference of Australia's positive attributes (safe, quality, healthy and sustainable image) within target range.
2. Increase consumer preference for Australian red meat in key international markets to be above 23.4% for beef and 21.4% for lamb.
3. 80% of CoMarketing participants rated their overall outcomes (based on their objectives for the year) as 'successful'.

Product group	Core activities	
International brand building	Initiatives within the 'international brand building' product group include: <ul style="list-style-type: none"> <li>■ creative and impactful communications to targeted segments (both campaigns and 'always-on' components such as websites, public relations and social media messaging)</li> </ul>	<ul style="list-style-type: none"> <li>■ promotional activities conducted with key customers (e.g. point of purchase promotions).</li> </ul>
International business development	Initiatives within the 'international business development' product group include: <ul style="list-style-type: none"> <li>■ building and maintaining a strong network of informed key accounts, strategic stakeholders and key influencers to ensure industry is responsive to consumers' changing needs and wants</li> </ul>	<ul style="list-style-type: none"> <li>■ delivery of events, trade shows, seminars and other communications that educate customers and drive positive awareness, attitudes and behaviours towards Australian red meat</li> <li>■ strategic supply/value chain projects with commercial partners to help extend the penetration and breadth of Australian red meat globally.</li> </ul>
International CoMarketing program	The 'international CoMarketing program' product group provides support to Australian brand owners to develop and implement their own business development and brand building activities.	

# Livestock export market activities

**MLA, together with LiveCorp, jointly invest in the Live Export Program (LEP). The LEP includes both market access activities and activities from the associated Livestock Export R&D sub-program. The LEP supports the growth, productivity improvements and sustainability of the livestock export trade for the benefit of both producers and exporters.**

The LEP shift from intensive industry compliance-related support to supply chain efficiency and business development focused work will continue.

## Key performance indicators in 2022–23

1. Facilitate installation of four stunning boxes in existing non-stun abattoirs in Indonesia.
2. Produce one program of work case study per region that showcases live export activities that have mitigated industry trade risk or improved industry’s ability to maintain market access or have contributed to industry’s trade competitiveness, resulting in demonstrated supply chain change and positive economic benefit to industry.
3. Produce one program of work case study per region that showcases live export activities that have provided insights and informed government/industry policy, resulting in demonstrated capacity for making decisions that reduce trade risk and support ongoing trade.

Product group	Core activities	
Livestock export welfare, market access and productivity	<p>The ‘livestock export welfare, market access and productivity’ product group supports industry with initiatives that:</p> <ul style="list-style-type: none"> <li>■ identify and mitigate animal welfare risks</li> <li>■ implement adoption of best practice welfare systems</li> <li>■ maintain access to key overseas markets</li> <li>■ improve supply chain efficiency.</li> </ul>	A key investment includes the Co-Funding Program, which supports commercial participants to develop and implement strategic welfare and supply chain improvements.



## Livestock export (research and development)

The purpose of the livestock export R&D sub-program is to invest in projects that seek to build knowledge, fill gaps in existing understanding, and develop, trial and implement practical extension outputs in the areas of animal health and welfare, supply chain efficiencies and market access.

Day-to-day management of the LEP R&D sub-program has been transitioned out of MLA and over to LiveCorp. LERDAC will continue to provide strategic research advice and represent industry priorities and community expectations. The management committee (representing LiveCorp and MLA) will be the decision-making group for the RD&E sub-program.

### Key performance indicators in 2022–23

1. Livestock export supply chain data framework implemented.
2. Training framework for industry stakeholders developed and implemented.
3. Investment in key research projects that improve and manage heat stress, bedding and stocking densities during shipping is continued and delivered in a timely manner.
4. Industry stakeholders demonstrate increased awareness of current R&D activities and the avenues to contribute new research ideas.

Product group	Core activities
Livestock export welfare, integrity and productivity	<p>Initiatives within the 'livestock export welfare, integrity and productivity' product group include:</p> <ul style="list-style-type: none"> <li>■ integrity initiatives such as building industry capability in data collection and analysis to enable benefits from transparency, benchmarking, reduced subjectivity, boosted supply chain productivity and efficient regulatory reporting to be achieved</li> <li>■ animal welfare-related initiatives such as facilitating better stunning outcomes, facilitation of feedback of information on the health and welfare of livestock supplied to live export and improve understanding of, and identify effective controls for, animal health and welfare risks that operate along the supply chain and for transparency, to address public expectations</li> <li>■ productivity-based initiatives such as key research projects that improve and manage heat stress, bedding and stocking densities during shipping</li> </ul>
Livestock export extension and adoption	<p>Initiatives within the 'livestock export extension and adoption' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting industry extension and adoption of best practice systems and procedures to achieve continuous improvements in animal welfare and mitigate risk of trade suspension or closure</li> <li>■ drive adoption of tools and techniques for identifying and assessing animal health and welfare risks through the supply chain</li> <li>■ targeted communications for the LIVEXCollect, UNE Project Partnership, Animal Welfare Indicators and SAWS projects</li> <li>■ communicating research, development and adoption outcomes and program performance to stakeholders via tools such as LIVEXCollect</li> </ul>

- developing tools and techniques for more effective and timely identification and assessment of animal health and welfare and promote their uptake and adoption
  - supporting and promoting the adoption of better health and welfare practices in market, including understanding the cultural and social factors affecting animal handling practices and facilitating better stunning outcomes through the uptake and use of industry leading tools and practices
  - enhancing supply chain risk and opportunity identification, assessment and management capability across regions, species and environmental factors in a way that supports a risk-based regulatory approach
  - improving the training environment to encourage uptake of leading animal health and welfare practices across industry.
- 
- consulting with industry through the Livestock Export Research & Development Advisory Committee (LERDAC)
  - implementing the new Livestock Export Program (LEP) research, development and extension systems and processes, including investment management training of management committee personnel
  - implementing the LEP *RD&E Blueprint 2020–2025*
  - support adoption of practices to improve livestock performance through the livestock export supply chain.

Table 16: Projected 2022–23 investment by funding source – international markets (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External M				
Livestock export market activities		3		68		324		1,555						442				48	2,439	2,439	
Livestock export (research and development)			48		241		224						536		168	1,217			2,434	2,434	
Market access	1	15	4	128	24	1,113	46	1,824	16	632	35	1,511		26		125			251	5,248	5,499
Market knowledge (international)		15		27		641		1,268		520		3								2,473	2,473
Marketing and promotion (international)		17		124		7,295		19,229		2,363		432					2,968			32,427	32,427
<b>Total</b>	<b>1</b>	<b>50</b>	<b>52</b>	<b>347</b>	<b>265</b>	<b>9,372</b>	<b>270</b>	<b>23,875</b>	<b>16</b>	<b>3,514</b>	<b>35</b>	<b>1,945</b>	<b>536</b>	<b>468</b>	<b>168</b>	<b>1,343</b>	<b>3,016</b>		<b>2,685</b>	<b>42,587</b>	<b>45,272</b>





# Program

## Eating quality

The Meat Standards Australia (MSA) program is integral to the red meat industry's 2030 goal of doubling the value of Australian red meat sales and ensuring continued trust in Australian red meat. The program aligns to the MLA strategic plan through data and insights, generating greater value through new revenue sources and high value products, and driving greater returns for livestock producers.

The program integrates research and development (R&D) with commercial activities and involves participation along the entire Australian red meat value chain. This includes education and adoption initiatives to enable on-farm practice changes to maximise returns and productivity. This is alongside leveraging off-farm supply partnerships to educate and support increased value, consistency of brands and consumer demand. Through this, the MSA program continues to grow year on year in accounting for proportion of Australian red meat being MSA-graded along with enabling price differentials in the market for producers that can meet MSA and customer specifications.

The program will also play an important role in transitioning the red meat industry to value-based pricing (VBP) and support the adoption of objective carcass measurement technology. The MSA program activities and partnerships with supply chains aim to demonstrate the value of eating quality and other traits, such as lean meat yield, in determining the value of the carcass, connecting this with the price paid, and underpinning progress towards VBP.

### Sub-programs

- Eating quality

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



## Operating environment

The MSA system predicts a cut by cook method eating quality outcome from traits that influence eating quality across the supply chain. The success and sophistication of the program has positioned Australia as the world leader in eating quality measurement, standards and eating quality research. This will enable Australia to leverage our position internationally to result in greater benefits for the Australian red meat industry and recognition of our eating quality language.

The program is unique as it integrates research and development (R&D) with commercial activities and involves participation along the entire Australian red meat value chain. This includes education and practice change initiatives to maximise returns and productivity on-farm, along with off-farm supply chain partnerships to support increased value and consumer demand for red meat producers.

The success of the MSA program is evidenced by its continued growth and delivery of returns to the farm gate, with MSA graded cattle representing more than 53% of the national adult cattle slaughter and 57% of the national lamb slaughter processed through MSA-licensed processors that follow pathways to optimise eating quality

during 2020–21. The program also delivered an estimated additional \$157 million in farm gate revenue thanks to price differentials paid for MSA-accredited and compliant cattle, with more than 2,500 additional cattle and sheep producers becoming MSA registered.

There has been strong adoption by the industry to meet consumer expectations for red meat as demonstrated by processors that represent 53% of MSA graded carcasses adopting the Eating Quality Graded cipher in their business to describe beef products by an eating quality outcome, as opposed to dentition-based classifications. MSA now underpins more than 200 beef and sheepmeat brands as the independent endorsement of eating quality.

The first MSA sheepmeat cut by cook method model was delivered in 2020–21, based on over a decade of research. Commercial implementation will be enabled by the delivery and adoption of intramuscular fat (IMF) measurement technologies and will enable processors and brand owners to apply sophisticated eating quality segregation within their supply chains, along with incentive and reward for improvement on-farm.



# Eating quality

In 2022–23, the MSA program will drive increased value across the supply chain and grow trust among our stakeholders and customers through:

- extracting greater value from the carcase through growth and utilisation of the MSA program, and linking eating quality, and other traits such as lean meat yield, to carcase value. This is underpinning the progress towards value-based pricing mechanisms
- commercialisation of the MSA cut by cook sheepmeat model through enabling processor adoption and technology installation, supported by proactive on-farm practice change initiatives for improved carcase outcomes
- increase the global recognition and value generated by Australia’s eating quality language through building confidence in eating quality language to be used in trade and leveraging our eating quality leadership position
- driving improved on-farm outcomes through partnering with supply chains and key livestock advisors to develop long-term practice change programs
- enhancing eating quality integrity solutions and data systems to build further trust in Australian red meat.

## Key performance indicators in 2022–23

1. Price differentials for MSA-compliant cattle demonstrate an annual return to farm gate of more than \$155 million.
2. The MSA sheepmeat cut by cook model is commercialised in one sheepmeat supply chain and testing is underway in at least one further supply chain representing at least 25% of MSA national slaughter.
3. 56% of the national adult cattle slaughter is MSA graded.

Product group	Core activities
MSA integrity and compliance	<p>Initiatives within the ‘MSA integrity and compliance’ product group include:</p> <ul style="list-style-type: none"> <li>■ an ever-enhanced risk-based approach to program integrity</li> <li>■ identifying and utilising new, innovative, and efficient solutions for managing integrity and compliance</li> </ul>
MSA business development	<p>Initiatives within the ‘MSA business development’ product group include:</p> <ul style="list-style-type: none"> <li>■ driving industry progression through on-farm practice change</li> <li>■ partnering with processors and brand owners to extract maximum value from the MSA program and progressing the industry towards VBP</li> </ul>
MSA research and development	<p>Initiatives within the ‘MSA research and development’ product group include:</p> <ul style="list-style-type: none"> <li>■ investments that enable all cattle and sheep pathways and production systems to be eligible for MSA grading</li> <li>■ supporting greater technology adoption to improve supply chain efficiencies, new traits and greater uptake of the MSA sheepmeat cut-based program</li> </ul>

Table 17: Projected 2022–23 investment by funding source – eating quality (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R				External M
Eating quality			20	46	414	479	551	1,001	234	492	34				161	1,415	291	2,830	2,309	5,140
Total			20	46	414	479	551	1,001	234	492	34				161	1,415	291	2,830	2,309	5,140





# Program

## Environmental sustainability

Through the environmental sustainability program, MLA invests in research, development and adoption activities that demonstrate red meat industry leadership in the management of land, water, biodiversity, climate variability and emission reductions.

Within the context of MLA's *Strategic Plan 2025*, this program places investments in research and development of technologies and tools to reduce emissions or store carbon and enable red meat stakeholders to be rewarded for adopting these technologies in their production and processing enterprises and supply chains. Current investment areas include greenhouse gas emissions avoidance (feed additives, forages and genetics) and carbon storage (pastures and trees, grazing management) intended to make a demonstrable contribution to addressing the key success indicator outlined in *Red Meat 2030* of achieving carbon neutrality by 2030 (CN30).

The investments required to achieve carbon neutrality are guided by the *CN30 Roadmap* which navigates a series of complex economic, social and environmental issues influencing almost all aspects of the red meat value chain, from animal genetics through to meat processing and consumer marketing. The four key work areas that provide the delivery framework for the investments are leadership building, emissions avoidance, carbon storage, and integrated management systems. The vast majority of investment is through partnership investments facilitated through MLA Donor Company (MDC), Federal Government programs, private investment and through Agriculture Innovation Australia. Investment is also sourced from producer levies, informed by MLA's industry and regional consultation processes.

### Sub-programs

- Sustainability (off-farm)
- Sustainability (on-farm)

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



## Operating environment

Livestock production relies on natural resources, with forage production dependant on soil/water supply and quality, and biological diversity. Changes in climate, regulations, market requirements and community concerns demand that livestock producers and value chain partners continually adapt to this evolving operating environment.

Because of geological, topographic and climatic factors, less than 8% of Australia's land is suitable for crop production. This is why Australian livestock enterprises cover over 50% of Australia's land mass (>4.2 million square kilometres). Much of this consists of extensive rangelands and semi-arid areas. Cattle and sheep production is the most efficient use of this land for producing highly nutritious protein. Coupled with the proximity of red meat processing facilities to urban communities, the red meat and livestock industry is under continuous scrutiny for its impact on the environment, particularly around vegetation management, greenhouse gas emissions, water and land use and biodiversity loss.

However, the industry has made major inroads on this issue. Red meat producers have reduced net greenhouse gas emissions more than any other sector in the Australian economy. Further opportunities exist to substantively reduce the industry's net greenhouse gas emissions and generate new revenue streams, branded low and zero carbon red meat value chains, through carbon farming and emerging biodiversity credit markets.

Industry's long-term prosperity depends on continuing to take a proactive approach to environmental sustainability – rather than a reactive one. The industry can continue to demonstrate its environmental credentials through investments that promote the environmental sustainability of its production systems and generate new value capture opportunities in the form of productivity gains and provision of environmental services.

## Sustainability (off-farm)

**This program supports innovation activities beyond the farm gate with economic value propositions for stewardship of environmental resources.**

These innovations are designed to unlock new business models that reward the supply chain for good environmental stewardship. Working in collaboration with Australian Meat Processor Corporation (AMPC), they reflect MLA's desire to invest in research, development and adoption activities demonstrating leadership in the management of land, water, waste, energy biodiversity, climate variability and biosecurity.

### Key performance indicators in 2022–23

1. At least 120 producers have contributed farm business and natural capital data into the design of an environmental credentials platform that will allow the environmental credentials for Australian red meat to move through the supply chain from paddock to plate.

#### Product group

#### Core activities

Sustainability technology and practices (off-farm)

Initiatives within the 'sustainability technology and practices (off-farm)' product group include:

- developing a technical platform that will allow the environmental credentials for Australian red meat to move through the supply chain from paddock to plate
- developing processing systems to eliminate wastes, reduce wastes or convert wastes into valuable products – this includes the Rural R&D for Profit project 'Wastes to Profits' program.

# Sustainability (on-farm)

Through this program, MLA places investments in innovations behind the farm gate with economic value propositions for stewardship of environmental resources.

These innovations are designed to unlock new business models that reward the supply chain for good environmental stewardship and reflect MLA's desire to invest in research, development and adoption activities demonstrating leadership in the management of land, water, biodiversity, climate variability and biosecurity.

## Key performance indicators in 2022–23

1. The number of producers deriving income for environmental services in the previous three years increases from the 3,500 producers (6%) surveyed in 2020 to 8%.
2. Sustainability monitoring and evaluation framework implemented for measuring MLA's progress towards CN30, and all Emissions Avoidance and Carbon Storage Partnership projects have been preliminarily assessed under the framework.
3. One viable delivery mechanism for methane-reducing additives is being trialled in cattle in grazing enterprises.

Product group	Core activities
Sustainability knowledge and enablers (on-farm)	<p>Initiatives within the 'sustainability knowledge and enablers (on-farm)' product group include:</p> <ul style="list-style-type: none"> <li>■ managing natural capital (including water, soils and living organisms)</li> <li>■ mitigating and adapting to climate variability and climate change.</li> </ul>
Sustainability technologies and practices (on-farm)	<p>Initiatives within the 'sustainability technologies and practices (on-farm)' product group include:</p> <ul style="list-style-type: none"> <li>■ climate forecast products and extension services</li> <li>■ emissions reduction products:               <ul style="list-style-type: none"> <li>- novel livestock feeds (i.e. pastures/legumes/shrubs) or supplements with the potential to reduce enteric methane emissions</li> <li>- grazing system delivery mechanisms for livestock additives with the potential to reduce enteric methane production</li> <li>- estimated breeding values and sheep breeding values for methane that can be included in current genetic selection indices</li> <li>- forages to reduce emissions/emissions intensity</li> </ul> </li> <li>■ carbon storage products:               <ul style="list-style-type: none"> <li>- use of trees and pastures on farm to increase carbon stored in the landscape</li> <li>- technologies and practices for measuring and managing stored carbon in trees and soil.</li> </ul> </li> </ul>
Animal wellbeing sustainability	<p>Initiatives within the 'animal wellbeing sustainability' product group include the adoption of sustainable on-farm practices to address on-farm chemical resistance for more effective parasite control.</p>
Beef productivity sustainability	<p>Initiatives within the 'beef productivity sustainability' product group include:</p> <ul style="list-style-type: none"> <li>■ reporting on sustainability practices and targets to support growth path management for a viable north-south supply chain (via BeefLinks)</li> <li>■ improving breeder herd efficiency in extensive northern systems through better management of the feedbase</li> <li>■ identifying the potential for northern grazing systems to deliver environmental services alongside red meat production.</li> </ul>

Product group	Core activities	
Feedbase sustainability	<p>Initiatives within the ‘feedbase sustainability’ product group include:</p> <ul style="list-style-type: none"> <li>■ developing and delivering indicators for monitoring of soil condition</li> </ul>	<ul style="list-style-type: none"> <li>■ generating solutions to soil productivity constraints</li> <li>■ development of guidelines and case studies that support both adoption and benchmark sustainability evaluation.</li> </ul>
Goat productivity sustainability	<p>Initiatives within the ‘goat productivity sustainability’ product group include:</p> <ul style="list-style-type: none"> <li>■ the development of a least cost supplementation calculator to inform supplementary feeding in rangeland goat enterprises</li> </ul>	<ul style="list-style-type: none"> <li>■ demonstrate impact of supplementary feeding on environmental sustainability.</li> </ul>
Sheep productivity sustainability	<p>Initiatives within the ‘sheep productivity sustainability’ product group include:</p> <ul style="list-style-type: none"> <li>■ developing management interventions to improve pasture utilisation and minimise patch overgrazing in the rangelands</li> <li>■ promoting the use of edible shelter to improve lamb survival outcomes, improve landscape diversity and reduce erosion</li> </ul>	<ul style="list-style-type: none"> <li>■ evaluating the impact of heat stress on sheep reproductive physiology and behaviour</li> <li>■ identifying and evaluating adaptations for sheep enterprises in a changing climate.</li> </ul>
Genetics sustainability	<p>Initiatives within the ‘genetics sustainability’ product group include:</p> <ul style="list-style-type: none"> <li>■ building and maintaining reference cattle and/or sheep populations to underpin accurate delivery of genetic tools</li> </ul>	<ul style="list-style-type: none"> <li>■ continuing linkage of desirable sustainability traits to the Beef Information Nucleus and Resource Flocks</li> <li>■ continuing novel and hard-to-measure reproductive trait phenotypes to improve the sustainability of breeding enterprises.</li> </ul>
Sustainability technologies and practices (AIA)	<p>Initiatives within the ‘sustainability technologies and practices (AIA)’ product group include:</p> <ul style="list-style-type: none"> <li>■ the development of multi-sectoral strategies that address shared challenges and opportunities to deliver transformative outcomes that drive the sustainable development of Australian agricultural value chains</li> </ul>	<ul style="list-style-type: none"> <li>■ the scope of the strategies covers the agriculture (including red meat), fisheries and forestry value chains, including input supply, production, processing and export.</li> </ul>

**Table 18: Projected 2022–23 investment by funding source – environmental sustainability (\$ ‘000\*)**

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External M			
Sustainability (off-farm)					3		7		38		3,821				117	3,987	189	<b>7,973</b>	<b>189</b>	<b>8,162</b>
Sustainability (on-farm)	49		96		1,399		1,209		469						10,634	13,856	2,279	<b>27,712</b>	<b>2,279</b>	<b>29,990</b>
<b>Total</b>	<b>49</b>		<b>96</b>		<b>1,402</b>		<b>1,216</b>		<b>507</b>		<b>3,821</b>				<b>10,751</b>	<b>17,842</b>	<b>2,468</b>	<b>35,685</b>	<b>2,468</b>	<b>38,153</b>



# Program Feedlot

The feedlot program addresses the specific research, development and adoption requirements of the beef feedlot sector.

It contributes to MLA's strategic plan by accelerating outcomes that provide substantial economic, social, welfare and environmental benefit to the grainfed beef supply chain.

The priority areas to be addressed during 2022–23 include:

- Environmental sustainability: greenhouse gas suppressing technologies; manure and effluent integrity and value adding; and environmental management of covered housing systems
- Feedlot animal wellbeing: continued investment will occur in welfare assessment frameworks; vaccine development; supply chain education; shade and shelter adoption
- Cattle productivity and compliance: carcase endpoint prediction technologies for cattle sorting and value-based marketing; next generation performance enhancing technologies; and world-class transportation and lairage practices will support profitability of the grainfed beef supply chain
- Automation: MLA will continue to engage world-leading technology partners to develop and commercialise key autonomous feeding, health diagnosis and heat load prediction systems
- Labour: the attractiveness, skill-base and engagement of the feedlot sector will be supported by continued investment in leadership development programs, online training and on-the-ground workshops.

## Sub-programs

- Feedlot productivity

## Red Meat 2030 priorities



## MLA Strategic Plan 2025 strategic focus areas



## Operating environment

Lot feeding remains an integral part of the beef industry given the demand for a consistent supply of quality product for an expanding population. Feedlots occupy a pivotal position in the beef supply chain. As such, their ability to operate profitably, and at capacity, is strongly influenced by weather and market conditions.

Improved seasonal conditions in 2020 meant the cattle industry has moved to a herd rebuilding phase, reducing the supply of cattle and increasing competition between restockers, processors and lot feeders. As this competition intensifies and is exacerbated by the difficult trading conditions internationally, the number of cattle on feed is expected to decline from record-high levels, with forecast reductions in levy income.

# Feedlot productivity

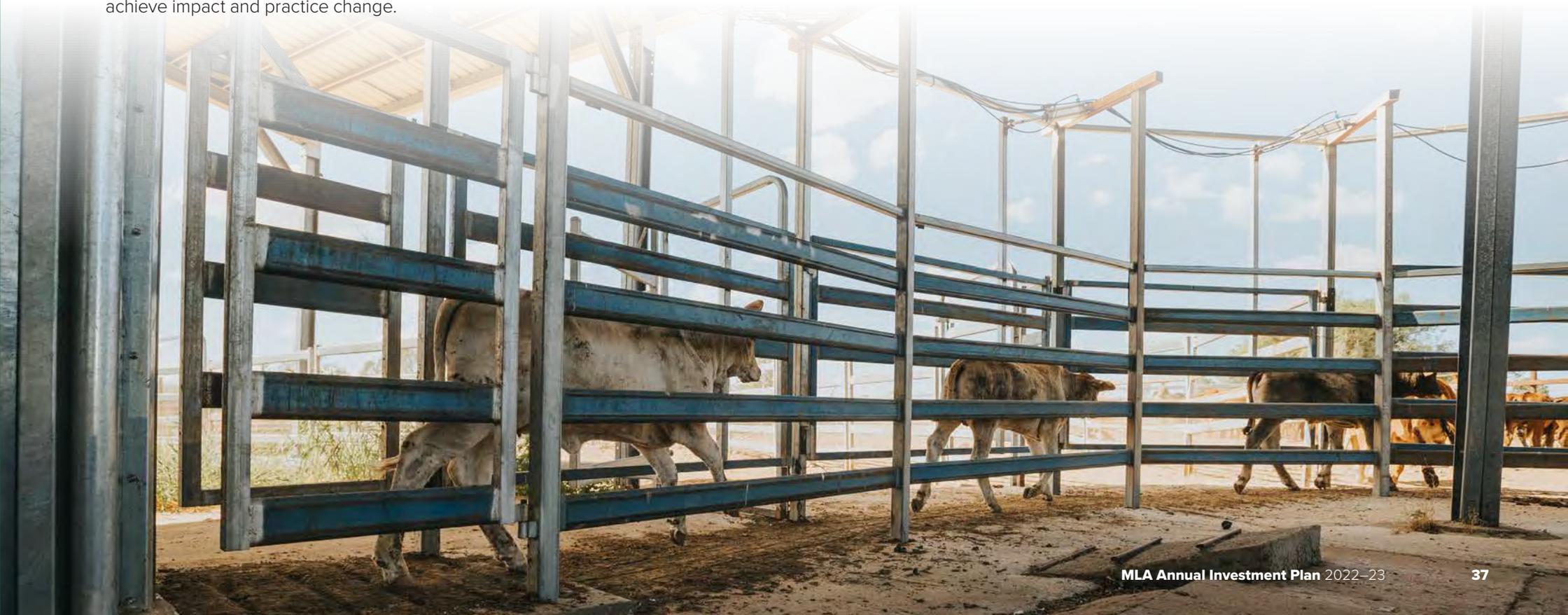
**MLA's feedlot productivity sub-program aims to increase productivity and profitability to underpin the sustainability of feedlot businesses and the sector through research, development and adoption activities to:**

- reduce the impacts of animal disease
- achieve and demonstrate to the community the continuous improvement of the welfare of feedlot animals
- increase animal productivity and enterprise profitability through development and implementation of technologies that reduce feedlot operational inputs and costs and increase efficiency and productivity
- address natural resource challenges that impact feedlot production and influence community perceptions of the industry
- build the capability of producers and advisors to increase feedlot productivity and profitability from research and development.

These investments will be complemented by producer adoption activities that will create opportunities to achieve impact and practice change.

## Key performance indicators in 2022–23

1. 650,000 grainfed cattle are processed via short duration lairage resulting in demonstrated efficiency and productivity improvements.
2. Increase in shade or shelter adoption by 35% of remaining feedlot capacity from 2019–20 baseline levels.
3. Review of feedlot enteric methane calculations of national greenhouse gas inventory submitted to the Federal Government for determination.



Product group	Core activities	
Feedlot animal wellbeing	<p>Initiatives within the ‘feedlot animal wellbeing’ product group include:</p> <ul style="list-style-type: none"> <li>■ developing and evaluating vaccines and immunostimulants to prevent feedlot disease and provide alternatives to medically important antimicrobials</li> <li>■ preventative practices during cattle backgrounding to lower disease incidence upon feedlot entry</li> <li>■ antimicrobial resistance surveillance of bovine respiratory disease and food-borne pathogens</li> </ul>	<ul style="list-style-type: none"> <li>■ shade and shelter research projects to ameliorate the effects of wet weather and heat on feedlot cattle</li> <li>■ development and adoption of a feedlot welfare assessment framework</li> <li>■ adoption programs for preventative health and welfare across the grainfed beef supply chain including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.</li> </ul>
Feedlot automation	<p>Initiatives within the ‘feedlot automation’ product group include:</p> <ul style="list-style-type: none"> <li>■ development and evaluation of autonomous feeding systems for feedlot cattle</li> <li>■ developing and evaluating sensor technologies for feedlot disease and heat load prediction, detection and diagnosis</li> </ul>	<ul style="list-style-type: none"> <li>■ adoption programs for feedlot automation including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.</li> </ul>
Feedlot productivity and compliance	<p>Initiatives within the ‘feedlot productivity and compliance’ product group include:</p> <ul style="list-style-type: none"> <li>■ research to support continued adoption of short duration lairage including animal welfare, food safety, carcass value and economic considerations</li> <li>■ developing solutions to ensure compliant ante-mortem inspection of grainfed cattle e.g. cattle cleanliness</li> <li>■ research on next generation performance-enhancing technologies such as feed additives, implants and novel application technologies</li> </ul>	<ul style="list-style-type: none"> <li>■ conducting feedlot cattle composition of gain research to predict days on feed to a set carcass endpoint (including lean meat yield), and potential integration with DEXA or CT composition analysis</li> <li>■ evaluating cattle sorting systems to maximise profit for a purchased population of cattle</li> <li>■ adoption activities for feedlot cattle performance and compliance including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.</li> </ul>
Feedlot environmental sustainability	<p>Initiatives within the ‘feedlot environmental sustainability’ product group include:</p> <ul style="list-style-type: none"> <li>■ commissioning research to reduce greenhouse gas emissions from feedlots and the grainfed supply chain (e.g. feed additives and novel approaches)</li> <li>■ conducting long-term benchmarking of greenhouse gas emissions for southern and northern Australian feedlots and greenhouse gas inventory review activities</li> <li>■ researching the environmental management of covered housing systems (odour, water, manure and effluent) to guide regulatory approvals across Australia</li> </ul>	<ul style="list-style-type: none"> <li>■ developing novel strategies to value-add and manage integrity of feedlot manure and effluent</li> <li>■ commissioning research on truck effluent management and its value proposition to renewable energy, carcass characteristics, food safety and animal welfare</li> <li>■ developing or evaluating strategies to improve feedlot energy and water use efficiency</li> <li>■ adoption activities for feedlot environment including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.</li> </ul>
Feedlot labour	<p>Initiatives within the ‘feedlot labour’ product group include:</p> <ul style="list-style-type: none"> <li>■ building capability for the feedlot sector through investment in training for feedlot operators and staff, industry leaders, service providers and researchers, including funding of scholarships for PhDs, and leadership scholarships/workshops.</li> <li>■ funding development of online training materials for the ‘Feedlot Tech’ training portal.</li> </ul>	<ul style="list-style-type: none"> <li>■ funding development of labour indicators for the national feedlot industry</li> <li>■ adoption activities for feedlot labour including publications, communications, workshops, conferences, industry meetings, demonstration sites, training strategy officers, monitoring and evaluation activities.</li> </ul>

Table 19: Projected 2022–23 investment by funding source – feedlot (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23				
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R				External M			
Feedlot									1,745	672	28								1,258	3,030	6,060	672	6,732
Total									1,745	672	28								1,258	3,030	6,060	672	6,732





# Program

## Integrity systems

MLA's integrity systems program assists MLA to foster the prosperity of the Australian red meat and livestock industry by helping to protect its disease-free status and underpinning the marketing of Australian product as clean, safe and traceable. It also helps Australia capture price premiums from customers and consumers willing to pay more for higher levels of product assurance.

### Sub-programs

- Integrity systems
- Market access science

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

The Australian red meat and livestock industry has a global reputation as a supplier of clean, safe and natural product, underpinned by its disease-free status and advanced food safety and integrity systems. However, the industry faces relentless competition from global suppliers so it must innovate, enhance its operating efficiencies and strengthen its competitive advantages.

The key priorities for investment are outlined in the *Integrity System 2025 and Beyond Strategy* which will see a strong focus on ensuring the current integrity system which includes – Livestock Production Assurance (LPA), National Vendor Declarations (NVD) and the National Livestock Identification System (NLIS) – are strengthened to meet the needs of our industry and continue to meet customer expectations. With consumers increasingly wanting to know about how and where their food has been produced (provenance, safety, welfare, biosecurity and sustainability), the industry needs to be able to demonstrate how our livestock production systems provide assurances that our products are produced and processed to meet consumer and regulatory requirements. Maintaining and increasing the level of trust in our product can also reduce non-tariff (technical) trade barriers and efficiency in the supply chain.

At the same time, digital technology and data science are rapidly advancing. Australia's red meat and livestock industry must capitalise on these innovations to strengthen its integrity and traceability systems, validate Australia's unique provenance and provide a single source of truth from the industry's data platforms. With this in mind, the integrity systems program will also invest in new technologies to enhance on-farm food safety and traceability across the value chain. Communication and adoption are another focus for investment to ensure that every value chain participant understands their role and responsibilities in maintaining the industry's integrity systems and the value that the systems deliver to individual participants and the industry as a whole.

As key inputs into the food industry, agricultural environmental management and antimicrobial stewardship practices are invested in as part of market access science to contribute towards the industry's *Red Meat 2030* goal of doubling the value of Australian red meat sales as the trusted source of the highest quality protein. The demonstration of food safety and ensuring customer, consumer and community trust in Australian red meat also helps to address key non-tariff trade barriers (contributing to reducing by \$1 billion by 2030 compared to a 2020 baseline).

# Integrity systems

MLA's integrity systems sub-program delivers core services to underpin the red meat industry's on-farm assurance and through-chain traceability systems. The 'integrity system' protects the disease-free status of the Australian red meat industry and underpins the marketing of Australian product as clean, safe and natural.

## Key performance indicators in 2022–23

1. Digital consignments are accompanying 40% of all livestock movements.
2. Data-driven compliance frameworks for the LPA program have been established with baseline metrics and targets set.
3. The NLIS platform modernisation program has been initiated.

Product group	Core activities
<p>Product assurance and traceability systems</p>	<p>Initiatives within the 'product assurance and traceability systems' product group includes focusing on reducing the complexity for the users of ISC's products and services, and setting our services up to meet the needs of tomorrow, by:</p> <ul style="list-style-type: none"> <li>■ delivering a seamless and integrated customer experience</li> <li>■ leveraging improved technologies to replace existing manual tasks</li> <li>■ bringing ISC's core services together under an integrated delivery model.</li> </ul> <p>The key activities and enablers that are included within the 'product assurance and traceability systems' product group are:</p> <ul style="list-style-type: none"> <li>■ maintaining, reviewing and improving the integrity system rules and standards (NLIS Animal Identification Technology Standards and Rules and the Livestock Production Assurance (LPA) program Standards and Rules)</li> <li>■ monitoring and assessing conformance with ISC's program rules and standards through audit and compliance activities, and actioning non-conformances to ensure overall system integrity and performance</li> <li>■ developing and maintaining the technology platforms that underpin the integrity system (including the NLIS database and eNVD system)</li> <li>■ delivering robust and effective communication and extension programs to drive integrity system awareness, understanding and compliance</li> <li>■ providing customer support services and innovative self-service functions</li> <li>■ conducting research and development and gathering insights to identify alternate approaches and technologies for integration within the integrity system in alignment with the <i>Integrity Systems 2025 Strategic Plan</i>.</li> </ul>



# Market access science

**MLA’s market access science sub-program maintains and increases the level of trust in our product while also reducing non-tariff (technical) trade barriers and efficiency in the supply chain. It addresses issues associated with production, processing and distribution systems that impact on technical acceptability of meat-based product to countries, companies, customers and consumers.**

This sub-program will produce data and information that will provide communities the opportunity to make positive decisions for our product due to industry credentials, and for industry to be able to connect meaningfully with consumers at the product level. Product level credentials may apply not only to meat itself, but also to products containing meat or by-products. The challenges of reducing the environmental footprint (waste, CN30) will be addressed through shelf life and cold chain management. The sub-program provides a significant part of the science-base for defending and maintaining market access and alleviating technical trade barriers. Activities extend through the chain from production to consumption.

The sub-program collaborates with a cross-sector of animal industries, antimicrobial stewardship framework steering group, the CSIRO Trusted Agrifood Export Mission, US-based FoodCoVNet (SARS Coronavirus2 in food network), EU RIBMINS (Risk-based Meat Inspection) project.

A joint AMPC-MLA committee arrangement will continue to work on setting strategic direction and projects to be undertaken, funding and management as part of AMPC’s research programs (technical market access and markets, product and process integrity).

## Key performance indicators in 2022–23

1. Evaluate three and trial one shelf-life technology that provides >20% increase in shelf life and/or >20% cost reductions for lamb or other value-added products.
2. Positive market access feedback is received for new stunning methods.
3. Value and applicability of systems for maintaining integrity and confidence in the meat supply chain through to consumers are evaluated and value to brands determined.

Product group	Core activities
Market access technical research	<p>Initiatives within the ‘market access technical research’ product group include:</p> <ul style="list-style-type: none"> <li>■ maintaining awareness and making assessments of threats and opportunities in markets and technologies; and making plans to address them when necessary</li> <li>■ responding to opportunities to reduce technical barriers to trade</li> </ul> <ul style="list-style-type: none"> <li>■ improve our ability to manage shelf life and cold chain to improve access to markets and reduce waste</li> <li>■ ensuring antimicrobial stewardship is practiced and evidenced by industry to demonstrate sustainability and avoid technical trade barriers</li> <li>■ improving efficiency of supply chains, through collecting and utilising supply chain data related to food safety, integrity and authenticity and market access.</li> </ul>

Table 20: Projected 2022–23 investment by funding source – integrity systems (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R				External M
Integrity systems	32	22	161	149	935	1,161	1,780	1,921	605	622	1,274	1,212	9	21	1,171	5,967	6,641	11,933	11,748	23,681
Market access science	6		29		168		318		109		2,295		2		491	3,417		6,833		6,833
<b>Total</b>	<b>38</b>	<b>22</b>	<b>190</b>	<b>149</b>	<b>1,103</b>	<b>1,161</b>	<b>2,098</b>	<b>1,921</b>	<b>713</b>	<b>622</b>	<b>3,569</b>	<b>1,212</b>	<b>10</b>	<b>21</b>	<b>1,662</b>	<b>9,383</b>	<b>6,641</b>	<b>18,767</b>	<b>11,748</b>	<b>30,515</b>





# Program

## Objective measurement

Objective measurement of livestock and carcass attributes is an essential enabler for industry to improve grading accuracy, transparency and enable value-based marketing (VBM). This underpins the industry's *Red Meat 2030* goal to double the value of Australian red meat sales as the trusted source of the highest quality protein. These include unlocking decisions informed through data measurements across key traits to describe carcass value, such as lean meat yield, eating quality, health attributes and sensing to drive meat-cutting automation.

These technologies enable objective measurement-related outcomes, and value, as modelled in the following value scenarios:

- Objective measurement-based processing of livestock to optimise processing efficiency and sales value
- Genetic trait selection for objective measurement-based lean meat yield (LMY) increase while maintaining or improving eating quality, and maintaining pH
- Objective measurement-based increase in feedlot marbling while optimising turn-off times
- Live animal objective measurement of lean meat yield (LMY) for on-farm management and selling decisions.

As well as technology development, the objective measurement program works closely with Meat Standards Australia (MSA) in development of value-based pricing and marketing models. Other key enablers include calibration of measurements, development of digital data and measurement standards, developing new meat industry language criteria, supporting feedback and producer/seedstock extension programs, and decision support systems.

### Sub-programs

- Objective measurement

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



## Operating environment

To date, livestock and carcass attributes have largely been assessed using manual subjective measurement resulting in unrealised value potential across the red meat supply chain through lower accuracy measurement or appraisal systems. There is significant scope to improve the accuracy of measurements through the adoption of transparent objective measurement technologies and add significant value to the supply chain.

Over recent years MLA has worked with industry, research institutes and technology providers to develop on-farm, feedlot and processing plant solutions, including the application of DEXA (Dual-Energy X-ray Absorptiometry) and focusing on delivering technology that measures carcass eating quality traits for beef and sheep. MLA is now facilitating the ongoing adoption of DEXA technology throughout the red meat industry to deliver an accurate objective measurement of carcass meat, fat and bone (lean meat yield) and the platform to pass this information back to producers. In addition, MLA is commercialising eating quality technology to measure carcass quality traits.

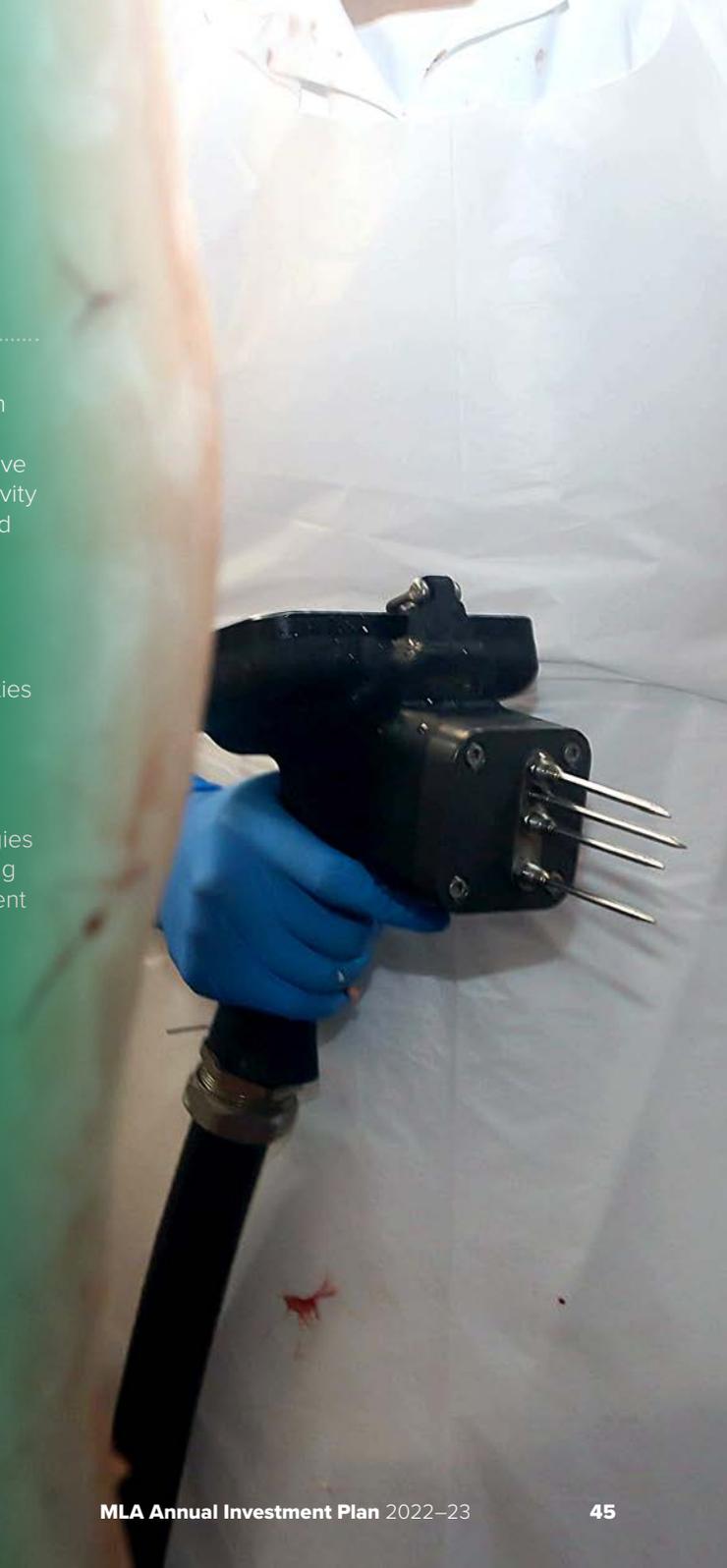
As well as technology development, the objective measurement program includes other key enablers such as the development of value-based pricing and marketing models, calibration of measurements, development of digital data and measurement standards, developing new meat industry language criteria, supporting producer/seedstock extension programs and decision support systems. All of these will need to be successfully delivered in order to achieve the expected benefits from the above objective measurement-based value propositions.

This will allow the red meat industry to transition to new business models, underpinned by key objective measurement technologies and related value-based trading.

The objective measurement program is closely linked to other programs such as MSA, productivity (both on- and off-farm), livestock genetics, integrity systems, producer adoption and market access. Additionally, the program incorporates the Rural R&D for Profit supported program, ALMTech II, which features device metrology, links to genetic databases, and adoption support with producers.

While the focus of the objective measurement program is around lean meat yield and eating quality, with strong linkages to MSA, other objective measurements may support productivity gains in such areas as food safety and animal health.

Genetic trait selection for objective measurement-based lean meat yield increase while maintaining eating quality and pH, along with opportunities to increase feedlot marbling while optimising turn-off times continues to be key focus areas along with integration in modern processing facilities. Advancements in technologies to enable cut-based MSA sheep along with live animal objective measurement of lean meat yield for on-farm management and selling decisions, remain complex problems and key opportunities to solve.



# Objective measurement

MLA's objective measurement sub-program develops and supports industry adoption of a range of technologies that measure or estimate key traits such as lean meat yield (LMY) and eating quality at appropriate points in the value chain for both live animals and carcasses. Key activities are focused on transitioning R&D to commercial implementation, and include:

- measurement of LMY and eating quality attributes to enhance MSA grading, by a range of technologies that support current grading and provide new grading opportunities, including cameras, intra-muscular probes, near infrared (NIR), and CT (computed tomography) scanning adapted from airline systems
- supporting adoption of LMY measurement by continuing to co-fund the rollout of DEXA systems at processing plants
- development of a range of potential technologies to measure eating quality, with a core focus on intra-muscular fat (IMF) and developing objective measurement of AUS-MEAT and MSA grading criteria
- prototyping and validating the value propositions for both the technology solution and the value propositions that these facilitate.

## Key performance indicators in 2022–23

1. At least one device which measures carcass value characteristics accredited by AUS-MEAT, as an enabler for feedback and value-based trading.
2. One abattoir pilot of hot beef preliminary MSA grading.
3. Five beef and five sheepmeat supply chains engaged in early adoption projects to trial business integration and implementation.

Product group	Core activities
Objective measurement technologies	<p>Initiatives within the 'objective measurement technologies' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting the development and adoption of technologies that can be applied to live animals or carcasses to measure traits describing carcass value.</li> </ul> <p>Outcomes from this product group are primarily delivered via the Rural Research and Development for Profit objective measurement program, other grant funding, and MLA Donor Company investments.</p> <p>Initiatives support technology development and adoption, including:</p> <ul style="list-style-type: none"> <li>■ measurement of carcass quality attributes to enhance MSA and AUS-MEAT grading, by a range of technologies that support current grading and provide new grading opportunities, including investigating opportunities for hot (pre-chiller) beef MSA grading</li> <li>■ development of new AUS-MEAT language and standards; and supporting new technologies to achieve accreditation</li> <li>■ supporting adoption of emerging technologies to enhance carcass grading and live animal measurements, including DEXA for lean meat yield</li> <li>■ development of new technologies to measure carcass value, composition and animal health attributes for supply chain feedback.</li> </ul>

Table 21: Projected 2022–23 investment by funding source – objective measurement (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R				External M
Objective measurement	1		19		224		216		63		885				1,741	3,149	1,582	6,299	1,582	7,881
Total	1		19		224		216		63		885				1,741	3,149	1,582	6,299	1,582	7,881





# Program

## Producer adoption

The producer adoption program realises MLA’s investments in research and development for red meat producers by delivering adoption programs and projects that allow producers to implement new practices, technologies, or products. The program engages producers in large scale awareness events, capability building and practice change projects that lead to productivity outcomes as a result of the adoption of R&D. Success from the program is measured by the improvements in production and profitability of participating livestock producers.

MLA’s regional consultation program operates alongside the producer adoption and related on-farm sub-programs as it engages producers directly in MLA on-farm investment decision-making. This works through the setting of R&D priorities as well as making recommendations to MLA on program and project level funding under the regional consultation model.

### Sub-programs

- Producer adoption

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



## Operating environment

MLA's producer adoption program encompasses adoption and regional consultation.

### Adoption

The MLA adoption program has a well-established and successful four-category framework (A, B, C and enablers) that allows producers with differing needs and skills, to move from awareness raising extension activities through to programs that enable producers to achieve lasting practice change. These categories can be further described as:

- Category A activities create awareness of the latest MLA R&D outputs and its adoption programs. These events act as feeder events for category B and C activities. For example, BeefUp and MeatUp events, and marketing and communication activities e.g. FutureBeef.
- Category B events provide short-term training opportunities to producers. Examples of category B events include BredWell FedWell, the EDGE Network workshops, the Feedbase Four soil clubs and Pasture Paramedic training.
- Category C programs aim to achieve long-term practice change with producers in their production systems. The principles of this category are long-term, peer-to-peer (producer groups), supported or experiential/hands-on learning programs. Programs include Profitable Grazing Systems (PGS) and Producer Demonstration Sites (PDS).
- Adoption enablers aim to build the resources and capability of advisors, which enable producers to implement a practice change through trusted advice or decision support tools. This includes programs like the Livestock Advisor Essentials, Future Livestock Consultants and Livestock Advisor Updates. Examples of support tools and calculators are the stocking rate calculator, soil phosphorus tool and Pasture Paramedic tool.

There is strong evidence demonstrating the return on investment of the MLA producer adoption framework. The 8,200 producers representing over 70 million hectares, 4.4 million cattle, 4 million sheep and 86,000 goats, that participated in MLA adoption programs in 2021–22 received an estimated annual net benefit of \$52.6 million. Specifically the Category B events of EDGE Network delivers a \$6.28/ha additional annual benefit for southern producers and \$44/km<sup>2</sup> for northern producers who participate. The Category C program of Profitable Grazing Systems (PGS) has been assessed to deliver an additional net benefit of \$18/ha annually as a result of participation where 92% of producers implemented practice changes. There are currently over 350 Producer Demonstration Sites (PDS) covering over 7 million hectares with the program providing participating producers with an additional net benefit of \$6/ha annually, resulting from over 85% of participating producers implementing permanent practice changes.

In 2022–23, MLA's producer adoption program will focus its business activities on three key areas of execution, motivation and impact.

**Execution** of the existing adoption pathway, delivering extension and adoption products that address producers' needs and developing products where there are gaps. The adoption program will improve the directing and signposting of adoption programs that producers can participate in. Promoting programs like PGS or EDGE network at events like MeatUp or BeefUp will encourage producers to take action in improving their production and profit.

**Motivation** of producers to get involved in MLA extension and adoption products and build momentum for producers to progress through the adoption pathway. The adoption program will devise and deliver regionally and industry specific campaigns to drive awareness and motivation of producers to address production issues like pasture dieback, utilisation of vaccines, sheep reproduction management practices and soil testing.

**Impact** of adoption program investments will be scrutinised through an enhanced monitoring and evaluation framework to ensure that the highest possible increases in production and profitability can be delivered via its products to producers. To further leverage the impact that can be achieved for producers, the adoption program will continue to work closely and collaboratively with strategic partnership programs across MLA programs on issues in common e.g. Northern Breeding Business (NB2), Sheep Reproductive Strategic Partnership (SRSP).

### Regional consultation

MLA implemented its regional consultation framework for directing research, development and adoption (RD&A) investment for grassfed cattle and sheepmeat levies in 2015. The aim of the consultation framework is to have a transparent, representative, cost-effective and systematic framework that underpins effective and relevant on-farm RD&A investment.

As the program evolves in 2022–23, it is focusing on not only having input into the areas of investment (regardless of funding source), but also involving the Research Advisory Councils (RACs) in understanding the outcomes of research and development and how this can lead to better adoption of these outcomes. Hence the focus will shift from not only priority setting but also to a focus on impact through bi-directional information flow. Utilising this group of engaged producers to understand how to communicate these outcomes more effectively to industry should help speed the rate of adoption of these outcomes.

# Producer adoption

**MLA's producer adoption sub-program builds the capability of red meat producers and advisors to increase on-farm productivity, profitability and sustainability through the implementation of on-farm research and development.**

## Key performance indicators in 2022–23

1. Deliver \$55 million in annual net benefits to producers, resulting from practice changes influencing up to 70 million hectares, 4 million cattle, 5 million sheep and 100,000 goats.
2. Total producer engagement over three years of 19,000 producers, rating their value of participation >7/10.
3. Engage 750 livestock advisors over three years in capacity building activities.

Product group	Core activities
Adoption awareness programs	<p>Initiatives within the 'adoption awareness programs' product group include:</p> <ul style="list-style-type: none"> <li>■ creating awareness for adoption opportunities</li> <li>■ informing producers and delivery partners of the latest practical research and development messages, and integrated learning opportunities through campaigns and large-scale forums</li> </ul>
Short-term training programs and workshops	<p>Initiatives within the 'short-term training programs and workshops' product group include:</p> <ul style="list-style-type: none"> <li>■ engaging producers with training and education opportunities to influence and motivate producers for uptake of improved practices and further skill development</li> </ul>
Long-term practice change programs	<p>Initiatives within the 'long-term practice change programs' product group include:</p> <ul style="list-style-type: none"> <li>■ involving and partnering with producers and service providers in integrated, long-term (&gt;12 months) adoption programs that deliver transformational change to their business performance</li> <li>■ partnering with producers and producer groups to demonstrate, develop and adopt research and development outcomes by validating the commercial value proposition and benefits</li> </ul>
Adoption enablers	<p>Initiatives within the 'adoption enablers' product group include:</p> <ul style="list-style-type: none"> <li>■ specialised programs which build public and private service provider capacity and capability, and encourage participation in, and leading of, MLA adoption programs</li> <li>■ program evaluation and producer market research to establish qualitative and quantitative impacts of adoption programs and inform research, development and adoption needs</li> </ul>

Product group	Core activities
Regional consultation for research, development and adoption	<p>Initiatives within the 'regional consultation for research, development and adoption' product group include:</p> <ul style="list-style-type: none"> <li>■ prioritisation of research and development areas used to develop an investment call that produces relevant research that incorporates and complements the adoption program</li> <li>■ facilitating participatory research through consultation from key stakeholders throughout the diverse regions of Australia</li> </ul> <p>■ facilitating RACs and associated producers to have confidence in MLA's <i>Strategic Plan 2025</i> and <i>Red Meat 2030</i> and ensure that there is a link between regional consultation and the objectives of these plans.</p>
Animal wellbeing adoption	This product group will focus on increasing the adoption of vaccines by producers based on their on-farm productivity, cost saving or animal wellbeing benefits.
Beef productivity adoption	Development and delivery of the Northern Breeding Business (NB2) to deliver extension activities and adoption practices that reduce calf mortality and guides reproductive benefits for northern herds. This will be used to guide the development of a similar, targeted livestock initiative for southern herds.
Feedbase adoption	Delivery of extension and adoption products that allow producers to have targeted grazing management practices to increase productivity, profitability and sustainability outcomes. These activities will allow producers to identify suitable areas for pasture diversification and enhance their skills, knowledge, and confidence to utilise sustainable grazing practices.
Goat productivity adoption	This product group will focus on increasing the number of producers incorporating managed goats as an enterprise within their business.
Sheep productivity adoption	This product group will focus on the uptake of sheep reproduction management practices by producers.

**Table 22: Projected 2022–23 investment by funding source – producer adoption (\$ '000\*)**

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R				External M
Producer adoption	27	7	96	103	1,767	1,036	1,162	1,670							5,576	8,628		17,255	2,816	20,071
Total	27	7	96	103	1,767	1,036	1,162	1,670							5,576	8,628		17,255	2,816	20,071



# Program

## Product and packaging innovation

MLA's product and packaging innovation program explores new products and occasions, new packaging and business model innovations to transform commodity red meat (and its components) into higher valued solutions.

It supports the industry's *Red Meat 2030* goal to double the value of Australian red meat sales as the trusted source of the highest quality protein by identifying and understanding consumer segments and preferences and capturing high value opportunities through new product concepts and food technology innovations that can add value to the whole carcass. By evolving from commodity meat trading to more value-adding, this program also contributes to changing the diversity of people in our industry with subject matter experts from adjacent sectors pivoting to the meat industry and making it a more inclusive place to work.

### Sub-programs

- High Value Food Frontiers

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



## Operating environment

Current and emerging global trends around convenience, snacking, personalised nutrition and wellness offer new usages and occasions for red meat beyond the traditional centre-of-plate protein. Other industries, including pharmaceutical, cosmetic, medical and biofuels sectors offer the potential for high premiums for red meat by-products and co-products.

Insights gathered from market and consumer research have identified several emerging global food trends that offer clear opportunities for the Australian red meat industry. Key themes include:

- personalised nutrition – health and wellness
- convenience and ‘snacking’
- nutraceuticals
- targeted demographic needs such as the ageing population, toddler foods
- the future of red meat protein in a rapidly changing global market with the rising middle class and world population growth
- sustainability – reducing food waste and upcycling waste stream ingredients via circular economies, plus reducing plastic pollution and carbon footprint and energy use from the ag-food sector.

To capitalise on these opportunities, new value-added product and service offerings need to be created through new technologies and business models.

Critically, this sub-program will apply learnings from global food trends with advancements in food and packaging technologies to prototype and scale up new usages, occasions and value for Australian red meat inclusion. Key opportunity spaces will be pursued in collaboration with MLA’s international markets team and commercial partners, using an iterative approach to designing, testing and delivering concepts in-market with an Australian red meat value proposition.

Producing higher utilisation, more desirable red meat products with different usages and occasions can create more value than the current model, where typically 80% of value is harvested from only 20% of the carcass. A paradigm shift to position red meat and its by-products beyond commodity offerings can help create more points of difference for the industry and potentially improve market access conditions.

Significant work is underway to extract collagen peptides from hides and skins and transform these, as well as other red meat glandules, into freeze-dried powders for snacks and nutraceuticals. Another key theme is identifying novel packaging materials and upcycling meat/food waste streams to drive wider sustainability credentials for the Australian red meat sector.

Finally, the development of alternative proteins to mimic meat such as plant proteins and lab-grown meat is likely to continue and is an area that MLA will be responding to.



# High value food frontiers

**MLA's high value food frontiers sub-program aims to drive new high-value usages/occasions (aligned to global food and market trend insights) that grow demand and deliver diversification for Australia's red meat industry.**

Novel technologies and value chains that can disrupt and provide an alternate, highly valued solution to the current paradigm of commodity meat trading will unlock higher premiums for, and increase customer preference of, Australian red meat products and services across key markets.

Outcomes from these activities will help customers globally value Australian red meat as a quality ingredient.

## Key performance indicators in 2022–23

1. Value adding (5th quarter) market opportunities are identified and at least one product group delivers annual sales of \$200 million in 2022–23.
2. Red meat protein ingredient (Future Protein) products have demonstrated a \$20 million annual retail opportunity.
3. Development of bespoke aged care red meat product sector that creates annual red meat product sales of \$5 million in 2022–23.
4. At least one pilot facility has been established that successfully demonstrates the viability of a non-refrigerated supply chain for Australian red meat.

Product group	Core activities
Develop new products, processes and business models	<p>Initiatives within the 'develop new products, processes and business models' product group include:</p> <ul style="list-style-type: none"> <li>■ engaging with food technology entrepreneurs, producer-led initiatives and brand owners of value-added products for developing or implementing innovative value adding products or supply chains that deliver significant benefits for the red meat industry</li> </ul>
Consumer, food technology and market insights	<p>Initiatives within the 'consumer, food technology and market insights' product group include:</p> <ul style="list-style-type: none"> <li>■ analysing global food trends and food technology platforms for 'what's next and what's possible' and identify opportunities for waste value chains, clean label and sustainable products</li> <li>■ analysing threats and opportunities (e.g. alternate meat proteins into blended meat-plant products and by-products such as hides into collagen)</li> </ul>

Table 23: Projected 2022–23 investment by funding source – product and packaging innovation (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R				External M
High value food frontiers			8	13	101	107	29	66	2	6	263				1,150	1,553		3,105	192	3,298
Total			8	13	101	107	29	66	2	6	263				1,150	1,553		3,105	192	3,298





# Program

## Value chain information and efficiency

MLA's value chain information and efficiency program assists MLA to foster the prosperity of the Australian red meat and livestock industry by capturing and appropriately managing data for increased productivity, integrity, market access and consumer trust in the red meat value chain.

### Sub-programs

- Digital value chain information

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

Agricultural supply chains are being disrupted by new and emerging technologies such as those supporting objective measurement. This technology and the data collection it enables, supports supply chain feedback systems and the verification of our integrity system claims that our product is clean, safe and fully traceable. Collecting and using data is essential in order to support the supply chain to strengthen decision making and performance, as well as safeguard consumer trust, and maintain and extend market access. These disruptive opportunities are driving the collection, storage and analysis of data at every node of the value chain. This is key to informing and driving decision making. This means that sharing data, agreeing on data ownership guidelines, rules for data sharing and access are more important than ever.

A secure and well-governed technology infrastructure, in the form of the Data Platform to host industry's key data sets, is a foundational requirement underpinning industry's integrity systems. The value chain information

and efficiency program delivers tools, enablers and infrastructure to support MLA, ISC and industry managing core data sets, such as those generated by the National Livestock Identification System (NLIS), Livestock Production Assurance (LPA), the electronic National Vendor Declaration (eNVD) and the producer feedback system (previously Livestock Data Link). The program contributes to the delivery of key priorities in the *Integrity Systems 2025 Strategic Plan (IS2025)* by providing tools that will support industry to make decisions based on data and ensuring safe, secure infrastructure and strong governance processes are in place to safeguard industry's data.

Investment priorities include the continued development of the Data Platform and Producer Feedback system. These investments underpin the strategic objective of leveraging the integrity system to support broader industry and MLA objectives such as lifetime animal performance tracking and enhanced decision making through data and insights.

# Digital value chain information

MLA's digital value chain information sub-program delivers tools and enablers that support programs to probe, identify and leverage opportunities to capture, interrogate and utilise data.

The program focuses on data governance, the capture/linking and enhancement of data, data culture, adoption and capability, analytic development and the provision of data infrastructure/tools.

## Key performance indicators in 2022–23

1. New producer feedback platform launched with an increase of 30% (approximately 1,000) users by June 2023.
2. Third party connectivity (API) strategy consultation completed, and implementation plan executed
3. Animal disease and defect feedback adoption plan implemented.

Product group	Core activities
Data and feedback systems	<p>Initiatives within the 'data and feedback systems' product group include:</p> <ul style="list-style-type: none"> <li>■ continued work to support adoption of animal disease, defect and wellbeing data capture and collection at processors</li> <li>■ launch of a new producer feedback system to replace Livestock Data Link (LDL) supported by a comprehensive adoption program</li> <li>■ work with supply chains and producers so that data (including animal disease and defect data) is captured and shared, giving producers access to information about the performance of their consignments and the opportunity to improve livestock and business performance</li> </ul> <ul style="list-style-type: none"> <li>■ facilitating the development of interoperable industry data providers, tools, architectures, protocols and standards</li> <li>■ rolling out new and enhanced functionality for the ISC data platform, including the inclusion of internal and external data sets</li> <li>■ explore new, emerging and novel uses for data to create opportunities of new value and income e.g. data marketplaces.</li> </ul>

Table 24: Projected 2022–23 investment by funding source – digital value chain information and efficiency (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External M			
Digital value chain information	50		105		759		1,147		364		50				1,267	3,742	264	7,483	264	7,747
Total	50		105		759		1,147		364		50				1,267	3,742	264	7,483	264	7,747



# Program

## Productivity (off-farm)

The productivity (off-farm) program focuses on the development and adoption of supply chain technologies that deliver productivity benefits to the red meat value chain by reducing costs, improving yield, optimising production and improving feedback and transparency.

Improving supply chain productivity enhances Australia's global competitiveness and contributes towards the industry's *Red Meat 2030* goal of doubling the value of Australian red meat sales as the trusted source of the highest quality protein from these improved systems.

### Sub-programs

- Productivity (off-farm)

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

The Australian red meat and livestock industry's processing sector operates within a highly competitive international marketplace and an operating environment characterised by high and increasing input costs.

Delivering cost-effective, high-quality products are drivers for automation, shared data, compliance and efficiency to ensure market access is maintained, changing workforce needs are met and global competitiveness is increased.

Accelerating the rate of innovation and adoption is an important contribution for the Australian red meat processing industry to remain globally competitive.

As operating costs continue to rise, especially for energy, transport and labour, there is a potential threat from foreign owned processors relocating their operations offshore to take advantage of cheaper labour. Should this occur, it would limit value chain innovation and value adding options and opportunities with the Australian red meat industry.

Changing workforce needs and global competitiveness for delivering cost-effective, high-quality products are drivers for automation, shared data, compliance and efficiency to ensure market access is maintained.

Program outcomes will deliver opportunities for higher food safety protocols, traceability and the ability to cost-effectively manufacture what the markets are signalling, not just what is procured and produced. Working closely with the the objective measurement sub-program, this will provide digital frameworks to better optimise buy-make-selling decisions along the value chain.

This program also seeks to help transition the industry to a culture that captures and shares data across every point in the supply chain. This enables the identification of the highest value opportunities and a shared understanding of challenges that need addressing off-farm that align to producer and brand owner expectations. This program works closely with Australian Meat Processor Corporation processor members.

## Productivity (off-farm)

MLA's productivity (off-farm) sub-program works to develop and adopt supply chain technologies that deliver productivity benefits to the off-farm sector. Key focus areas include maximising carcass value, optimising product mix and addressing labour availability and workplace health and safety issues.

Other priorities include support for objective measurement and data exchange up and down the supply chain.

### Key performance indicators in 2022–23

1. Technologies adopted in 2022–23 and previous years deliver \$80 million of increased productivity for the red meat industry.
2. Beef automation system prototypes test cutting sequence for accuracy and yield at processor R&D site, including CT donut/horizontal DEXA integration.
3. Detailed design and fabrication of Leap4Beef commercial prototype boning system.

Product group	Core activities
Productivity and logistics (off-farm)	<p>Initiatives within the 'productivity and logistics (off-farm)' product group include:</p> <ul style="list-style-type: none"> <li>■ further developing the beef and lamb boning automation program, with a focus on the development, commercialisation and adoption of beef boning automation modules.</li> </ul> <p>Tool and enabler initiatives supporting the development of the above include:</p> <ul style="list-style-type: none"> <li>■ conducting ongoing cost-benefit analyses on key technologies and programs</li> <li>■ developing and demonstrating innovative and aviation type computer tomography (CT) and other imaging technologies for accurate 3D cutting lines and automation</li> <li>■ engaging with new global solution providers, as well as continuous global technology scanning.</li> </ul>

Table 25: Projected 2022–23 investment by funding source – productivity (off-farm) (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External M			
Productivity (off-farm)											13,315				4,326	17,641		35,282	35,282	
Total											13,315				4,326	17,641		35,282	35,282	



# Program

## Productivity (on-farm)

MLA's productivity (on-farm) program assists MLA to foster the prosperity of the Australian red meat and livestock industry by supporting new research which leads to increased productivity and profitability across the beef, sheepmeat and goat production sectors.

### Sub-programs

- Beef productivity
- Sheep productivity
- Goat productivity
- Livestock genetics
- Feedbase production
- Digital agriculture

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

On-farm productivity and profitability gains can be achieved through new research, development and adoption that results in production efficiencies, reduced costs and higher returns on investment. In parallel, on-farm productivity must also contribute to a sustainable red meat industry that meets with community expectations on land, water, and environmental management.

**Grassfed beef productivity** relies on pasture-based systems which are influenced by seasonality and quality of an extensive feedbase. The MLA beef productivity sub-program seeks to increase beef productivity and enterprise sustainability by targeting increased reproductive efficiencies for breeder herds, reduced mortality between conception and weaning for northern herds, and an optimised value chain through integration of data to support management decisions on-farm.

Sheepmeat production has remained stable and is beginning to increase following a period of flock rebuilding following improved seasonal conditions across much of southern Australia. On-farm prices remain strong, driven by strong global demand. Production is predominantly pasture-based, exposing it to seasonal fluctuations and competition from crop farming

enterprises. A key focus of the **sheep productivity** sub-program is to contribute to a sustainable production system that improves the amount of sheepmeat produced per hectare, increasing lamb weaning rates, reducing ewe mortality, while managing the landscape and biodiversity outcomes and maximising the opportunities for integration with mixed farming systems.

The **goat productivity** sub-program continues to evolve. Record prices are driven by tight and inconsistent supplies and strong export demand. The challenge is to grow and improve the consistency of supply by increasing producer and animal numbers. Demonstrating 'proof of profit' to entice producers to 'give goats a go' and the provision of support in adding goats as a long-term enterprise within their business are prerequisites. A whole-of-supply-chain approach and data-based decision-making that considers best practice and total grazing pressure within each business is also necessary to ensure sustainability.

In the **livestock genetics** sub-program, significant ongoing co-investment in livestock genetics and genomics RD&A is setting up the industry for future success in driving improvements in genetic gains and establishing world-leading practices.

Through aligning genetic investment to value chain outcomes, and by better meeting the needs of consumers, there will be the greatest rate of commercial adoption – however, this does require a culture change to break through barriers to adoption. The investment in genetics will lead to addressing key drivers of profit including, but not limited to, improving market specification compliance, reducing costs, increasing growth rates, improving fertility and improving livestock production efficiency to improve overall productivity. To accelerate the rate of genetic gains, investments in disruptive and transformational research of new and novel technologies will be important and will ensure Australia is delivering world-leading genetic tools, whilst continuing to commercialise genetics outputs through the established delivery pipelines of BREEDPLAN, breed societies, LAMBPLAN, MERINOSELECT and KIDPLAN.

The **feedbase production** sub-program is the foundation of cost-effective animal production. The required feedbase is to ensure animal supply meets market needs and consumer expectations in the face of variable seasons, changing climates, environmental conditions, regulation and competition from undesirable plants and pest animals. The feedbase sub-program addresses these challenges through research that focuses on new and improved plants

and forages, enhanced management of grasses, legumes and shrub-tree combinations to accommodate varied capability and capacity of soils and regional rainfall, better utilisation (grazing frequency and intensity), and biological and non-biological controls for pest animals and plants.

Advancements in **digital agriculture** such as the internet of things (IoT), sensors and data analytics continue to be evaluated. Working with a cohort of 'early adopter producers', case studies are being derived for applying technologies that capture and utilise data. This includes animal health and welfare data and feedbase, as well as ensuring feedback and mapping processes are in place along the supply chain informed by customer and consumer expectations with key strategic industry partners. These technologies may also enable feedback and feedforward processes within networks and supply chains that are informed by consumer expectations around things such as sustainability credentials. With the introduction of new technologies on-farm comes increased efficiencies, which in turn will increase the amount of land and livestock one producer can manage. Going forward, these technologies will also provide producers with tools and resources to make more informed decisions and improve productivity.



# Beef productivity

MLA's grassfed beef productivity sub-program conducts activities which will increase beef productivity and enterprise profitability through improved and targeted applied R&D leading to practice change. This includes manipulation of rumen function, enhanced breeder herd fertility, improved calf survival, optimising the compliance of grass-finished cattle to market specifications and enhanced decision tools to improve enterprise management. These investments will be complementary to producer adoption activities which will create opportunities to achieve impact and practice change on-farm.

## Key performance indicators in 2022–23

1. At least 70 northern businesses with at least 300,000 breeders are engaged in benchmarking and peer-to-peer activities that identify intervention practices and improvement in reproductive performance.
2. WA BeefLinks identifies two practice change activities along the value chain which increases slaughter weight by at least 10%.
3. Near Infrared Reflectance (NIR) based objective measurement method developed for faster and more accurate assessment of diet quality in southern pasture systems.

Product group	Core activities
Productivity practices and technologies for grassfed cattle	<p>Initiatives within the 'productivity practices and technologies for grassfed cattle' product group include:</p> <ul style="list-style-type: none"> <li>■ improving fertility through targeted management, achieving genetic potential and supplementation practices which deliver improvements in conception, gestation and lactation</li> <li>■ understanding the causes of calf loss through applied research</li> <li>■ on-farm practices to improve sale weight and mitigation of enteric methane using specific supplements and/or feed additives</li> <li>■ improving herd management by developing and utilising animal monitoring, control technologies and on-farm sensors</li> <li>■ initiating cross sectoral and consortium activities through MDC partnerships which materially deliver the goals of the Australian Beef Sustainability Framework and address market, economic and environmental impacts for future sustainable and resilient red meat production systems.</li> </ul>



# Sheep productivity

**MLA's sheep productivity sub-program aims to increase on-farm productivity and profitability to underpin the sustainability of lamb and sheepmeat businesses.**

## Key performance indicators in 2022–23

1. Integrate 150 producer participatory RD&A sites into sheep productivity projects that demonstrate improved reproductive performance by at least 10%.
2. Deliver a pregnancy scanning strategy, including publishing the revised business case for pregnancy scanning, creating a series of training materials and information resources, delivering extension outcomes to more than 200 sheep producers.

Product group	Core activities
Sheep productivity practices and animal management	<p>Initiatives within the 'sheep productivity practices and animal management' product group include:</p> <ul style="list-style-type: none"> <li>■ reproductive performance to increase lamb production through increased weaning rates and decreased mortality</li> <li>■ optimising sheepmeat production systems, including the Towards 90, SheepLinks and lamb feedlotting programs – these are focused on accelerating the rate of adoption of best practice management in sheep enterprises</li> <li>■ sheep-related climate adaptation, preparedness and sustainability outcomes such as investigating the impact of shade and shelter on reproductive physiology and animal behaviour.</li> </ul>



# Goat productivity

MLA's goat productivity sub-program aims to increase on-farm productivity and profitability to underpin the sustainability of goat businesses through research, development and adoption activities.

## Key performance indicators in 2022–23

1. Develop insights into the barriers to adoption of KIDPLAN and a strategy to enhance uptake of the platform.
2. Engage 200 goat producers and potential entrants to the sector in extension activities including but not limited to BredWell FedWell, Feeding Fundamentals, National Goat Roadshow and Going into Goats workshops.

Product group	Core activities
Goat productivity improvement	<p>Initiatives within the 'goat productivity improvement' product group include:</p> <ul style="list-style-type: none"><li>■ delivering projections through the population modelling project and using them to inform strategic messaging back to industry</li><li>■ delivering improved off-label chemical data to vets across Australia to improve services to goat producers</li><li>■ identifying efficiencies to be adopted relating to herd management, particularly with relation to reproductive performance</li><li>■ investigating opportunities for goat genetic improvement</li><li>■ demonstrating the transition to managed goat enterprises.</li></ul>



# Livestock genetics

**MLA's livestock genetics sub-program aims to deliver world-leading genetic improvements for the beef cattle, sheep and goat industries by accelerating the development and adoption of genetic and genomic technologies and continuing partnership investments facilitated by the National Livestock Genetics Consortium (NLGC). This includes reducing timelines from research to outputs, reducing costs and aiding in seamless transfer of information through the provision of easy-to-use products and services.**

## Key performance indicators in 2022–23

1. Sheep Genetics client numbers and animal numbers increase by a minimum of 5% (based on five-year rolling average) from a base of 900 flocks and 300,000 new animals per year.
2. Rate of genetic progress in all three major Sheep Genetics evaluations at least 3% and combined BREEDPLAN analyses at least 1.5% based on index change.
3. Review of BREEDPLAN delivery structure completed with agreement on new model for implementation.
4. Northern fertility herd profile and/or genomic breeding values (GBVs) being delivered commercially to at least 50 producers.

Product group	Core activities
Reference populations	<p>Initiatives within the 'reference populations' product group include:</p> <ul style="list-style-type: none"> <li>■ utilisation of resource flocks to enhance sheep genetics data, which includes evaluating new ways to capture and utilise industry data</li> <li>■ supporting current Beef Information Nucleus projects for major cattle breeds while evaluating future models to fund the resource</li> </ul> <ul style="list-style-type: none"> <li>■ utilisation of reference populations to identify and fill critical gaps in data required to accelerate genetic improvements</li> <li>■ novel and hard-to-measure phenotype collection.</li> </ul>
Genetic improvement research and development	<p>Initiatives within the 'genetic improvement research and development' product group include:</p> <ul style="list-style-type: none"> <li>■ new genomic tools and technology development</li> </ul> <ul style="list-style-type: none"> <li>■ alignment of new tools and technology developed with the genetic evaluation software (OVIS and BREEDPLAN) pipelines</li> <li>■ ongoing development of genetics data platforms.</li> </ul>
Delivery of genetic tools and technologies	<p>Initiatives within the 'delivery of genetics tools and technologies' product group include:</p> <ul style="list-style-type: none"> <li>■ delivering world-class Sheep Genetics services: LAMBPLAN, MERINOSELECT and KIDPLAN</li> </ul> <ul style="list-style-type: none"> <li>■ developing analytical engines for BREEDPLAN and OVIS to improve single-step analysis and multi-breed analysis capabilities</li> <li>■ delivering commercial genetic improvement tools: Northern Genomics Herd Profile and Commercial Heifer GBVs and Flock Profile.</li> </ul>
Adoption of genetic tools and technologies	<p>Initiatives within the 'adoption of genetic tools and technologies' product group include:</p> <ul style="list-style-type: none"> <li>■ implementing MLA's <i>Genetics Adoption Plan</i> aligned with the <i>NLGC Strategic Plan</i></li> </ul> <ul style="list-style-type: none"> <li>■ providing support for genetic evaluation 'users' through beef extension pathways and Sheep Genetics</li> <li>■ executing an effective and wide-reaching genetics communications strategy.</li> </ul>

# Feedbase production

MLA's feedbase production sub-program aims to support the development of better plants, better management, and better utilisation of forages; reduce the impact on the feedbase by pest animals, plants, and diseases; and sustain or improve natural capital.

## Key performance indicators in 2022–23

1. At least 150,000ha of additional legume pastures, as demonstrated by seed sales of new and existing cultivars.
2. Dieback producer network expands to >300 members across Queensland/ NSW, managing more than 2 million hectares.
3. Improved monitoring of land condition on more than 10 million hectares of grazing land.
4. CISS invasive grasses network of >25 RD&E sites established.

Product group	Core activities
Feedbase productivity research and development	<p>Initiatives within the 'feedbase productivity research and development' product group include:</p> <p><b>Natural capital</b></p> <p>This initiative focuses on the monitoring, maintenance and improvement of soil health and land condition. Key activities include:</p> <ul style="list-style-type: none"> <li>■ improving accuracy and efficiency of monitoring and managing</li> <li>■ assessing impacts of extreme events on soil health</li> <li>■ understanding and fixing constraints to soil productivity and land condition.</li> </ul> <p><b>Feedbase improvement</b></p> <p>This initiative seeks to improve pasture and forage productivity. Key activities include:</p> <ul style="list-style-type: none"> <li>■ legume adoption initiative that seeks to rapidly deploy legume species into regions where they are underutilised</li> <li>■ breeding of new pasture and forage species, including provision of independent variety/species comparisons (Pasture Trial Network)</li> <li>■ development and delivery of agronomic packages for new species.</li> </ul>
	<p><b>Feedbase protection</b></p> <p>This initiative focuses on protecting the feedbase from weeds, diseases, and pests. Key activities include:</p> <ul style="list-style-type: none"> <li>■ pasture dieback initiative: understanding and managing pasture dieback and improving adoption of management practices</li> <li>■ development/delivery of biological, chemical, mechanical, and integrated products for animal and insect pests, diseases, and weeds.</li> </ul> <p><b>Feedbase utilisation</b></p> <p>This initiative seeks to improve feedbase management across the whole farm to maximise livestock production in the face of a changing and variable climate. Key activities include:</p> <ul style="list-style-type: none"> <li>■ develop data-driven approaches to measure land condition, groundcover, forage diversity, biomass and quality, and animal performance</li> <li>■ using all forage sources (e.g. crops, native and exotic pastures) for business benefits.</li> </ul>

# Digital agriculture

MLA's digital agriculture sub-program invests in infrastructure, decision support, automation and data platform tools to boost feedbase and animal productivity increases. In 2022–23, the sub-program will focus on encouraging in-market adoption of digital technology and data analytics.

## Key performance indicators in 2022–23

1. Redesign GPS chip module at a size which enables integration into existing Internet of Things devices, including ear tags.
2. Develop a 'producer and technology partner use' case for aerial platform in mustering.
3. Deliver three use cases through co-funded partnership farm models to support the adoption of more complex digital ag use cases e.g. livestock and pasture management.

Product group	Core activities
Digital agriculture tools and technologies	<p>Initiatives within the 'digital agriculture tools and technologies' product group include:</p> <ul style="list-style-type: none"> <li>■ showcasing connectivity options for use of digital technologies in remote locations</li> <li>■ developing digital information products and dashboard decision tools/guidelines to provide informed and predictive management systems</li> </ul> <ul style="list-style-type: none"> <li>■ deploying autonomous ground and aerial platforms for data collection and livestock/pasture management to improve decisions, efficiency, animal welfare and safety on-farm</li> <li>■ establishing an ecosystem for multi-vendors and producers to share data and have third party solution providers value add to the raw data</li> <li>■ establishing partnerships with enterprises wanting to test and adopt digital technology solutions on-farm and using these as case studies to drive further awareness and validate value propositions to stakeholders.</li> </ul>

Table 26: Projected 2022–23 investment by funding source – productivity (on-farm) (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External M			
Beef productivity			2		36		947								2,314	3,298		6,596	6,596	
Feedbase production			27		584		1,032								3,287	4,931		9,861	9,861	
Goat productivity	141														199	341		682	682	
Sheep productivity			48		847										886	1,780	84	3,561	84	3,645
Livestock genetics					999		1,032	91	142						4,979	7,152	1,806	14,304	1,897	16,201
Digital agriculture			2		33		124		28						841	1,027		2,054		2,054
<b>Total</b>	<b>142</b>		<b>78</b>		<b>2,498</b>		<b>3,135</b>	<b>91</b>	<b>170</b>						<b>12,507</b>	<b>18,529</b>	<b>1,890</b>	<b>37,058</b>	<b>1,981</b>	<b>39,039</b>



# Program

## Capability building

MLA's capability building program fosters the prosperity of the Australian red meat and livestock industry by investing in current and emerging industry leaders, innovators, scientists, value chain partners and representative organisations. It aims to enhance professional leadership and business skills, support industry advocates, accelerate adoption and build a culture of innovation and cross-sectoral performance.

Building these capabilities will attract, retain and grow a professional and skilled industry workforce that can deliver on the ambitious targets in our industry's strategic plan.

### Sub-programs

- Innovation capability building
- Industry leadership and capacity building

### Red Meat 2030 priorities



### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

There are currently numerous professional development and training programs within the industry. This program aims to build on these programs to support graduates and potential industry leaders to move into leadership roles within industry organisations and the peak industry councils.

Importantly, capability programs also expose the career opportunities available within the red meat sector, ensuring future security of the industry by attracting, recruiting and retaining the skills required for the future workforce.

This program also develops researcher and advisor capability to support Australian red meat producers to achieve productivity gains and respond to environmental, economic and social challenges.

Close collaboration with the research and start-up community ensures R&D and innovation is focused on strategic areas identified by MLA and the red meat industry.

Through the innovation capability building sub-program, MLA works closely with value chain stakeholders, such as producers, processors and other red meat businesses, to identify and implement innovation as well as fast-track R&D outcomes.

It supports the industry's *Red Meat 2030* goal to double the value of Australian red meat sales as the trusted source of the highest quality protein by enabling practice change and contributing towards increased adoption rates, attracting and retaining a diverse workforce, and developing skilled and capable people.

# Innovation capability building

**MLA's innovation capability building sub-program engages with scientists, researchers, value chain partners, rural professionals, producers, the start-up ecosystem and innovators in a range of capability building initiatives to accelerate innovation adoption and increase the industry's investment in innovation.**

## Key performance indicators in 2022–23

1. 80% of co-funded resources demonstrate evidence of accelerated innovation adoption aligned with MLA's *Strategic Plan 2025* focus areas.
2. At least 10 MLA-supported early career professionals are accelerating the adoption and impacts from key MLA strategic programs such as CN30 and NB2.
3. Industry leadership investments are accelerating the advancement of industry innovation leadership capability.

Product group	Core activities
Industry professional development	<p>Initiatives within the 'industry professional development' product group include:</p> <ul style="list-style-type: none"> <li>■ The Intercollegiate Meat Judging Competition program</li> <li>■ The Rural Professionals Program (RPP), which recognises that investing in the development of young people is crucial to building and retaining a skilled and capable future workforce. RPP includes the Livestock Consulting Internship, which is evolving to provide development of specialist consultants to support the adoption of CN30 and NB2 programs.</li> </ul>
Industry leadership and academic research	<p>Initiatives within the 'industry leadership and academic research' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting under/postgraduates to work on industry's complex problems by providing opportunities for them to enter the red meat industry</li> <li>■ supporting postgraduate innovation capability required to deliver industry strategic innovation priorities (scholarship stipend top-ups)</li> <li>■ industry leadership – developing enhanced leadership capability to develop impactful industry leaders and ambassadors for MLA.</li> </ul>
Producer entrepreneurship	<p>Initiatives within the 'producer entrepreneurship' product group include:</p> <ul style="list-style-type: none"> <li>■ accelerating producer innovation capability by recognising the importance of producer-led innovation</li> <li>■ creating new sources of revenue for producers beyond today's farm gate.</li> </ul>
Co-funded innovation resources	<p>Initiatives within the 'co-funded innovation resources' product group include:</p> <ul style="list-style-type: none"> <li>■ the Collaborative Co-innovation Program, which is                             <ul style="list-style-type: none"> <li>- supporting leading Australian red meat value chains to fast-track their innovation strategies</li> <li>- customised to match the specific business and innovation goals of participating enterprises and their value chains, with a deliberate focus on partners who share MLA's strategic innovation focus areas</li> <li>- based on very focused commercial partnerships that will accelerate MLA's innovation agenda</li> </ul> </li> <li>■ the digital and supply chain officers program, which                             <ul style="list-style-type: none"> <li>- accelerates the development of whole-of-value chain digital strategies that leverage the best solutions and ensures industry is competitively positioned for new and evolving digital enablers</li> <li>- fast-tracks the transitioning to a culture that captures and shares data across every point in the supply chain</li> <li>- increases the industry's capacity to make decisions informed through data and insights.</li> </ul> </li> </ul>

# Industry leadership and capacity building

MLA's industry leadership and capacity building sub-program equips industry representatives with the skills, knowledge and confidence to be effective communicators, positive contributors and successful leaders.

## Key performance indicators in 2022–23

1. At least two media training and two crisis management simulations completed.
2. 80% of trained advocates using the strategies and skills from the training in their communications about the red meat industry.

Product group	Core activities
Industry development	<p>Initiatives within the 'industry development' product group include:</p> <ul style="list-style-type: none"> <li>■ a professional development program to equip current and emerging industry leaders and others in key industry and MLA roles. Initiatives include advocacy workshops and tools to encourage industry engagement with the community.</li> </ul>
Industry corporate affairs unit	<p>Initiatives within the 'industry corporate affairs unit' product group include:</p> <ul style="list-style-type: none"> <li>■ supporting the development of agreed messaging around key industry issues and facilitating the process for a united industry response when required</li> <li>■ supporting peak industry councils with proactive messaging around key issues</li> <li>■ supporting media and issues management and activity of the peak industry councils</li> <li>■ supporting crisis management capability building</li> <li>■ facilitating media and presentation training</li> <li>■ providing media and industry monitoring services</li> <li>■ providing R&amp;D, data and evidence to aid/inform peak industry councils' policy development.</li> </ul>
Peak council development	<p>Initiatives within the 'peak council development' product group include:</p> <ul style="list-style-type: none"> <li>■ annual service agreements with the production peak industry councils (CCA, ALFA, SPA, GICA), including activities across consultation, animal health/welfare and biosecurity, industry leadership and capability building, and adoption</li> <li>■ <i>State of the Industry</i> annual report and other industry issues research and analysis to assist industry stakeholders and peak industry councils in policy development.</li> </ul>

Table 27: Projected 2022–23 investment by funding source – capability building (\$ '000\*)

\*Total may not add up due to rounding

Sub-program	Funding source																	Sum of R	Sum of M	Sum of AIP 2022–23
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External M			
Industry leadership and capacity building	1	39	3	49	43	1,404	50	1,611	11	502	21	132		2		130		260	3,740	4,000
Innovation capability building	1		2	31	20	129	31	178	8	25	6,902				2,245	9,210		18,419	363	18,782
<b>Total</b>	<b>2</b>	<b>39</b>	<b>5</b>	<b>80</b>	<b>64</b>	<b>1,533</b>	<b>82</b>	<b>1,789</b>	<b>19</b>	<b>527</b>	<b>6,923</b>	<b>132</b>		<b>2</b>	<b>2,245</b>	<b>9,340</b>		<b>18,679</b>	<b>4,103</b>	<b>22,783</b>



# Program Communication

MLA’s communication program assists MLA to foster the prosperity of the Australian red meat and livestock industry by ensuring that MLA’s marketing, research, development and adoption products and services are known and accessible to levy payers and stakeholders. It also seeks to build confidence in the industry, ensuring the community supports and has increasing trust in the Australian red meat and livestock industry.

## Sub-programs

- Communication (community)
- Communication (stakeholder)

## Red Meat 2030 priorities



## MLA Strategic Plan 2025 strategic focus areas



## Operating environment

The communication program operates in a complex and diverse environment with stakeholders who have wide-ranging research, development and marketing needs. Understanding these needs is critical for MLA to deliver impact to industry by tailoring its services and communications to ensure stakeholders can access the information they need, when they need it, through the channels they prefer. Improved access to enhanced information empowers stakeholders to make more informed decisions and increase their uptake of business-enhancing marketing, research and development.

Understanding our consumers, meeting their expectations and telling our story as an industry helps ensure we maintain the community’s support and trust. The community has high expectations around sustainability, animal health and welfare, and the role of red meat in a healthy, balanced diet. The community is also increasingly interested in the provenance of their food. MLA works with industry to maintain and enhance community confidence by engaging the community and demonstrating that the industry is an ethical and responsible custodian of livestock, land and natural resources.

MLA’s communication program also operates in a highly competitive environment where stakeholders face an abundance of free-flowing information from countless sources on endless topics. Seeking engagement with MLA communications becomes increasingly challenging, requiring the exploration of new delivery platforms and formats.

## Communication (community)

MLA's communication (community) sub-program under the *Australian Good Meat* brand informs and engages the community about the Australian red meat and livestock industry credentials with a focus on animal welfare, environmental management, and the role of red meat in a healthy, balanced, sustainable diet.

### Key performance indicators in 2022–23

1. Maintain the percentage of consumers who feel good or very good about the Australian cattle industry (65%) and sheepmeat industry (60%).
2. 15% increase in average monthly Good Meat website users on 2021–22 average.
3. Overall average 10% increase in community engagement – measured by a range of metrics such as followers, likes, views, and shares for all the Good Meat social media channels, measured from 2021–22 baseline.
4. 65% of those surveyed at Good Meat events feel positive about the red meat industry.
5. Achieve 11,000 page views of Australian Good Meat teacher resources by June 2023.

Product group	Core activities
Community education	<p>The 'community education' product group includes development of engaging, targeted content, collateral and online assets through dedicated communications channels, such as MLA's online platform <a href="http://goodmeat.com.au">goodmeat.com.au</a>, social media and other strategic communication channels. An annual benchmarking survey is also undertaken to understand community sentiment which informs the strategy for the <i>Australian Good Meat</i> communications program.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> <li>■ <a href="http://goodmeat.com.au">goodmeat.com.au</a> online platform enhancements, including search engine optimisation, paid campaigns and improved user experience to ensure relevancy, currency and accessibility of content</li> <li>■ online content development including producer and influencer content, videos, animations and infographics</li> <li>■ annual benchmarking survey of community sentiment</li> <li>■ collaborate with other RDCs in the AgriFutures 'Community Trust in Australia's Rural Industries' national survey.</li> </ul>
Community engagement	<p>The 'community engagement' product group has evolved over the past couple of years away from engagement through foodie events to focus on digital engagement to expand the reach and frequency of engaging with the community. MLA will maintain a smaller presence at key royal agriculture shows to provide an opportunity to engage face-to-face with the community.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> <li>■ social media channel management: Instagram, Facebook, YouTube and Twitter</li> <li>■ active social media driven communications to engage the community online</li> <li>■ digital media/influencer campaigns to promote the industry's credentials</li> <li>■ targeted amplification of social content and paid advertising online</li> <li>■ <i>Australian Good Meat</i> branded exhibition at key royal agricultural shows</li> <li>■ <i>Australian Good Meat</i> collateral to support community engagement activities.</li> </ul>

## Product group

## Core activities

### School education

The 'school education' product group engages schools and teachers through education partnerships and the development of national curriculum aligned teaching resources focused on animal welfare and environmental management and the role of red meat in a healthy balanced diet.

Initiatives include:

- education industry engagement with key education and industry organisations, such as the Primary Industries Education Foundation (PIEFA) and Kids Media, to promote the *Australian Good Meat* educational resources, and support teacher consultation to inform on preferred teaching methods, resource needs and sentiment towards teaching Australian agriculture in the classroom
- virtual classrooms: curriculum aligned livestream lessons with red meat industry stakeholders that focus on *Australian Good Meat* pillars of environmental management, animal health and wellbeing and the role of red meat in a healthy diet
- maintenance of teaching resources with current industry information to align to national curriculum and preferred ways of learning
- leveraging other school program initiatives to benefit (or amplify) the *Australian Good Meat* core program objectives and outcomes.



# Communication (stakeholder)

MLA's communication (stakeholder) sub-program engages and communicates with MLA members, levy payers and stakeholders across the value chain about MLA's work in research, development and marketing.

## Key performance indicators in 2022–23

1. High levels of satisfaction (above 77%) recorded by participants at MLA events.
2. High levels of member satisfaction (73% or higher) with printed and digital communications, as measured by the annual member survey.

Product group	Core activities	
Sustainability frameworks	<p>The 'sustainability frameworks' product group strives to ensure all relevant external stakeholders are aware of and understand the industry's sustainability commitments and programs, while empowering industry stakeholders to demonstrate their continual improvement.</p> <p>The flagship programs are the Australian Beef Sustainability Framework (ABSF) that MLA manages on behalf of the Red Meat Advisory Council (RMAC) and</p>	<p>the Sheep Sustainability Framework (SSF) that MLA manages on behalf of WoolProducers Australia and Sheep Producers Australia. The frameworks are led by industry as directed by the Sustainability Steering Groups (SSGs). They are investor and customer focused to demonstrate industry's commitment, performance and progress on sustainability around the four themes of economic resilience, animal welfare, environmental stewardship, and people and community.</p>
MLA communications content	<p>The 'MLA communications content' product group provides a targeted suite of print and digital communications to engage stakeholders (primarily levy payers) with clear, relevant, engaging and accessible content that empowers decision making. Initiatives include:</p> <ul style="list-style-type: none"> <li>■ developing and implementing content and digital strategies to coordinate and direct MLA's communications toward the achievement of MLA's mission and the needs of MLA's stakeholders</li> <li>■ providing communications input, support and advice to MLA managers and service providers regarding relevant MLA projects and work programs</li> </ul>	<ul style="list-style-type: none"> <li>■ producing and delivering relevant and engaging regional and seasonal content through e-newsletters, mla.com.au, social media and printed materials such as MLA's flagship <i>Feedback</i> magazine</li> <li>■ fulfilling MLA's corporate reporting requirements under the <i>Corporations Act 2001</i> and the <i>Australian Meat and Livestock Industry Act 1997</i> as per MLA's Statutory Funding Agreement with the Australian Government</li> <li>■ delivering high impact communications campaigns that benefit red meat producers and the Australian red meat and livestock industry.</li> </ul>
Stakeholder collaboration	<p>The 'stakeholder collaboration' product group covers MLA's activities to build stakeholder awareness and adoption of MLA programs. Initiatives include:</p> <ul style="list-style-type: none"> <li>■ MLA-hosted events to inform stakeholders and build awareness of MLA's program plans and outcomes</li> </ul>	<ul style="list-style-type: none"> <li>■ targeted industry event sponsorship and MLA speakers at events</li> <li>■ a 'red meat positioning' campaign to ensure our stakeholders have information handy to respond to questions and concerns with robust, evidence-based information about red meat's credentials.</li> </ul>
Industry engagement	<p>The 'industry engagement' product group covers MLA's activities to engage with industry stakeholders including MLA members. Initiatives include:</p> <ul style="list-style-type: none"> <li>■ MLA member services to support and manage MLA membership</li> <li>■ MLA's customer relationship management (CRM) is fit for purpose and utilised effectively across the business to ensure services and communications are targeted to stakeholder needs</li> <li>■ internal communications to drive greater knowledge of MLA's strategy and areas of work with MLA staff. Staff understand how their work fits into the organisation's goals</li> </ul>	<ul style="list-style-type: none"> <li>■ consolidation of the key account management program internally</li> <li>■ industry bodies are informed and share key information with their members</li> <li>■ quarterly consultation updates with PICs and RDCs</li> <li>■ MLA engagement with key members and industry groups, memberships and subscriptions.</li> </ul>

Product group	Core activities	
Media and corporate affairs	<p>MLA's 'media and corporate affairs' product group includes strategic and operational aspects of professional corporate communications, media engagement and issues/crisis management. Initiatives include:</p> <ul style="list-style-type: none"> <li>ensuring MLA's corporate affairs activities are aligned with MLA's <i>Strategic Plan 2025</i> and directed to the achievement of MLA's purpose</li> <li>building a consistent narrative to demonstrate MLA's work and achievements and promote the credentials of the red meat industry</li> </ul>	<ul style="list-style-type: none"> <li>proactively identifying, developing and managing opportunities across traditional and new media for MLA to contribute to industry debate, news commentary and similar forums of influence</li> <li>carrying out media training for MLA staff and industry stakeholders</li> <li>proactively identifying relevant issues or trends in the communications environment, and ensuring industry preparedness.</li> </ul>

**Table 28: Projected 2022–23 investment by funding source – communication (\$ '000\*)**

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R				External M
Communication (community)	2	1	3	15	136	565	108	847	9	174						258		515	1,601	2,116
Communication (stakeholder)	5	2	12	50	454	1,892	362	2,835	29	582						863	16	1,726	5,376	7,102
<b>Total</b>	<b>7</b>	<b>3</b>	<b>15</b>	<b>65</b>	<b>590</b>	<b>2,457</b>	<b>471</b>	<b>3,682</b>	<b>38</b>	<b>755</b>						<b>1,121</b>	<b>16</b>	<b>2,241</b>	<b>6,977</b>	<b>9,218</b>



# Program

## Corporate services

MLA's corporate services program assists MLA to foster the prosperity of the Australian red meat and livestock industry by:

- effectively managing levy and government matching investments through accounting, contracting, project management, foreign exchange management, advice, IP transfer, evaluation and reporting
- ensuring MLA meets its statutory and legislative requirements through a robust corporate governance framework including audit, risk and legal services
- providing the frameworks to attract and retain a diverse and talented workforce.

### Sub-programs

- Corporate services

### MLA Strategic Plan 2025 strategic focus areas



### Operating environment

A tight and mobile labour market is presenting short-term challenges in relation to talent acquisition and retention. MLA has successfully introduced a hybrid working model and continues to promote its flexible work environment to remain competitive in attracting talent.

Favourable weather conditions and the ongoing herd and flock rebuild are expected to result in an increase in levies in the medium to long term. Levy income is expected to increase by 4.6% in 2022–23.

MLA's government-matching cap is calculated as 0.5% of the three-year rolling average of the industry's gross value of production (GVP). ABARES has projected a 4.5% increase in red meat GVP in 2022–23 which, when combined with the two strong preceding years, is expected to result in a 4.4% increase in the value of federal matching dollars available in 2022–23.

# Corporate services

MLA's corporate services sub-program assists MLA to foster the prosperity of the Australian red meat and livestock industry by:

- effectively managing levy and government matching investments through accounting, contracting, project management, foreign exchange management, advice, IP transfer, evaluation and reporting
- ensuring MLA meets its statutory and legislative requirements through a robust corporate governance framework including audit, risk and legal services
- providing the frameworks to attract and retain a diverse and talented workforce.

Product group	Core activities
Board and executive	Initiatives within the 'board and executive' product group include providing strategic guidance for MLA and effective oversight of the management and performance of MLA in delivering its <i>Strategic Plan 2025</i> .
Legal and contracts	Initiatives within the 'legal and contracts' product group includes providing legal advice and contract support to the business. Other initiatives include: <ul style="list-style-type: none"> <li>■ transforming from a transaction based to an advisory function</li> <li>■ streamlining contracting and project approval process</li> <li>■ enabling the business to deliver on its strategic plan and annual investment portfolio through collaboration and delivery of training and education.</li> </ul>
Crisis management	Initiatives within the 'crisis management' product group include: <ul style="list-style-type: none"> <li>■ maintaining the MLA crisis response plan and portal</li> <li>■ supporting the MLA crisis management training and activities, where required.</li> </ul>
Risk and compliance	Initiatives within the 'risk and compliance' product group include activities that ensure MLA's risk management and compliance frameworks such as: <ul style="list-style-type: none"> <li>■ regularly reviewing, maintaining and operationalising the Board's risk appetite</li> <li>■ reflecting the industry's operating environment</li> <li>■ monitoring compliance with statutory and other regulations applicable to the MLA Group of companies.</li> </ul>
Finance	Initiatives within the 'finance' product group include capturing the stewardship role of effectively managing levy and non-levy investments. Other initiatives include: <ul style="list-style-type: none"> <li>■ management reporting to internal and external stakeholders</li> <li>■ financial planning and analysis including the <i>Annual Investment Plan</i> and quarterly rolling forecasts</li> <li>■ treasury, including the management of cash and foreign exchange</li> <li>■ financial accounting services, including Annual Statutory accounts.</li> </ul>

## Key performance indicators in 2022–23

### Legal and contracts

1. Maintain MLAs templates to ensure they remain current.
2. Continued delivery of legal training to educate the business to ensure strong awareness on MLA's agreements, key terms, and legal obligations.
3. Continue the journey of transforming the legal function with the roll out of the team's roadmap and new ways of working.
4. Continuous support to business in respect to contract administration.
5. Continue to provide PRC secretariat support.
6. Develop and maintain a new PRC SharePoint page to support the members and as a resource to the business.

### Crisis management (MLA)

1. Ensure an effective Crisis Response Plan is in place for managing MLA crises, including templates and relevant resources.

### Risk and compliance

1. Ensure efficient and effective identification and assessment of risks to MLA (operational) and industry, as well as implementation of action plans to address risk, and regularly report to the Audit, Finance and Risk Committee (AFRC).
2. Development and delivery of the 2022–23 internal audit plan to the Audit, Finance and Risk Committee.
3. Ensure a robust compliance management program, including reporting to the Audit, Finance and Risk Committee (AFRC).
4. Submission of the annual Modern Slavery Statement to the Australian Border Force.

Product group	Core activities
Levy management	Initiatives within the 'levy management' product group include containing costs associated with MLA's share of levy administration (including third party verification of voting entitlements).
Evaluation	Initiatives within the 'evaluation' product group include implementing and providing oversight of the MLA Evaluation Framework, encompassing the entire suite of MLA's investments.
Knowledge and IP transfer	Initiatives within the 'knowledge and IP transfer' product group include supporting and providing advice on intellectual property, licensing and commercialisation of research and development and marketing outputs. A key priority is further streamlining licensing and adoption of outputs from MLA investments, including technologies that require commercial partners to facilitate adoption and where the focus is on high impact products with appropriate IP protection.
Human resources	<p>Initiatives within the 'human resources' product group include supporting MLA to attract, develop and engage a diverse and talented workforce through programs of work that aim to enhance performance and culture that will develop our organisation for the future and drive transformational change for the industry. Initiatives include:</p> <ul style="list-style-type: none"> <li>■ programs that support a high-performance culture in order to deliver MLA's strategic and operational priorities</li> <li>■ providing the frameworks and advice to support a safe and compliant work environment.</li> </ul>
Information technology	<p>Initiatives within the 'information technology' product group include providing IT advice and support to the greater MLA group and across all facets of the technology platform including infrastructure, intranet, customer relationship management (CRM) tool, websites, business intelligence, financials and project/contract management.</p> <p>The IT team's core focus is to ensure the technology platform is at all times both robust and scalable and one which the business can leverage off to achieve their objectives.</p>
Project and process improvements	<p>Initiatives within the 'project and process improvements' group include providing support and guidance to the greater MLA group on:</p> <ul style="list-style-type: none"> <li>■ continuous improvements to systems and process</li> <li>■ process mapping</li> <li>■ internal project management.</li> </ul>
Agriculture Innovation Australia (AIA)	Initiatives within the 'Agriculture Innovation Australia (AIA)' product group include capturing MLA's annual membership contribution to Agricultural Innovation Australia.
AUS-MEAT	Initiatives within the 'AUS-MEAT' product group include containing MLA's investment in the standards division of AUS-MEAT. The costs included by the services division (AUS-QUAL) is met from revenues and from previous industry transition capitalisation.

## Key performance indicators in 2022–23 (cont.)

### Finance

1. Clean audit report received.
2. Ensure financial reporting to internal and external stakeholders is timely, accurate and insightful.

### Evaluation

1. Implement the social and environment tranches of the triple bottom line (TBL) evaluation framework, including the rollout of quantitative and qualitative KPIs to facilitate ongoing TBL reporting and monitoring.

### Knowledge and IP Transfer

1. At least 80% of high/medium impact commercial ready products have commercial partners or identified commercialisation pathways.

### Human Resources

1. Employee engagement to support talent retention and organisational performance is greater than or equal to the Australian average and adopts a continuous improvement approach.
2. A goal of zero harm in an environment where everyone is physically and psychologically safe in the workplace.

### Information Technology

1. Internal stakeholder satisfaction measures at 80% or more for MLA IT infrastructure and services.
2. Deliver information technology projects on time and within budget.

### Project and process improvements

1. Deliver project and process improvements on time and within budget.

**Table 29: Projected 2022–23 investment by funding source – corporate services (\$ '000\*)**

\*Total may not add up due to rounding

Sub-program	Funding source																Sum of R	Sum of M	Sum of AIP 2022–23	
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R				External M
<b>Corporate services</b>	36	18	85	115	1,099	3,092	1,238	5,622	438	1,023						2,897	2,242	<b>5,794</b>	<b>12,111</b>	<b>17,905</b>
<b>Total</b>	<b>36</b>	<b>18</b>	<b>85</b>	<b>115</b>	<b>1,099</b>	<b>3,092</b>	<b>1,238</b>	<b>5,622</b>	<b>438</b>	<b>1,023</b>						<b>2,897</b>	<b>2,242</b>	<b>5,794</b>	<b>12,111</b>	<b>17,905</b>

# Detailed budget tables by funding sources

Table 30: Expenditure by funding source 2022–23 (\$ '000\*)

\*Total may not add up due to rounding

Program	Funding source																								MLA consolidated
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Total sheep R	Total sheep M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	Total cattle R	Total cattle M	Total levies R	Total levies M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	External M	Government R		
Animal wellbeing			29		378		406		148				148		554						1,950		2,504	5,008	
Capability building	2	39	5	80	64	1,533	69	1,614	82	1,789	19	527	101	2,316	171	3,969	6,923	132	0	2	2,245		9,340	22,783	
Communication	7	3	15	65	590	2,457	605	2,521	471	3,682	38	755	509	4,437	1,121	6,961						16	1,121	9,218	
Environmental sustainability	49		96		1,402		1,498		1,216		507		1,723		3,270		3,821				10,751	2,468	17,842	38,153	
Feedlot										1,745	672	1,745	672	1,745	672	1,745	672	28			1,258		3,030	6,732	
Integrity systems	38	22	190	149	1,103	1,161	1,293	1,310	2,098	1,921	713	622	2,811	2,543	4,142	3,874	3,569	1,212	10	21	1,662	6,641	9,383	30,515	
International markets	1	50	52	347	265	9,372	317	9,719	270	23,875	16	3,514	285	27,389	604	37,158	35	1,945	536	468	168	3,016	1,343	45,272	
Objective measurement	1		19		224		243		216		63		279		523		885				1,741	1,582	3,149	7,881	
Producer adoption	27	7	96	103	1,767	1,036	1,863	1,139	1,162	1,670			1,162	1,670	3,052	2,816					5,576		8,628	20,071	
Product and packaging innovation			8	13	101	107	109	120	29	66	2	6	31	72	140	192	263				1,150		1,553	3,298	
Productivity (off-farm)																	13,315				4,326		17,641	35,282	
Productivity (on-farm)	142		78		2,498		2,576		3,135	91	170		3,305	91	6,022	91					12,507	1,890	18,529	39,039	
Eating quality			20	46	414	479	435	525	551	1,001	234	492	785	1,493	1,220	2,018	34				161	291	1,415	5,140	
Domestic market	11	20	57	100	336	8,263	393	8,370	637	10,283	217	1,689	854	11,972	1,258	20,362	514	1,716	3	10		541	1,776	26,180	
Value chain information and efficiency	50		105		759		864		1,147		364		1,511		2,424		50				1,267	264	3,742	7,747	
Corporate services	36	18	85	115	1,099	3,092	1,184	3,207	1,238	5,622	438	1,023	1,676	6,644	2,897	9,870						2,242	2,897	17,905	
<b>Total</b>	<b>363</b>	<b>160</b>	<b>855</b>	<b>1,025</b>	<b>11,000</b>	<b>27,500</b>	<b>11,855</b>	<b>28,525</b>	<b>12,400</b>	<b>50,000</b>	<b>4,525</b>	<b>9,300</b>	<b>16,925</b>	<b>59,300</b>	<b>29,143</b>	<b>87,985</b>	<b>29,436</b>	<b>5,006</b>	<b>550</b>	<b>500</b>	<b>44,762</b>	<b>18,951</b>	<b>103,891</b>	<b>320,224</b>	

**Table 31: Income available by funding source 2022–23 (\$ '000\*)**

\*Total may not add up due to rounding

	Funding source																								MLA consolidated
	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Total sheep R	Total sheep M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	Total cattle R	Total cattle M	Total levies R	Total levies M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	External M	Government R		
<b>Levies</b>	342	215	913	1,031	10,140	24,665	11,053	25,696	11,783	45,730	3,756	7,713	15,539	53,443	26,934	79,354									<b>106,288</b>
<b>Government</b>																							103,891	<b>103,891</b>	
<b>AMPC</b>																	29,436	5,006						<b>34,442</b>	
<b>LiveCorp</b>																			550	500				<b>1,050</b>	
<b>External R</b>																					44,762			<b>44,762</b>	
<b>External M</b>																						16,776		<b>16,776</b>	
<b>Total income</b>	<b>342</b>	<b>215</b>	<b>913</b>	<b>1,031</b>	<b>10,140</b>	<b>24,665</b>	<b>11,053</b>	<b>25,696</b>	<b>11,783</b>	<b>45,730</b>	<b>3,756</b>	<b>7,713</b>	<b>15,539</b>	<b>53,443</b>	<b>26,934</b>	<b>79,354</b>	<b>29,436</b>	<b>5,006</b>	<b>550</b>	<b>500</b>	<b>44,762</b>	<b>16,776</b>	<b>103,891</b>	<b>307,209</b>	
<b>Difference (to/from reserves)</b>	<b>-21</b>	<b>55</b>	<b>58</b>	<b>6</b>	<b>-860</b>	<b>-2,835</b>	<b>-802</b>	<b>-2,829</b>	<b>-617</b>	<b>-4,270</b>	<b>-769</b>	<b>-1,587</b>	<b>-1,386</b>	<b>-5,857</b>	<b>-2,209</b>	<b>-8,631</b>						<b>-2,175</b>	<b>-13,015</b>		
<b>Opening reserves</b>	<b>129</b>	<b>87</b>	<b>486</b>	<b>540</b>	<b>8,526</b>	<b>21,699</b>	<b>9,013</b>	<b>22,239</b>	<b>5,568</b>	<b>34,667</b>	<b>3,844</b>	<b>8,252</b>	<b>9,412</b>	<b>42,919</b>	<b>18,554</b>	<b>65,244</b>									
<b>Closing reserves 2022–2023</b>	<b>108</b>	<b>142</b>	<b>544</b>	<b>546</b>	<b>7,666</b>	<b>18,864</b>	<b>8,211</b>	<b>19,410</b>	<b>4,951</b>	<b>30,397</b>	<b>3,075</b>	<b>6,665</b>	<b>8,026</b>	<b>37,062</b>	<b>16,345</b>	<b>56,614</b>									
<b>% of revenue</b>	<b>32%</b>	<b>66%</b>	<b>60%</b>	<b>53%</b>	<b>76%</b>	<b>76%</b>	<b>74%</b>	<b>76%</b>	<b>42%</b>	<b>66%</b>	<b>82%</b>	<b>86%</b>	<b>52%</b>	<b>69%</b>	<b>61%</b>	<b>71%</b>									

# Acronyms

<b>ABARES</b>	Australian Bureau of Agricultural and Resource Economics
<b>ABN</b>	Australian business number
<b>ABSF</b>	Australian Beef Sustainability Framework
<b>A-EU FTA</b>	Australia-European Union Free Trade Agreement
<b>AFRC</b>	Audit, Finance and Risk Committee
<b>A-I CECA</b>	Australia-India Comprehensive Economic Cooperation Agreement
<b>AIP</b>	Annual Investment Plan
<b>ALFA</b>	Australian Lot Feeders' Association
<b>AMIC</b>	Australian Meat Industry Council
<b>API</b>	Application Programming Interface
<b>A-UK FTA</b>	Australia-UK Free Trade Agreement
<b>CBA</b>	Cost benefit analysis
<b>CCA</b>	Cattle Council of Australia
<b>CISS</b>	Centre for Invasive Species Solutions
<b>CRM</b>	Customer relationship management
<b>CSIRO</b>	Commonwealth Scientific and Industrial Research Organisation
<b>CT</b>	Computed tomography
<b>DEXA</b>	Dual-Energy X-ray Absorptiometry
<b>EU</b>	European Union
<b>GICA</b>	Goat Industry Council of Australia
<b>GPS</b>	Global Positioning System
<b>GVP</b>	Gross value of production
<b>IMF</b>	Intramuscular fat
<b>IoT</b>	Internet of things
<b>IP</b>	Intellectual property
<b>ISC</b>	Integrity Systems Company
<b>IS2025</b>	Integrity Systems 2025 Strategic Plan
<b>IT</b>	Information technology
<b>LDL</b>	Livestock Data Link
<b>LEP</b>	Livestock Export Program
<b>LERDAC</b>	Livestock Export Research and Development Advisory Committee
<b>LMY</b>	Lean meat yield

<b>LPA</b>	Livestock Production Assurance
<b>MDC</b>	MLA Donor Company
<b>MENA</b>	Middle East and North Africa
<b>MLA</b>	Meat & Livestock Australia
<b>MSA</b>	Meat Standards Australia
<b>NIR</b>	Near infrared
<b>NLGC</b>	National Livestock Genetics Consortium
<b>NLIS</b>	National Livestock Identification System
<b>NLRS</b>	National Livestock Reporting Service
<b>NSW</b>	New South Wales
<b>NVD</b>	National Vendor Declaration
<b>PDS</b>	Producer Demonstration Site
<b>PGS</b>	Profitable Grazing Systems
<b>PIEFA</b>	Primary Industries Education Foundation Australia
<b>PRC</b>	Project Review Committee
<b>RD&amp;A</b>	Research, development and adoption
<b>RD&amp;E</b>	Research, development and extension
<b>RDEA</b>	Research, development, extension and adoption
<b>RIBMINS</b>	Risk-based Meat Inspection
<b>RMAC</b>	Red Meat Advisory Council
<b>RPP</b>	Rural Professionals Program
<b>SAWS</b>	Shipboard Animal Welfare Surveillance
<b>SEA</b>	South-East Asia
<b>SPA</b>	Sheep Producers Australia
<b>SSF</b>	Sheep Sustainability Framework
<b>SSG</b>	Sustainability Steering Group
<b>TBL</b>	Triple bottom line
<b>UK</b>	United Kingdom
<b>UNE</b>	University of New England
<b>US</b>	United States of America
<b>VBP</b>	Value-based pricing
<b>WA</b>	Western Australia









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