

Annual Investment Plan 2023–24



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Banchory Grazing –
Dulacca, Queensland

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 2023–24.

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.

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

MLA has taken its strategic direction from the *Strategic Plan 2025*, 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.

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

 <p>Our people</p>	<p>People see being part of the Australian red meat and livestock industry as attractive now and into the future.</p>
 <p>Our customers, consumers and communities</p>	<p>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.</p>
 <p>Our livestock</p>	<p>We set the standard for world class animal health, welfare, biosecurity and production practices.</p>
 <p>Our environment</p>	<p>We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.</p>
 <p>Our markets</p>	<p>We improve the economic resilience for our industry by increasing access to, and the performance of, existing and new markets.</p>
 <p>Our systems</p>	<p>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.</p>

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 2023–24. 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:

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



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

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

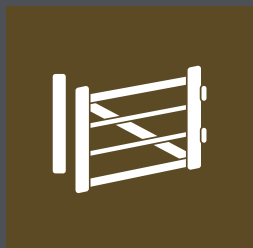
MLA will focus on balancing the current 'known' challenges and opportunities and anticipating the future issues industry will face. MLA needs to foster a culture that looks both to the future and to adjacent industries to inform today's decision making.

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

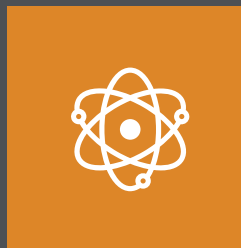
MLA will focus on continuing to invest in the essential services which underpin the competitiveness of our industry, specifically our integrity systems, market access, nutrition, and domestic and international marketing and promotion activities.

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 \$1b 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 2023–24, MLA plans to invest \$327.8 million in research, development and marketing activities across 16 program areas.

Tables 2–4. Projected 2023–24 investment by pillar, funding source and program (\$ millions)

*Total may not add up due to rounding








Table 2: Pillar		Total \$327.8 million*
	Our people	35.9
	Our customers, consumers and community	46.6
	Our livestock	91.0
	Our environment	46.2
	Our markets	56.6
	Our systems	32.9
	Essential services	18.6

























Table 3: Funding source		Total \$327.8 million*
	Sheep levies	41.5
	Grainfed cattle levies	14.0
	Grassfed cattle levies	51.8
	Goat levies	0.6
	Government	102.9
	Australian Meat Processor Corporation	33.4
	LiveCorp	1.1
	External	82.4

Table 4: Program		Total \$327.8 million*
	Animal wellbeing	15.9
	Domestic markets	24.1
	International markets	41.5
	Eating quality	4.4
	Environmental sustainability	38.3
	Feedlot	7.4
	Integrity systems	31.5
	Objective measurement	8.5
	Producer adoption	30.3
	Product and packaging innovation	4.0
	Value chain information and efficiency	7.9
	Productivity (off-farm)	29.3
	Productivity (on-farm)	30.3
	Capability building	24.9
	Communication	10.9
	Corporate services	18.6

Funding by industry priority

Tables 5–11: Red Meat 2030 objectives, projected 2023–24 investment by funding source (\$ millions)

*Total may not add up due to rounding

Table 5: Our people People see being part of the Australian red meat and livestock industry as attractive now and into the future.










 Sheep levies	3.7	 Goat levies	0.1	 LiveCorp	0
 Grainfed cattle levies	1.2	 Government	13.7	 External	11.0
 Grassfed cattle levies	3.3	 AMPC	2.9	 Total \$35.9 million*	

Table 6: 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	11.1	 Goat levies	0.1	 LiveCorp	0
 Grainfed cattle levies	3.3	 Government	7.1	 External	9.3
 Grassfed cattle levies	14.3	 AMPC	1.5	 Total \$46.6 million*	

Table 7: Our livestock We set the standard for world class animal health, welfare, biosecurity and production practices.










 Sheep levies	4.7	 Goat levies	0.1	 LiveCorp	0.3
 Grainfed cattle levies	2.3	 Government	38.5	 External	29.3
 Grassfed cattle levies	3.4	 AMPC	12.4	 Total \$91.0 million*	

Table 8: Our environment We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.










 Sheep levies	2.2	 Goat levies	0	 LiveCorp	0
 Grainfed cattle levies	1.2	 Government	19.3	 External	16.8
 Grassfed cattle levies	1.7	 AMPC	5.0	 Total \$46.2 million*	

Table 9: Our markets We improve the economic resilience for our industry by increasing access to, and the performance of, existing and new markets.










 Sheep levies	11.2	 Goat levies	0.1	 LiveCorp	0.5
 Grainfed cattle levies	3.0	 Government	9.9	 External	4.9
 Grassfed cattle levies	18.6	 AMPC	8.5	 Total \$56.6 million*	

Table 10: 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	3.7	 Goat levies	0.1	 LiveCorp	0.2
 Grainfed cattle levies	1.4	 Government	11.4	 External	8.9
 Grassfed cattle levies	4.0	 AMPC	3.2	 Total \$32.9 million*	

Table 11: 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	5.0	 Goat levies	0.1	 LiveCorp	0
 Grainfed cattle levies	1.7	 Government	3.0	 External	2.3
 Grassfed cattle levies	6.5	 AMPC	0	 Total \$18.6 million*	

Operating environment – opportunities and challenges

Australia experienced ideal seasonal conditions across most regions in 2022, ensuring the continuation of the national herd and flock rebuild.

MLA's sheep and cattle projections indicate the national flock and cattle herd will grow to 78.5 million head and 29.5 million head out to 2025, respectively. These figures will result in the flock reaching its highest level since 2007 and the herd reaching a size not seen since the 1970s, underpinning Australia's ability to meet global demand.

Given the high levels of water storage, pasture and soil moisture resulting from the recent wet weather, 2023 is shaping up to be an extremely productive year. This is despite the fact the Bureau of Meteorology predicts a return to 'normal' seasonal conditions in the second half of the year. However, flooding across multiple regions has created challenges for many producers, with recovery efforts expected to take some time.

The favourable position of Australia's red meat industry has resulted in several opportunities for our stakeholders – however, there are also a number of challenges to consider.

Opportunities

Market access

Australia currently exports about 70% of its beef and 65% of its lamb production – figures that have increased over time, along with population and household wealth (especially in Asia). Improving product competitiveness in light of an increase in global suppliers, as well as securing diversification of export markets, has been the hallmark of the red meat industry's market access strategy.

This investment, via the ongoing pursuit of trade reform, has delivered significant dividends.

The 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 via liberalisation of a highly restricted beef, sheepmeat and goatmeat import regime.

The Australia-India Economic Cooperation and Trade Agreement has eliminated the previous 30% tariff on Australian sheepmeat exported

to India, while negotiations continue with both the European Union and the United Arab Emirates.

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

There is also ongoing work on technical access issues by supporting industry to mitigate access risks and prioritising initiatives that avoid, alleviate or reduce non-tariff barriers to trade (in conjunction with industry and government).

Carcase weights

Lamb, sheep and cattle carcase weights were at historically high levels in 2022. The main driver for these high carcase weights was improved seasonal conditions, in addition to high prices and a greater proportion of grainfed animals being turned off.

Carcase weights will remain high due to improvements in genetics and management practices, as well as the

shift from wool breeds of sheep to meat breeds. However, carcase weights will ease across species as seasonal conditions return to normal.

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

It's imperative that MLA's research investments have a clear pathway

to adoption and commercialisation. Adoption of research findings on-farm relies on a range of programs, resources and tools that cater for all. This is why MLA's adoption team invests in 'raising awareness' activities, short-term training programs and long-term practice change activities.

Building the capacity of local advisors and consultants to support these activities is critical. This approach will support red meat supply chains to increase use of technology, connect animal and carcass performance feedback to make informed decisions, and adopt practices that drive productivity gains, which in turn, will also have environmental co-benefits.

Sustainability

The 'Carbon neutral by 2030 (CN30)' initiative offers abundant opportunities for red meat producers. On-farm changes that result in a reduction in net emissions may give rise to co-benefits such as increased productivity and profitability, long-term business sustainability, improved biodiversity and other ecosystem service values. These co-benefits converge to build enduring prosperity

for red meat industry stakeholders and encourage them to pursue continuous improvement in sustainability.

CN30 has opened new markets for premium products and channelled direct and indirect investment into the development and adoption of win-win technologies. The initiative has steered the development of sustainability frameworks, targets and initiatives by many corporate livestock entities and sub-sectors of the red meat industry. It has also enabled 'brand Australia' to be a world leader in red meat net greenhouse gas (GHG) emissions reduction. This has opened the door for more Australian red meat producers to participate in existing and new markets, access sustainability-linked loans, build resilience to future climate challenges, and retain consumer and community trust.

Challenges

Labour shortages and supply chain disruptions

In 2023, labour shortages are expected to remain an area of concern for the red meat industry across the entire supply chain. However, the resumption

of international travel, new immigration schemes, such as the Pacific Australia Labour Mobility scheme (PALM), and immigration plans for skilled labour, will hopefully see the labour issue ease in 2023 and 2024.

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.

Cost-of-living affecting consumption

Increased cost-of-living pressures caused by high inflation rates both domestically and across many global markets is likely to negatively affect patron numbers across most foodservice sectors in the year ahead. The impact of this will see an increase in retail (grocery) channel spend and consolidation of 'eat at home' occasions at the expense of 'dining

out', which will be saved for special occasions by many households.

Surveys indicate a significant number of consumers are actively focusing on eating out less, cutting back on entertainment and food delivery services due to cost-of-living pressures. These behaviour shifts are not isolated to the foodservice, with a reduction in disposable income affecting consumption across associated sectors such as travel, subscriptions and memberships. This will have a collective secondary impact on out-of-home food consumption, with frequency across all foodservice channels likely to soften in the medium term.

Live export

A total of 600,084 cattle were exported in 2022, 22% less than 2021. Tight supply, lower consumer demand 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 increased 48% in 2022, underpinned by China's significant investment in its dairy herd since 2018.

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Operating environment – opportunities and challenges

continued

This trend is likely to drop off in 2023, with high feed prices and softening milk prices hindering further growth.

Indonesia, the largest feeder cattle market, was down 17% on 2021 volume and Vietnam was back by 65%. Exotic animal diseases in Indonesia contributed to a disrupted trade in 2022. With cattle prices easing in 2023 as supply improves, the live cattle trade should begin to trend upwards again to meet demand, although volume to Vietnam is unlikely to return to previous high levels (>200,000 head), despite the price relief.

Total live sheep exports were back 13% year-on-year, with 59% of the 502,758 total sheep exports going to Kuwait. Jordan and the United Arab Emirates were down 56% and 30% respectively, but Israel bounced back by 45%, importing 69,308 live sheep in 2022. Industry will be challenged by the Federal Government's commitment to phase out live sheep exports.

Exotic animal diseases in Indonesia

Cases of foot and mouth disease (FMD) and lumpy skin disease (LSD) were confirmed in Indonesia in 2022.

Australia is currently free from FMD and LSD and our priority is to keep it that way.

MLA in conjunction with the Australian Government, is working closely with the Indonesian Government and industry via a biosecurity support program to help control the spread of FMD and LSD in Indonesia.

Should either disease reach Australian shores, there would be a significant impact for our livestock industries, along with substantial trade impacts if Australia was no longer recognised as being free from FMD or LSD.

The cost of a disease incursion would also see severe economic losses to Australia's agricultural sector.

Geopolitics (trade with China)

China is one of Australian agriculture's most important trade partners and is still one of our fastest growing markets. However, political relations between the Australian and Chinese governments have been strained in recent years, with China applying trade barriers on several Australian agricultural products (including beef). One of the challenges for the Australian red meat and livestock industry is maintaining this trade relationship with China and avoiding the fallout from any conflicts that may arise.

Input costs

Australian red meat processing costs are consistently higher than all our major competitors' and energy prices continue to escalate. Inflation jumped in 2022 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 CN30 target is an ambitious but achievable challenge, as well as an opportunity (see 'Sustainability'). The target was set to ensure continued community and consumer trust in red meat, maintain market and capital access, minimise the need for taxes and subsidies to bring about change, and build industry resilience to future market and environmental changes.

Consumer insights have validated the need to pursue this goal through indicating that their perception of the red meat industry improves as our industry's emissions reduce. As new commercial products or practices become available, on-farm adoption is critical – but the challenge is ensuring producers are well-equipped, resourced and informed on the next steps to take towards carbon neutrality. This is becoming increasingly important as the landscape becomes more congested with carbon-related products and services being promoted.

Programs

 Animal wellbeing14	 Producer adoption42
 Domestic market16	 Product and packaging innovation46
 International markets20	 Value chain information and efficiency48
 Eating quality26	 Productivity (off-farm)50
 Environmental sustainability30	 Productivity (on-farm)52
 Feedlot34	 Capability building58
 Integrity systems37	 Communication62
 Objective measurement40	 Corporate services66



Program

Animal wellbeing

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

Sub-programs

- Animal wellbeing

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Animal wellbeing

The animal wellbeing sub-program works to reduce the impacts of animal disease through improved diagnosis (fast, affordable and accessible); 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 on livestock wellbeing will be reduced through ongoing research. This demonstrates our industry's commitment to continually improve the welfare of Australia's livestock.

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

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"> ■ developing safe, effective, long-acting vaccines and therapeutics – the investments in this pillar include development of vaccines such as for lumpy skin disease, utilising modern technology (mRNA, novel delivery systems/antigens and sustained release formulations) ■ a new and targeted approach to improve control of the cattle tick and buffalo fly ■ collaboration with other programs as well as the Centre for Invasive Species Solutions for the management of invasive animals ■ large-scale integrated Producer Demonstration Site (PDS) activities to facilitate translation of science into impact: including transition to a polled herd; broad uptake of effective reproductive vaccines; transition to non-mulesed sheep; and reducing the prevalence of sheep pneumonia in flocks. <p>Investments include integration of effective extension and adoption of outcomes and benefits of investments, through continuous monitoring and evaluation and on-farm demonstration of program objectives.</p>

Key performance indicators in 2023–24

1. In-vivo testing of an mRNA lumpy skin disease vaccine construct completed.
2. A scour worm vaccine construct produced and in-vivo testing underway.
3. A 5% increase in polledness across 15 commercial pastoral enterprises and 100,000 animals.
4. A 50% reduction demonstrated in flystrike incidence on Kangaroo Island after island-wide release of sterile blowflies.

Table 12: Projected 2023–24 investment by funding source – animal wellbeing (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Animal wellbeing	-	-	42	-	317	-	76	-	-	-	-	-	-	-	4,443	4,878	6,130	9,755	6,130	15,885
Total ¹	-	-	42	-	317	-	76	-	-	-	-	-	-	-	4,443	4,878	6,130	9,755	6,130	15,885



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



Market knowledge (domestic)

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

Product group	Core activities
National Livestock Reporting Service (NLRS)	<p>The 'National Livestock Reporting Service (NLRS)' product group produces timely, accurate and independent Australian livestock price data. Initiatives include:</p> <ul style="list-style-type: none"> ■ 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 ■ reporting livestock pricing data across all selling methods ■ transform current process through improving the market transparency of livestock (cattle, sheep and goat) 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.
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 by producing a range of new indicators that are both relevant and reflective of new market trends.</p>
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"> ■ market insights: channel (retail and foodservice) insights ■ consumer insights: consumption behaviour, shopper insights and consumer tracking ■ collaboration: cross-functional collaboration of all domestic market research.

Key performance indicators in 2023–24

1. High levels of satisfaction (above 85%) by industry stakeholders with MLA’s market information services.
2. Increase utilisation of MLA’s key market information reports (*State of the Industry report, Beef projections, Sheep projections*) by 10% year-on-year.
3. Revise market indicators to better represent the trading environment – this includes implementing two new indicators.
4. Successful expansion and implementation of the domestic ‘Insights Week’ program.

Nutrition

MLA's nutrition sub-program incorporates research and communication activities that inform policy discussion on the role of Australian red meat and contribute to communicating an evidence-based narrative on its nutritional and health benefits in a sustainable diet.

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

Key performance indicators in 2023–24

1. Increase the percentage of GPs and dietitians who claim recommending red meat three to four times a week or equivalent to $\geq 45\%$.
2. Increase the percentage of main grocery buyers who agree beef makes healthy meals to $\geq 50\%$.
3. At least 60% of GPs and dietitians agree MLA's resources are relevant and credible.

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 in the promotion of red meat as part of a healthy, balanced diet.

Product group	Core activities
Domestic business development	<p>Initiatives within the 'domestic business development' product group include:</p> <ul style="list-style-type: none"> ensuring marketing activities are supported by retail and foodservice partners collaborating with retailers and industry on insight-led growth initiatives as part of the Category Management Playbook developing and implementing bespoke key foodservice and retail customer plans setting appropriate targets for promotional activities and conduct post evaluations.
Domestic brand building	<p>Initiatives within the 'domestic brand building' product group include:</p> <ul style="list-style-type: none"> ensuring marketing activities are targeted against consumer purchase drivers and focused on building long-term relevance of Australian red meat with domestic consumers leveraging the strong emotional bonds consumers have with beef to continue to ensure that they feel good about consuming it, through the promotion of beef's flavour, ease and convenience, and health credentials ensuring beef is top of mind in consumers' mid-week meal decision making by implementing 'always on' media and messaging creating top of mind brand awareness for lamb and its attributes at key occasions through the year with the iconic Summer Lamb campaign and 'always on' media channels 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 evaluating the impacts of marketing activity, sharing the results and taking corrective action as required.

Key performance indicators in 2023–24

1. Maintain main grocery buyer endorsement of the statement 'willing to pay more for beef/lamb' to 29% (beef) and 27% (lamb).
2. Customer development plans in place with all key retail and foodservice customers, with at least two case studies demonstrating impact of implemented initiatives completed.
3. Launch the combined Rare Medium and Rare Medium Academy digital hub for foodservice customers and achieve 15% increase in usage of the content.
4. Maintain mean number of serves per week at 1.7 for beef and at 0.7 for lamb.

Table 13: Projected 2023–24 investment by funding source – domestic market (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Market knowledge (domestic)	10	10	35	57	303	959	300	1,512	152	385	308	648	4	12	-	1,112	545	2,224	4,130	6,354
Nutrition	3	1	11	7	96	83	95	131	48	41	98	118	1	2	-	354	-	708	385	1,092
Marketing and promotion (domestic)	-	11	-	110	-	7,168	-	7,034	-	1,197	-	1,173	-	-	-	-	-	-	16,693	16,693
Total	13	23	47	175	399	8,210	395	8,676	201	1,624	407	1,939	5	15	-	1,466	545	2,931	21,208	24,139



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 Australia 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



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 2023–24

1. Industry positions/submissions prepared by MLA on priority trade reform issues (particularly A-EUFTA, A-I CECA, A-UAE 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 2023–24.

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

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 2023–24

1. Increase utilisation of the Global Insights online tool by 10% year-on-year.
2. Complete at least two customer case studies and two MLA internal case studies that demonstrate the impact of MLA insights.
3. Successful implementation of an 'Insights Week' in a key international market.
4. Develop and roll out the *Aussie Red Meat Factbook* for each major market (US, SEA, MENA, China, Japan, Korea, UK).

Product group	Core activities
International market insights	<p>Initiatives within the 'international market insights' product group include:</p> <ul style="list-style-type: none"> ■ monitoring market trends ■ monitoring media. ■ monitoring competitors
International consumer insights	<p>Initiatives within the 'international consumer insights' product group include:</p> <ul style="list-style-type: none"> ■ translating market signals and data into insights that positively influence the supply chain ■ developing the <i>Aussie Red Meat Factbook</i>, containing market and consumer insights to support incremental ranging and improved execution with local customers ■ market research: consumer, shopper, trade, retail and foodservice (as agreed with stakeholders in key Australian red meat markets) ■ translating insights from across both product groups (market insights and consumer insights) and from across other MLA programs' market research into strategic growth drivers ■ identifying opportunities to contribute to doubling the value of Australian red meat ■ enabling greater adoption of market classification and category growth driver tools via the Global Insights online tool ■ Annual Global Beef/Sheep industry and trade reports (including competitor analysis) and annual Goat snapshot ■ developing MLA's global market strategic portfolio model ■ MLA market research library: collaborating across MLA to house all market research in one location for expanded use and value ■ media monitoring and reporting services.

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 2023–24

1. Build or maintain customer awareness and preference of Australia's positive attributes (safe, quality, healthy and sustainable) 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.

Product group	Core activities
International marketing and development	<p>Initiatives within the 'international marketing and development' product group include:</p> <ul style="list-style-type: none"> ■ creative and impactful communications to targeted segments (both campaigns and 'always-on' components such as websites, public relations and social media messaging) ■ promotional activities conducted with key customers (e.g. point of purchase promotions) ■ 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 ■ delivery of events, trade shows, seminars and other communications that educate customers and drive positive awareness, attitudes and behaviours towards Australian red meat ■ strategic investments with commercial partners to help extend the penetration and breadth of Australian red meat globally.

Livestock export market activities

MLA and LiveCorp jointly invest in the Live Export Program (LEP), which funds research and development to improve animal health, welfare and productivity throughout the livestock export supply chain.

The LEP supports the growth, productivity improvements and sustainability of the livestock export industry through the delivery of risk mitigation strategies and extension, as well as adoption of best practice livestock management.

Key performance indicators in 2023–24

1. Provide biosecurity support to 33 overseas feedlots, 10 breeding centres and 10 abattoir facilities.
2. Produce one 'program of work' case study per region showcasing live export activities that have either mitigated industry trade risk, improved industry's ability to maintain market access or 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 has provided insights and informed government/industry policy, resulting in demonstrated capacity for decisions that reduce trade risk and allow trade to operate.

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"> ■ identify and mitigate animal welfare risks ■ implement adoption of best practice welfare systems ■ maintain access to key overseas markets ■ improve supply chain efficiency. <p>Key investments include biosecurity support in Indonesia and the LEP Co-Funding Program, which supports commercial participants to develop and implement strategic welfare and supply chain improvements.</p>

Livestock export (research and development)

MLA's livestock export (research and development) sub-program, undertaken in collaboration with LiveCorp, provides industry with the tools, technologies, knowledge and capability to improve their productivity, profitability and sustainability at an individual business and industry level.

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"> ■ 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 ■ 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 ■ productivity-based initiatives such as key research projects that improve and manage heat stress, bedding and stocking densities during shipping ■ 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.
Livestock export extension and adoption	<p>Initiatives within the 'livestock export extension and adoption' product group include:</p> <ul style="list-style-type: none"> ■ 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 ■ drive adoption of tools and techniques for identifying and assessing animal health and welfare risks through the supply chain ■ targeted communications for the LIVEXCollect, UNE Project Partnership, Animal Welfare Indicators, SAWS projects, northern cattle and dairy economics projects ■ communicating research, development and adoption outcomes and program performance to stakeholders via tools such as LIVEXCollect ■ 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 <i>RD&E Blueprint 2020–2025</i> ■ support adoption of practices to improve livestock performance through the livestock export supply chain.

Key performance indicators in 2023–24

1. Identify and trial innovative technology and initiatives, including those used in other industries, to enhance animal welfare, efficiency and sustainability.
2. Initiate and progress the development of a system that describes the welfare of individual and/or groups of animals.
3. Industry stakeholders demonstrate increased awareness of RD&E investments and priorities.
4. Industry stakeholders utilise outcomes of livestock export RD&E projects to assist improvements in animal welfare and productivity.

Table 14: Projected 2023–24 investment by funding source – international markets (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Market access	1	15	3	78	23	863	23	1,360	11	431	23	1,233	0	23	-	84	-	168	4,004	4,171
Market knowledge (international)	-	24	-	66	22	626	71	948	3	538	-	-	-	-	-	96	-	192	2,201	2,394
Marketing and promotion (international)	-	51	-	299	-	7,604	-	16,962	-	2,091	-	431	-	-	-	-	2,306	-	29,743	29,743
Livestock export market activities	-	5	-	111	-	494	-	1,549	-	-	-	-	-	436	-	-	405	-	2,999	2,999
Livestock export (research and development)	-	-	77	-	207	-	120	-	-	-	-	-	526	-	142	1,072	57	2,144	57	2,201
Total	1	96	79	553	252	9,586	214	20,818	15	3,060	23	1,665	526	459	142	1,252	2,768	2,504	39,005	41,509





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 the 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



Eating quality

MLA's eating quality sub-program, Meat Standards Australia (MSA) strives to deliver a world-leading, consumer-focused eating quality program that drives demand for Australian beef and sheepmeat.

The eating quality program integrates research and development (R&D) with commercial activities and involves participation along the entire Australian red meat value chain.

The MSA program initiatives focus on improving on-farm and off-farm performance, efficiencies and value.

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"> ■ an ever-enhanced risk-based approach to program integrity ■ identifying and utilising new, innovative and efficient solutions for managing integrity and compliance ■ enhancing systems for data supply chain capture and feedback for informed decisions and identification of value capture opportunities.
MSA business development	<p>Initiatives within the 'MSA business development' product group include:</p> <ul style="list-style-type: none"> ■ driving industry progression through on-farm practice change ■ partnering with processors and brand owners to extract maximum value from the MSA program and progressing the industry towards value-based pricing (VBP) ■ supporting the further education and confidence of supply chain participants to differentiate MSA brands in all markets, particularly international opportunities ■ progress towards whole-of-industry adoption of eating quality principles for sheepmeat.
MSA research and development	<p>Initiatives within the 'MSA research and development' product group include:</p> <ul style="list-style-type: none"> ■ investments that enable all cattle and sheep pathways and production systems to be eligible for MSA grading ■ supporting greater technology adoption to improve supply chain efficiencies, new traits and greater uptake of the MSA sheepmeat cuts-based program ■ as a global eating quality leader, leverage international research that drives positive outcomes for the Australian red meat industry and an increased recognition of our eating quality language.

Key performance indicators in 2023–24

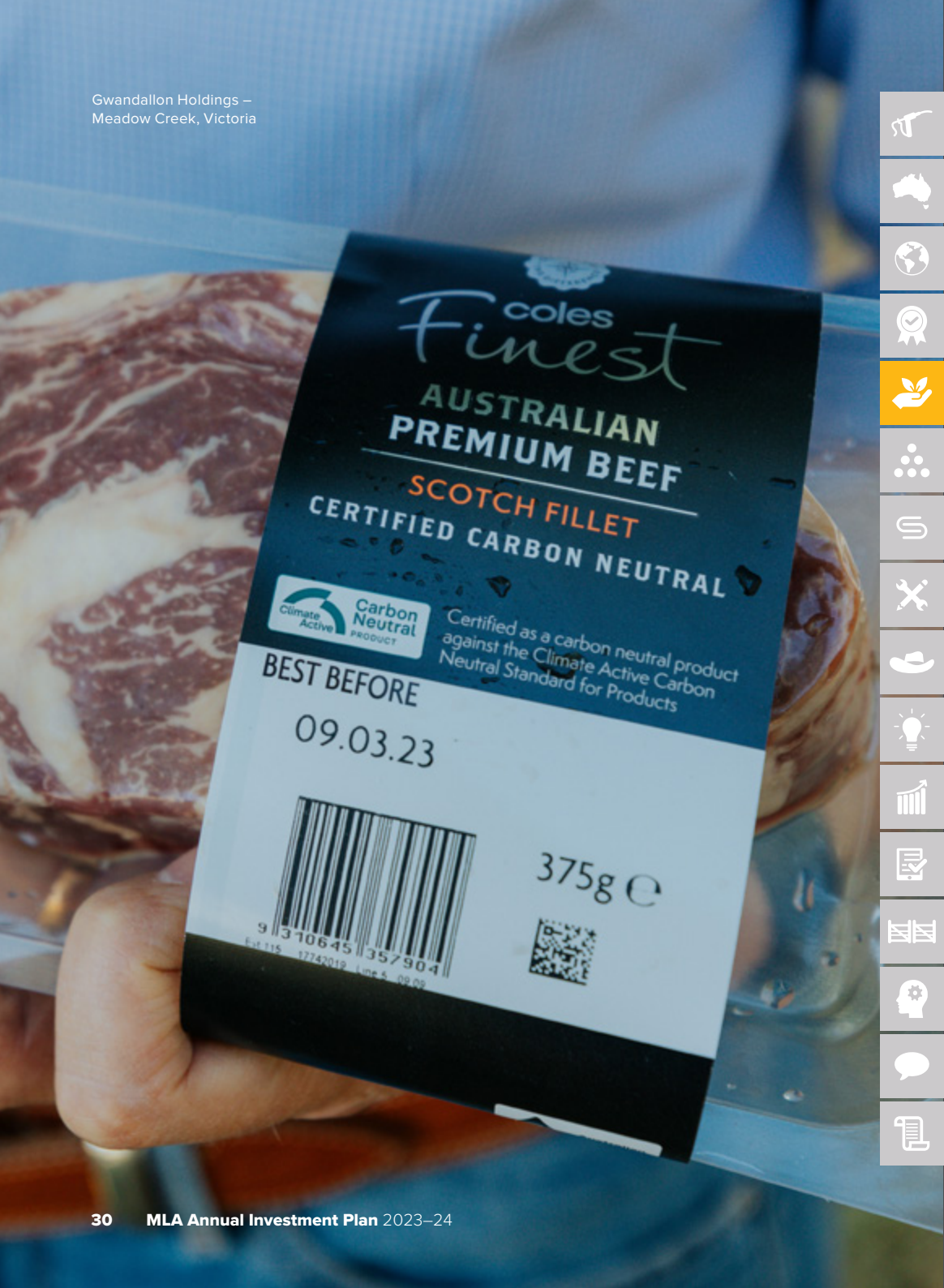
1. Price differentials for MSA-compliant cattle demonstrate an annual return to farm gate of more than \$190 million.
2. 57% of the national adult cattle slaughter is MSA graded.
3. At least two sheepmeat supply chains are segregating carcasses based on eating quality (representing >25% of MSA graded carcasses).

Table 15: Projected 2023–24 investment by funding source – eating quality (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Eating quality	-	-	46	-	418	-	517	-	301	-	-	-	-	-	192	1,474	1,432	2,949	1,432	4,381
Total	-	-	46	-	418	-	517	-	301	-	-	-	-	-	192	1,474	1,432	2,949	1,432	4,381





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



Sustainability (off-farm)

The sustainability (off-farm) sub-program supports innovation activities limited to Australian red meat processors with economic value propositions for stewardship of environmental resources.

From 2023–24, Australian Meat Processor Corporation (AMPC) will lead the implementation and adoption of off-farm related investments within the Australian processor community.

Product group	Core activities
Sustainability technology and practices (off-farm)	Initiatives within the 'sustainability technology and practices (off-farm)' product group include: <ul style="list-style-type: none">■ supporting AMPC to create awareness and drive the adoption of processing systems to eliminate or reduce wastes or convert wastes into valuable products – this includes the Rural R&D for Profit project Wastes to Profits program.

Key performance indicators in 2023–24

1. Successful handover to Australian Meat Processor Corporation (AMPC) of processor-focused sustainability initiatives, including an agreement to a joint AMPC/MLA investment and evaluation strategy.

Sustainability (on-farm)

Through the sustainability (on-farm) program, MLA invests 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.

Product group	Core activities	Key performance indicators in 2023–24
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"> ■ emissions reduction interventions <ul style="list-style-type: none"> › novel livestock feeds (i.e. pastures/legumes/shrubs) or feedlot supplements with the potential to reduce enteric methane emissions › grazing system livestock additives and associated delivery mechanisms with the potential to reduce enteric methane production › development of methane reducing genetic traits that can be included in current genetic selection indices › forages to reduce animal methane emissions and/or emissions intensity. ■ carbon storage products <ul style="list-style-type: none"> › use of trees and pastures on-farm to increase carbon stored in the landscape › technologies and practices for measuring and managing stored carbon in trees and soil. ■ mitigating and adapting to climate change <ul style="list-style-type: none"> › weather/climate forecasting and extension › extension related on-farm adaptation practice change. ■ biodiversity, habitat enhancement and natural resource management (NRM) <ul style="list-style-type: none"> › managing natural capital (including water, soils and living organisms) › benchmarking natural capital (including water, soils and living organisms) › developing sustainability data standards and associated databases. 	<ol style="list-style-type: none"> 1. Successful communication to stakeholders of a climate neutral milestone on the road to CN30. 2. At least 200 producers have completed a carbon-related red meat production eLearning module and/or are participating in the Environmental Credentials for Grassfed Beef platform. 3. Successful trials underway for at least two methane additive delivery mechanisms for grazing livestock.
Animal wellbeing sustainability	<p>Initiatives within the 'animal wellbeing sustainability' product group include:</p> <ul style="list-style-type: none"> ■ adoption of sustainable on-farm practices to address on-farm chemical resistance for more effective parasite control. 	
Beef productivity sustainability	<p>Initiatives within the 'beef productivity sustainability' product group include:</p> <ul style="list-style-type: none"> ■ reporting on sustainability practices and targets to support growth path management for a viable north-south supply chain (via BeefLinks) ■ improving breeder herd efficiency in extensive northern systems through better management of the feedbase ■ identifying the potential for northern grazing systems to deliver environmental services alongside red meat production. 	
Feedbase sustainability	<p>Initiatives within the 'feedbase sustainability' product group include:</p> <ul style="list-style-type: none"> ■ developing and delivering indicators for monitoring of soil condition ■ generating solutions to soil productivity constraints ■ development of guidelines and case studies that support both adoption and benchmark sustainability evaluation. 	

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

Table 16: Projected 2023–24 investment by funding source – environmental sustainability (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Sustainability (off-farm)	-	-	-	-	-	-	-	-	-	-	4,094	-	-	-	55	4,148	42	8,296	42	8,338
Sustainability (on-farm)	33	-	87	-	870	-	566	-	257	-	-	-	-	-	9,978	11,790	6,384	23,581	6,384	29,964
Total¹	33	-	87	-	870	-	566	-	257	-	4,094	-	-	-	10,033	15,939	6,425	31,877	6,425	38,302



Program

Feedlot

The feedlot program is funded from grainfed levies and external funds with matching contributions from the Australian Government, and addresses the specific research, development and adoption requirements of the beef feedlot sector.

Within the context of MLA's *Strategic Plan 2025*, this program contributes to MLA's *Strategic Plan 2025* by accelerating outcomes that provide substantial economic, social, welfare and environmental benefit to the grain-fed beef supply chain.

Sub-programs

- Feedlot productivity

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Emma Walker, Stockyard Lot Feeders – Jondaryn, Queensland

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.

Product group	Core activities
Feedlot animal wellbeing	<p>Initiatives within the 'feedlot animal wellbeing' product group include:</p> <ul style="list-style-type: none"> ■ developing and evaluating vaccines to prevent feedlot disease and provide alternatives to medically important antimicrobials ■ preventative practices during cattle backgrounding to lower disease incidence upon feedlot entry, including supply chain extension programs ■ development of best practice guidelines on veterinary feed additive safety ■ shade and shelter research projects to ameliorate the effects of wet weather and heat on feedlot cattle ■ development and adoption of a feedlot welfare assessment framework ■ 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.
Feedlot automation	<p>Initiatives within the 'feedlot automation' product group include:</p> <ul style="list-style-type: none"> ■ development and evaluation of autonomous feeding systems for feedlot cattle ■ developing and evaluating sensor technologies for feedlot disease and heat load prediction, detection and diagnosis ■ adoption programs for feedlot automation including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.

Key performance indicators in 2023–24

1. 78% of National Feedlot Accreditation Scheme (NFAS) accredited feedlots' capacity is covered by shade or shelter.
2. Feedlot trials of at least one novel methane additive completed, including determining relevance for adoption by the grazing sector.
3. 25% of grainfed slaughter is from short duration lairage.

Product group	Core activities
Feedlot productivity and compliance	<p>Initiatives within the ‘feedlot productivity and compliance’ product group include:</p> <ul style="list-style-type: none"> ■ research to support continued adoption of short duration lairage and best practice transportation practices including animal welfare, food safety, carcass value and economic considerations ■ developing solutions to ensure compliant ante-mortem inspection of grainfed cattle e.g. cattle cleanliness ■ research on next generation performance enhancing technologies such as feed additives, implants and novel application technologies ■ conducting feedlot cattle composition of grain research to predict days on feed to a set carcass endpoint (including lean meat yield), and potential integration with dual-energy X-ray absorptiometry (DEXA) or computed tomography (CT) composition analysis ■ evaluating cattle sorting systems to maximise profit for a purchased population of cattle ■ adoption activities for feedlot cattle performance and compliance including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.
Feedlot environmental sustainability	<p>Initiatives within the ‘feedlot environmental sustainability’ product group include:</p> <ul style="list-style-type: none"> ■ commissioning research to reduce greenhouse gas emissions from feedlots and the grainfed supply chain (e.g. feed additives and novel approaches) ■ conducting long-term benchmarking of greenhouse gas emissions for southern and northern Australian feedlots and greenhouse gas inventory review activities ■ researching the environmental management of covered housing systems (odour, water, manure and effluent) to guide regulatory approvals across Australia ■ developing novel strategies to value add and manage integrity of feedlot manure and effluent ■ commissioning research on truck effluent management and its value proposition to renewable energy, carcass characteristics, food safety and animal welfare ■ developing or evaluating strategies to improve feedlot energy, and water use efficiency ■ development of best practice guidelines to guide voluntary and regulatory approaches to feedlot design and management ■ adoption activities for feedlot environments including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities.
Feedlot labour	<p>Initiatives within the ‘feedlot labour’ product group include:</p> <ul style="list-style-type: none"> ■ building professional and research 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 ■ funding development of online training materials for the ‘Feedlot Tech’ training portal ■ funding development of labour indicators for the national feedlot industry ■ co-funding the Feedlot Research Manager Partnership for commercial feedlot research capability building and technology evaluation ■ adoption activities for feedlot labour including publications, communications, workshops, conferences, industry meetings, demonstration sites, training strategy officers, monitoring and evaluation activities.

Table 17: Projected 2023–24 investment by funding source – feedlot (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Feedlot productivity	-	-	-	-	-	-	-	-	1,760	635	-	-	-	-	1,456	3,216	319	6,433	954	7,387
Total ¹	-	-	-	-	-	-	-	-	1,760	635	-	-	-	-	1,456	3,216	319	6,433	954	7,387



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



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.

Product group	Core activities
Product assurance and traceability systems	<p>The 'product assurance and traceability systems' product group focuses 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"> ■ delivering a seamless and integrated customer experience ■ leveraging improved technologies to replace existing manual tasks ■ bringing ISC's core services together under an integrated delivery model. <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"> ■ 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) ■ 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 ■ developing and maintaining the technology platforms that underpin the integrity system (including the NLIS database, the LPA database and eNVD system) ■ delivering robust and effective communication, extension and adoption programs to drive integrity system awareness, understanding and compliance ■ providing customer support services and innovative self-service functions ■ gathering insights through data and research to inform the roadmaps for the integrity system programs and products in alignment with the <i>Integrity Systems 2025 Strategic Plan</i>.

Key performance indicators in 2023–24

1. Digital consignments accompany 50% of all livestock movements.
2. The National Livestock Identification System (NLIS) database is upgraded in readiness for the national roll-out of sheep and goat eID.
3. A 'next generation livestock traceability platform' scope is defined and agreed to by key stakeholders.

Market access science

MLA's market access science sub-program delivers improved supply chain efficiency and helps reduce non-tariff (technical) barriers to trade by applying science and technology to the supply chain.

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"> demonstrating technologies for shelf-life extension and packaging that will expand export market opportunities and reduce waste promotion and adoption of cold chain management tools which can reduce waste, increase consumer confidence and reduce product loss ensuring Australian value-adders are satisfying all requirements for importing countries' food safety and packaging sustainability targets (in collaboration with Australian Meat Processors Corporation).

Key performance indicators in 2023–24

1. Deliver a reduction in red meat cold chain waste by 1% with an annual net benefit of \$4.3 million.
2. Successful trials with ambient temperature packaged red meat products in three markets.
3. Demonstrate that the shelf life of chilled vacuum-packed lamb can be extended from 90 to 120 days.

Table 18: Projected 2023–24 investment by funding source – integrity systems (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Integrity systems	70	18	217	91	1,902	1,110	1,785	1,748	911	521	1,493	1,280	18	24	1,200	7,596	5,904	15,193	10,696	25,889
Market access science	3	-	12	-	101	-	100	-	51	-	2,404	-	1	-	113	2,786	43	5,572	43	5,616
Total¹	73	18	229	91	2,004	1,110	1,886	1,748	962	521	3,898	1,280	19	24	1,313	10,382	5,947	20,765	10,740	31,505



Gundagai Meat Processors using the MEQ Probe for measuring intramuscular fat – Gundagai, NSW

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. 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.



Objective measurement

Sub-programs

- Objective measurement

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



MLA's objective measurement sub-program supports development and adoption of a range of technologies that objectively measure or estimate key traits to describe livestock productivity and carcass value, for both live animals and carcasses.

Product group	Core activities
Objective measurement technologies	<p>The 'objective measurement technologies' product group supports the development and adoption of technologies that can be applied to live animals or carcasses to measure traits describing productivity and carcass value.</p> <p>Outcomes from this product group are primarily delivered by MLA Donor Company investments, supported by grant funds.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> 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. These include investigating opportunities for hot (pre-chiller) beef MSA grading, and enabling adoption of the cuts-based MSA sheepmeat model development of new AUS-MEAT language and standards and supporting new technologies to achieve accreditation supporting adoption of emerging technologies to enhance carcass grading and live animal measurements, including lean meat yield development of new technologies to measure carcass value, composition and animal health attributes for supply chain feedback, with an increased focus on live animal productivity and welfare.

Key performance indicators in 2023–24

1. Trial of a pre-commercial automated intramuscular fat (IMF) measurement solution in one lamb abattoir to support MSA sheepmeat model adoption.
2. Trial of a lower-cost, small footprint beef lean meat yield (LMY) and cuts prediction system.
3. Complete three field trials of live animal trait measurement technologies.

Table 19: Projected 2023–24 investment by funding source – objective measurement' (\$ '000)

*Total may not add up due to rounding

Sub-program	Goat R	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Objective measurement	1	28	26	188	146	111	-	54	-	101	3,176	3,659	980	7,319	1,152	8,471
Total ¹	1	28	26	188	146	111	-	54	-	101	3,176	3,659	980	7,319	1,152	8,471



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



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.

Product group	Core activities
Adoption awareness programs	<p>Initiatives within the 'adoption awareness programs' product group include:</p> <ul style="list-style-type: none"> ■ creating awareness for adoption opportunities ■ informing producers and delivery partners of the latest practical research and development messages, and integrated learning opportunities through campaigns and large-scale forums ■ providing educational materials to support producer decision making.
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"> ■ engaging producers with training and education opportunities to influence and motivate them to uptake improved practices and further skill development ■ strategically targeted workshops and seminars to motivate producers into further skills development and inform their decision making ■ strategic development of online tools and support resources to support producer decision making.
Long-term practice change programs	<p>Initiatives within the 'long-term practice change programs' product group include:</p> <ul style="list-style-type: none"> ■ involving and partnering with producers and service providers in integrated, long-term (>12 months) adoption programs that deliver transformational change to their business performance ■ partnering with producers and producer groups to demonstrate, develop and adopt research and development outcomes by validating the commercial value proposition and benefits. <p>Adoption programs focused on long-term practice change include Profitable Grazing Systems (PGS) and Producer Demonstration Sites (PDS). MLA is also building customised research, development and adoption programs to address shared regional priorities, which are expected to have a much larger impact on adoption in comparison to individual producer groups working in isolation.</p>
Adoption enablers	<p>Initiatives within the 'adoption enablers' product group include:</p> <ul style="list-style-type: none"> ■ specialised programs which build public and private service provider capacity and capability, and encourage participation in, and leading of, MLA adoption programs ■ program evaluation and producer market research to establish qualitative and quantitative impacts of adoption programs and inform research, development and adoption needs ■ research to inform new and innovative adoption strategies.

Key performance indicators in 2023–24

1. Deliver annual net benefit of \$79 million to red meat producers by impacting 100 million hectares, 6 million cattle, 7 million sheep and 200,000 goats.
2. Total producer engagement over four years with 38,000 producers, with a participation rating of 7/10.
3. Total engagement over four years with 2,500 advisors.

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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"> ■ prioritisation of research and development areas used to develop an investment call that produces relevant research which incorporates and complements the Adoption program ■ facilitating participatory research through consultation from key stakeholders throughout the diverse regions of Australia ■ facilitating Regional Advisory Councils (RACs) and associated producers to have confidence in MLA’s <i>Strategic Plan 2025 and Red Meat 2030</i> and ensure that there is a link between regional consultation and the objectives of these plans.
Animal wellbeing adoption	<p>Initiatives within the ‘animal wellbeing adoption’ product group include:</p> <ul style="list-style-type: none"> ■ focusing on transitioning to a polled herd on extensive beef properties ■ the targeted adoption of vaccines by extensive beef operations based on their routine testing of four key reproductive diseases.
Beef productivity adoption	<p>Initiatives within the ‘beef productivity adoption’ product group include:</p> <ul style="list-style-type: none"> ■ 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	<p>Initiatives within the ‘feedbase adoption’ product group include:</p> <ul style="list-style-type: none"> ■ 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	<p>Initiatives within the ‘goat productivity adoption’ product group include:</p> <ul style="list-style-type: none"> ■ focusing on increasing the number of producers incorporating managed goats as an enterprise within their business.
Sheep productivity adoption	<p>Initiatives within the ‘sheep productivity adoption’ product group include:</p> <ul style="list-style-type: none"> ■ focusing on the uptake of sheep reproduction management practices by producers.

Table 20: Projected 2023–24 investment by funding source – producer adoption (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Producer adoption	38	-	248	-	2,044	-	1,399	-	-	-	-	-	-	-	8,513	12,242	5,775	24,484	5,775	30,260
Total¹	38	-	248	-	2,044	-	1,399	-	-	-	-	-	-	-	8,513	12,242	5,775	24,484	5,775	30,260





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



High value food frontiers

MLA's high value food frontiers (food innovation) 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 food innovation activities will help customers globally value Australian red meat as a quality ingredient.

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"> ■ 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 ■ designing sprints to develop and test proof-of-concepts and value propositions for rapid financial modelling and cost benefit analyses/business cases to define drivers of change and emerging technology platforms ■ validation of at least one ambient red meat supply chain.
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"> ■ analysing global food trends and food technology platforms for 'what's next and what's possible' and identifying opportunities for waste value chains, clean label and sustainable products ■ analysing threats and opportunities (e.g. alternate meat proteins into blended meat-plant products and by-products such as hides into collagen) ■ identifying three new opportunity spaces that explore what the future of red meat consumption looks like in domestic and selected international markets (examples can consider the worldwide emergence and growth of the middle class as well as the ageing population).

Key performance indicators in 2023–24

1. 17,000 hides processed using freeze dry technology and converted into food grade collagen, with capacity increased to 45,000 hides by 30 June 2024.
2. 250 tonnes of red meat organs freeze dried for consumer and wholesale markets, creating an additional \$1.2 million in net value-adding benefit for participating processors.
3. Deliver an additional net value-adding benefit of \$1.5 million for participating processors via increased demand for dysphagia meals.

Table 21: Projected 2023–24 investment by funding source – product and packaging innovation (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
High value food frontiers	-	-	20	23	130	140	43	80	5	7	61	-	-	-	1,388	1,646	408	3,293	658	3,951
Total ¹	-	-	20	23	130	140	43	80	5	7	61	-	-	-	1,388	1,646	408	3,293	658	3,951



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



'Strathdale Wagyu' – Sarina, Queensland

Digital value chain information

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

The sub-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.

Product group	Core activities
Data and feedback systems	<p>The 'data and feedback systems' product group aims to ensure livestock producers receive value from using integrity system technologies and data to support day-to-day decisions within their businesses. Initiatives include:</p> <ul style="list-style-type: none"> ■ supporting adoption of animal disease, defect and wellbeing data capture and collection at processors ■ launching a new producer feedback system (myFeedback) to replace Livestock Data Link (LDL) and parts of myMSA, supported by a comprehensive adoption program ■ working 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 ■ facilitating the development of interoperable tools, architectures, protocols and standards ■ rolling out new and enhanced functionality for the MLA data platform, including the inclusion of internal and external data sets into the platform.

Key performance indicators in 2023–24

1. Launch the myFeedback platform, with disease and defect data available to 10% more producers compared to 2022–23.
2. Establish Digital Product Officers (DPO) as mechanisms to ensure company specific data is shared with Integrity Systems Company, as well as demonstrating that producers are using this feedback data.

Table 22: Projected 2023–24 investment by funding source – Value chain information and efficiency (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Digital value chain information	38	-	117	-	1,097	-	935	-	432	-	-	-	-	-	1,129	3,749	399	7,499	399	7,898
Total¹	38	-	117	-	1,097	-	935	-	432	-	-	-	-	-	1,129	3,749	399	7,499	399	7,898



Beef boning automation unit



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.

Over the past decade, the program has delivered large annual productivity and cost saving benefits (\$80 million in 2022–23) to processors, 63% of which have been redistributed to producers.

However, a strategic review of the program, combined with a reduction in available funding and the termination of a key beef automation project co-funded with a processor, has resulted in the following:

- a transition to AMPC management and funding of most processor-based technology development that relates to operational efficiency
- continued funding of some interim beef automation technology projects, with MLA's ongoing role and funding for this technology to be determined by the end of 2023–24
- ongoing joint collaboration with AMPC on facilitated adoption and the development of high return and high impact technologies.

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 skills, availability and workplace health and safety issues.

Sub-programs

- Productivity (off-farm)

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Product group	Core activities
Productivity and logistics (off-farm)	<p>Productivity-focused initiatives within the 'productivity and logistics (off-farm)' product group include:</p> <ul style="list-style-type: none"> further developing the beef boning automation program, with a focus on the development, commercialisation and adoption of beef boning automation modules validating processing technology that value adds to the carcass and supports eating quality. <p>Tools and enabler initiatives supporting the development of the above include:</p> <ul style="list-style-type: none"> developing and demonstrating innovative and aviation type computed tomography (CT) and other imaging technologies for accurate 3D cutting lines and automation.

Key performance indicators in 2023–24

- Technologies adopted in 2023–24 and previous years deliver \$90 million of increased productivity for the red meat industry.
- Prototype beef middle processing modules completed and trialed.
- Validate image quality of alternative dual-energy computed topography (CT) technology to support beef automation and/or objective measurement.
- Validate eating quality benefits of innovative Rinse & Chill® technology (entails rinsing the vasculature using a chilled isotonic solution (3°C; 98.5% water and a blend of dextrose, maltose, and sodium phosphates) to rinse out the residual blood from the carcass).

Table 23: Projected 2023–24 investment by funding source – productivity (off-farm) (\$ '000)

*Total may not add up due to rounding

Sub-program	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Productivity (off-farm)	-	-	-	-	-	-	-	-	13,649		936	14,585	127	29,170	127	29,297
Total ¹	-	-	-	-	-	-	-	-	13,649		936	14,585	127	29,170	127	29,297



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



Beef productivity

The grassfed beef productivity sub-program conducts activities which will increase beef productivity and enterprise profitability through improved and targeted applied research and development, 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 2023–24

1. At least 70 northern beef 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. At least 500 southern beef and sheep producers actively using Near Infrared Spectroscopy (NIRS) to make decisions on herd and flock management.
3. Southern beef cattle strategy developed and agreed on for implementation by industry.

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"> ■ improving fertility through targeted management, achieving genetic potential and supplementation practices which deliver improvements in conception, gestation and lactation ■ understanding the causes of calf loss through applied research ■ on-farm practices to improve sale weight and mitigation of enteric methane using specific supplements and/or feed additives ■ improving herd management by developing and utilising animal monitoring, control technologies and on-farm sensors ■ initiating cross sectoral and consortium activities through MLA Donor Company (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.

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 2023–24

1. Total of 175 producers participating in sheep productivity projects and demonstrating an average improved reproductive performance of at least 10%.
2. Establishment of >10 research sites evaluating the impact of microclimates on sheep reproductive physiology, behaviour and lamb survival.
3. Best practice recommendations on the management of ewe lambs and triplet-bearing ewes integrated into MLA adoption programs.

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"> ■ reproductive performance to increase lamb production through increased weaning rates and decrease mortality ■ optimising sheepmeat production systems, including the Towards 90 and SheepLinks programs – these are focused on accelerating the rate of adoption of best practice management in sheep enterprises ■ sheep-related climate adaptation, preparedness and sustainability outcomes such as investigating the impact of shade and shelter on reproductive physiology and animal behaviour.

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.

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

Key performance indicators in 2023–24

1. At least 10,000 goats enrolled in the Kids+ program.
2. Engage 200 goat producers in extension activities, including the National Goat Roadshow, Kids+, Managed Goats workshops and Sustainability Credentials workshops.

Livestock genetics

MLA's livestock genetics sub-program aims to improve the rate of genetic progress in the beef cattle and sheep industries by accelerating the development and adoption of genetic and genomic technologies, as well as continuing partnership investments within the National Livestock Genetics Consortium (NLGC).

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

Key performance indicators in 2023–24

1. Increase the number of animals in the Sheep Genetics evaluation by at least 3% and increase genetic progress across all Sheep Genetics evaluations by at least 2% compared to previous year.
2. Deliver genomic-only tools via a new pipeline to 100 sheep producers and pilot the delivery of genomic breeding values in beef.
3. Deliver and launch an on-farm genomics tool to supply genetic profiles on commercial beef cattle.

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.

Product group	Core activities
Feedbase productivity research and development	<p>Initiatives in the 'feedbase productivity research and development' product group include:</p> <p>Natural capital 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"> ■ improving accuracy and efficiency of monitoring and managing soil health and land condition ■ assessing impacts of extreme events on soil health ■ understanding and fixing constraints to soil productivity and land condition. <p>Feedbase improvement This initiative seeks to improve pasture/forage productivity and quality. Key activities include:</p> <ul style="list-style-type: none"> ■ legume adoption initiative that seeks to deploy legume species into regions where they are under-utilised ■ pasture mixes including forages or combinations of species ■ breeding of new pasture and forage species, including provision of variety/species comparisons (Pasture Trial Network) ■ development and delivery of agronomic packages for new species. <p>Feedbase protection This initiative focuses on protecting the feedbase from weeds, diseases, and pests. Key activities include:</p> <ul style="list-style-type: none"> ■ pasture dieback initiative: research and adoption activities to help producers manage and mitigate risks of pasture dieback infestations ■ development/delivery of biological, chemical, mechanical, and integrated products for animal and insect pests, diseases, and weeds. <p>Feedbase utilisation 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"> ■ develop data-driven approaches to measure land condition, groundcover, forage diversity, biomass and quality, and animal performance ■ using all forage sources (e.g. crops, native and exotic pastures) to manage seasonal supply and mitigate risk for business benefits.

Key performance indicators in 2023–24

1. Establish 10 new on-farm legume adoption/ demonstration sites in northern Australia.
2. Expand the dieback producer network to >330 members across Queensland and NSW, managing more than 2 million hectares.
3. Improve monitoring of land condition on more than 15 million hectares of grazing land.
4. Report on the spread and impact of Parkinsonia from biological control agents released at >350 sites across northern Australia.

Digital agriculture

MLA's digital agriculture sub-program invests in infrastructure, decision support, automation and data platform tools to boost feedbase and animal productivity. In 2023–24, the sub-program will focus on encouraging in-market adoption of digital technology and data analytics.

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"> ■ showcasing connectivity options for use of digital technologies in remote locations ■ developing digital information products and dashboard decision tools/guidelines to provide informed and predictive management systems ■ deploying aerial platforms for data collection and livestock/pasture management to improve decisions, efficiency, animal welfare and safety on-farm ■ establishing an ecosystem for multi-vendors and producers to share data and have third party solution providers value-add to the raw data ■ 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.

Key performance indicators in 2023–24

1. GPS chip module successfully integrated and tested on 200 ear tags.
2. Ag-tech return on investment (ROI) web selection tool launched on myMLA and used by at least 300 producers.
3. Australian Feedbase Monitor used by at least 1,500 producers.

Table 24: Projected 2023–24 investment by funding source – productivity (on-farm) (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Beef productivity	-	-	2	-	30	-	485	-	-	-	-	-	-	-	809	1,326	395	2,653	395	3,048
Sheep productivity	-	-	71	-	710	-	-	-	-	-	-	-	-	-	595	1,375	77	2,751	77	2,827
Goat productivity	148	-	-	-	-	-	-	-	-	-	-	-	-	-	803	952	40	1,903	40	1,943
Livestock genetics	-	-	-	-	1,118	-	422	-	90	-	-	-	-	-	4,264	5,895	1,721	11,789	1,721	13,510
Feedbase production	-	-	40	-	373	-	529	-	-	-	-	-	-	-	1,991	2,933	57	5,866	57	5,923
Digital agriculture	0	-	3	-	27	-	173	-	24	-	-	-	-	-	1,184	1,411	274	2,822	274	3,096
Total¹	148	-	116	-	2,259	-	1,610	-	114	-	-	-	-	-	9,646	13,892	2,563	27,784	2,563	30,348



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



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.

Product group	Core activities
Industry professional development	<p>Initiatives within the 'industry professional development' product group include:</p> <ul style="list-style-type: none"> ■ the Intercollegiate Meat Judging Competition program ■ 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 Northern Breeding Business (NB2) programs.
Industry leadership and academic research	<p>Initiatives within the 'industry leadership and academic research' product group include:</p> <ul style="list-style-type: none"> ■ supporting under/postgraduates to work on industry's complex problems by providing opportunities for them to enter the red meat industry ■ supporting postgraduate innovation capability required to deliver industry strategic innovation priorities (scholarship stipend top-ups) ■ industry leadership – developing enhanced leadership capability to develop impactful industry leaders and ambassadors for MLA.
Producer entrepreneurship	<p>Initiatives within the 'producer entrepreneurship' product group include:</p> <ul style="list-style-type: none"> ■ accelerating producer innovation capability by recognising the importance of producer-led innovation ■ creating new sources of revenue for producers beyond today's farm gate ■ supporting the Indigenous beef value chain capability development program.
Co-funded innovation resources	<p>Initiatives within the 'co-funded innovation resources' product group include:</p> <ul style="list-style-type: none"> ■ the Collaborative Co-Innovation program, which includes: <ul style="list-style-type: none"> › supporting leading Australian red meat value chains to fast-track their innovation strategies › customised investments that 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 › focusing on commercial partnerships that will accelerate MLA's innovation agenda including CN30, value-based marketing, high value foods and animal wellbeing › building human capability to better equip our industry to succeed in a highly competitive environment.

Key performance indicators in 2023–24

1. Five CN30 co-innovation partners have completed enterprise level supply chain carbon emission baseline measures and developed carbon reduction strategies.
2. Three 'high value foods' co-innovation partners' new product sales represent 10% of their enterprise level turnover.
3. Three value-based marketing co-innovation partners have implemented value-based marketing systems that provide feedback and pay premiums to suppliers.

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.

Product group	Core activities
Red Meat Ambassadors	The 'Red Meat Ambassadors' product group is a professional development program to equip current and emerging industry leaders to engage with the community.
Industry Corporate Affairs Unit	<p>Initiatives within the 'Industry Corporate Affairs Unit' product group include:</p> <ul style="list-style-type: none"> management and delivery of the Red Meat Industry Corporate Affairs Unit that works across the supply chain to support effective stakeholder engagement, issues, media and crisis management, and helps to build capacity in peak industry councils' (PICs) policy development.
Peak council development	<p>Initiatives within the 'peak council development' product group include:</p> <ul style="list-style-type: none"> annual service agreements with the production peak industry councils (Cattle Australia, Australian Lot Feeders' Association, Sheep Producers Australia, Goat Industry Council of Australia), including activities across consultation, animal health/welfare and biosecurity, industry leadership and capability building, and adoption.

Key performance indicators in 2023–24

- 85% of trained Red Meat Ambassadors using the strategies and skills from the training in their communications about the red meat industry.
- One crisis management simulation conducted with industry stakeholders by 30 June 2024.
- Successful completion of all milestones in the peak industry council (PIC) annual service agreements by 30 June 2024.

Table 25: Projected 2023–24 investment by funding source – capability building (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Innovation capability building	2	-	23	-	71	-	92	-	17	-	6,157	-	-	-	3,923	10,284	-	20,568	-	20,568
Industry leadership and capacity building	1	69	3	92	44	1,477	31	1,776	10	621	14	121	0	2	-	102	-	204	4,158	4,363
Total¹	2	69	26	92	115	1,477	122	1,776	27	621	6,171	121	0	2	3,923	10,386	-	20,773	4,158	24,931



The Ambassadors for the Red Meat Industry workshop –
Brisbane, Queensland



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



Heidi Brunner – Content Manager,
Community Communications,
Meat & Livestock Australia at Gwandallan
Holdings – Meadow Creek, Victoria

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 and sustainable diet.

Product group	Core activities
Community education	<p>The 'community education' product group includes development of engaging and targeted content, collateral and online assets, through dedicated communications channels, such as MLA's online platform goodmeat.com.au, social media and other strategic communication channels.</p> <p>An annual benchmarking survey is undertaken to understand community sentiment which informs the strategy for the Australian Good Meat communications program.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ goodmeat.com.au online platform enhancements, including Search Engine Optimisation (SEO), paid campaigns and improved user experience to ensure relevancy, currency and accessibility of content ■ online content development including videos, website content, animations and infographics ■ annual benchmarking survey of community sentiment ■ collaborate with other Rural Research and Development Corporations (RDCs) in AgriFutures 'Community Trust in Australia's Rural Industries' national survey.
Community engagement	<p>The 'community engagement' product group focuses on activities to improve perceptions towards the industry. Key initiatives include:</p> <ul style="list-style-type: none"> ■ 'red meat positioning' campaigns and events ■ social media: Instagram, Facebook, YouTube, LinkedIn and Twitter ■ digital media/influencers to promote the industry's credentials ■ targeted amplification of social content and Google Ads ■ Australian Good Meat collateral to support community engagement activities.
School education	<p>The 'school education' product group engages schools and teachers through education partnerships and the promotion of the newly developed national curriculum aligned teaching resources, focusing on animal welfare, environmental management and the role of red meat in a healthy balanced diet.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ membership of Primary Industries Education Foundation Australia (PIEFA) and subscriptions to education service providers such as Kids Media and Education Australia to promote the Australian Good Meat educational resources – membership investments also support the opportunity for access to teacher and student insights into preferred teaching methods, resource needs and sentiment towards teaching Australian agriculture in the classroom ■ promotion of school education resources through participating at events and social media channels that target teachers and/or students ■ host online educational programs featuring Red Meat Ambassadors.

Key performance indicators in 2023–24

1. Improved positive perceptions towards red meat and the industry compared to 2022–23 community sentiment survey results.
2. A 15% increase from 2022–23 in average monthly Australian Good Meat website users.
3. Overall average 10% increase from 2022–23 in community engagement – measured by a range of metrics for all Australian Good Meat social media channels.
4. Achieve 12,000 page views of Australian Good Meat teacher resources.

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.

Product group	Core activities	Key performance indicators in 2023–24
Sustainability frameworks	<p>MLA manages the Australian Beef Sustainability Framework (ABSF) on behalf of the Red Meat Advisory Council (RMAC) and the Sheep Sustainability Framework (SSF) on behalf of WoolProducers Australia and Sheep Producers Australia. These frameworks are MLA's flagship sustainability engagement programs.</p> <p>The frameworks are investor and customer focused to demonstrate the red meat industry's sustainability commitment and performance, as aligned to the four themes of economic resilience, animal welfare, environmental stewardship, and people and community.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ delivery of ABSF, SSF and MLA sustainability reports annually ■ delivery of <i>ABSF Work Plan</i> and <i>SSF Strategic Plan</i> key projects and activities ■ sustainability communications to generate improvement in customer, investor and supply chain endorsement of the industry-led Frameworks and year-on-year improvement in producers' awareness and understanding of the Frameworks' purpose. 	<ol style="list-style-type: none"> 1. Positive feedback from supply chain stakeholders on the Australian beef and sheep sustainability frameworks. 2. Increase MLA membership by 200 members from 2022–23 baseline. 3. Increase of 0.1/10 pts in member satisfaction with printed and digital communications on 2022–23 survey. 4. Increase media activity by 5% above the 2022–23 benchmark. 5. High level of satisfaction (80%) and positive feedback on MLA activation at events.
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"> ■ fulfilling MLA's corporate reporting requirements under the <i>Corporations Act 2001</i> and the <i>Australian Meat and Live-stock Industry Act 1997</i> as per MLA's <i>Statutory Funding Agreement</i> with the Australian Government ■ producing and delivering relevant regional and seasonal content for printed and digital channels, including <i>Feedback</i> magazine ■ refining and evolving the delivery of content to a more digital-first approach to ensure MLA's communications achieve MLA's mission and the needs of MLA's stakeholders ■ delivery of reporting requirements for MLA's statutory performance review, as per MLA's <i>Strategic Plan 2025</i> and MLA's <i>Statutory Funding Agreement</i> with the Australian Government ■ delivery of communication campaigns that help to drive positive on-farm practice change and foster success by communicating adoption priorities. 	
MLA digital communications	<p>The 'MLA digital' product group delivers on MLA's digital communications strategy, to ensure digital platforms are clear, relevant, accessible, informative and engaging to identified audiences. Initiatives include:</p> <ul style="list-style-type: none"> ■ refining digital platforms and provide input, support and advice to MLA managers and service providers regarding relevant MLA projects and work programs ■ delivering MLA's relevant and engaging regional and seasonal content through e-newsletters, mla.com.au, myMLA and social media. 	
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"> ■ MLA-hosted events to inform stakeholders and build awareness of MLA's program plans and outcomes ■ targeted industry event sponsorship and facilitating MLA speakers at events ■ 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. 	

Product group	Core activities
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"> ■ servicing and managing MLA's membership base ■ ensuring that 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 ■ 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 ■ consolidating the Key Account Management program internally ■ informing industry bodies of key activities and sharing key information with their members ■ quarterly consultation updates with Peak Industry Councils (PICs) and RDCs ■ engaging with key members and industry groups, memberships and subscriptions.
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"> ■ ensuring MLA's corporate affairs activities are aligned with MLA's <i>Strategic Plan</i> and directed to the achievement of MLA's purpose ■ managing MLA's media and public relations activities, delivering against an implementation plan to build a consistent narrative to demonstrate MLA's work and achievements and promote the credentials of the red meat industry ■ demonstrating thought leadership to ensure MLA has a prominent voice on strategically important industry issues – setting the news agenda ■ proactively identifying, developing and managing opportunities for the Managing Director and MLA senior leaders to contribute to industry debate, news commentary and similar forums of influence ■ facilitating media training for MLA staff and industry stakeholders ■ proactively identifying relevant issues or trends in the communications environment.

Table 26: Projected 2023–24 investment by funding source – communication (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Communication (community)	3	2	9	55	212	901	120	1,339	22	536	-	-	-	-	-	365	-	730	2,833	3,562
Communication (stakeholder)	5	3	22	119	449	1,967	243	2,656	46	1,077	-	-	-	-	-	765	15	1,531	5,837	7,368
Total¹	8	4	31	174	660	2,868	363	3,995	68	1,613	-	-	-	-	-	1,130	15	2,260	8,670	10,930



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



Harriet Bawden, Project Manager – Northern Beef Adoption and Tony Parker, Program Manager – Grassfed Productivity – Meat & Livestock Australia

Corporate services

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

- effectively managing the levy investments through accounting, contracting, project management, foreign exchange management, evaluation and reporting
- ensuring MLA meets its statutory and legislative requirements through robust frameworks including company secretarial, audit, risk and legal advisors
- providing the frameworks to attract, develop and engage 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	The 'legal' product group provides legal advice and support to the business. Initiatives include: <ul style="list-style-type: none"> ■ transforming from a transaction-based to an advisory function ■ rationalising and consolidating MLA's agreement library ■ enabling the business to deliver on its strategic plan and annual investment portfolio through collaboration and delivery of training and education.
Crisis management	Initiatives within the 'crisis management' product group include: <ul style="list-style-type: none"> ■ maintaining the MLA crisis response plan and portal ■ supporting MLA crisis management training and activities, where required.
Risk and compliance	The 'risk and compliance' product group includes activities that support MLA's risk management and compliance frameworks such as: <ul style="list-style-type: none"> ■ regularly reviewing, maintaining and operationalising the Board's risk appetite ■ reflecting the industry's operating environment ■ monitoring compliance with statutory and other regulations applicable to the MLA Group of companies.
Finance	The 'finance' product group captures the stewardship role of effectively managing levy and non-levy investments. Initiatives include: <ul style="list-style-type: none"> ■ management reporting to internal and external stakeholders ■ financial planning and analysis including the <i>Annual Investment Plan</i> and quarterly rolling forecasts ■ treasury, including the management of cash and foreign exchange ■ financial accounting services, including annual statutory accounts ■ contract support, including streamlining the contracting and project approval process.
Levy management	The 'levy management' product group contains costs associated with MLA's share of levy administration (including third party verification of voting entitlements).
Evaluation	The 'evaluation' product group implements and provides oversight of the MLA Triple Bottom Line Evaluation Framework, encompassing the entire suite of MLA's investments.

Key performance indicators in 2023–24

Legal

1. Maintain MLA's templates to ensure they remain current.
2. Continued delivery of legal training to educate the business to ensure strong awareness of 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 the provision of legal advice.

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 *2023–24 Internal Audit Plan* to the AFRC.
3. Ensure a robust compliance management program, including reporting to the AFRC.
4. Submission of the annual Modern Slavery Statement to the Australian Border Force.

continued next page

Product group	Core activities
Knowledge and IP transfer	The 'knowledge and IP transfer' product group supports and provides advice on intellectual property, licensing, knowledge & IP transfer 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	The 'human resources' product group supports 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: <ul style="list-style-type: none"> ■ programs that support a high-performance culture in order to deliver MLA's strategic and operational priorities ■ providing the frameworks and advice to support a safe and compliant work environment.
Information technology	The 'information technology' product group provides 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. 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 its objectives.
Project and process improvements	The 'project and process improvements' product group provides support and guidance to the greater MLA group on: <ul style="list-style-type: none"> ■ continuous improvements to systems and processes ■ process mapping ■ internal project management.
Agriculture Innovation Australia (AIA)	The 'Agriculture Innovation Australia (AIA)' product group captures MLA's annual membership contribution to Agricultural Innovation Australia.
AUS-MEAT	The 'AUS-MEAT' product group contains 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 2023–24

Finance

1. Clean audit report received.
2. Ensure financial reporting to internal and external stakeholders is timely, accurate and insightful.
3. Continuous support to business in respect to contract administration.

Evaluation

1. Implement the social and environment tranches of the Triple Bottom Line Evaluation Framework.
2. Capture baseline KPI measures/data and implement a process for systematic collection of ongoing data to measure against established baseline.

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. Ensure the IT platform is robust and secure.
3. 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 27: Projected 2023–24 investment by funding source – corporate services (\$ '000)

*Total may not add up due to rounding

Sub-program	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 Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2023–24
Corporate services	45	31	133	167	1,249	3,463	1,064	5,457	504	1,220	-	-	-	-	-	2,995	2,278	5,990	12,615	18,605
Total ¹	45	31	133	167	1,249	3,463	1,064	5,457	504	1,220	-	-	-	-	-	2,995	2,278	5,990	12,615	18,605



David Greig, 'Bellevue', -
Tottenham NSW

Detailed budget tables by funding sources

Table 28: Expenditure by funding source 2023–24, \$ '000

*Total may not add up due to rounding

Program	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 Unmatched	Government R	MLA consolidated
Animal wellbeing	-	-	42	-	317	-	359	-	76	-	-	-	76	-	435	-	-	-	-	-	4,443	6,130	4,878	15,885
Domestic market	13	23	47	175	399	8,210	446	8,385	395	8,676	201	1,624	596	10,301	1,054	18,708	407	1,939	5	15	-	545	1,466	24,139
International markets	1	96	79	553	252	9,586	331	10,139	214	20,818	15	3,060	229	23,879	560	34,113	23	1,665	526	459	142	2,768	1,252	41,509
Eating quality	-	-	46	-	418	-	464	-	517	-	301	-	818	-	1,282	-	-	-	-	-	192	1,432	1,474	4,381
Environmental sustainability	33	-	87	-	870	-	956	-	566	-	257	-	823	-	1,812	-	4,094	-	-	-	10,033	6,425	15,939	38,302
Feedlot	-	-	-	-	-	-	-	-	-	-	1,760	635	1,760	635	1,760	635	-	-	-	-	1,456	319	3,216	7,387
Integrity systems	73	18	229	91	2,004	1,110	2,232	1,201	1,886	1,748	962	521	2,848	2,269	5,153	3,488	3,898	1,280	19	24	1,313	5,947	10,382	31,505
Objective measurement	1	-	28	26	188	146	216	172	111	-	54	-	165	-	382	172	101	-	-	-	3,176	980	3,659	8,471
Producer adoption	38	-	248	-	2,044	-	2,293	-	1,399	-	-	-	1,399	-	3,729	-	-	-	-	-	8,513	5,775	12,242	30,260
Product and packaging innovation	-	-	20	23	130	140	150	163	43	80	5	7	48	87	197	250	61	-	-	-	1,388	408	1,646	3,951
Value chain information and efficiency	38	-	117	-	1,097	-	1,214	-	935	-	432	-	1,368	-	2,620	-	-	-	-	-	1,129	399	3,749	7,898
Productivity (off-farm)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	13,649	-	-	-	936	127	14,585	29,297
Productivity (on-farm)	148	-	116	-	2,259	-	2,374	-	1,610	-	114	-	1,724	-	4,247	-	-	-	-	-	9,646	2,563	13,892	30,348
Capability building	2	69	26	92	115	1,477	141	1,569	122	1,776	27	621	149	2,397	292	4,034	6,171	121	0	2	3,923	-	10,386	24,931
Communication	8	4	31	174	660	2,868	691	3,042	363	3,995	68	1,613	431	5,608	1,130	8,655	-	-	-	-	-	15	1,130	10,930
Corporate services	45	31	133	167	1,249	3,463	1,382	3,629	1,064	5,457	504	1,220	1,568	6,677	2,995	10,337	-	-	-	-	-	2,278	2,995	18,605
Total	400	240	1,250	1,300	12,000	27,000	13,250	28,300	9,300	42,550	4,700	9,303	14,000	51,853	27,650	80,393	28,403	5,006	550	500	46,290	36,114	102,893	327,799

Table 29: Income available by funding source 2023–24, \$ '000

*Total may not add up due to rounding

	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 Unmatched	Government R	MLA consolidated
Levies	368	232	1,139	1,287	10,381	25,251	11,520	26,538	10,850	43,090	4,176	8,575	15,026	51,665	26,915	78,435	-	-	-	-	-	-	-	105,349
Government	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	102,893	102,893
AMPC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	28,403	5,006	-	-	-	-	-	33,409
LiveCorp	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	550	500	-	-	-	1,050
External R	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	46,290	-	-	46,290
External Unmatched	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	36,114	-	36,114
Total* income	368	232	1,139	1,287	10,381	25,251	11,520	26,538	10,850	43,090	4,176	8,575	15,026	51,665	26,915	78,435	28,403	5,006	550	500	46,290	36,114	102,893	325,105
Difference (to/from reserves)	(32)	(8)	(111)	(13)	(1,619)	(1,749)	(1,730)	(1,762)	1,550	540	(524)	(728)	1,026	(188)	(735)	(1,958)	-	-	-	-	-	-	-	(2,694)
Opening reserves	257	169	480	422	7,768	14,676	8,249	15,098	1,189	10,149	3,379	5,887	4,568	16,036	13,074	31,302								
Closing reserves (2023–24)	226	160	369	409	6,150	12,927	6,519	13,336	2,740	10,689	2,855	5,159	5,594	15,848	12,339	29,344								
% of revenue	61%	69%	32%	32%	59%	51%	57%	50%	25%	25%	68%	60%	37%	31%	46%	37%								

Acronyms

A-EUFTA	Australia-European Union Free Trade Agreement
A-I CECA	Australia-India Comprehensive Economic Cooperation Agreement
A-UAE	Australia-United Arab Emirates
ABSF	Australian Beef Sustainability Framework
AFRC	Audit, Finance and Risk Committee
AIA	Agriculture Innovation Australia
AIP	<i>Annual Investment Plan</i>
AMIC	Australian Meat Industry Council
AMPC	Australian Meat Processor Corporation
CN30	Carbon Neutral 2030

CRM	customer relationship management
CT	computed tomography
DEXA	dual-energy X-ray absorptiometry
DPO	Digital Product Officer
eID	electronic identification
eNVD	electronic National Vendor Declaration
FMD	foot and mouth disease
GBV	Genomic Breeding Value
GHG	greenhouse gas
GP	General Practitioner
GPS	Global Positioning System

IMF	intramuscular fat
IP	intellectual property
ISC	Integrity Systems Company
IT	information technology
KPI	key performance indicator
LDL	Livestock Data Link
LEP	live export program
LERDAC	Livestock Export Research & Development Advisory Committee
LMY	lean meat yield
LSD	lumpy skin disease





MDC	MLA Donor Company
MENA	Middle East/North Africa
MLA	Meat & Livestock Australia
mRNA	messenger ribonucleic acid
MSA	Meat Standards Australia
NB2	Northern Breeding Business
NFAS	National Feedlot Accreditation Scheme
NIRS	near infrared spectroscopy
NLGC	National Livestock Genetics Consortium
NLIS	National Livestock Identification System
NLRS	National Livestock Reporting Service

NRM	natural resource management
PALM	Pacific Australia Labour Mobility scheme
PDS	Producer Demonstration Site
PGS	Profitable Grazing Systems
PIC	peak industry council
PIEFA	Primary Industries Education Foundation Australia
RAC	regional advisory council
RDC	Research and Development Corporation
RDEA	research, development, extension and adoption
RMAC	Red Meat Advisory Council
ROI	return on investment

RPP	Rural Professionals Program
SAWS	Shipboard Animal Welfare Surveillance
SEA	South East Asia
SEO	search engine optimisation
SSF	Sheep Sustainability Framework
UK	United Kingdom
UNE	University of New England
US	United States
VBP	value-based pricing



Meat & Livestock Australia

Level 1, 40 Mount Street, North Sydney NSW 2060

Phone: 02 9463 9333 | Email: info@mla.com.au

mla.com.au