

Strategic Plan 2030




Productivity and profitability will underpin the sustainability and prosperity of our great industry.

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 MLA acknowledges the Traditional Custodians of the lands on which we live, work and care for. We pay our respects to Elders past and present, as we recognise their history, culture, connection to land and water, and share in their commitment to caring for Country.

MLA acknowledges the matching funds provided by the Australian Government to support the research and development detailed in this plan. Numbers in graphs and tables within the plan may be affected by rounding.

Chair's statement



John Lloyd

Chair

This five-year strategic plan has been created through almost 12 months of consultation with stakeholders from across the industry.

Through these extensive conversations and feedback, Meat & Livestock Australia (MLA) has created an in-depth analysis of the opportunities and challenges facing the cattle, sheep and goat supply chains.

Consequently, we have also translated this into a strategic direction that will guide how MLA delivers outcomes for industry between now and 2030.

I want to acknowledge and thank everyone who took part in this process. Your feedback and guidance have been vital to building this strategic plan and we are grateful to everyone who committed their time and ideas at our in-person and online discussions.

The strategic plan's core purpose is to be a driving force behind MLA's investments over the next five years to ensure that the organisation delivers outcomes and impact for the industry. It builds on a legacy of 25 years of MLA being the industry service provider.

The plan is guided strongly by MLA's overarching purpose, which is: to deliver world leading outcomes that fuel global competitiveness, sustainability and producer profitability.

MLA's *Strategic Plan 2030* is also built on strong collaborations throughout the value chain, with research, development and adoption delivery partners, government and peak industry bodies.

Our industry has a strong track record of collaboration, and we know that we can deliver much stronger outcomes by working together.

We will continue to collaborate strongly with industry and our fellow rural Research and Development Corporations to ensure optimum investment of government and levy payer funds.

The plan is directly aligned to the overarching meat industry strategic plan: *Red Meat 2030*. This industry plan is in the second half of its 10 years, and has gone through a mid-point review to ensure it remains aligned to the rapidly changing external environment in which we are operating. MLA's *Strategic Plan 2030* has been created in tandem with that process.

The world has changed significantly in the past five years with more complex trading environments, volatile financial markets, drought, flood, fluctuating livestock prices, and heightened risks around biosecurity. Our stakeholders told us they want MLA to be prepared for these challenges to continue to assist the industry in its response.

They also told us they want MLA to be responsive and attuned to the specific challenges of the future – partnering widely and responding quickly, looking for exciting opportunities and turning them into reality on the ground.

Our industry is already renowned throughout the world as a leading provider of nutritious and sustainable protein. We feed the world and provide economic stimulus for regional communities and the nation as a whole.

This plan sets out a vision for driving our industry further through the next five years to 2030.

I look forward to working with all our stakeholders and partners to deliver the plan.

Managing Director's statement



Michael Crowley

Managing Director

Productivity and profitability will underpin the sustainability and prosperity of our great industry. By focusing on value creation and capture along the supply chain, we will deliver benefits that translate into profitability for the production sector.

At its core, the MLA strategy is insight-led and market driven, ensuring customers and consumers remain at its centre. The strategy aligns directly with the meat industry

strategic plan – *Red Meat 2030* – which has also undergone a mid-point review.

We will meet, and exceed, evolving customer and consumer needs. As a result, market signals including feedback and pricing will drive the supply side to respond. This approach covers beef, sheepmeat, goats and live export.

Market access remains a key lever to unlock value as we work with industry and government to further advance favourable trade agreements. We will deliver solutions for technical and non-tariff barriers reducing economic barriers to trade.

MLA remains committed to aspirational innovation goals that will be delivered through practical execution of the Strategic Plan. A balanced portfolio of cutting-edge R&D will deliver tangible and measurable outcomes. MLA's deeply committed people will work directly with producers, researchers, service providers and the supply chain to deliver impact.

Contributing to Australia's net zero ambitions will be the guiding light for our environmental sustainability investments. As we look to accelerate the adoption of innovations that drive efficiency and productivity, we will measure the

benefits through both overall emissions reduction and reducing emissions intensity per kg of production.

Productivity-led sustainability will ensure we can grow the herd and flock whilst delivering a positive environmental outcome. We will continue to invest in carbon storage and emissions avoidance initiatives with additional leverage being achieved through our partnership with the Zero Net Emissions for Agriculture CRC (ZNE CRC).

Integrity systems are fundamental to our food safety and biosecurity. Our world leading NLIS database is being redeveloped to future-proof our integrity systems whilst also significantly improving our data capability. Seamless transfer of information in the form of feedback and feeding forward information will unlock the value of our industry data.

In order to capture this opportunity, we will pursue value-based marketing to connect the supply chain and capture the value opportunity. This will be achieved through strategic partnerships to deliver incentives and pull-through demand to produce higher value livestock.

We will work together with producers, processors, brand owners, technology providers, researchers and service companies to design and deliver a value capture program. The supply chain will become a value chain benefitting all.

We have a great industry with a fantastic story to tell. As we bring our strategy to life, we will elevate our communication to ensure consumers and the broader community continue to support the vital role livestock producers and our industry deliver for the prosperity of our country.

Livestock play a vital role in delivering positive environmental outcomes and are a significant part of the solution to our national priorities. Our producers care deeply about the welfare of our livestock. Red meat plays a vital role in human health and nutrition, and we will elevate these messages through our Australian Good Meat platform.

The MLA team is excited to be working closely with levy payers – and all our stakeholders along the supply chain – to deliver on the initiatives within this strategy to ultimately create a more prosperous industry.

Michael D. Crowley

Who we are

MLA's role

Meat & Livestock Australia (MLA) is a Rural Research and Development Corporation and the declared industry marketing body and the industry research body under section 39(1) of the *Primary Industries Levies and Charges Disbursement Act 2024*.

Our purpose

To deliver world leading outcomes that fuel global competitiveness, sustainability and producer profitability.

Our mission

To collaborate with stakeholders to invest in research, development and marketing initiatives that contribute to producer profitability, sustainability and global competitiveness.

Our members and stakeholders

MLA membership is free for levy-paying producers of grassfed cattle, grainfed cattle, sheep, lamb, and goats. MLA had 50,614 members at the time of writing. Programs are funded by livestock levies and co-investment from processors, lot feeders, exporters and the Australian Government. MLA collaborates with research partners, industry bodies, and supply chain stakeholders.

Our corporate governance framework

MLA is governed by a skills-based Board that works with industry to set strategic priorities for the company.

MLA's corporate governance framework is set by the Board, having regard to the best interests of members, the values of the organisation, MLA's obligations set out under the Statutory Funding Agreement with the Commonwealth of Australia, and in accordance with the ASX Corporate Governance Council's Corporate Governance Principles and Recommendations.

MLA is subject to independent reviews to ensure accountability and value delivery. This long-established framework has been implemented to ensure that MLA remains accountable to its stakeholders and that stakeholder interests are protected. MLA's governance arrangements are reviewed regularly to reflect industry developments, stakeholder expectations and regulatory and legislative changes.

For more information, visit mla.com.au/how-we-are-governed

Our subsidiary companies

MLA Donor Company drives innovation through co-investment in transformative research.

Integrity Systems Company manages national traceability and quality assurance programs: Livestock Production Assurance (LPA), electronic National Vendor Declarations (eNVD), and the National Livestock Identification System (NLIS).

International markets and trade

MLA operates in key export markets including North America, the UK, China, Japan, South Korea, Indonesia, Singapore and the UAE, additional presence in Thailand, Vietnam, Malaysia, the Philippines, and Saudi Arabia.

Priorities

Australian Government priorities

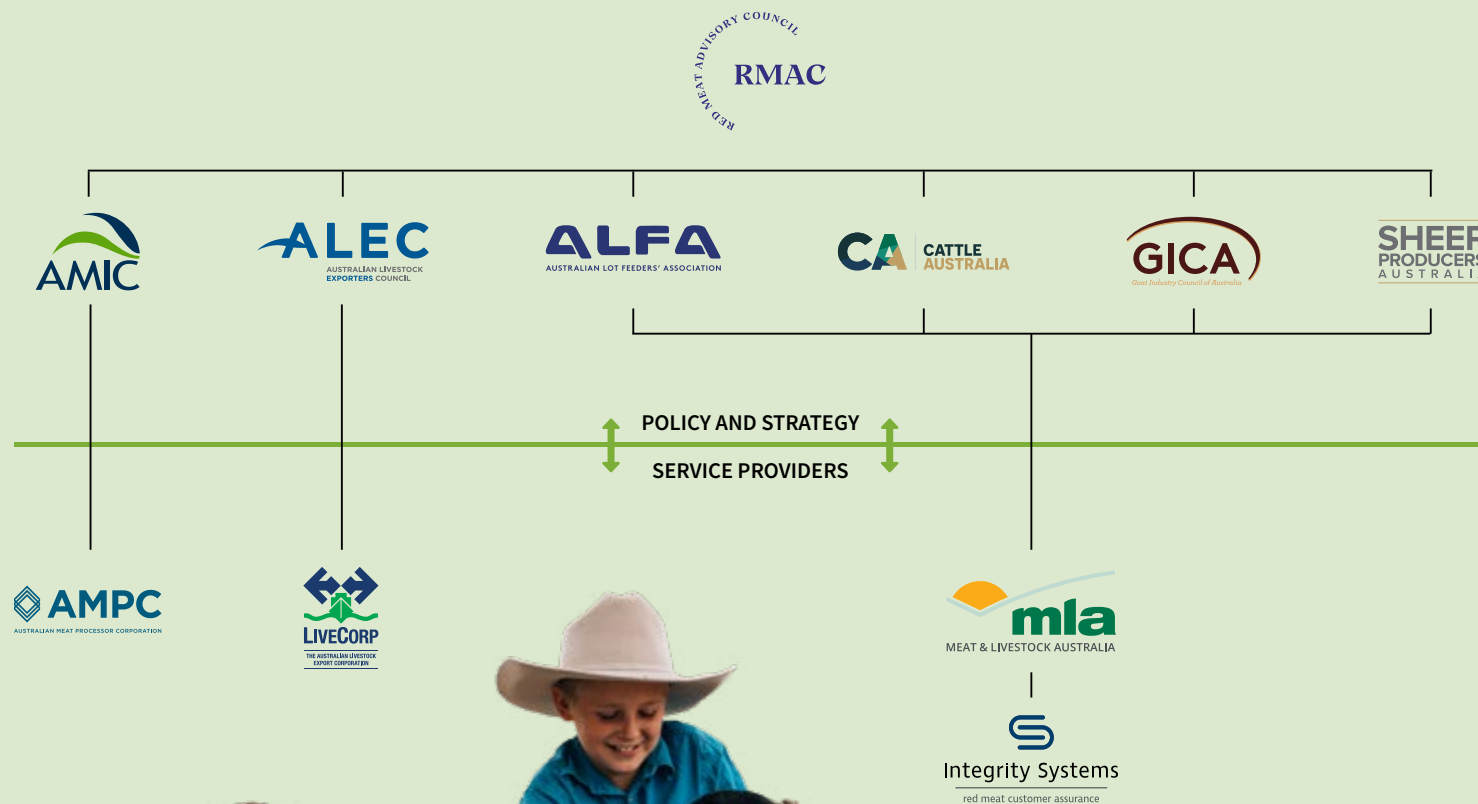
MLA supports the Australian Government's national Science and Research Priorities and research, development and extension objectives, with a focus on climate resilience, biosecurity, digital innovation and premium export growth.



Our funding and industry partnerships

MLA's funding includes producer levies, government contributions and industry co-investment. MLA works with Australian Lot Feeders' Association, Cattle Australia, the Goat Industry Council of Australia and Sheep Producers Australia. Processor and exporter levies are directed through the Australian Meat Processor Corporation and LiveCorp.

Industry structure



Industry at a glance



2.24M

tonnes of Australian red meat products exported to **104 countries** in 2024 (DAFF)



1.34M

tonnes of beef exported (DAFF)



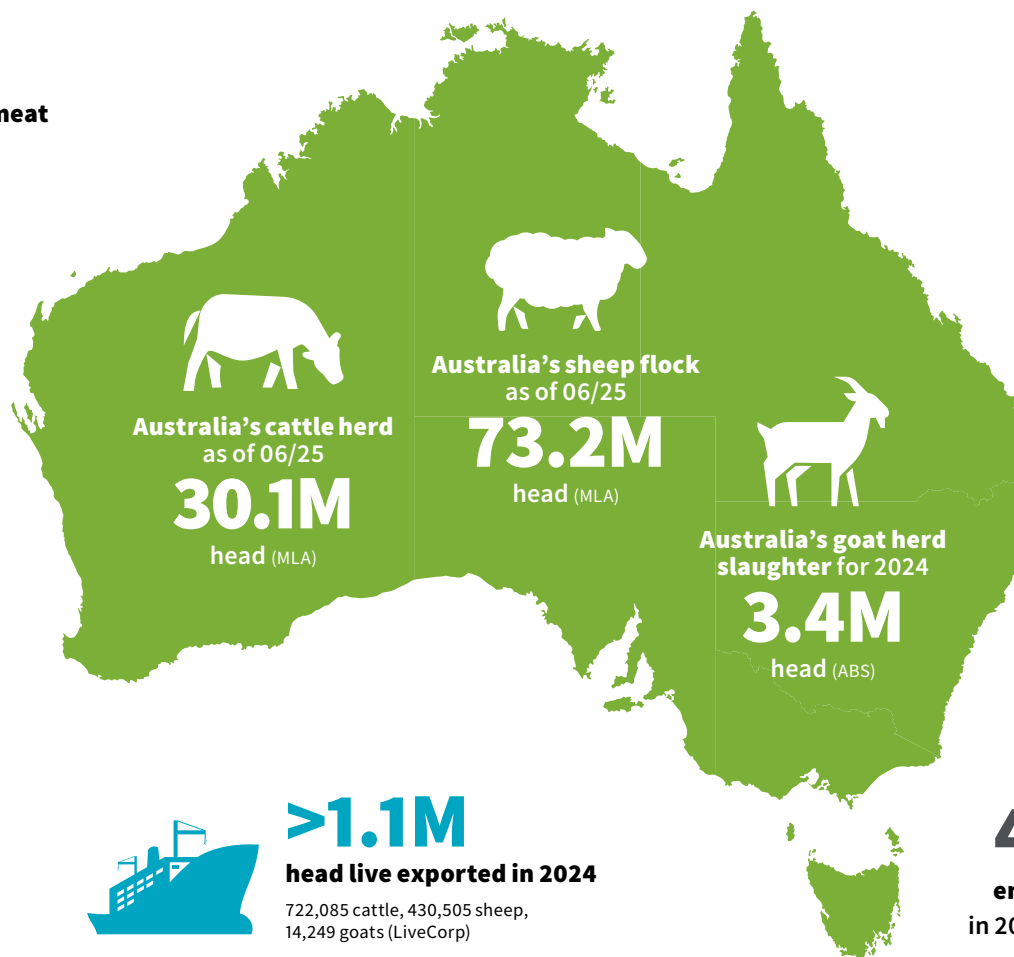
614,000

tonnes of lamb and mutton exported (DAFF)



51,000

tonnes of goatmeat exported (DAFF)



\$81.7B

FY24 Australian red meat and livestock industry turnover

\$22.9B

gross value of production

92%

Australian households purchased beef and



72%

purchased lamb in the past year

03/24 (NielsenIQ)

419,000

employed by industry in 2022–23 (EY, IBISWorld, ABS)



Our vision

Productivity and profitability will underpin the sustainability and prosperity of our great industry.

By focusing on value creation and capture along the supply chain, we will deliver benefits that translate into profitability for the production sector.

Our priorities for 2025–30



Optimise demand by expanding markets and creating and capturing value

- Position Australian red meat as the most trusted protein of choice in both domestic and international markets.
- Expand high-value markets, strengthen trade relationships and identify and capitalise on global trends to maximise value across the supply chain.



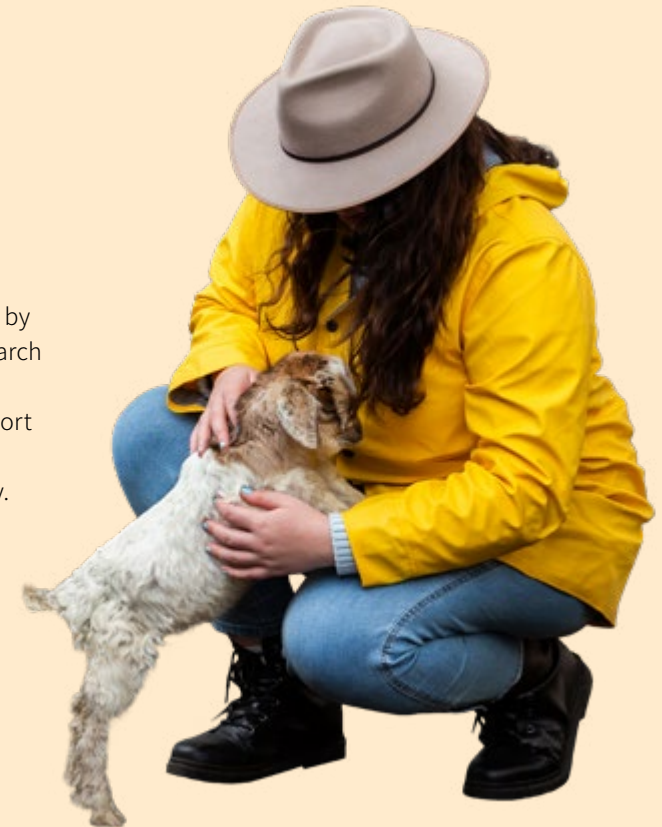
Drive profitable, productive and sustainable growth

- Invest in research, development and adoption to ensure long-term success to enhance productivity and resilience for producers and the supply chain.
- Strengthen national traceability and quality assurance programs to reinforce Australia's global reputation and maintain our competitive advantage in premium markets.
- Accelerate the adoption of cutting-edge technology and innovation.
- Lead the industry's path to sustainability and contribute to Australia's net zero ambition.



Strengthen the industry's foundation

- Ensure MLA is an agile, responsive service company delivering real impact for levy payers by collaborating with industry to respond to global uncertainty.
- Maximise the impact of our funding by partnering with world-leading research organisations to drive innovation, foster thought leadership and support disruptive solutions that deliver cutting-edge outcomes for industry.
- Collaborate and engage with institutional partners including government agencies and other RDCs to maximise the value delivered by MLA's investments.



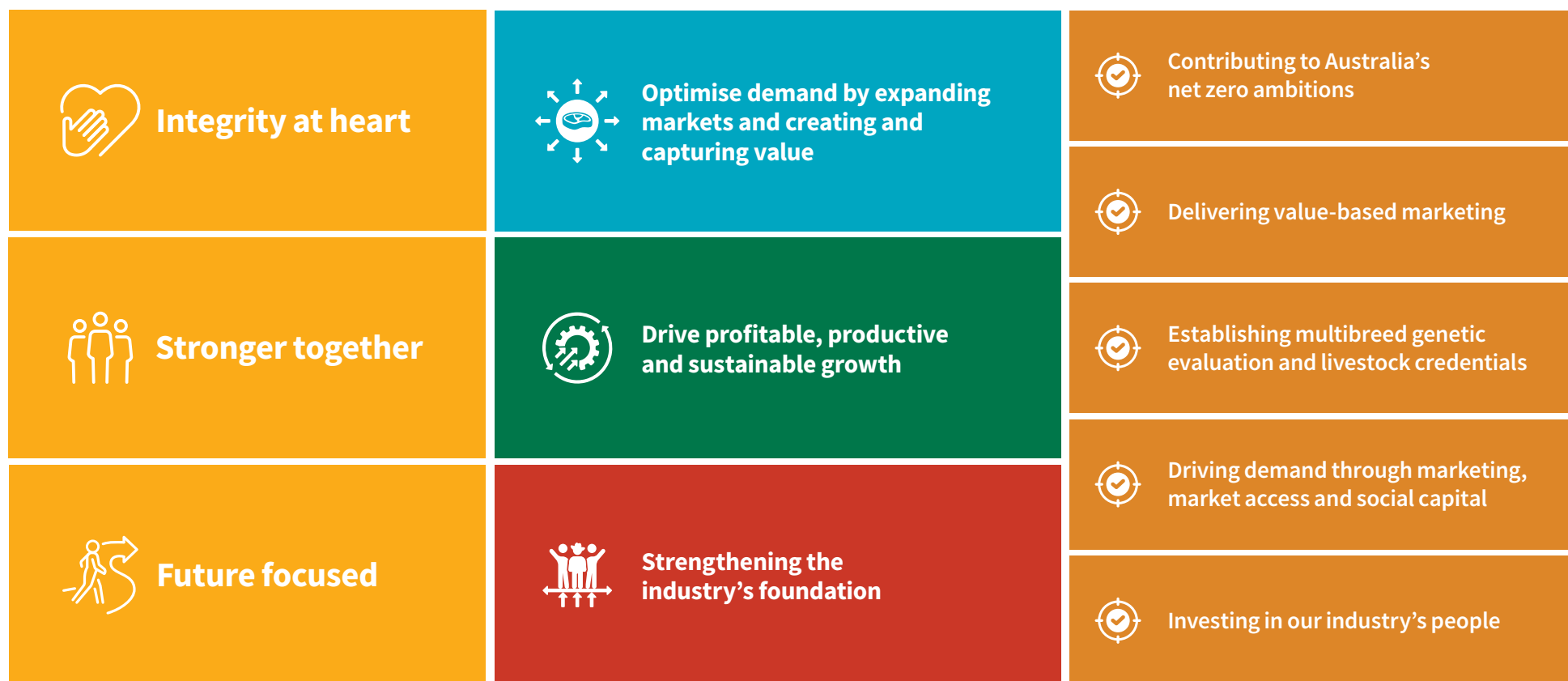
Together, we will ensure that Australian red meat remains the world's premier choice – trusted, sustainable and unmatched in quality.

Our Strategic Plan 2030 vision

Productivity and profitability will underpin the sustainability and prosperity of our great industry

By focusing on value creation and capture along the supply chain, we will deliver benefits that translate into profitability for the production sector

will be delivered by our values → while focusing on our *Strategic Plan* priorities → to achieve our bold ambitions





Our strategic *foundations*

Alignment to Red Meat 2030

Red Meat 2030 is the industry's shared 10-year plan. It shaped MLA's Strategic Plan 2025 and continues to guide our direction with the new Strategic Plan 2030.

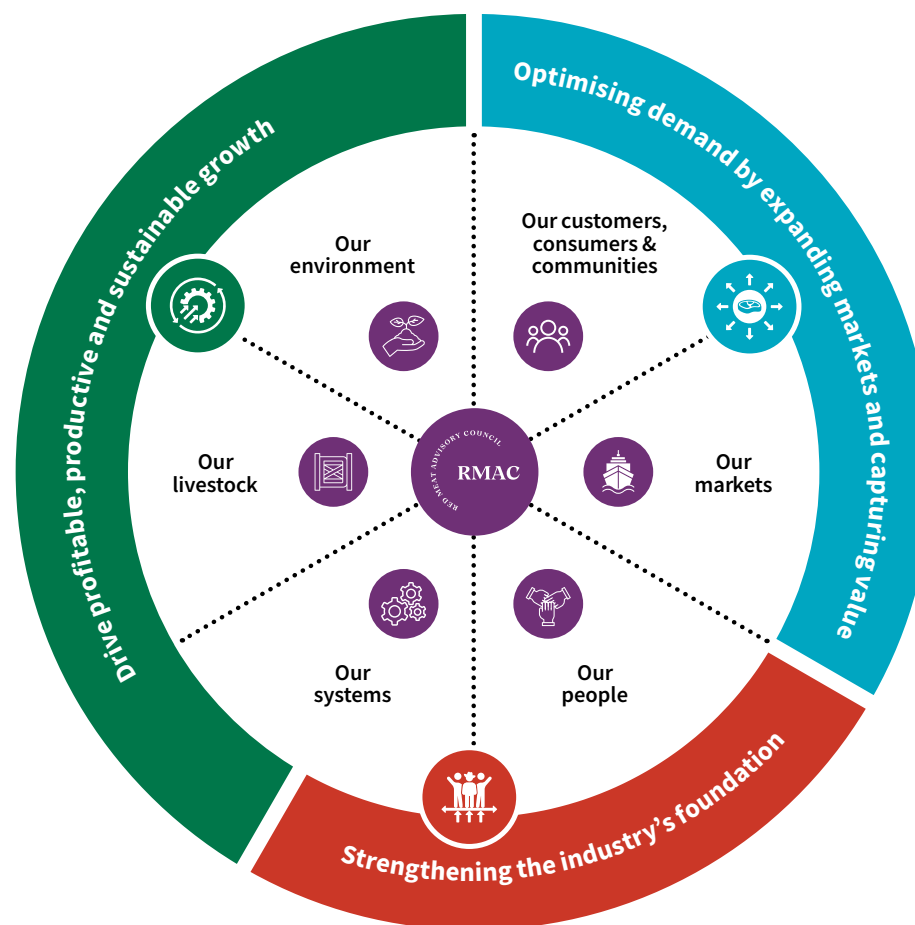
Red Meat 2030 focuses the red meat sector on working collectively to create a productive, profitable and sustainable future while creating and capturing value along the entire supply chain.

MLA's goals remain aligned with Red Meat 2030 and reflect the priorities of the industry:

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

Through Red Meat 2030, industry remains committed to ensuring our people, our livestock and the environment continue to thrive and we retain the trust of customers, consumers and communities as a global leader in the production and delivery of trusted, sustainable and high-quality red meat products to Australia and the world. For more detail on the Red Meat 2030 mid-term update visit rmac.com.au

How MLA's Strategic Plan 2030 strategic priorities align with Red Meat 2030 strategic priorities



Our approach

Stakeholder engagement

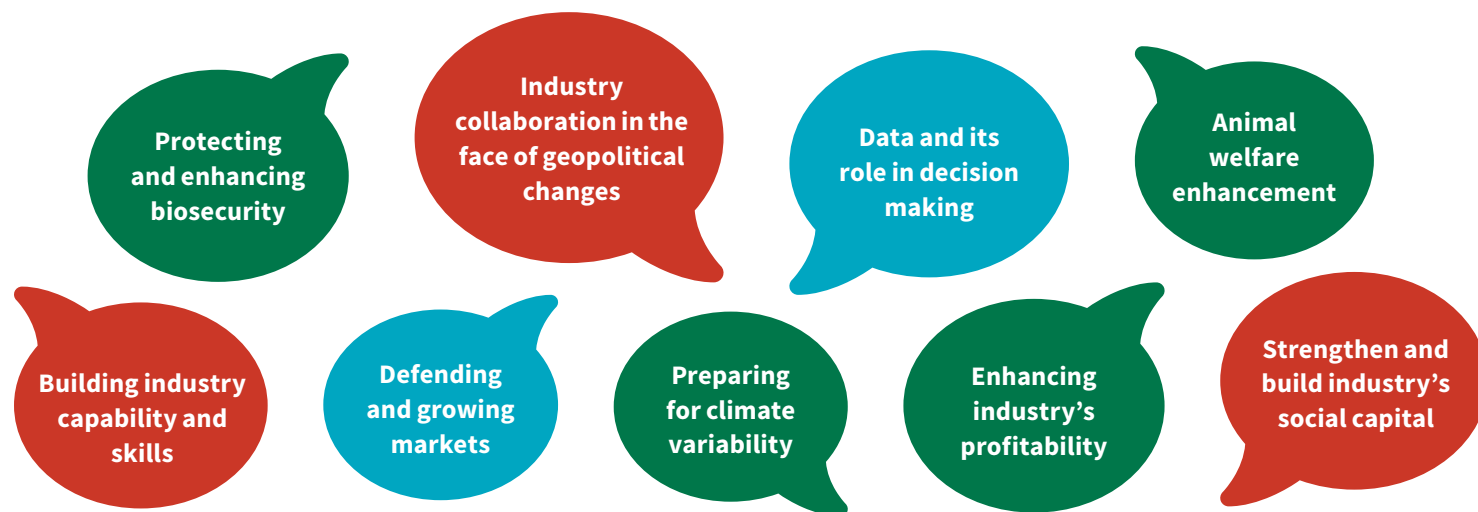
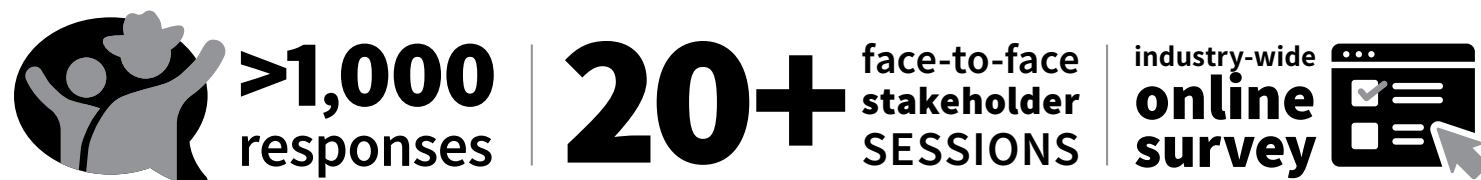
MLA's *Strategic Plan 2030* was shaped by strong consultation across industry. Over the past year, we held more than 20 sessions nationwide, engaging producers, industry groups, government and our people.

We received thousands of responses through face-to-face events and online feedback. This input helped us refine our direction and ensure our priorities align with *Red Meat 2030*. Working closely with peak industry bodies was essential to this process.

What we heard

There is optimism in the industry. Producers and stakeholders expect growth but also understand the need to stay alert and be ready for change. Global politics, markets volatility, biosecurity risks and extreme weather make the operating environment complex.

The message was clear: MLA and the industry must stay agile and collaborative to manage risks and seize opportunities.



Commitment to data-driven insights

Data is one of our industry's most powerful tools and it's growing in value. Stakeholders called for better connection and use of existing data to support decision-making, lift productivity and boost profitability.

MLA plays a key role in managing data across integrity systems (NLIS, LPA and eNVD), Meat Standards Australia (MSA), livestock genetics, objective carcass measurement, and the National Livestock Reporting Service (NLRS). When linked, these systems offer powerful insights that improve decisions and demonstrate our credentials to global markets.

Stakeholders also made it clear that data must be secure. It is a sensitive asset requiring strong governance and protection from cyber threats.

Long-term sustainability, innovation and immediate industry needs

Sustainability is both a challenge and an opportunity. Producers see themselves as land stewards and want continued support to manage climate-related risks.

Concerns included the need for clearer sustainability reporting, managing carbon markets, and protecting Australia's clean, green image.

MLA's sustainability investment is positioning the industry as a world leader. Continued research and innovation will help improve farm profitability, unlock access to more markets and support global issues like climate change and food security.

Sharing Australian red meat with consumers all over the world

Marketing continues to be a top priority both domestically and internationally. Stakeholders want MLA to keep driving demand for red meat through bold, innovative campaigns. Growing demand in Asia and other international markets presents a major growth opportunity.

There's also a clear desire to tell the real stories of our producers – their commitment to animal care, sustainability, and feeding the world. Promoting red meat's nutritional value to both local and global audiences is also key.

MLA's scientific leadership, research and adoption drives our industry's future

MLA's science-based approach is a core strength. Stakeholders highlighted the importance of our research and adoption programs to improve animal welfare, on-farm productivity, and profitable and sustainable production systems. Ongoing work in weed and pest management, on-farm safety and producer-led research and development remains important.

Trust in our products also depends on strong integrity systems that ensure traceability and quality assurance, in order to maintain market access. Strengthening these systems will reinforce Australia's reputation as a trusted supplier of safe, sustainable and nutritious red meat.

Biosecurity remains a top priority. MLA will continue working with industry and government to help prevent incursions, protect trade, and maintain our disease-free status.



Setting the scene

Operating challenges 2025–30

Australia's red meat and livestock industry faces both opportunity and uncertainty. Since MLA's *Strategic Plan 2025*, strong global demand and record exports have created growth. To stay competitive and resilient, the industry must overcome supply chain constraints, economic pressures, complex market access, and shifting consumer expectations, and MLA plays a crucial role in navigating this evolving landscape.

Global and national market forces

Global demand for Australian red meat remains high. Supply shortages in countries like the US, Brazil and New Zealand have opened new export opportunities for Australian beef, lamb, and goatmeat. Economic and population growth in developing countries is expanding the middle class and increasing demand for high-quality protein.

Health and wellness trends are also boosting demand for meat by-products like collagen and nutraceuticals, creating new value streams. These trends are driving commercial interest in emerging supply chains, making efficient market access critical.

However, supply must keep pace with demand. Reliable infrastructure – especially logistics and cold storage – is essential to meet demand.

Inflation and high costs for fuel, electricity, labour and insurance continue to squeeze margins. Even as inflation slows, elevated input costs hinder investment in infrastructure, livestock rebuilding and productivity gains. This highlights the value of MLA's role in driving innovation and efficiency.

Climate variability also influences supply. Weather patterns will remain a key factor in herd and flock numbers.

Processing capacity is another constraint. While programs like the Pacific Australia Labour Mobility (PALM) scheme have

eased labour shortages, long-term contracts limit flexibility and raise costs. Larger carcass weights add further pressure on storage and logistics.

Regulatory and policy landscape

The policy environment is growing more complex due to evolving trade rules, sustainability expectations and global politics. Non-tariff barriers add compliance burdens and challenge Australia's competitiveness.

Domestically, new climate and sustainability reporting rules require greater transparency. Banks and lenders are applying environmental, social, and governance (ESG) criteria, making sustainability performance key to accessing finance.

Retailers and foodservice providers are also embedding sustainability into contracts. Producers must invest in traceability, integrity systems and risk management. Labour shortages persist, and compliance with biosecurity and animal welfare standards remain essential.

Technology and innovation

Technology is reshaping the red meat industry. Artificial intelligence, predictive analytics and digital tools are improving on-farm decisions and market insights. Enhanced traceability is increasing supply chain transparency and boosting consumer trust.

Continued investment in genetics, precision livestock management and processing automation will lift productivity. Better breeding strategies will boost herd performance, and precision farming will reduce input use and reliance on labour.

Sustainability technologies, like satellite monitoring, carbon measurement, and biodiversity tools, are helping producers demonstrate responsible land use. Innovations in water efficiency, feed conversion and drought resilience will improve adaptability while meeting global sustainability demands.

To stay competitive and resilient, the industry must overcome supply chain constraints, economic pressures, complex market access, and shifting consumer expectations, and MLA plays a crucial role in navigating this evolving landscape.

Looking to the future

The red meat industry is entering a transformative period. Rising costs, complex regulations and processing constraints create challenges, but they also open the door to innovation and strategic change.

Agility will define the industry's future. With strong foundations in innovation, world-class assurance programs and a growing sustainability focus, Australia is well-positioned to lead. By embracing technology, deepening trade ties and responding to evolving expectations, the industry can secure its place as a global leader in red meat and livestock production.





Our bold
ambitions

A photograph of three cows in a field at sunset. The cows are in the foreground, with one cow on the right being the most prominent, facing left. The other two cows are further back and to the left. The field is filled with tall, dry grass. The background shows a line of trees and a bright, hazy sky with some clouds. The overall lighting is warm and golden, typical of a sunset.

The next five years will be pivotal for Australia's red meat industry. MLA's *Strategic Plan 2030* provides a clear, ambitious roadmap to guide the industry through this critical period.

Our plan aims to boost profitability through innovation, value capture and productivity. These efforts are supported by sustainability, market insights and long-term planning to drive the future of the red meat sector.

BOLD AMBITION

Contributing to Australia's net zero ambition

Productivity and profitability will underpin the sustainability of the industry. We are committed to driving the innovation agenda to deliver productivity-driven sustainability outcomes. This will be achieved by focusing on efficiencies that deliver improvements in the net emissions per kilogram of production. Opportunities to drive efficiencies in extensive grazing present the greatest opportunity as the emissions intensity measurements will go hand-in-hand with reducing cost of production and increasing profitability of the livestock sector.

Building on the foundations delivered through the ambitious target of carbon neutrality by 2030 (CN30), we will continue to balance our investments across carbon storage, emissions avoidance, and integrated management to deliver a range of tools that enable producers to improve their net emissions position whilst creating the opportunity to access high-value market segments, pursue new revenue opportunities and drive operational efficiencies.

Global and national emissions targets have evolved and we remain committed to making a significant contribution to Australia's net zero ambitions.

The Australian red meat and livestock industry has made considerable progress to reducing net emissions. Its contribution to the national greenhouse gas inventory has reduced by 78% from the 2005 baseline, according to the most recent data at 2022.

Over the past five years we have accelerated investment in sustainability, united industry around shared environmental objectives, and positioned red meat as a solution to global challenges.

MLA has advanced low-methane genetics, improved our understanding of soil carbon in grazing systems, and trialled feed additives that have cut methane emissions in feedlots by up to 90 per cent. Our goal now is to extend those trials into grassfed systems. These efforts have attracted major investment from both Australia and overseas.

Our research has improved the accuracy of red meat and livestock net contribution to Australia's national greenhouse gas inventory, and we've delivered Carbon EDGE training across 17 locations nationally, equipping producers with the knowledge and tools to reduce emissions on-farm.

Locally and internationally, trading partners, customers and consumers have welcomed our drive to reduce emissions and manage land sustainably. The European Union has recognised Australia as low risk in the deforestation regulations to be introduced later in 2025.

Our commitment to sustainability has translated into improved market access for brands synonymous with quality. Australian red meat is universally recognised as clean, green and nutritious.

Expectations around climate and emissions continue to grow. Customers in Australia and around the world are looking for food that is produced with care for the planet.

Delivering on expectations is essential to building trust, keeping market access and staying competitive. Our commitment to sustainability is vital to the long-term prosperity of our industry.

MLA will accelerate investment in practical, science-based solutions that help producers lower emissions, reduce emissions intensity per kilogram, increase carbon storage in the landscape, and improve productivity. This work includes deepening our understanding of the biogenic methane cycle to improve how

we measure and reduce emissions and support on-farm changes that deliver both economic and environmental value.

Our contribution to Australia's net zero ambitions won't be achieved alone. Our entire industry and supply chain has a part to play in achieving our goals. MLA will work with partners like the Zero Net Emissions for Agriculture CRC to deliver innovation that supports the CRC's goals.

The role of livestock in a low-carbon future is clear. Contributing to Australia's net zero ambitions will continue to focus MLA's efforts and investment. We will not slow down in driving practical, science-backed solutions and industry wide collaboration. We will continue to track our performance towards climate and carbon neutrality as a key benchmark for our industry.

By continuing to focus on emissions intensity and land stewardship, the red meat and livestock industry can help tackle global climate challenges while growing a profitable and resilient sector that feeds the world.

Key initiatives



Carbon storage and emissions avoidance

The Biogenic Carbon Cycle Program will lead a world-first collaboration to measure the complete farm system carbon cycle for grazing ruminants. It will improve profitability and resource efficiency while supporting new inventory methods and emissions calculators.



Climate resilience

MLA will deliver land management strategies to build resilience and profitability. Focus areas include water and soil management, management of grazing systems, forage conservation, lot feeding, and income diversification.



Environmental credentials

The Environmental Credentials Initiative will give producers digital tools, like eLearning, calculators and checklists, to track sustainability practices and meet growing market expectations.



BOLD AMBITION

Delivering value-based marketing

Creating and capturing value is central to MLA's vision for a more profitable red meat industry. By moving beyond traditional models, we aim to unlock value at every stage of the supply chain.

MLA's value capture program focuses on providing tools, systems and feedback loops that allow individual livestock carcasses to be assessed on traits like meat yield and quality.

These insights reshape how livestock are valued and traded, aligning payment systems with market expectations and rewarding higher-value production.

This approach helps producers breed, feed and finish livestock with the end market in mind. Carcase feedback will reach all parts of the supply chain so stakeholders can make informed decisions that boost long-term performance and profitability.

While embracing value creation, MLA will continue to support and enhance traditional commodity markets, ensuring industry can access a full range of marketing opportunities.

Key initiatives



Enable value creation and capture

MLA will deliver tools that support a value capture model, where market signals reflect objective measurement of traits like yield and eating quality with the addition of brand specifications. Two-way data flow will ensure producers receive clear pricing signals from the market with pull-through demand driving production changes.



Data connectivity and market signals

MLA will invest in digital platforms that link production, genetics and market data. These tools will offer real-time feedback and predictive analytics, helping producers align with demand and make better decisions.



Market-driven genetics and production

By integrating genetics and eating quality data into decision making, producers can better target premium markets. Widespread use of ag-tech and data dashboards will support more informed, efficient production.



Industry adoption and education

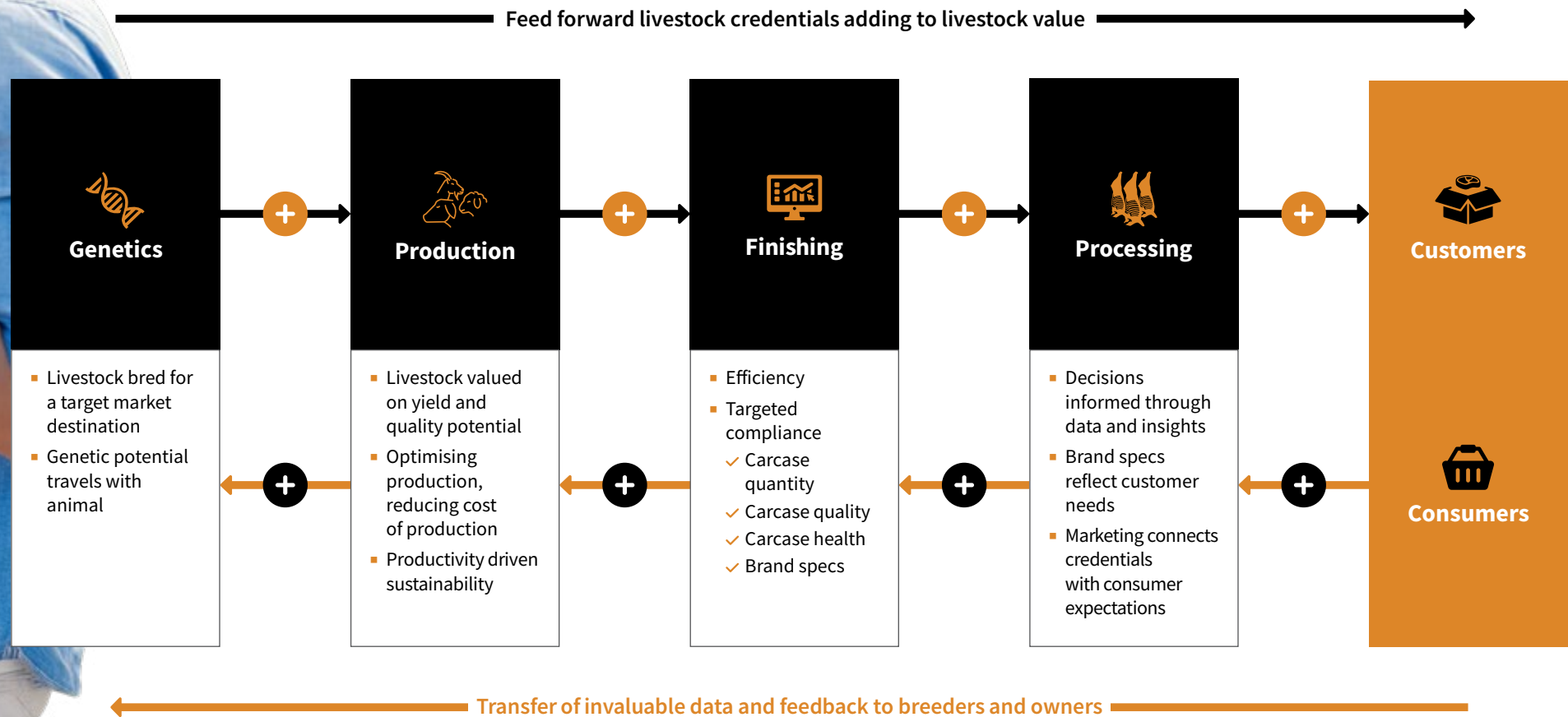
MLA and industry will support producers through workshops, digital tools and resources to adopt value capture models, with an emphasis on the myFeedback platform. These efforts will help improve profitability and help producers adapt to changing markets.



Verified livestock credentials

MLA will help create independently verified credentials to reflect traits valued by the market. These will build buyer confidence and support access to premium and export markets.





BOLD AMBITION

Establishing multibreed genetic evaluation and livestock credentials

MLA is driving genetic progress by investing in tools that support smarter, data-driven breeding decisions. These innovations will improve productivity, eating quality and livestock resilience while supporting profitability and market performance. Through robust data systems, livestock credentials will flow through the supply chain to underpin industry's commitment to traceability, animal welfare and sustainability.

By combining modern genetics with advanced traceability, MLA is positioning Australia as a global leader in sustainable, high-quality, livestock production.

Key initiatives



Multibreed genetic evaluation

MLA is developing a commercial-scale evaluation system across multiple breeds. This will accelerate progress in key traits such as fertility, carcase quality and feed efficiency, driving supply chain alignment and profitability.



Advanced data and genomic insights

Expanding use of genomics and analytics will help producers select for traits like disease resistance and feed efficiency, lifting both sustainability and productivity.



Feed forward livestock credentials

A new digital system will trace and verify livestock quality, animal welfare and sustainability data from paddock to plate. These credentials offer trusted, data-backed proof for access to premium markets.





BOLD AMBITION

Driving demand through marketing, market access and social capital

MLA's marketing efforts drive demand both at home and abroad, while also strengthening the industry's social capital. Social capital is built through public trust and community support, which are essential to the long-term prosperity of the Australian red meat and livestock industry.

Domestic market growth

As consumer habits shift, MLA uses real-time insights to stay ahead of expectations. Australia's growing and diverse population presents major opportunities, but we must stay relevant by promoting red meat in new, engaging ways.

Key initiatives



Investment in consumer-led campaigns

MLA will launch campaigns driven by consumer insights to promote beef, lamb and goat as premium proteins. These campaigns will address both motivations and barriers to consumption.



Recruit the future generations of consumers

Tailored marketing will engage younger Australians and culturally diverse communities to ensure beef, lamb and goat remains relevant across generations and dietary preferences.



Retail and foodservice optimisation

MLA will work with retailers and restaurants to enhance the way red meat is presented – whether through better shelf placement, improved menus or new product formats.

Social capital investment

Alongside market growth, MLA is committed to strengthening public trust in the red meat industry. Our social capital depends on how well we connect our industry with communities and communicate our focus on animal welfare, the environment and nutrition. We will lead this effort through clear, consistent communication.

Key initiatives



Proactive and verified storytelling

Fact-based stories across multiple channels will counter misinformation and showcase the industry's leadership in sustainability and animal welfare, as well as red meat's role in a healthy diet.



Engaging with stakeholders and thought leaders

MLA will partner with educators, influencers and industry bodies to build understanding and trust of the red meat and livestock industry's role in global food security and sustainability.



Communicating the role of red meat in a healthy diet

Evidence-based campaigns will promote red meat's nutritional benefits, helping consumers and health professionals understand its role in a balanced diet.

International market development

MLA will target high-growth markets across Asia, the Middle East and other emerging regions while defending and growing our position in key markets like Japan, South Korea and North America. Messaging will align with global trends in health, wellness and ethical consumption.

To support this growth in value, MLA will strengthen partnerships with governments and industry to defend and improve trade access. This includes proactively managing risks, addressing trade disruptions and ensuring Australia's red meat remains a trusted and competitive choice around the world.

Key initiatives



Embedding 'Aussie' into the culture of growing markets

Investment in key high-growth regions like South East Asia, Greater China and the Middle East will build loyalty, inspire local consumers, and develop passionate ambassadors for Australian red meat and live exports.



Supply chain collaboration

MLA will develop marketing programs in collaboration with commercial partners, delivering shared wins for producers, brands and international customers.



Defending and growing Australia's hard-won position in developed markets

In markets like North America, Japan and South Korea, MLA will reinforce Australia's reputation for quality, trust and safety through targeted campaigns and product expansion.



Defending and improving economic market access

MLA will work with industry and government to expand trade access by tackling tariffs, quotas and trade disruptions, particularly in key markets like India, the European Union, the United States, and the Middle East.



Consumer-aligned messaging

Marketing will respond to premium consumer demands for healthy, ethical food, enhancing relevance in competitive global markets.



Improving technical market access

MLA will invest in reducing non-tariff trade barriers by supporting compliance with evolving food safety and regulatory standards in key markets so our exports remain competitive and compliant.



BOLD AMBITION

Investing in our industry's people

The future of Australia's red meat and livestock industry depends on a skilled, safe and resilient workforce. MLA is committed to developing the people in the industry through education, leadership development and workplace safety.

Australia's Workplace Health and Safety legislation sets strict standards. These obligations include managing risks, training staff, maintaining equipment and preparing for emergencies.

For livestock producers, compliance is especially challenging. The work often involves handling livestock, using heavy machinery, and working in remote, hazardous conditions with limited access to medical assistance. Overcoming these risks requires innovation and a strong commitment to safety.

These initiatives will help future-proof the red meat industry by strengthening leadership, fostering inclusion and creating a culture that supports safety and long-term success.

Key initiatives



Developing the workforce of the future

MLA will connect with students through the schools program and partner with education providers, industry and employers to create clear career pathways into the red meat and livestock industry.



Supporting a safe and vibrant workforce

MLA is working with industry and government to create workplaces that are safe, inclusive and appealing to the next generation. We're building a culture of wellbeing and career longevity so more people see a future in the red meat and livestock industry.



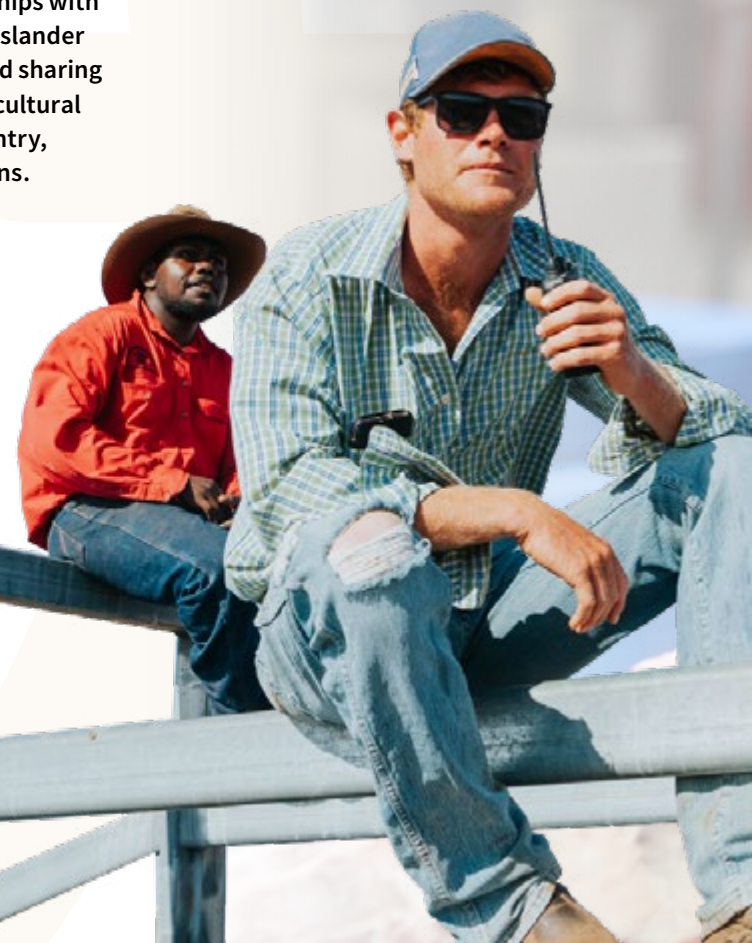
Enhancing industry leadership

MLA will support future leaders through training and leadership programs, PhD sponsorships, the Intercollegiate Meat Judging (ICMJ) initiative, our Red Meat Ambassadors and a network of co-innovation managers. These programs build the skills and vision needed to lead the industry forward.



Making meaningful reconciliation action

MLA's Reconciliation Action Plan aims to strengthen relationships with Aboriginal and Torres Strait Islander peoples. By collaborating and sharing knowledge, we can support cultural understanding, care for Country, and create lasting connections.







Strategic.
priorities



Optimise demand by expanding markets and creating and capturing value

The global red meat industry is changing rapidly. MLA's priority is to ensure Australian red meat remains the top choice for consumers at home and abroad. Through market insights, expanded demand and strong supply chain collaboration, MLA is focused on creating lasting value across the entire industry.

Understanding markets and driving insights

MLA's Insights team tracks consumer trends, global shifts and competitive pressures. This helps identify risks and opportunities, giving stakeholders the information they need to make better decisions.

A key focus is ensuring market signals flow across the supply chain. This helps producers, processors and exporters respond quickly and capture value from paddock to plate.

MLA is also upgrading its digital tools so businesses can access and apply real-time insights more easily. This will support better decision making and industry performance.

Future investments in R&D will target unmet and high-value opportunities, helping Australian red meat stay competitive and ready for the future.

Supporting and enhancing live exports

MLA is firmly committed to the live cattle export trade and will actively drive market demand, as well as strengthen supply chain capability. We will pursue new commercial opportunities while working to safeguard and expand access to key markets.

Live exports remain a vital part of northern and western supply chains and plays an essential role in global food security, particularly in markets like Indonesia, Vietnam, Malaysia, and the Middle East and North Africa.

Over the next five years, MLA and LiveCorp will co-invest in the Live Export Program (LEP). This R&D initiative will improve animal health, welfare and supply chain capability. It will also strengthen market access and promote animal welfare and trade sustainability. The LEP will help grow export opportunities, especially in Indonesia, and build long-term partnerships with key trading nations.

Enhancing market access and global trade stability

MLA is focused on removing trade barriers and ensuring a level playing field for Australian red meat.

MLA works with government and industry to reduce or eliminate trade restrictions in key markets.

MLA is also focused on reducing non-tariff trade barriers. These are often complex regulatory hurdles that restrict exports. MLA partners with organisations like the Australian Meat Industry Council (AMIC) to simplify complex regulations and ensure Australian exports meet evolving standards. As global trade becomes more unpredictable, we are helping the industry prepare and respond. Collaboration across the supply chain, will ensure Australia remains a trusted supplier of high-quality red meat and livestock.

Supporting market transition for WA sheep producers

The Australian Government has announced the phase-out of live sheep exports by sea by 1 May 2028. This decision presents challenges for exporters, producers and supply chain businesses, particularly in Western Australia.

MLA will work closely with WA stakeholders to support a sustainable future for the sheep industry. This includes:

- investing in new market opportunities for sheepmeat
- supporting supply chain diversification
- providing adoption and extension programs to guide producers through the transition.

These investments will be delivered in partnership with government and other Research and Development Corporations.

Optimise demand by expanding markets and creating and capturing value – strategic KPIs

Key initiatives	KPIs
Understanding markets and driving insight	<ul style="list-style-type: none"> ✓ We have continuously improved our market information and insights service to industry, delivering attributable benefits for our stakeholders, including improving satisfaction scores with livestock reporting and market information from 7.2 to 7.5/10 as measured by the annual MLA member survey.
Strengthening demand in the domestic market	<ul style="list-style-type: none"> ✓ Improve domestic consumers' preference for buying and eating Australian beef from 8.1 to 8.2/10 and lamb from 5.5 to 5.8/10. This will be measured by consumer sentiment, attitude surveys and tracking. ✓ Improve domestic consumers' endorsement that red meat is part of 'healthy meals'. Increase endorsement for Australian beef from 5.2 to 5.4/10 and for lamb from 4.0 to 4.2/10. This will be measured by consumer sentiment, attitude surveys and tracking.
Expanding Australia's global footprint	<ul style="list-style-type: none"> ✓ Increase global supply chain customers' preference for Australian beef and lamb compared to key competitors. Preference for Australian beef to exceed the FY24 benchmark of 7.4/10. Preference for Australian lamb to exceed the FY24 benchmark 7.7/10. Measured by MLA Global Trade Survey. ✓ Increase in international consumer preference for Australian beef and lamb compared to key competitors. Preference for Australian beef to exceed the FY24 benchmark of 8.1/10. Preference for Australian lamb to exceed the FY24 benchmark of 8.5/10. Measured by MLA Global Trade Survey.
Supporting and enhancing live exports	<ul style="list-style-type: none"> ✓ Demonstrate supply chain change and received economic benefit from live export activities that mitigate industry trade risk, improve ability to maintain market access and/or contribute to industry trade competitiveness. Evidenced by case studies.
Enhancing market access and global trade stability	<ul style="list-style-type: none"> ✓ Significant contribution to improving or maintaining preferential access to key markets and to a \$1b reduction in technical trade barriers. Measured from FY20 baseline of zero to align with <i>Red Meat 2030</i>.



Drive profitable, productive and sustainable growth

As global markets evolve and consumers expect more from their food, the red meat and livestock industry must prove its ability to deliver high-quality, sustainable products. This will require investment in technology, systems and people. Over the next five years, MLA will lead efforts to enhance the natural carbon cycle, improve animal wellbeing, accelerate genetic progress, strengthen supply chains and drive innovation. We will also focus on building a future-ready workforce through leadership development, safe and inclusive workplaces, and clear career pathways. These investments will help ensure long-term profitability, resilience and sustainability for the industry.

Investing in natural capital and land productivity

MLA is committed to production systems that improve land management, reduce emissions and support biodiversity across Australia's vast grazing landscapes.

We will promote integrated land management practices that promote positive economic and ecological outcomes.

A systems-based approach will help producers assess soil health, match pasture species to environments and optimise carrying capacity. Efforts will also target reproductive performance in the north and pasture utilisation in the south to boost overall herd and flock productivity.

MLA will also launch a National Feedbase Program to deliver research, tools and resources that improve feed efficiency and pasture use across diverse production systems. MLA has identified that the optimal use of the feedbase is a key factor that differentiates the

profitability of the top 20% of businesses and the remaining 80% of the industry.

To address this issue, an MLA adoption initiative will support practice change programs driving adoption of efficient pasture utilisation, delivering national benefit.

Strengthening animal wellbeing

Animal wellbeing is central to the integrity and success of Australia's red meat industry. MLA will invest in disease prevention, improved husbandry practices, accessible pain management, and stewardship of veterinary medicines, ensuring high welfare outcomes while maintaining industry efficiency and competitiveness.

We will also work closely with the feedlot sector to drive improvements in animal welfare, productivity and environmental performance. MLA research has shown that grain finishing not only improves production efficiency but also delivers emissions benefits at an industry level.

Our future priorities include:

- supporting the wider adoption of shade infrastructure
- promoting short lairage times to reduce animal stress
- investing in preventative health strategies, including vaccines and immunobiologicals to improve animal wellbeing and feedlot productivity.

Boosting biosecurity

Biosecurity is a critical safeguard for productivity, market access and Australia's disease-free status. MLA will continue to invest in research, preparedness planning and prevention programs to strengthen biosecurity across the supply chain.

These efforts will support producers, align with government-led initiatives, and ensure fast, coordinated responses to disease threats. A targeted gap analysis will guide future investment to maximise impact, whether it's controlling

invasive species, protecting livestock health, or preserving trade access.

MLA will also support the development of long-acting vaccines to reduce the impact of endemic and exotic diseases. These innovations will help maintain productivity and protect the integrity of Australia's red meat and livestock sector.

People driving productivity and performance

Building a productive industry starts with investing in people, systems and workplace safety.

MLA will expand leadership development programs, partner with education providers and industry experts to equip future leaders with the skills to drive progress.

We will also strengthen the national network of livestock advisors and extension specialists. Their expert support will help producers adopt best practice management and deliver better outcomes across the supply chain.

Delivering innovation and value

MLA is focused on turning innovation into impact – unlocking more value from each animal and every stage of production.

We will explore new ways to capture value from co-products like blood, bones, offal and skins. These materials can be transformed into high-value products for food, health and wellness markets.

Improved processing techniques like drying, hydrolysis and extrusion will support product development. At the same time, investment in sustainable packaging will help meet global expectations for environmental performance.

MLA will continue to support innovators developing breakthrough technologies, new business models and smarter supply chain solutions that increase demand and productivity.

MLA will enhance digital systems so that livestock data such as breed, genetics, raising claims and performance can flow securely and efficiently from farm to market. Our integrity systems will anchor this transformation, helping to not only build trust but make the industry more profitable

Accelerating adoption

Innovation only delivers value when it's adopted on the ground. Over the next five years, MLA will scale the roll-out of productivity, profitability, and sustainability initiatives by using smarter, data-driven delivery models.

MLA will also accelerate the adoption of advanced genetic services across cattle, sheep and goats. By combining genomics, data and breeding technologies, producers will make smarter decisions that unlock efficiency, sustainability and market value.

We recognise that adoption is not one-size-fits-all. It requires tailored support, local relevance and strong relationships. MLA will deliver practical tools, digital platforms and programs that reflect the diversity of Australia's production systems.

To fast-track uptake, we will work with early adopters, industry leaders, peak bodies and commercial partners. These partnerships will help identify barriers, test scalable solutions, create pilot sites and programs, and share success stories that inspire wider industry change.

Our approach will include:

- Co-designing solutions with producers to ensure relevance and usability.
- Expanding peer-to-peer learning through producer groups and demonstration sites.
- Delivering data-driven insights that help producers make confident, timely decisions.
- Training advisors and service providers who play a key role in guiding adoption on the ground.

By working closely with the supply chain, MLA will help ensure that proven innovations are not only accessible but actively applied where they make the most difference.

Harnessing the power of data and AI

Data, artificial intelligence (AI) and digital tools are opening new opportunities for growth, efficiency and insight. Over the next five years, MLA will lead a digital transformation across industry to improve traceability, transparency and decision making throughout the supply chain.

MLA will enhance digital systems so that livestock data such as breed, genetics, raising claims and performance can flow securely and efficiently from farm to market. Our integrity systems will anchor this transformation, helping to not only build trust but make the industry more profitable.

We will continue investing in secure, scalable platforms that protect privacy while making data useful and accessible. New ag-tech solutions will help producers manage both livestock and pasture more effectively, boosting productivity and supporting better environmental outcomes.

By using AI and predictive analytics, MLA will give producers and supply chain partners the tools to act faster, uncover insights and respond to changing conditions. Linking data across systems will improve performance,

support market access and strengthen Australia's global competitiveness.

We will actively seek out emerging science and technology to keep the industry at the forefront. All digital investments will follow national standards for governance, security and compliance. A clear data strategy will guide how we manage and share trusted information across the supply chain.

New services based on MLA and industry-wide data will offer producers personalised, real-time insights, helping them make smarter, faster business decisions.

Ensuring trust, market access and industry integrity

Australia's red meat and livestock industry is trusted around the world for its safety, quality and integrity. This trust is built on strong systems and our disease-free status, both of which MLA will continue to strengthen.

We will invest in the industry's core integrity programs:

- National Livestock Identification System (NLIS)
- Livestock Production Assurance (LPA)
- electronic National Vendor Declarations (eNVDs).

These systems provide full traceability, food safety and product assurance, reinforcing market confidence and maintaining Australia's competitive edge.

MLA will also expand the LPA program with voluntary modules linked to advanced traceability tools. These updates will improve data capture, verification and compliance, helping the industry meet future global standards.

By enhancing integrity systems, MLA will not only protect trade and reputation – it will also create new ways for producers and processors to stand out in a competitive global market.

A future built on growth, sustainability and innovation

The next five years will define the future of the Australian red meat and livestock industry. Through strategic investment, strong partnerships and a clear vision, MLA will help the industry stay resilient, globally competitive and ready for long-term success.

By placing sustainability, innovation and productivity at the heart of our strategy, we will ensure Australian red meat continues to lead globally – delivering high-value, responsibly-produced protein to consumers around the world.



Driving profitable, productive and sustainable growth – strategic KPIs

Key initiatives	KPIs
Investing in natural capital and land productivity	<ul style="list-style-type: none"> ✓ Establish a baseline and report on increased adoption of sustainability-related interventions and practice changes that drive productivity-led environmental sustainability impacts. ✓ Increase in supply chain satisfaction with the Beef and Sheep Sustainability Frameworks from 7.9 to 8.0/10. Measured by a qualitative survey of participating stakeholders. ✓ Measurable reduction in red meat industry net emissions and net emissions intensity from MLA investments. Measured from FY25 emission reduction baseline of 3.5 Mt CO₂e. Net emission intensity per kilo liveweight baselines will be developed and reported in FY26. ✓ Measurable reduction in the overall contribution of the red meat industry to net emissions reduction, as reported against 2005 emission baselines.
Strengthening animal wellbeing	<ul style="list-style-type: none"> ✓ Safe and effective vaccines, therapeutics and other control measures are developed and adopted, leading to measurable improvements in animal health and welfare. Actual and expected impact modelled across the animal wellbeing portfolio. ✓ Measures of animal welfare for live export, feedlot and extensive production systems implemented, with year-on-year increase in practice change. Collate existing and new data to develop baselines for each industry sector and measure year-on-year practice change.
Boosting biosecurity	<ul style="list-style-type: none"> ✓ Establish a baseline and report on improvements in global customers' confidence and trust in Australia's biosecurity and food safety systems and processes. Measured by global survey and biosecurity related case studies.
People driving productivity and performance	<ul style="list-style-type: none"> ✓ There has been an increase in the skills, capabilities and opportunities for those employed by, or providing services to, the red meat industry. Collate existing data sources on capability building activity delivered by MLA and MLA partners to create a FY25 baseline. Evidenced by case studies.



Key initiatives	KPIs
Driving innovation and value	<ul style="list-style-type: none"> ✓ Investments in low value 'fifth quarter' items deliver an additional annual sales value of \$750 million across the supply chain, with \$50 million in net value-adding benefit captured by the red meat industry. This is an increase from the FY25 baseline of \$300 million sales and \$1.75 million of value adding. ✓ Develop and deliver new value capture business models that include 15% of the sheep and 7% of sheep and cattle being processed annually.
Accelerating adoption	<ul style="list-style-type: none"> ✓ Deliver annual net benefit of adoption activities of \$120 million to red meat producers responsible for up to 200 million hectares, 12 million cattle, 16 million sheep and 1 million goats. This is an increase from the FY25 baseline of \$75.6 million impact on producers responsible for 199 million hectares, 6.1 million cattle, 7.7 million sheep and 114,000 goats.
Delivering multibreed evaluation and livestock credentials	<ul style="list-style-type: none"> ✓ 750,000 new animals receive breeding values generated through multibreed genetic evaluations, with a genetic gain of 10 index points.
Harnessing the power of data and AI	<ul style="list-style-type: none"> ✓ Increased adoption of production, animal wellbeing, genetic and sustainability feed forward and feedback data credentials that enable supply chain value creation. Develop and collate new and existing data to create baselines for feedback and feed forward systems. ✓ Increased usage of feedback platforms such as myFeedback that support decision making and improve on-farm management and business performance. Measured by numbers of producers using each platform, including a baseline of 3,000 myFeedback users.
Ensuring trust, market access and industry integrity	<ul style="list-style-type: none"> ✓ Maintain or increase on-farm and supply chain compliance to industry quality assurance and integrity systems. FY25 MSA baseline of 94.5% for beef and 99.4% for sheep. Reduction in proportion of non-conformances raised across LPA random audits from a FY25 baseline of 104%*.

*Benchmark is calculated as being 'total non-conformances raised across LPA random audits, as a % of total LPA random audits conducted each year'.





Strengthen the industry's foundation

To deliver on its vision, MLA must be equipped with the right people, tools and strategies. A strong internal foundation built on efficiency, adaptability and clear communication will ensure MLA continues to deliver value to the red meat and livestock industry.

Stronger communication, stronger industry

MLA's communications are vital to industry connection and collaboration. They help producers access research, best practices and market trends that drive better decisions.

Our producer-focused communications will be practical, timely and outcome-driven, giving producers the right information at the right time and in the right format to improve productivity and profitability.

A key priority is building public trust in the Australian red meat and livestock industry. We will share clear, consistent messages that highlight the industry's commitment to quality, sustainability and its role in local communities.

Consumers want transparency, and MLA will meet that demand with proactive, engaging communication that builds confidence in Australia's red meat and livestock industry.

An agile, high-performing organisation

To stay responsive in a fast-changing world, MLA must operate as an agile, high-performing organisation. This begins with the right people, skills, and systems to deliver MLA's five-year *Strategic Plan 2030*. Our funding decisions will be evidence-based, guided by foresight committees that identify future risks and opportunities.

To strengthen commercial capability, MLA will adopt global-standard commercialisation models and provide staff with the training to use them effectively. A new investment framework will be introduced to boost returns and improve value for both industry and government.

This approach will ensure MLA remains a leader in research, marketing, and service delivery.

Built for the future

By strengthening its communications and corporate functions, MLA is becoming more agile, effective and future-ready. Better planning, forecasting, systems and engagement will ensure MLA remains a trusted voice for Australia's red meat and livestock industry – today and into the future.



Strengthening the industry's foundation – strategic KPIs

Key initiatives	KPIs
Stronger communication, stronger industry	<ul style="list-style-type: none"> ✓ Improve member satisfaction with MLA communication products and services from 6.8 to 7.2/10, as measured by the MLA member survey. ✓ Increase percentage of Australians surveyed who agree/strongly agree with the statement 'the Australian cattle and sheep industry is committed to sustainable production' from 51% to 53%. ✓ Increase the percentage of Australians surveyed who agree/strongly agree with the statement 'Australian cattle and lamb are farmed and raised in a humane manner' from 55% to 56%.
An agile, high-performing organisation	<ul style="list-style-type: none"> ✓ Improve MLA staff satisfaction with MLA processes, policies, tools and technologies from 65% to 66%, measured by annual staff engagement survey. External satisfaction scores to be developed in FY26.

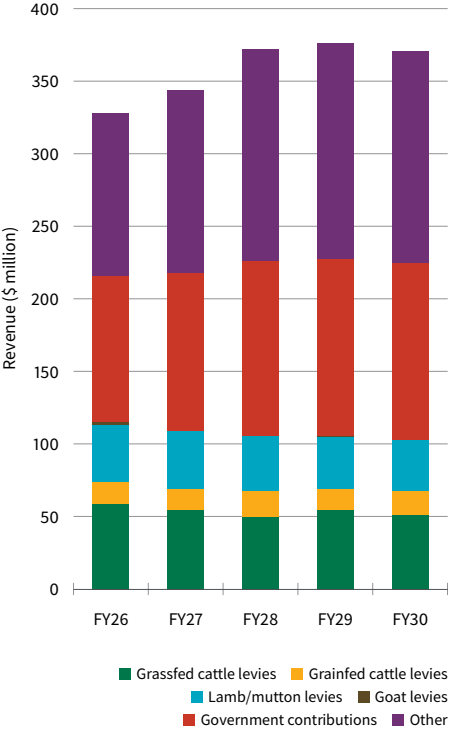


Financials

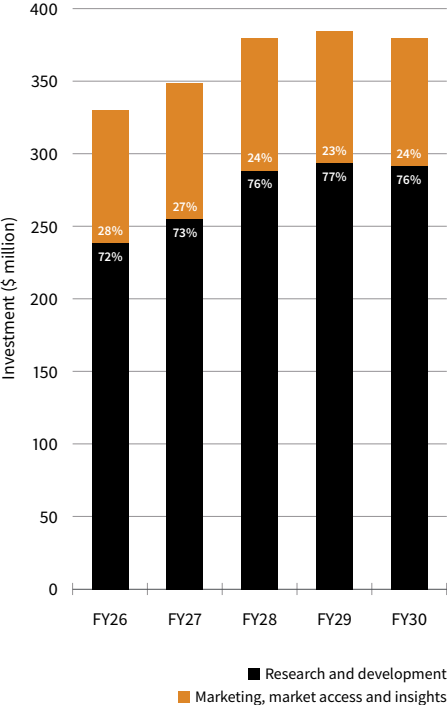
Revenue and expenditure summary FY2026–30 (\$ million)

Program	FY26	FY27	FY28	FY29	FY30	Total
Grassfed cattle levies	59.0	54.8	53.5	53.2	52.2	272.7
Grainfed cattle levies	14.2	14.7	15.2	15.7	16.3	76.1
Lamb/mutton levies	40.9	39.0	37.0	36.2	34.8	187.9
Goat levies	0.6	0.6	0.6	0.6	0.6	3.0
Total producer levies	114.7	109.1	106.3	105.7	103.9	539.7
Government contributions	102.3	108.9	120.8	122.9	121.1	576.0
Other	111.8	124.7	145.2	148.6	146.7	676.9
Total revenue	328.8	342.7	372.3	377.2	371.7	1,792.6
Marketing, market access and insights	91.7	92.0	90.7	89.2	89.0	452.7
Research and development	236.9	254.8	287.1	293.0	289.3	1,361.2
Total expenditure	328.6	346.8	377.8	382.2	378.3	1,813.9

Total revenue FY2026–30



Total investment FY2026–30







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