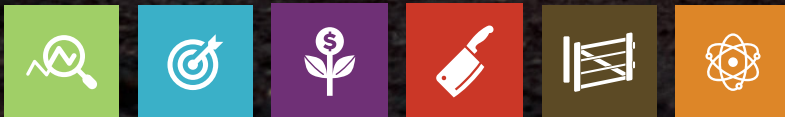


Annual Investment Plan

2024-25



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

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Introduction

This Annual Investment Plan (AIP) has been developed to inform levy payers, peak industry councils, the Australian Government and the wider industry about MLA’s planned work program in 2024–25.

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

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

MLA has taken its strategic direction from 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 2024–25. 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 carcase	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

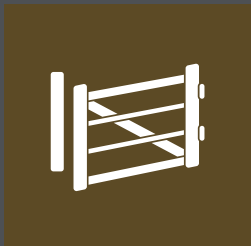
MLA will focus on balancing the current 'known' challenges and opportunities and anticipating the future issues industry will face. MLA needs to foster a culture that looks both to the future and to adjacent industries to inform today's decision making.

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

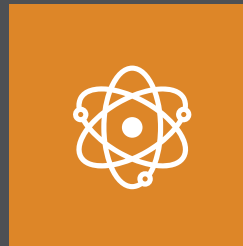
MLA will focus on continuing to invest in the essential services which underpin the competitiveness of our industry, specifically our integrity systems, market access, nutrition, and domestic and international marketing and promotion activities.

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 2024–25, MLA plans to invest \$299.9 million in research, development and marketing activities across 16 program areas.

Table 2: Pillar		Total \$299.9 million*
	Our people	32.0
	Our customers, consumers and community	38.7
	Our livestock	78.9
	Our environment	41.5
	Our markets	54.1
	Our systems	34.4
	Essential services	20.3

























Table 3: Funding source		Total \$299.9 million*
	Sheep levies	39.0
	Grainfed cattle levies	15.8
	Grassfed cattle levies	55.6
	Goat levies	0.7
	Government	93.7
	Australian Meat Processor Corporation	26.5
	LiveCorp	1.1
	External	67.6

Table 4: Program		Total \$299.9 million*
	Animal wellbeing	11.9
	Domestic markets	25.2
	International markets	43.7
	Eating quality	3.8
	Environmental sustainability	27.9
	Feedlot	7.1
	Integrity systems	33.0
	Objective measurement	8.2
	Producer adoption	23.8
	Product and packaging innovation	3.2
	Value chain information and efficiency	6.9
	Productivity (off-farm)	22.9
	Productivity (on-farm)	31.5
	Capability building	21.0
	Communication	9.4
	Corporate services	20.3

Tables 2–4: Projected 2024–25 investment by pillar, funding source and program (\$ millions)

*Total may not add up due to rounding

Funding by industry priority

Tables 5–11: Red Meat 2030 objectives, projected 2024–25 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	1.3	 Government	12.3	 External	8.4
 Grassfed cattle levies	4.0	 AMPC	2.2	 Total \$32.0 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	9.6	 Goat levies	0.1	 LiveCorp	0
 Grainfed cattle levies	3.8	 Government	5.0	 External	3.7
 Grassfed cattle levies	14.7	 AMPC	1.8	 Total \$38.7 million*	

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










 Sheep levies	4.5	 Goat levies	0.2	 LiveCorp	0.3
 Grainfed cattle levies	2.4	 Government	35.0	 External	23.0
 Grassfed cattle levies	4.1	 AMPC	9.5	 Total \$78.9 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	1.8	 Goat levies	0	 LiveCorp	0
 Grainfed cattle levies	1.2	 Government	19.3	 External	13.5
 Grassfed cattle levies	1.9	 AMPC	3.8	 Total \$41.5 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	11.1	 Goat levies	0.1	 LiveCorp	0.6
 Grainfed cattle levies	3.5	 Government	8.3	 External	4.1
 Grassfed cattle levies	19.8	 AMPC	6.7	 Total \$54.1 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	3.5	 Goat levies	0.1	 LiveCorp	0.2
 Grainfed cattle levies	1.5	 Government	10.6	 External	11.7
 Grassfed cattle levies	4.0	 AMPC	2.6	 Total \$34.4 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	4.8	 Goat levies	0.1	 LiveCorp	0
 Grainfed cattle levies	2.0	 Government	3.2	 External	3.2
 Grassfed cattle levies	7.1	 AMPC	0	 Total \$20.3 million*	

Operating environment – opportunities and challenges

Following three years of favourable weather conditions between 2020–2022, seasonal conditions underwent a shift in 2023 as Australia entered an El Niño event. Seasonal conditions in the beginning of 2024 have been varied depending on geography. Northern and eastern Australia have experienced a wetter than average start to the year, while Western Australia and Tasmania have received little rainfall. Given the normalisation of weather in 2024, the herd and flock rebuilds are expected to stabilise.

The national herd and flock achieved 10 and 15-year highs respectively in 2023. The increase in livestock numbers helped boost lamb, mutton and beef production, but also resulted in softer livestock prices.

Over the next three years the flock and herd will shrink as slaughter increases. Encouragingly, the increase in slaughter of both cattle and sheep will lead to record Australian meat production.

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.

Entry into force of the Australia-United Kingdom Free Trade Agreement for example, has provided industry with the opportunity to secure immediate new access to a high value export market via liberalisation of a previously highly restricted beef, sheepmeat and goatmeat import regime.

Further trade reform is currently being pursued via partnering the Australian Government in negotiations with the European Union, India 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 helping 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 remain above historical averages.

However, all carcase weights have dropped from the records achieved in 2022.

The slight drop in carcase weights is driven by lower livestock prices, increased slaughter, especially of grassfed and female animals, and less favourable seasonal conditions.

Despite the slight carcase weight drops in 2024, carcase weights will remain historically high due to investments by industry in genetics and improved management strategies.

Food security and traceability

Food security and sustainable food production continues to be rising in importance as social awareness of global food scarcity becomes a focus. The need to develop sustainable food support networks and to increase expansion into traditionally challenging markets requires the recognition for investment into agricultural productivity, infrastructure, robust social security and market expansion. This rise in importance provides an opportunity for innovative research into ambient supply chains for increased market access to remote and isolated communities or markets with fragmented cold chains.

Strengthening communication of Australian red meat’s benefits to customers and consumers through verified country of origin, provenance and nutrition claims, ensures Australia’s robust red meat integrity system remains a clean, quality protein source.

Advancements in positioning value added meats and collagen powders as a food and nutraceutical ingredient further highlights the need for traceability and origins back to Australia.

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 carcase 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 is a globally-recognised target, and channelled direct and indirect investment into the development and adoption of win-win technologies. The initiative has steered the development of 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.

The red meat industry is making huge headway in reducing net greenhouse gas emissions, with the 2021 figures showing a 78% reduction since the 2005 baseline¹ (reductions were calculated at 65% in 2020). The results highlight the important role the red meat and livestock industry plays in the management of our

landscapes – and as a result, the nation's capacity to manage emissions. Since 2017, MLA has co-invested \$152 million in research, development and extension to support net emissions reduction of the red meat supply chain.

Challenges

Labour shortages and supply chain disruptions

Labour remains to be an issue for the agriculture sector, especially for the on-farm sector. While labour remains an issue for the processing sector, 2023 saw record lamb slaughter (10% or 2 million above the previous record set in 2016). This would indicate that the labour issues that affected the processing sector in 2022 are beginning to ease.

Cost-of-living affecting consumption

Rising cost-of-living pressures caused by high inflation rates both domestically and across many global markets are likely to negatively affect consumption numbers across most foodservice sectors in the year ahead. The impact of this will see an increase in the percentage of 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. Seeking

value will become more prominent for most consumers. The value equation is not only a function of price alone, but also, its relationship with perceived quality.

Foodservice sectors are reporting evidence that consumers are focusing on eating out less, and cutting back on entertainment and food delivery services due to cost-of-living pressures. These behaviour shifts are not isolated to the foodservice industry, with a reduction in disposable income affecting consumption across associated sectors such as travel, insurance, subscriptions, and memberships. This will have a collective secondary impact on out-of-home food consumption, with frequency across all foodservice channels showing signs of softening in 2024.

Live export

High supply of export-ready animals and low livestock prices have made the export of Australian livestock attractive in import markets.

Cattle

Obtaining live export permits for Indonesia presented difficulties in early 2024, however, live export of cattle is expected to increase throughout 2024 and 2025.

continued next page

Operating environment – opportunities and challenges

continued

Sheep

In May 2024, the Australian government announced that live export of sheep by sea is being phased out by May 2028. This will have a significant impact on the WA sheep industry in particular. MLA is continuing to support the sheep live export trade until legislation is passed in the Australian Parliament and also during proposed transitional arrangements. MLA will have a role to play to assist the industry with:

- diversification and maximising supply chain opportunities for sheepmeat
- development of new markets for sheepmeat
- adoption and extension programs to assist producers with decision making.

Exotic animal diseases in Indonesia

Recent cases of foot-and-mouth disease (FMD) and lumpy skin disease (LSD) were confirmed in Indonesia and in July 2022, FMD status changed from outbreak to situationally endemic.

No FMD cases were reported by government in Bali, despite over 600,000 reported cases either side of the island. The vaccination program continues, with 26 million doses given to livestock.

Over 75,000 LSD cases were officially

reported across 18 provinces. The Australian government donated 500,000 doses in early January 2024. The Indonesian government is unlikely to have the budget for further LSD vaccines in 2024.

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 Australia's most important agricultural trading partners and continues to be our largest market for red meat and livestock exports combined, valued at just over A\$3.9 billion in 2023. Australia-China bilateral relations were notably strained

since 2020, with China applying trade barriers on several Australian agricultural products, including red meat. However, 2024 has seen a continuation of easing tensions in the bilateral relationship, following the resumption of high-level ministerial meetings from 2023. Managing the trade relationship with China to minimise potential fallout when any tensions arise will continue to be a focus for Australia's red meat and livestock industry. MLA staff play an active role alongside government and industry stakeholders to build positive and resilient relations that can be leveraged to foster dialogue during challenging times.

Input costs

Input prices remain high due to logistical issues caused by the Middle East, the low Australian dollar, and relatively high interest rates. High input costs, and lower livestock prices could put pressure on producer margins, which will encourage better productivity and efficiency.

Environment

The CN30 target is an ambitious challenge, as well as an opportunity (see 'Sustainability'). The target was set by the red meat and livestock industry 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.

There is evidence that over time, consumer perceptions of the Australian red meat industry will become increasingly positive if the industry were to reduce its greenhouse gas emissions to net zero by 2030. 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.

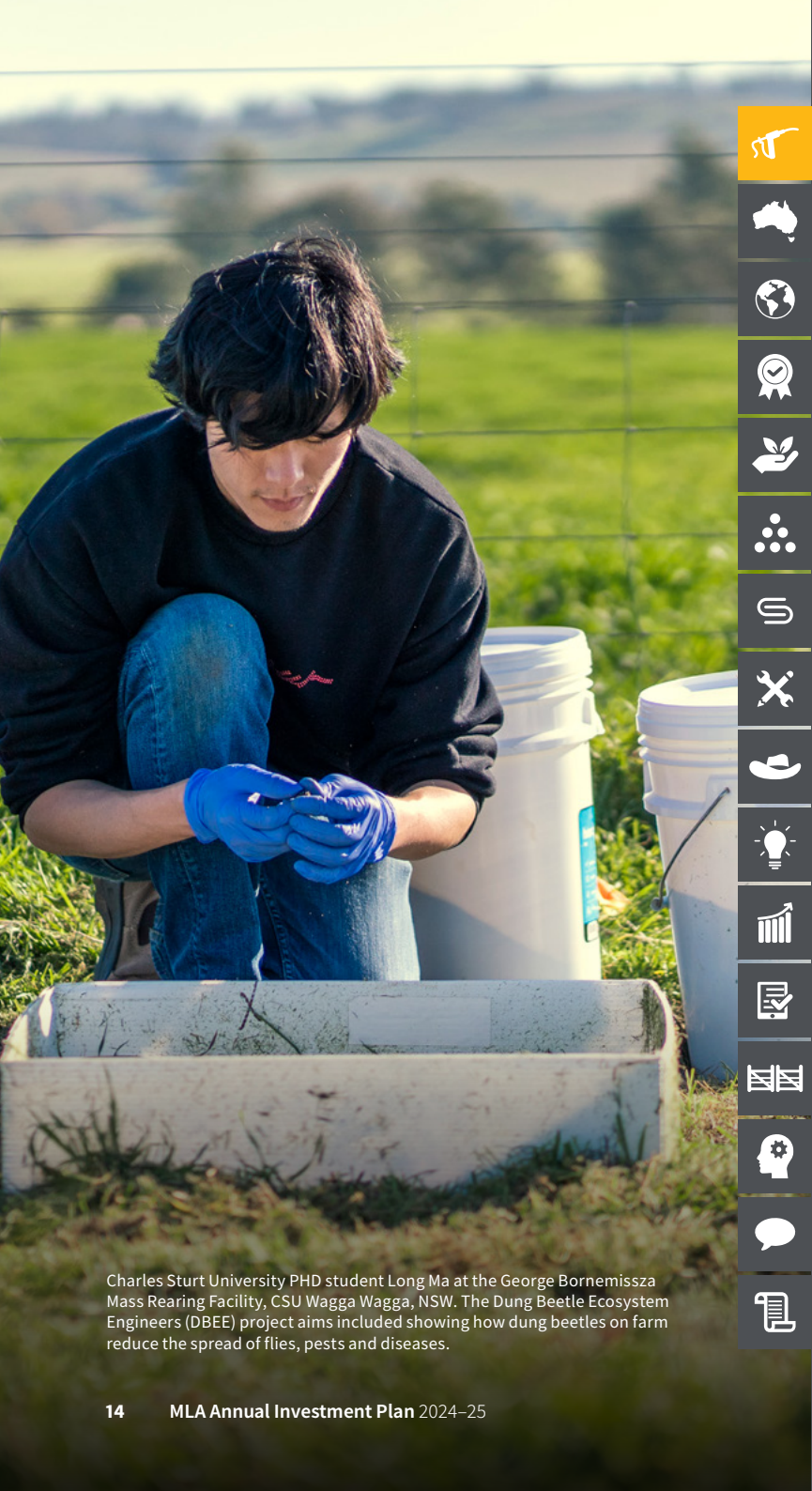
Increasing domestic and export market focus on reducing plastic waste is challenging sectors like the meat industry to develop packaging sustainability targets. MLA is actively working with meat processors and brand owners to develop strategies as part of the Australian Packaging Covenant.

1. CSIRO. *B.CCH.2124 - 2021–2023 Red meat greenhouse gas emissions*. Commissioned by Meat & Livestock Australia, 2024.

Programs

 Animal wellbeing14	 Producer adoption 38
 Domestic market16	 Product and packaging innovation41
 International markets20	 Value chain information and efficiency 43
 Eating quality25	 Productivity (off-farm) 45
 Environmental sustainability 27	 Productivity (on-farm) 47
 Feedlot30	 Capability building 53
 Integrity systems33	 Communication.....56
 Objective measurement36	 Corporate services60





Program

Animal wellbeing

MLA's investment in animal wellbeing research, development and adoption (RD&A) 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



Charles Sturt University PHD student Long Ma at the George Bornemissza Mass Rearing Facility, CSU Wagga Wagga, NSW. The Dung Beetle Ecosystem Engineers (DBEE) project aims included showing how dung beetles on farm reduce the spread of flies, pests and diseases.

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, sustained release formulations) ■ a new and targeted approach to improve control of the cattle tick and buffalo fly ■ use of the Sterile Insect Technique approach to target eradication of blowflies on Kangaroo Island ■ further investment in dung beetles, focusing on the capacity of dung beetles to reduce parasite burdens on farms as well as introduce more northern adapted species to areas without dung beetles ■ 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. These include 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>Program investments include the integration of effective producer on-farm focused extension and adoption of project outcomes, as well as the continuous monitoring and evaluation of on-farm benefits.</p>

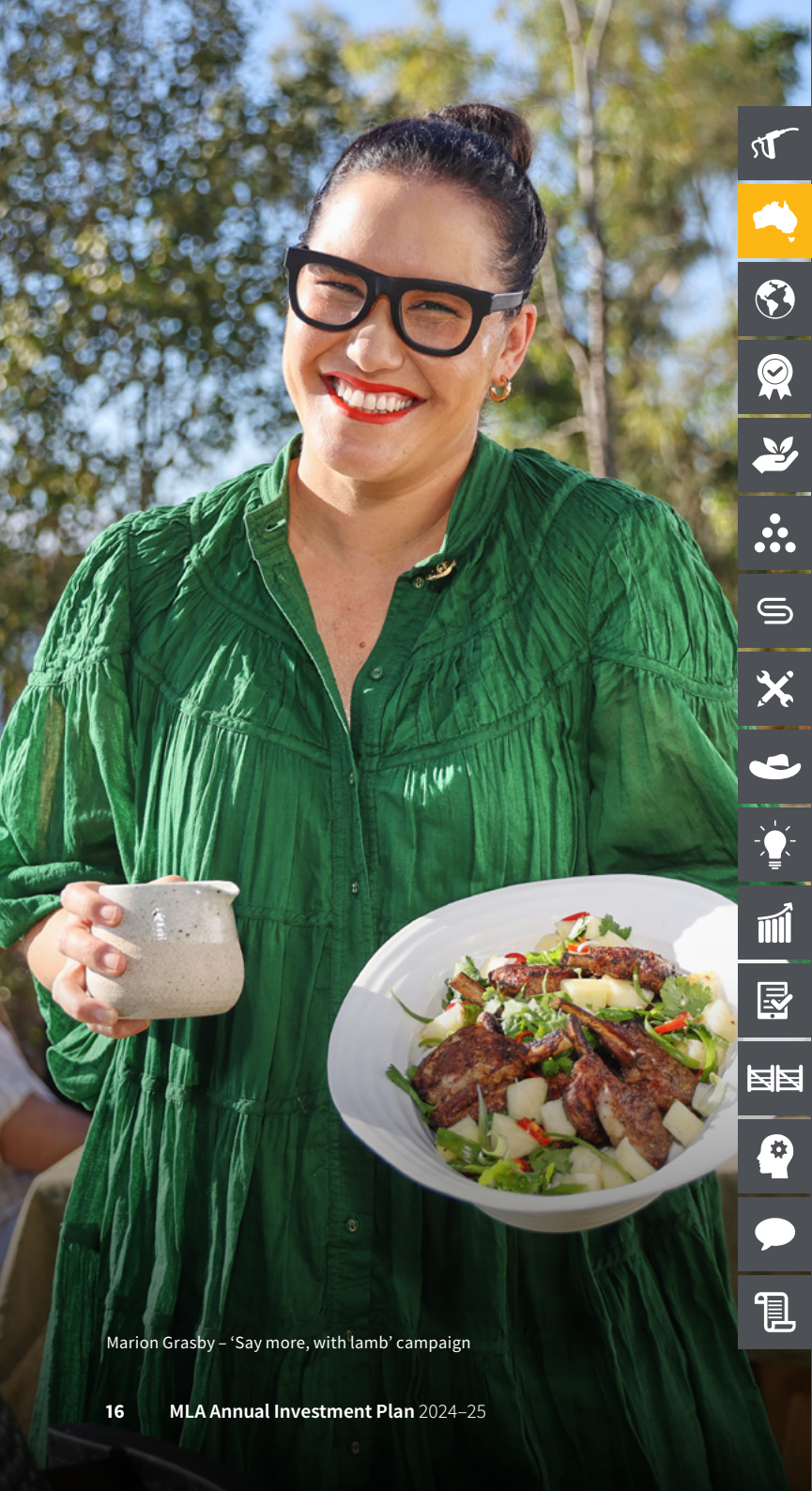
Key performance indicators in 2024–25

- A 50% reduction demonstrated in flystrike incidence on Kangaroo Island after island-wide release of sterile blowflies.**
- mRNA vaccine constructs for lumpy skin disease and bovine viral diarrhoea virus developed and full efficacy and testing completed.**
- A 5% reduction in Trichomoniasis prevalence across three northern pastoral enterprises.**
- Three northern properties complete novel wound treatment proof of concept studies.**

Table 12: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Animal wellbeing	-	-	65	-	392	-	92	-	-	-	-	-	-	-	4,840	5,389	1,167	10,778	1,167	11,945
Total*	-	-	65	-	392	-	92	-	-	-	-	-	-	-	4,840	5,389	1,167	10,778	1,167	11,945



Marion Grasby – ‘Say more, with lamb’ campaign



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, reporting these to industry and transforming data 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 captures and produces timely, accurate and independent Australian livestock price data. Initiatives include:</p> <ul style="list-style-type: none"> ■ collection of key sheep and cattle data points at saleyards and reporting with pricing data across major saleyards to cover throughput in line with the saleyard strategy ■ reporting livestock pricing data across all selling methods (including on-line) ■ transforming current process through improving the market transparency of livestock (cattle, sheep and goat) by providing a greater throughput of 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, interprets and transforms data and signals into insights from the end of the supply chain, focusing on customers, consumers and those who purchase red meat (shoppers). Initiatives include:</p> <ul style="list-style-type: none"> ■ channel insights: retail and foodservice ■ consumer insights: consumption behaviour, shopper insights and consumer tracking ■ collaboration: cross-functional collaboration across MLA for all domestic market research projects.

Key performance indicators in 2024–25

- 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 (e.g. *State of the Industry report, Beef projections, Sheep projections*) by 5% year-on-year.**
- 3. Revise market indicators to better represent the trading environment – including implementing two new indicators.**

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 monitors, generates, connects and publishes compelling evidence to inform the public health discussion about Australian red meat consumption and healthy eating and alignment with <i>Australian Dietary Guidelines</i>.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ publication of research reports on the MLA Healthy Meals website, providing key messages and underpinning evidence on the nutrition and health benefits of Australian red meat consumption and healthy eating ■ monitoring and consultation with key stakeholders to identify adoption pathways for promoting Australian red meat consumption and healthy eating in line with <i>Australian Dietary Guidelines</i>.
Nutrition communications	<p>The ‘nutrition communications’ product group provides health and nutrition 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 practical resources on red meat and healthy eating and nutrition information about Australian red meat on the MLA Healthy Meals website ■ health professional campaigns to promote uptake of consumers material by GPs and dietitians ■ effective integration of nutrition messaging through nutrition influencer channels, MLA marketing and communications programs that target consumers in retail and consumer media.

Key performance indicators in 2024–25

- 1. Maintain the percentage of GPs and dietitians who claim recommending red meat three to four times a week at $\geq 45\%$.**
- 2. Maintain 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 acting as thought leaders by collaborating with retailers and industry on insight-led growth initiatives to deliver profitable growth of their red meat businesses developing and implementing bespoke key foodservice and retail customer plans supporting the butcher channel to overindex on red meat through knowledge, resources and shopper experience improvement setting appropriate targets for promotional activities and conducting 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 current and emerging domestic consumers developing insight led campaigns that recruit and retain the future red meat consumer, such as younger and culturally diverse demographics leveraging the strong emotional bonds consumers have with beef to continue to ensure that they perceive beef as a superior protein to competitors through the promotion of beef’s quality, ease and versatility, as well as its taste and health credentials ensuring beef is top of mind in mid-week meal decision making with consumers by disrupting with ‘always on’ media and messaging creating top of mind brand awareness for lamb and its attributes at key occasions through the year through the iconic Summer Lamb campaign and targeted activity throughout the year 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 2024–25

- Maintain main grocery buyer endorsement of the statement ‘willing to pay more for beef/lamb’ to 29% (beef) and 27% (lamb).**
- Customer development plans in place with all key retail and foodservice customers, with at least two case studies completed that demonstrate impact from development initiatives.**
- Achieve 10% increase in usage of the Rare Medium foodservice hub content on previous year.**
- Maintain mean number of serves per week at 1.8 for beef and at 0.8 for lamb.**

Table 13: Projected 2024–25 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	AMPCR	AMPCCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Market knowledge (domestic)	13	9	33	43	339	1,115	342	1,668	159	392	264	855	2	16	-	1,152	-	2,303	4,100	6,403
Nutrition	3	2	9	7	93	149	93	260	43	62	72	211	1	4	-	315	-	629	695	1,324
Marketing and promotion (domestic)	-	21	-	173	-	6,645	-	7,479	-	1,773	-	1,412	-	-	-	-	-	-	17,503	17,503
Total*	16	31	42	223	431	7,910	435	9,407	202	2,227	336	2,479	3	20	-	1,466	-	2,932	22,297	25,230

Celebrity Chef Tarek Ibrahim showcased the use of secondary cuts (D-rump, oyster blade, skirt and flank) at an Aussie Beef Mates 'raise the steakns' beef immersion. The MENA team hosted 16 chefs and procurement managers in collaboration with Trade and Investment Queensland (TIQ).



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/maintain existing favourable access conditions
- improve access in high value markets via favourably positioning the sector in trade negotiations
- alleviate technical trade barriers.

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 and providing a strategic response ■ prioritising reform initiatives in conjunction with Australian Meat Industry Council (AMIC) and government to avoid/alleviate/reduce non-tariff barriers to trade.

Key performance indicators in 2024–25

1. Industry positions/submissions prepared by MLA on priority trade reform issues 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 2024–25.

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.

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 macro trends ■ monitoring market and channel trends ■ 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 ■ updating <i>Market Factbooks</i> and <i>Market Snapshots</i> across key export markets, 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 red meat exporter tools via the Global Insights online tool in the Aussie Meat Trade Hub portal ■ Annual <i>Global Beef/Sheep industry</i> and trade reports (including competitor analysis) and annual <i>Goat snapshot</i> ■ developing MLA's global market strategic portfolio model.

Key performance indicators in 2024–25

1. Increase utilisation of the Global Insights online tool by 5% 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. Develop and roll out the *Economic and Global Factbooks* to complement individual market factbooks and provide context to stakeholders.

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.

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, impactful and locally relevant communications to targeted consumer segments (both media 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 supply/value chain projects with commercial partners to help extend the penetration and breadth of Australian red meat globally.

Key performance indicators in 2024–25

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.

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.

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>

Key performance indicators in 2024–25

1. Stakeholder satisfaction demonstrated for MLA’s support in resolving the skin lesion market access issue for northern Australian cattle destined for Indonesian live cattle trade.
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.

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 ■ 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 key projects such as; interpreting animal welfare, stockpersons course review, VR stunning and lifecycle carbon assessment ■ communicating research, development and adoption outcomes and program performance to stakeholders ■ 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.

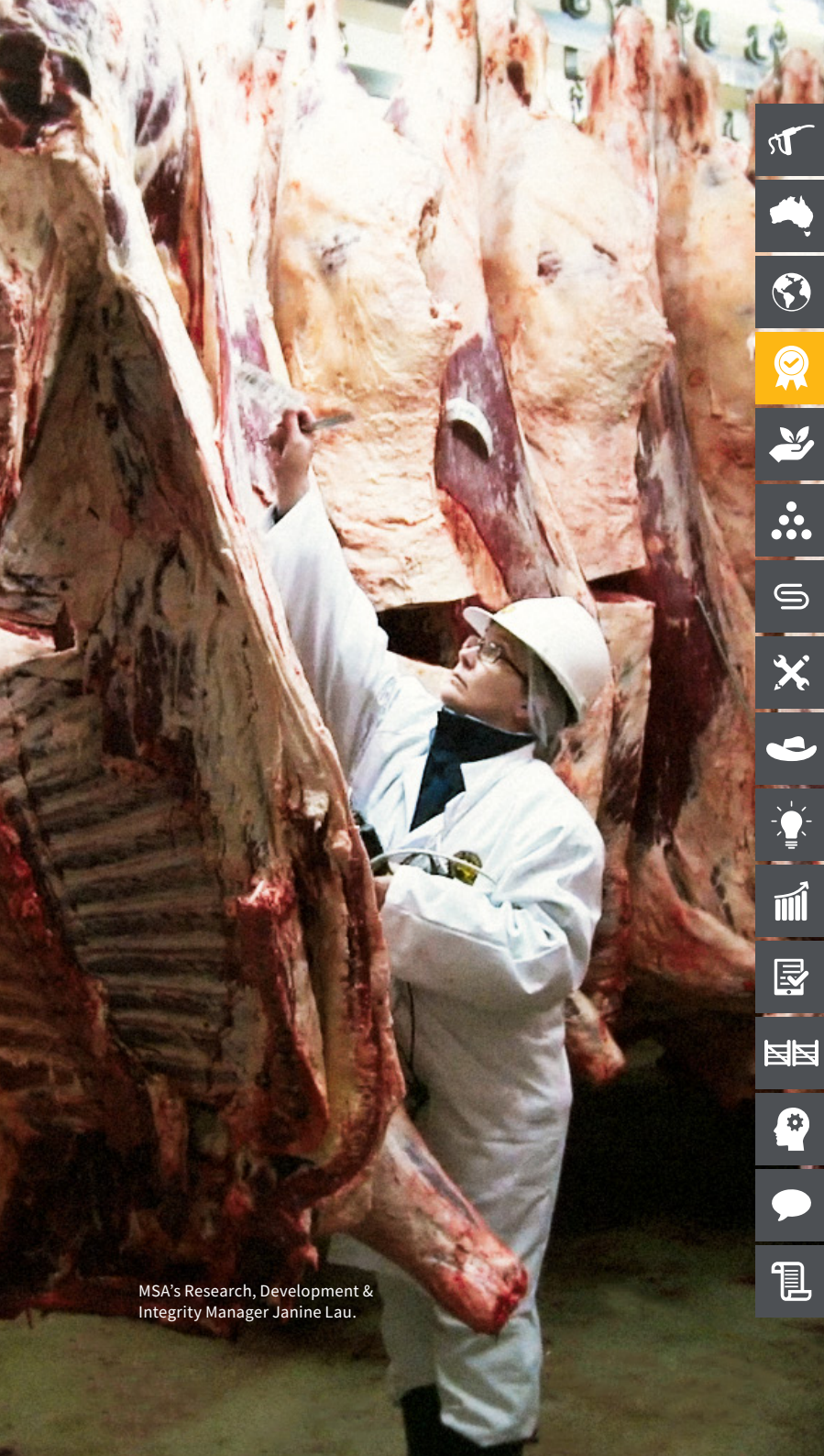
Key performance indicators in 2024-25

- 1. Report on the sustainability performance and benefits of the live export trade.**
- 2. Develop a system to assess the welfare of individual and/or groups of animals.**
- 3. Industry stakeholders utilise outcomes of livestock export RD&E projects to make improvements in animal welfare and productivity.**

Table 14: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Market access	1	6	2	28	24	565	24	983	11	233	19	799	0	15	-	82	-	165	2,628	2,793
Market knowledge (international)	-	5	-	25	19	905	82	1,092	4	253	-	-	-	-	-	104	-	209	2,279	2,488
Marketing and promotion (international)	-	90	-	315	-	7,674	-	18,968	-	3,086	-	426	-	-	-	-	1,400	-	31,959	31,959
Livestock export market activities	-	4	-	172	-	796	-	1,304	-	-	-	-	-	500	-	-	207	-	2,983	2,983
Livestock export (research and development)	-	-	29	-	288	-	233	-	-	-	-	-	550	-	588	1,688	101	3,376	101	3,477
Total'	1	104	32	539	331	9,940	339	22,346	15	3,573	19	1,225	550	515	588	1,875	1,708	3,750	39,951	43,700



MSA's Research, Development & Integrity Manager Janine Lau.



Program

Eating quality

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

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

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

Sub-programs

- Eating quality

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



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.

This now includes additional animal disease and defect information on carcasses via myFeedback, enabling even greater insight and value to be captured through the program.

Product group	Core activities
MSA standards and systems	<p>Initiatives within the ‘MSA standards and systems’ product group include:</p> <ul style="list-style-type: none"> ensuring robust MSA Standards and program integrity is maintained by industry providing and developing systems, namely myFeedback and myMSA, to capture supply chain data and provide feedback that can inform decisions on how to extract the greatest value from MSA. For the first time, myFeedback will include additional animal disease and defect information on carcasses and opportunities to implement data efficiencies across the supply chain.
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 more of 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 enabling industry to extract value through eating quality principles for sheepmeat, including the commercialisation of the MSA cuts-based model.
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 2024–25

1. Price differentials for MSA-compliant cattle demonstrate an annual return to farm gate of more than \$220 million.
2. 57% of the national adult cattle slaughter is MSA graded.
3. At least two sheepmeat supply chains have implemented the MSA Sheepmeat model (>30% of MSA lamb supply).

Table 15: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Eating quality	-	-	31	-	315	-	513	-	272	-	-	-	-	-	613	1,745	303	3,489	303	3,792
Total*	-	-	31	-	315	-	513	-	272	-	-	-	-	-	613	1,745	303	3,489	303	3,792



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 (on-farm)

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



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
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"> › 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 › investment in ‘blue sky’ strategic research that may reduce methane emissions. This might include vaccines, genetically modified forages, nanotechnology, inoculants and microdevices. ■ carbon storage products: <ul style="list-style-type: none"> › adoption materials (such as Carbon EDGE modules) covering use of trees and pastures on-farm to increase carbon stored in the landscape › generation of data underpinning the response of soil carbon to various grazing management practices › 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"> › development of resources including weather/climate forecasting tools and content for extension materials › extension related on-farm adaptation practice change via the adoption program. ■ 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). ■ integrated management systems: <ul style="list-style-type: none"> › supporting development of government endorsed sustainability data standards and associated databases › enabling producer supply chain sustainability data sharing to capture value.
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.

Key performance indicators in 2024–25

1. **At least one methane reducing feed additive delivery mechanism being trialled in a commercial grazing system.**
2. **6,300 methane and 2,000 direct feed intake records captured on reference animals and used to inform Sheep Genetics, BREEDPLAN or other genetic indexes.**
3. **At least 350 producers achieve tier 1 of the Environmental Credentials assessment platform.**

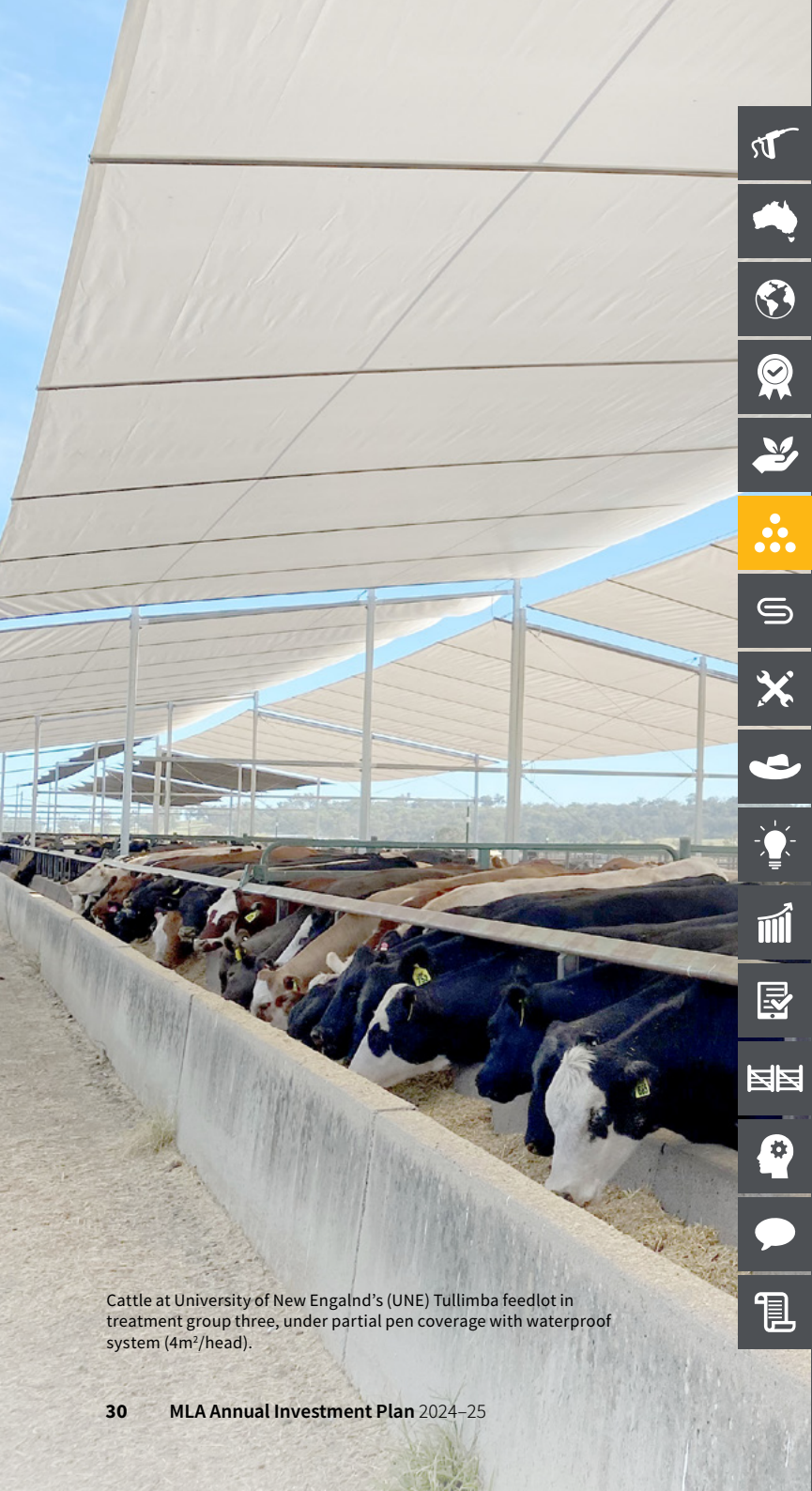
Product group	Core activities
Feedbase sustainability	<p>Initiatives within the ‘feedbase sustainability’ product group include:</p> <ul style="list-style-type: none"> improving accuracy and efficiency of monitoring and managing soil health and land condition assessing impacts of extreme events on soil health understanding and fixing constraints to soil productivity and land condition such as acidity, soil erosion, and soil nutrient decline.
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.

Product group	Core activities
Sheep productivity sustainability	<p>Initiatives within the ‘sheep productivity sustainability’ product group include:</p> <ul style="list-style-type: none"> identifying animal responses to environmental stressors (heat and cold) and the impact on reproductive performance outcomes identifying key adaptation strategies for sheep producers in different agro-ecological zones identifying novel feed options to optimise year-round supply of feed.
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.

Table 16: Projected 2024–25 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 2024–25
Sustainability (off-farm)	-	-	-	-	-	-	-	-	-	-	3,077	-	-	-	-	3,077	-	6,154	-	6,154
Sustainability (on-farm)	22	-	39	-	447	-	439	-	191	-	-	-	-	-	9,378	10,516	675	21,033	675	21,708
Total*	22	-	39	-	447	-	439	-	191	-	3,077	-	-	-	9,378	13,593	675	27,186	675	27,861



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 grainfed beef supply chain.

Sub-programs

- Feedlot productivity

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Cattle at University of New England's (UNE) Tullimba feedlot in treatment group three, under partial pen coverage with waterproof system (4m²/head).

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, immunostimulants and probiotics 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 2024–25

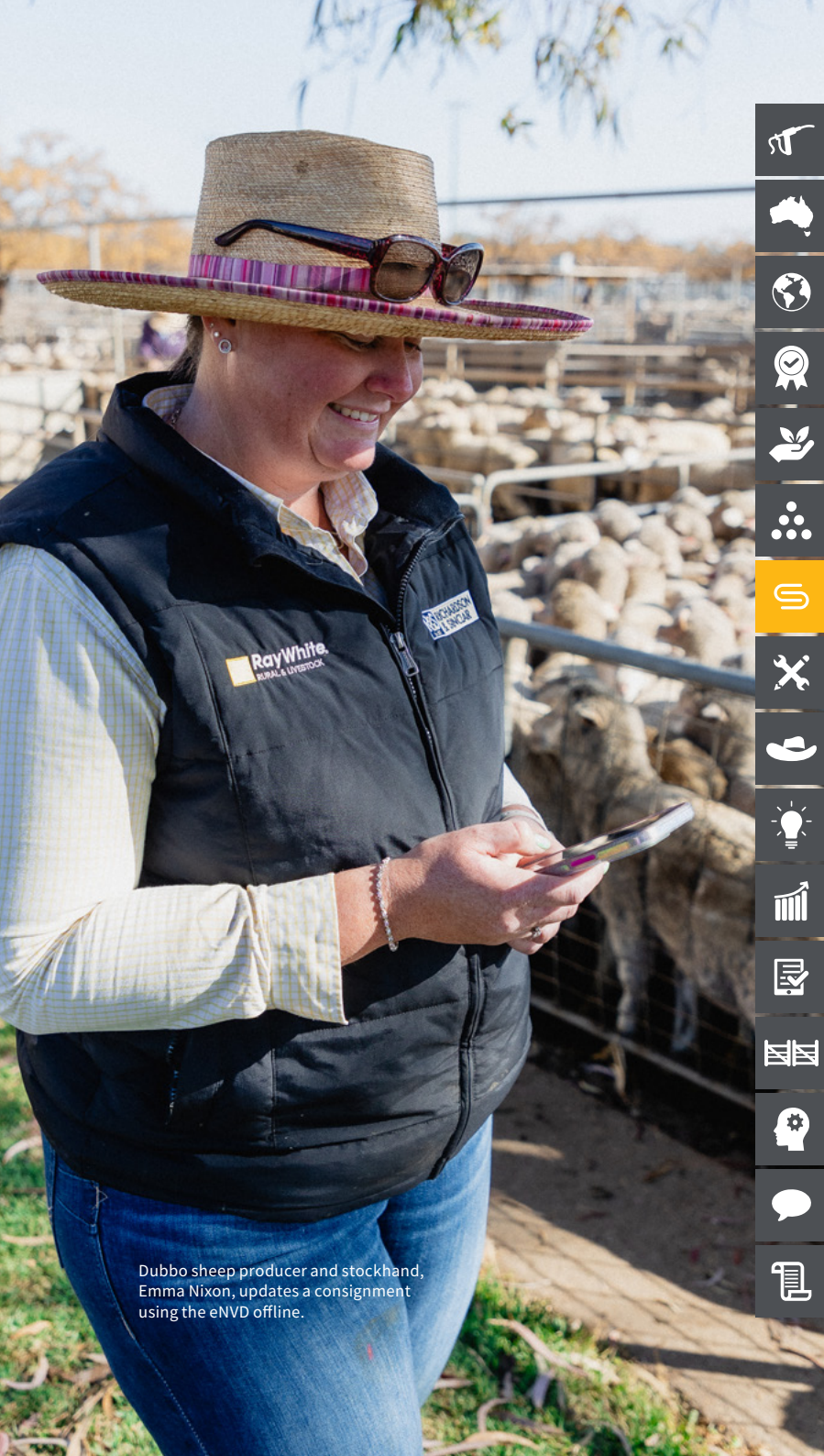
1. **80% of National Feedlot Accreditation Scheme (NFAS) accredited feedlots’ capacity is covered by shade or shelter.**
2. **Achieve an average of 80 enrolments and at least 60% completion for each Feedlot Fundamental eLearning course.**
3. **25% of grainfed slaughter is from short duration lairage.**

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, carcase 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 	<ul style="list-style-type: none"> ■ conducting feedlot cattle composition of grain research to predict days on feed to a set carcase 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 	<ul style="list-style-type: none"> ■ commissioning research on truck effluent management and its value proposition to renewable energy, carcase 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 ■ implementing sustainability partnerships with commercial feedlots to host research on greenhouse gas suppression, and associated sustainability projects ■ 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 	<ul style="list-style-type: none"> ■ 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 2024–25 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 2024–25
Feedlot productivity	-	-	-	-	-	-	-	-	1,888	462	-	-	-	-	1,165	3,053	484	6,106	946	7,052
Total*	-	-	-	-	-	-	-	-	1,888	462	-	-	-	-	1,165	3,053	484	6,106	946	7,052



Dubbo sheep producer and stockhand, Emma Nixon, updates a consignment using the eNVD offline.



Program

Integrity systems

MLA's integrity systems program assists industry 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 2024–25

- 1. The portion of digital consignments (eNVD) of total consignments increases to 37%.**
- 2. The Livestock Production Assurance (LPA) program Self-Assessment tool is implemented and 30% of producers that complete a Self-Assessment access their recommendations report.**
- 3. The architecture and design of the new NLIS platform is completed and the new platform build commences in line with the build and release plan.**

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).

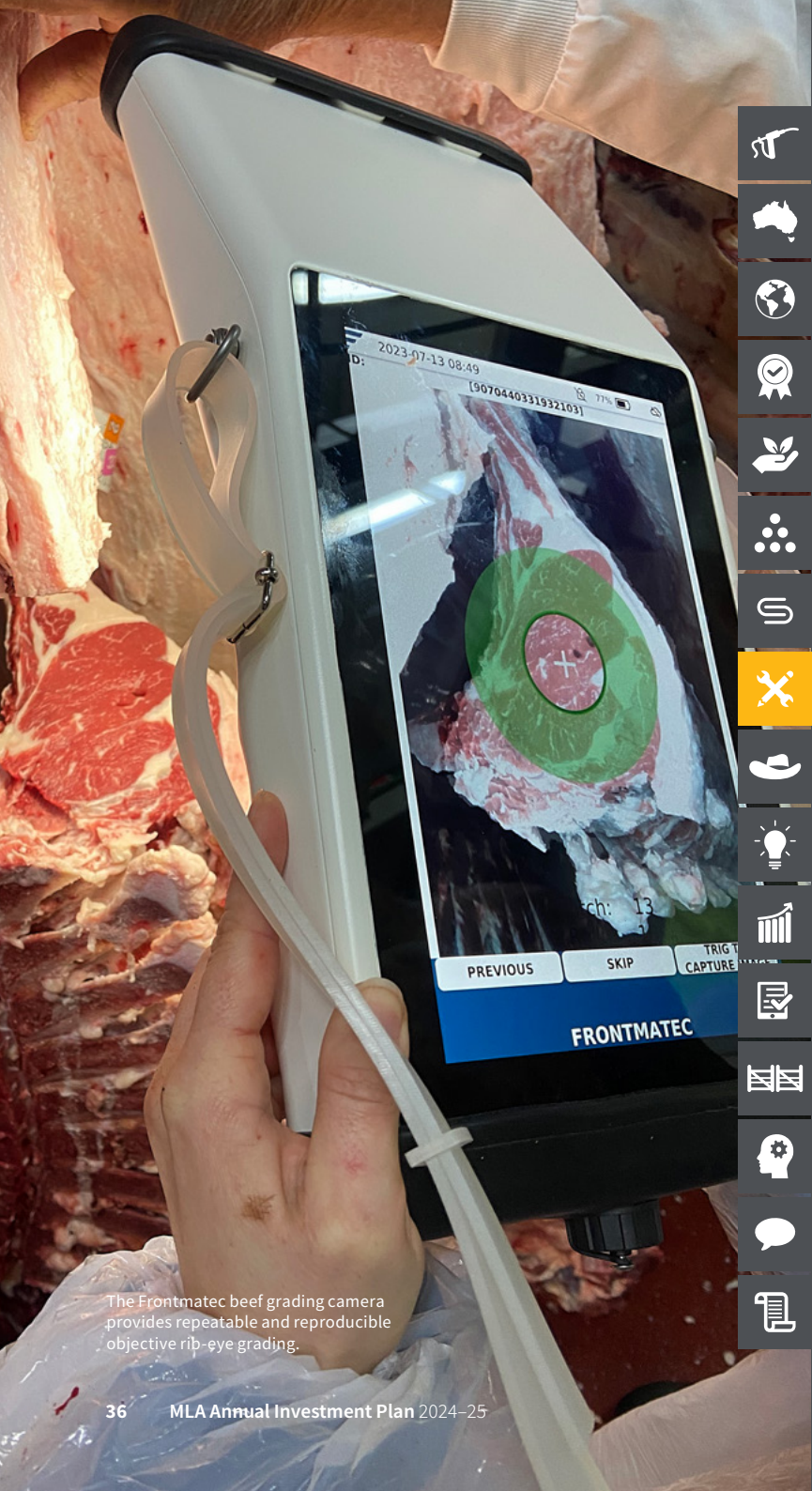
Key performance indicators in 2024–25

1. ‘Market Access Scorecard’ web tool is delivered to industry to support further cold chain waste reduction.
2. Deliver red meat sustainable waste reduction solutions that save at least \$6m annually.
3. Two technology platforms that support ambient temperature red meat supply chains are assessed for their technical and commercial viability.

Table 18: Projected 2024–25 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 2024–25
Integrity systems	75	10	182	48	1,856	993	1,871	1,736	867	410	1,231	1,162	8	21	928	7,018	10,234	14,036	14,615	28,651
Market access science	1	-	4	-	40	-	40	-	19	-	1,760	-	0	-	267	2,130	118	4,261	118	4,378
Total*	76	10	186	48	1,896	993	1,911	1,736	885	410	2,991	1,162	9	21	1,194	9,149	10,352	18,297	14,733	33,030



The Frontmatec beef grading camera provides repeatable and reproducible objective rib-eye grading.



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.

Sub-programs

- Objective measurement

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Objective measurement

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 producer levy, Australian Meat Processor Corporation (AMPC) and 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 2024–25

1. **At least one eating quality Objective Measurement (OM) technology is fully integrated into a processor’s internal business systems and supports brand optimisation.**
2. **Intramuscular Fat (IMF) measurement solution and Girth Rib (GR) fat measurement device evaluated in one lamb supply chain to enable MSA sheepmeat cuts model.**
3. **One live animal measurement solution adopted and used to make business decisions by one feedlot-based supply chain.**

Table 19: Projected 2024–25 investment by funding source – objective measurement (\$ '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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Objective measurement	3	-	40	34	258	193	123	50	83	27	179	-	-	-	3,104	3,790	361	7,580	666	8,246
Total*	3	-	40	34	258	193	123	50	83	27	179	-	-	-	3,104	3,790	361	7,580	666	8,246



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



Animal nutrition and breeder management consultant Désirée Jackson dissects a cattle rumen at a BeefUp forum – Broome WA.

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 to red meat producers ■ 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 also invests in 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 2024–25

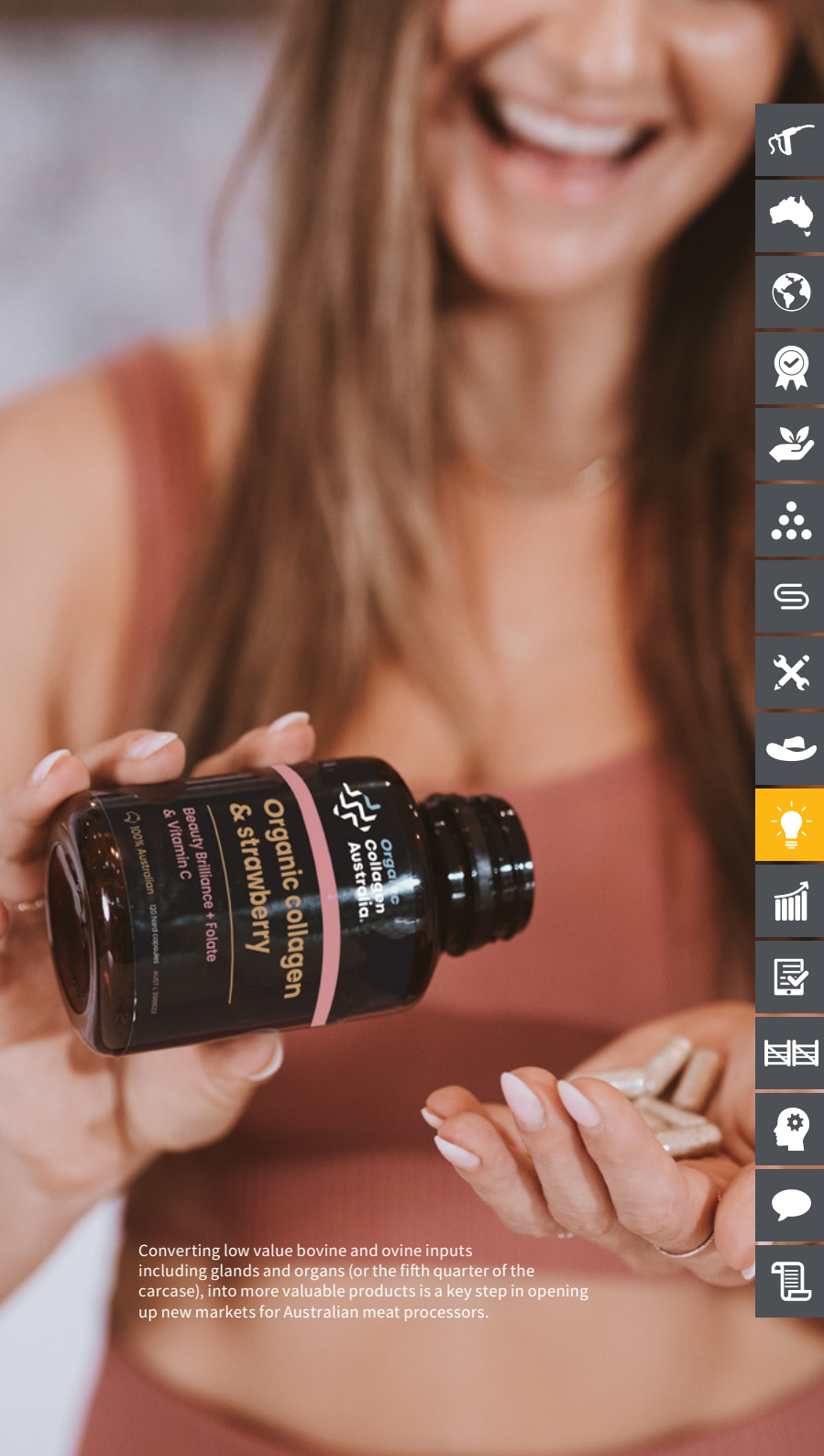
- 1. Deliver annual net benefit of \$100 million to red meat producers from an impact on 150 million hectares, 7 million cattle, 8 million sheep and 250,000 goats.**
- 2. Total producer engagement over five years with 50,000 producers, with a value of participation rating of 7/10.**
- 3. Total engagement over five years with 6,000 advisors.**

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</i> and <i>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 and the targeted adoption of four key reproductive vaccines on extensive beef properties ■ implementation of a Growing Beef from Dairy (GBfD) PDS ■ delivery of a dedicated extension and adoption strategy to support the launch of the Transport Hub to assist with uptake of best practice preparation for livestock prior to transport.
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 ■ a southern beef cattle productivity strategy that focuses on adoption of known technologies to improve herd productivity in southern Australia. Improving pasture utilisation, grazing management and reproductive outcomes are focal areas.
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. <p>This activity will allow producers to identify suitable areas for pasture diversification, improve pasture resilience and land condition management, and enhance their skills, knowledge, and confidence to utilise sustainable grazing practices.</p>
Goat productivity adoption	<p>Initiatives within the ‘goat productivity adoption’ product group include:</p> <ul style="list-style-type: none"> ■ focusing on supporting the transition from a rangeland harvest-based industry to semi- and managed herds.
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 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Producer adoption	53	-	187	-	1,963	-	2,131	-	-	-	-	-	-	-	7,012	11,346	1,127	22,692	1,127	23,819
Total*	53	-	187	-	1,963	-	2,131	-	-	-	-	-	-	-	7,012	11,346	1,127	22,692	1,127	23,819



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 carcase. 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



Converting low value bovine and ovine inputs including glands and organs (or the fifth quarter of the carcase), into more valuable products is a key step in opening up new markets for Australian meat processors.



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 2024–25

1. **Fifth quarter investments deliver incremental sales value of \$300 million across the value chain.**
2. **300 tonnes of red meat organs freeze dried for consumer and wholesale markets, creating an additional \$1.75 million in net value-adding benefit for participating processors.**
3. **Collagen production capacity increased to an annual 200 tons by the end of 2025.**

Table 21: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
High value food frontiers	-	-	15	-	150	-	56	-	5	-	58	-	-	-	961	1,245	665	2,489	665	3,155
Total*	-	-	15	-	150	-	56	-	5	-	58	-	-	-	961	1,245	665	2,489	665	3,155



myFeedback combines the functionality of Integrity System Company's (ISC) Livestock Data Link (LDL) with MSA's myMSA benchmarking system, bringing together carcass, eating quality and disease and defect data.



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



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 systems	<p>The ‘data systems’ product group supports the following:</p> <ul style="list-style-type: none"> ■ 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 ■ working with supply chains to support software upgrades and enhancement of digital literacy via Digital Product Officer program.
Enabling supply chain feedback	<p>The ‘enabling supply chain feedback’ product group aims to ensure livestock producers receive value from using data to support day-to-day decisions within their businesses.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ supporting adoption of all carcase feedback data, including animal disease, defect and wellbeing data captured and provided along the supply chain ■ ensuring that support is provided to processors for the collection and reporting on animal disease and defect data ■ ensuring that myFeedback becomes the primary source of MSA, animal disease and defect data for carcase feedback for producers ■ practice change programs are developed with supply chains to improve on-farm and carcase outcomes, which includes MSA and animal health and welfare ■ further developments for myFeedback and myMSA are initiated to improve supply chain efficiencies and data upload and flow.

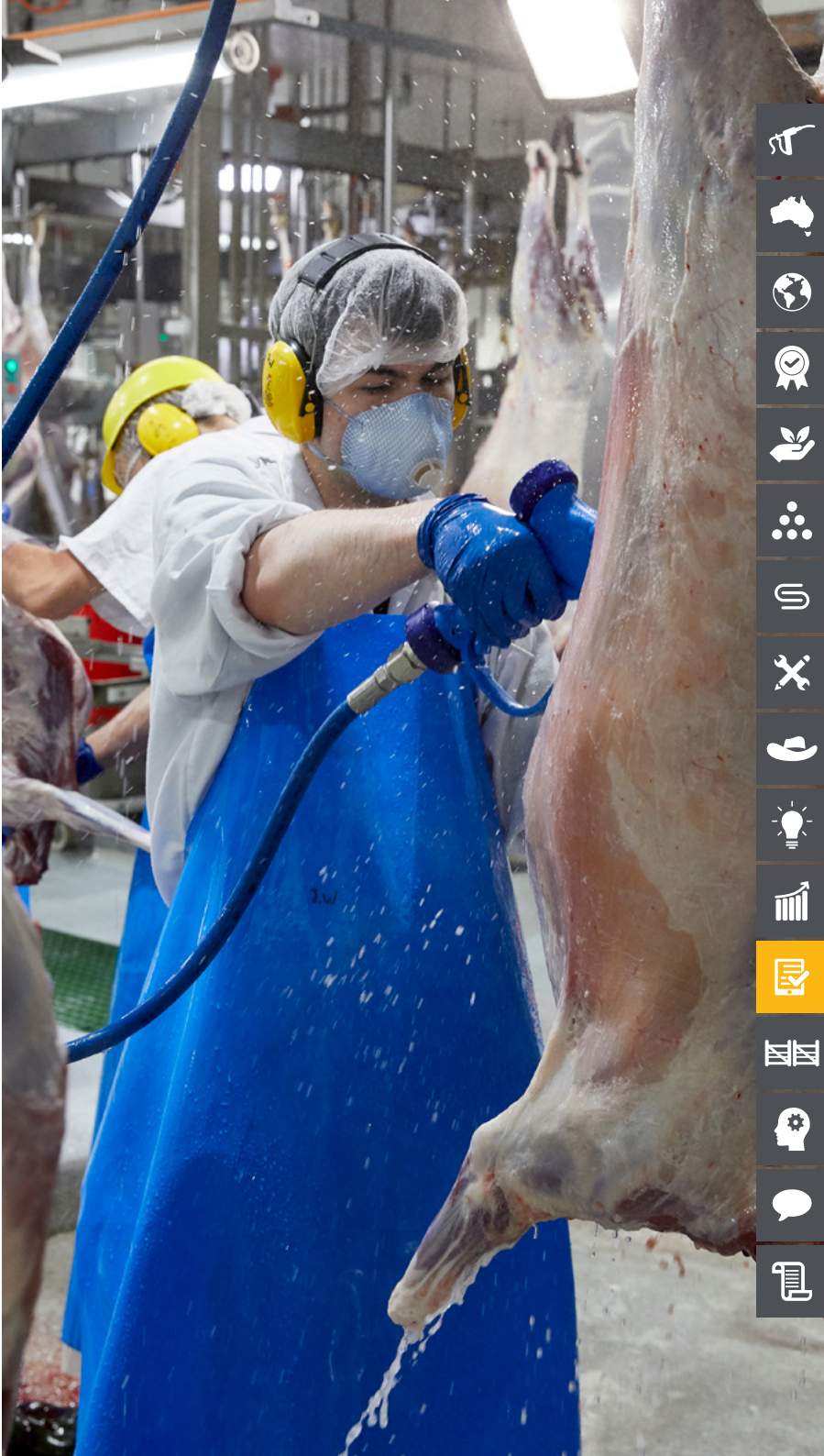
Key performance indicators in 2024–25

1. >90% of MSA licensed processors are providing MSA and carcase data through myFeedback.
2. At least 3,500 producers access myFeedback as their primary source of carcase feedback information.
3. Digital Product Officers (DPO) established as mechanisms to ensure company specific data is shared with the Integrity Systems Company and are delivering impact against program targets.

Table 22: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Digital value chain information	36	-	92	-	897	-	1,023	-	791	-	-	-	-	-	536	3,375	193	6,750	193	6,943
Total*	36	-	92	-	897	-	1,023	-	791	-	-	-	-	-	536	3,375	193	6,750	193	6,943



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 (\$90 million in 2023–24) to processors, 63% of which have been redistributed to producers over the long term.

A strategic review of the program, combined with a reduction in available funding, has resulted in the following:

- a transition to AMPC management and funding of processor-focused technology developments that relate specifically to operational efficiency
- continued funding of key, high return beef boning automation technology projects, with MLA's strategic role and funding for this technology to be determined as the strategy is developed and established
- ongoing joint collaboration with AMPC, technology providers and industry on facilitated adoption and the development of high return and high impact technologies.

Sub-programs

- Productivity (off-farm)

Red Meat 2030 priorities



MLA Strategic Plan 2025 strategic focus areas



Productivity (off-farm)

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

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 specific beef boning automation modules that deliver the highest return and impact validating automation technologies that value add to the carcass and support eating quality. <p>Tools and enabler initiatives that support 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 2024–25

- Technologies adopted in 2024–25 and previous years deliver \$100 million of increased productivity for the red meat industry.
- Prototype beef middle processing modules completed and trialled in a commercial production boning room.
- Integration of aviation computed topography (CT) technology data into beef middle boning modules and trial equipment for offal defect detection.
- Establish the Rinse and Chill (RCT®) technology value proposition for both beef and lamb supply chains.

Table 23: Projected 2024–25 investment by funding source – productivity (off-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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Productivity (off-farm)	-	-	-	-	-	-	-	-	-	-	10,258	-	-	-	972	11,230	448	22,460	448	22,909
Total*	-	-	-	-	-	-	-	-	-	-	10,258	-	-	-	972	11,230	448	22,460	448	22,909



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. Improved and targeted applied research and development leads 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.

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 that deliver improvements in conception, gestation and lactation performance of breeder herds ■ understanding the causes of calf loss through applied research ■ on-farm practices to improve sale weight and eating quality ■ 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.

Key performance indicators in 2024–25

1. 35 additional beef businesses are engaged in the NB2 ‘Pathways to Practice’ project.
2. 25 beef businesses from the pilot NB2 ‘Pathways to Practice’ project demonstrate improvements in herd productivity.
3. Upskill up to 10 new livestock advisors to deliver a long-term learning pathway in the revised ‘More Beef from Pastures’ program.

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 across Australia.

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 decreased 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.

Key performance indicators in 2024–25

1. Quantify the current reproductive performance of commercial shedding sheep flocks on 20 properties.
2. A minimum of 40 new producer participatory RD&A sites integrated into R&D projects.
3. Quantified the mortality of Merino ewes on >30 commercial properties and implemented a mitigation strategy on >8 commercial properties.

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■ investments in further understanding goat animal health and welfare challenges, particularly around internal parasites and pain relief■ 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 2024–25

1. At least 10,000 additional goats enrolled in goat benchmarking projects.
2. Development of a goat sustainability framework development plan and business case.



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 data sets relating to productivity and sustainability traits that underpin accurate delivery of genetic tools</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ support of sheep and beef multibreed reference flocks/herds for novel and hard-to-measure phenotypes ■ new ways to capture data to support genomic prediction ■ evaluating new models to fund on-going reference populations for easy to measure, harder to measure and future traits of importance.
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 ■ continuous improvement of analytical engines for BREEDPLAN and OVIS for single-step analysis and multi-breed analysis capabilities ■ ensuring the delivery and commercialisation of beef and sheep genomic tools to industry ■ ensuring effective and competitive commercialisation of BREEDPLAN ■ Sheep Genetics review with the aim to deliver a three-year strategic business plan detailing the roadmap to Sheep Genetics' financial independence.
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 <i>MLA Genetics Adoption Plan</i> aligned with the <i>NLGC Strategic Plan</i> ■ supporting customers in the use of Sheep Genetics including working with livestock consultants and service providers ■ a strategic communications and adoption effort on supporting commercial producers to engage with and access new genomic technologies as part of their on-farm decision making.

Key performance indicators in 2024–25

1. Single multibreed evaluation delivered for all LAMBPLAN breeds.
2. Commercial delivery of Genomic Breeding Values for northern beef and Merino producers, with at least 100 producers using these products.
3. Increase genetic progress across selection indexes in Sheep Genetics by 2.5% compared to the previous year.
4. Implementation of research indexes for two beef and one sheep evaluation that address sustainability goals.

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</p> <p>This initiative focuses on the monitoring, maintenance and improvement of soil health and land condition. Key activities include:</p> <ul style="list-style-type: none"> ■ 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</p> <p>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 improve deployment of legume species into regions where they are not performing, persisting or are under-utilised ■ identification of reasons for legume under performance ■ 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</p> <p>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 that diminish the quality or quantity of the feedbase. <p>Feedbase utilisation</p> <p>This initiative seeks to improve feedbase management across the whole farm to maximise livestock production in the face of a changing and variable climate. Key activities include:</p> <ul style="list-style-type: none"> ■ 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 2024–25

1. **750 producers and advisors educated on legume selection and establishment in Tasmania and Victoria.**
2. **8 pasture dieback field days conducted with more than 200 producers attending.**
3. **40 additional on-farm land condition assessments and training sessions conducted.**

Digital agriculture

MLA’s digital agriculture sub-program invests in infrastructure, decision support, automation and data platform tools to boost feedbase, animal productivity, sustainability, wellbeing and traceability. In 2024–25, 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"> ■ developing and trialling connectivity options for the use of digital technologies in remote locations ■ developing digital information products and dashboard decision tools/guidelines to provide informed and predictive management systems including the use of Artificial Intelligence (AI) and machine learning (ML) ■ 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.

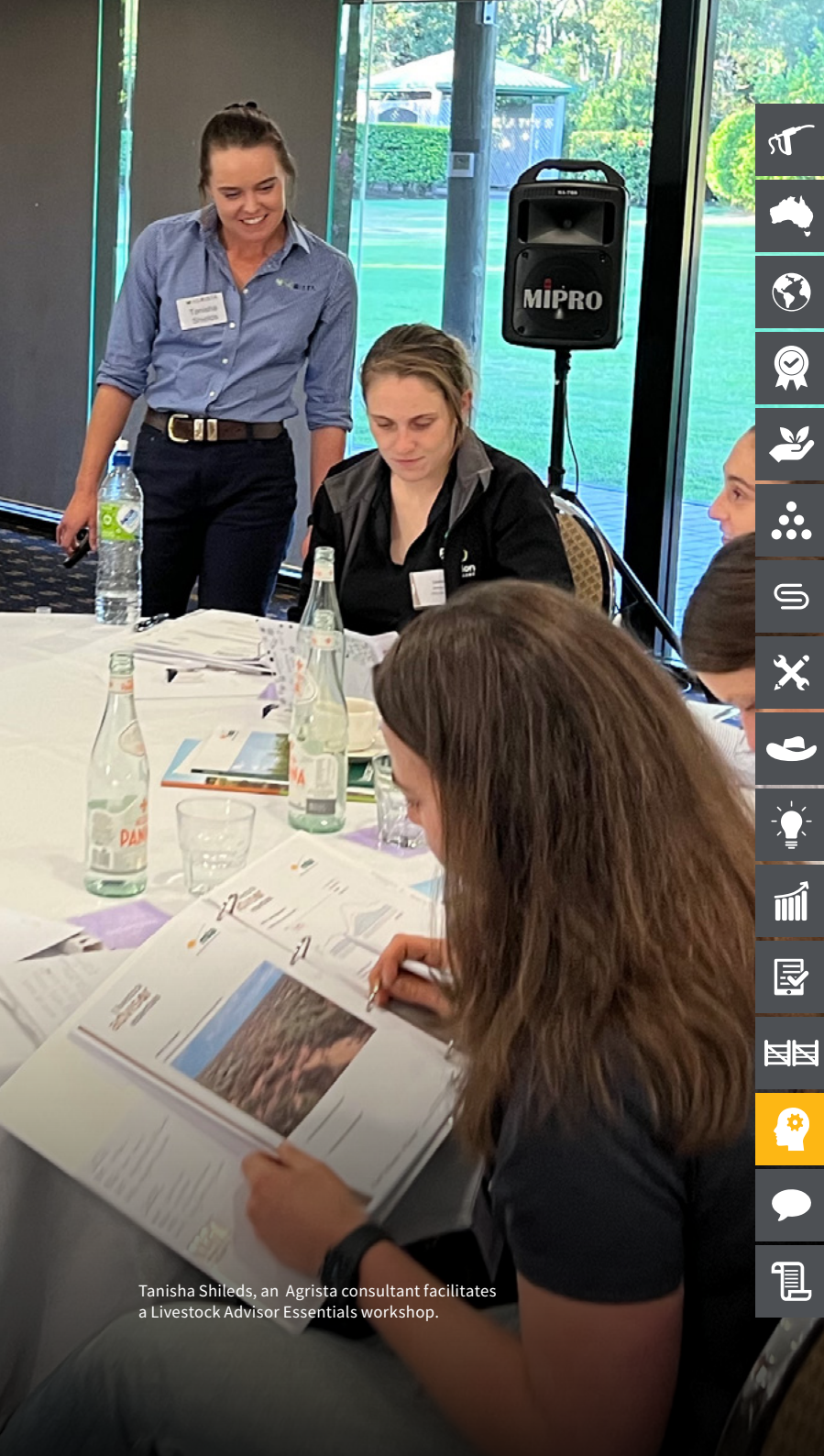
Key performance indicators in 2024–25

1. At least 1,000 GPS eSat enabled farm IoT devices/ear tags in commercial use or being trialled on-farm.
2. Australian Feedbase Monitor used by at least 3,000 producers.
3. Foragecaster pasture/livestock predictive planning and management tool being trialled by four producer groups.

Table 24: Projected 2024–25 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 2024–25
Beef productivity	-	-	0	-	3	-	112	-	-	-	-	-	-	-	687	802	145	1,605	145	1,750
Sheep productivity	-	-	54	-	546	-	-	-	-	-	-	-	-	-	658	1,258	154	2,517	154	2,670
Goat productivity	153	-	-	-	-	-	-	-	-	-	-	-	-	-	584	736	7	1,473	7	1,480
Livestock genetics	-	-	-	-	1,323	-	988	-	46	-	-	-	-	-	2,963	5,321	2,669	10,641	2,669	13,310
Feedbase production	3	-	52	-	528	-	747	-	-	-	-	-	-	-	2,735	4,066	275	8,131	275	8,406
Digital agriculture	0	-	2	-	24	-	148	-	19	-	-	-	-	-	1,455	1,648	607	3,297	607	3,903
Total*	156	-	109	-	2,425	-	1,994	-	65	-	-	-	-	-	9,082	13,832	3,857	27,663	3,857	31,520



Tanisha Shileds, an Agrista consultant facilitates a Livestock Advisor Essentials workshop.



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.
New business ventures and producer entrepreneurship	<p>Initiatives within the ‘new business ventures and producer entrepreneurship’ product group include:</p> <ul style="list-style-type: none"> ■ accelerating producer innovation capability by recognising producer-led innovation ■ identifying and progressing investment opportunities in early-stage, high risk, high potential impact tech companies ■ 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 2024–25

1. **Five CN30 co-innovation partners have successfully implemented emission reduction strategies reflecting industry’s CN30 aspirations.**
2. **At least three ‘high value foods’ co-innovation partners’ new product sales achieve 15% (existing partners) or 10% (new partners) 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 2024–25

- 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 2025.
- Successful completion of all milestones in the peak industry council (PIC) annual service agreements by 30 June 2025.

Table 25: Projected 2024–25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024–25
Innovation capability building	5	-	114	6	80	19	157	19	46	19	4,572	-	-	-	2,877	7,850	544	15,701	606	16,307
Industry leadership and capacity building	1	77	3	113	36	1,506	62	1,928	19	648	10	140	0	3	-	132	-	263	4,415	4,678
Total*	5	77	117	119	116	1,525	219	1,947	65	667	4,582	140	0	3	2,877	7,982	544	15,964	5,021	20,985

Instagram influencers Lachlan and Jaxson Fairbairn visit Tim Burvill, Callendale SA property, creating content for Australian Good Meat's FY23–24 social media campaign.



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



Communication (community)

MLA’s communication (community) sub-program under the Australian Good Meat program informs, educates and engages all levels of the community about the Australian red meat and livestock industry, and its 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 the development of targeted and engaging digital content for the Australian Good Meat program that builds and maintains community trust in our industry and its commitment to best practice animal welfare and responsible stewardship of environmental resources. Communicated through dedicated channels such as MLA’s Australian Good Meat website goodmeat.com.au, and Australian Good Meat social media 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"> ■ annual benchmarking survey of community sentiment ■ development of digital assets for both website and social media channels ■ ‘red meat myth busting’ materials such as <i>Red Meat Green Facts</i> and <i>Red Meat Health Facts</i>.
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"> ■ social media influencers ■ amplification of social media content ■ campaigns on the Australian Good Meat social media channels and website ■ Search Engine Optimisation (SEO) of content to better engage the community ■ participation in Royal Agriculture Society shows.
School education	<p>The ‘school education’ product group utilises education service providers and networks to support the development and promotion of the Australian Good Meat Education curriculum-aligned teaching resources and digital learning programs. Teacher-targeted promotional activities are undertaken such as participation at education events, social media, marketing, and campaign-based promotions to create awareness and adoption.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ membership of the Primary Industries Education Foundation Australia (PIEFA) and subscription to Kids Media, and collaborating with education networks ■ developing and maintaining curriculum-aligned teaching resources and digital learning programs via Australian Good Meat Education ■ building education networks to promote school resources through participation in educational programs and events, sponsorships, social media, advertising, and campaigns to support adoption outcomes.

Key performance indicators in 2024–25

1. Improved positive perceptions towards red meat and the industry on FY24 community sentiment survey results.
2. Achieve 12,000 page views of Australian Good Meat Education teaching resources and digital learning.

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
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 commitments.</p> <p>The frameworks are investor and customer focused to demonstrate the red meat industry's sustainability commitment and to transparently report annually industry's performance and progress with relevant and robust data, 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 and SSF Strategic Plans and Work Plans' key priorities and activities, and delivery of the ABSF and SSF <i>Annual Reports</i> and <i>MLA Sustainability Impact Report</i> ■ delivery of materiality assessments, insights and data to inform MLA sustainability investments and stakeholders' (external and internal) understanding and utilisation of the Frameworks to inform their sustainability commitments and pathways to market.
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 ■ 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.

Key performance indicators in 2024–25

1. **Year-by-year increase in understanding and utilisation of sustainability priorities, insights and data across the supply chain.**
2. **High level of satisfaction (80%) and positive feedback on MLA activation at events.**
3. **Increase MLA membership by 200 members from June 2024 baseline.**
4. **Maintain high level of member satisfaction (7.5/10) for customer service.**
5. **Increase of 0.1/10 pts in member satisfaction with printed and digital communications on 2023–24 survey.**

Product group	Core activities
MLA digital communications	<p>The 'MLA digital communications' 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 providing 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 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.
MLA events and sponsorship	<p>The 'MLA events and sponsorship' 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 production of materials for use at MLA and sponsored events.

Product group	Core activities
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Table 26: Projected 2024–25 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 2024–25
Communication (community)	1	1	7	31	101	406	212	733	57	457	-	-	-	-	-	377	-	755	1,629	2,384
Communication (stakeholder)	2	3	17	92	257	1,198	564	2,226	151	1,300	-	-	-	-	58	1,049	128	2,097	4,946	7,044
Total*	3	4	23	123	358	1,604	776	2,959	207	1,757	-	-	-	-	58	1,426	128	2,852	6,575	9,427



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



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"> ■ the transformation of the team from a transaction-based one 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 consultation with key stakeholders, 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).

Key performance indicators in 2024–25

Legal

1. Complete the journey of transforming the legal function and fulfilling the Legal team’s 2020–2025 roadmap.
2. Maintain MLA’s templates to ensure they remain current.
3. Continued delivery of legal training to educate and enable the business to ensure strong awareness of MLA’s agreements, key terms, and legal obligations.

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. Efficient and effective identification and assessment of risks to MLA and industry, as well as implementation of action plans to address risks, and regularly report to the Audit, Finance and Risk Committee (AFRC).
2. Development and delivery of the 2024–25 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 Commonwealth.

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.

Product group	Core activities
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.
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.
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) are met from revenues and from previous industry transition capitalisation.

Key performance indicators in 2024-25

Evaluation

1. Complete 2020-25 TBL evaluation cycle for all investment programs.
2. Evaluation component of the F24 performance review has been approved.

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.
3. A Reconciliation Action Plan has been developed and endorsed by Reconciliation Australia.
4. Gender Equality Plan has been developed and Gender Pay Gap report has been published.

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. Enhance Project HUB to be a one stop shop integrated with MLA ERP SAP.

Table 27: Projected 2024-25 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2024-25
Corporate services	46	34	122	164	1,219	3,259	1,249	5,804	580	1,377	-	-	-	-	-	3,217	3,212	6,434	13,851	20,285
Total*	46	34	122	164	1,219	3,259	1,249	5,804	580	1,377	-	-	-	-	-	3,217	3,212	6,434	13,851	20,285

Detailed budget tables by funding sources

Table 28: Expenditure by funding source 2024–25, \$ '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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	External Unmatched	Government R	MLA consolidated
Animal wellbeing	-	-	65	-	392	-	457	-	92	-	-	-	92	-	549	-	-	-	-	-	4,840	1,167	5,389	11,945
Domestic market	16	31	42	223	431	7,910	474	8,133	435	9,407	202	2,227	637	11,634	1,127	19,798	336	2,479	3	20	-	-	1,466	25,230
International markets	1	104	32	539	331	9,940	362	10,479	339	22,346	15	3,573	354	25,919	718	36,502	19	1,225	550	515	588	1,708	1,875	43,700
Eating quality	-	-	31	-	315	-	347	-	513	-	272	-	785	-	1,131	-	-	-	-	-	613	303	1,745	3,792
Environmental sustainability	22	-	39	-	447	-	486	-	439	-	191	-	630	-	1,138	-	3,077	-	-	-	9,378	675	13,593	27,861
Feedlot	-	-	-	-	-	-	-	-	-	-	1,888	462	1,888	462	1,888	462	-	-	-	-	1,165	484	3,053	7,052
Integrity systems	76	10	186	48	1,896	993	2,082	1,041	1,911	1,736	885	410	2,796	2,146	4,954	3,197	2,991	1,162	9	21	1,194	10,352	9,149	33,030
Objective measurement	3	-	40	34	258	193	299	227	123	50	83	27	205	78	507	304	179	-	-	-	3,104	361	3,790	8,246
Producer adoption	53	-	187	-	1,963	-	2,149	-	2,131	-	-	-	2,131	-	4,333	-	-	-	-	-	7,012	1,127	11,346	23,819
Product and packaging innovation	-	-	15	-	150	-	165	-	56	-	5	-	61	-	226	-	58	-	-	-	961	665	1,245	3,155
Value chain information and efficiency	36	-	92	-	897	-	989	-	1,023	-	791	-	1,813	-	2,839	-	-	-	-	-	536	193	3,375	6,943
Productivity (off-farm)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10,258	-	-	-	972	448	11,230	22,909
Productivity (on-farm)	156	-	109	-	2,425	-	2,534	-	1,994	-	65	-	2,060	-	4,750	-	-	-	-	-	9,082	3,857	13,832	31,520
Capability building	5	77	117	119	116	1,525	233	1,644	219	1,947	65	667	284	2,614	523	4,335	4,582	140	0	3	2,877	544	7,982	20,985
Communication	3	4	23	123	358	1,604	382	1,727	776	2,959	207	1,757	984	4,716	1,368	6,447	-	-	-	-	58	128	1,426	9,427
Corporate services	46	34	122	164	1,219	3,259	1,341	3,423	1,249	5,804	580	1,377	1,830	7,181	3,217	10,638	-	-	-	-	-	3,212	3,217	20,285
Total*	417	260	1,100	1,250	11,200	25,424	12,300	26,674	11,300	44,250	5,250	10,500	16,550	54,750	29,267	81,684	21,500	5,006	562	560	42,383	25,225	93,712	299,898

Table 29: Income available by funding source 2024–25, \$ '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	430	270	1,153	1,302	10,215	24,846	11,367	26,149	11,542	45,916	4,583	9,411	16,125	55,327	27,922	81,746	-	-	-	-	-	-	-	109,668
Government	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	93,712	93,712
AMPC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	21,500	5,006	-	-	-	-	-	26,506
LiveCorp	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	562	560	-	-	-	1,122
External R	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	42,383	-	-	42,383
External Unmatched	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	25,225	-	25,225
Total income*	430	270	1,153	1,302	10,215	24,846	11,367	26,149	11,542	45,916	4,583	9,411	16,125	55,327	27,922	81,746	21,500	5,006	562	560	42,383	25,225	93,712	298,615
Difference (to/from reserves)	13	10	53	52	-985	-578	-933	-525	242	1,666	-667	-1,089	-425	577	-1,345	62	-	-	-	-	-	-	-	-1,283
Opening reserves	503	249	576	618	8,279	14,348	8,854	14,966	3,554	11,614	4,148	6,271	7,702	17,885	17,059	33,100								
Closing reserves (2024–25)	515	260	628	670	7,293	13,771	7,922	14,441	3,796	13,280	3,481	5,182	7,277	18,461	15,714	33,162								
% of revenue	120%	96%	54%	51%	71%	55%	70%	55%	33%	29%	76%	55%	45%	33%	56%	41%								

Acronyms

ABSF	Australian Beef Sustainability Framework
AFRC	Audit, Finance and Risk Committee
AI	Artificial Intelligence
AIP	Annual Investment Plan
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
ERP	enterprise resource planning
FMD	foot-and-mouth disease

GHG	greenhouse gas
GPS	Global Positioning System
GR	girth rib
IMF	intramuscular fat
IoT	Internet of Things
IP	intellectual property
ISC	Integrity Systems Company
IT	information technology
LEP	live export program
LERDAC	Livestock Export Research & Development Advisory Committee
LMY	lean meat yield
LPA	Livestock Production Assurance
LSD	lumpy skin disease

MDC	MLA Donor Company
ML	machine learning
MLA	Meat & Livestock Australia
MSA	Meat Standards Australia
NB2	Northern Breeding Business
NFAS	National Feedlot Accreditation Scheme
NLGC	National Livestock Genetics Consortium
NLIS	National Livestock Identification System
NLRS	National Livestock Reporting Service
NRM	natural resource management
OM	objective measurement
PDS	Producer Demonstration Site
PGS	Profitable Grazing Systems
PIC	peak industry council

PIEFA	Primary Industries Education Foundation Australia
RCT®	Rinse and Chill technology
RD&A	research, development and adoption
RD&E	research, development and extension
RDC	Research and Development Corporation
RMAC	Red Meat Advisory Council
RPP	Rural Professionals Program
SEO	search engine optimisation
SSF	Sheep Sustainability Framework
TBL	triple bottom line
VBP	value-based pricing
VR	virtual reality





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