

Meat & Livestock Australia

Annual Report 2014-15

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About this report

This *Annual Report* presents a summary of Meat & Livestock Australia's programs, outcomes and financial performance during 2014-15. It contains four main sections:

- > a summary of MLA's operations and highlights of 2014-15 and reports by the MLA Chair and Managing Director
- > a *Report to Stakeholders* that outlines MLA's performance across four strategic imperatives, program highlights and progress against key performance indicators, and provides an overview of the company, the strategic framework, investments and operations
- > an *About MLA* section with a summary of MLA's finances and corporate strategy, information about corporate governance and overview of the organisation
- > a *Directors' Report* and audited *Financial Report* compiled in accordance with the *Corporations Act 2001*, Australian Accounting Standards and MLA's Deed of Agreement with the Australian Government.

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2014-15: a year of listening and changing

Over the past 12 months MLA has listened to levy payers and positively changed the way it operates:

Efficiency

More than \$6.5 million in fixed costs savings have been achieved in 2014-15 to channel back into research, development and marketing.

Engagement

Our Managing Director hosted 40 face-to-face MLA forums across Australia and many other events attended by senior staff helped MLA speak directly to more than 5,000 producers.

Consultation

A new regional consultation model is being developed to encourage more producers to have their say on the direction of research and development investment.

Transparency

The new MLA website provides a clear breakdown of levy income and key investments.

Our vision

To be the recognised leader in delivering world-class research, development and marketing outcomes that benefit the Australian red meat and livestock industry.

Our mission

Working in collaboration with the Australian Government and wider red meat industry, MLA's mission is to deliver value to levy payers by investing in research, development and marketing initiatives that contribute to producer profitability, sustainability and global competitiveness.

Our strategic imperatives

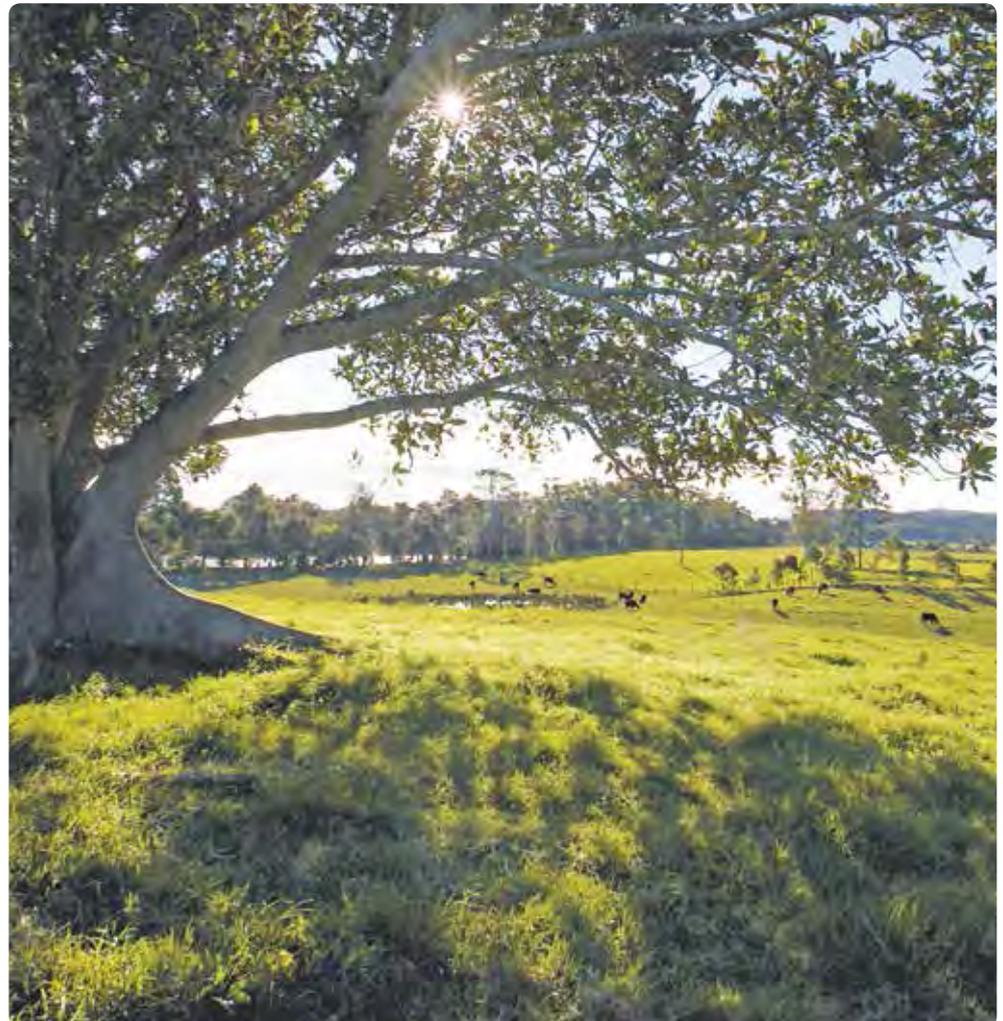
- > Maintaining and improving market access
- > Growing demand
- > Increasing productivity across the supply chain
- > Supporting industry integrity and sustainability

Our values

- > Customer centricity
- > Accountability through transparency
- > Outcomes that make a difference

Our history

MLA was established in 1998, following the merging of two industry statutory organisations – the Australian Meat & Live-Stock Corporation and the Meat Research Corporation.



Our funding

MLA is primarily funded by transaction levies paid on livestock sales by producers.

The Australian Government also contributes a dollar for each levy dollar. MLA invests in research and development. This can be supplemented by unmatched grants from the Australian Government and cooperative contributions from other Research and Development Corporations, individual processors, wholesalers, foodservice operators and retailers.

Processors and live animal exporters also co-invest levies into MLA programs through their service companies: Australian Meat Processor Corporation and LiveCorp. Exporters and importers can also co-invest with MLA on marketing activities.

MLA generates additional income via voluntary contributions which are matched by the Australian Government. This funding is invested in research and development partnerships that benefit the Australian red meat industry through the MLA Donor Company.

Our members

Membership of MLA is open to all levy-paying grassfed cattle, grainfed cattle, sheep, lamb and goat producers and is free of charge. MLA had 49,845 members at 30 June 2015.

Our stakeholders

MLA operates in partnership with industry and government to deliver services to the cattle, sheep and goat industries.

Through the National and Rural R&D Priorities, the Australian Government sets high-level priority research and development objectives covering community, industry and environmental concerns.

Peak industry councils provide policy direction, scrutinise budgets and monitor MLA's performance on behalf of the red meat industry. These are the Australian Lot Feeders' Association, Cattle Council of Australia, Goat Industry Council of Australia and Sheepmeat Council of Australia.

MLA also works closely with the Australian Meat Processor Corporation, Australian Meat Industry Council, LiveCorp and Australian Livestock Exporters' Council to develop programs that address key industry issues and opportunities through the supply chain, manage projects and communicate outcomes.

Our decision making processes

MLA doesn't spend levies and make decisions in isolation. This is done in concert with producers, the government, peak industry councils and other industry organisations (see 'Our stakeholders' and page 73 for other consultation mechanisms).

The new regional consultation model (see pages 73-74) will give producers direct input into MLA's research and development priorities, commencing in the second half of 2015.

Our staff

At 30 June 2015 MLA employed 237 staff. More than 50 per cent were from a rural background and more than 33 per cent were under 35 years of age (see staff profiles on page 91).

Our locations

MLA staff are based strategically to leverage the best possible access to all stakeholders and markets.

MLA office locations



Chair's Report



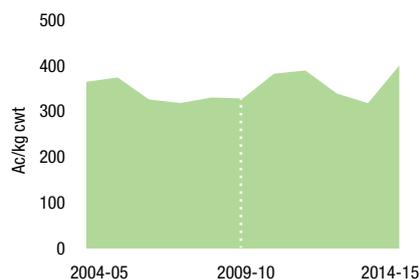
Dr Michele Allan, Chair

This past year could be summed up as record-breaking for the cattle, sheep and goat industry. Record production, cattle and retail prices, and exports have contributed to the total off-farm value of the beef, lamb and mutton industry increasing to \$23.2 billion in 2014-15, 18 per cent higher year-on-year. Although this is a stellar result, it is tempered by the ongoing challenges faced by producers with continuing drought conditions across the eastern states.

Despite this, I'm very optimistic about the future of the red meat industry.

Since April 2014, three free trade agreements have been signed, with MLA playing a crucial behind-the-scenes role assisting the Australian Government and industry to get these agreements over the line.

Eastern Young Cattle Indicator



Source: MLA

The global consumer wants our red meat like never before. The safety and integrity systems that underpin Australian red meat have now been wrapped up in our new *True Aussie* country of origin brand to give our exporters an added platform to help promote Australian red meat and underpin their own brands. The early success and support for *True Aussie* indicates this marketing element is adding value (see page 35).

Cattle and beef market and outlook

Intense export demand – particularly from the US, Japan and Korea – has rippled through saleyards, processing plants, and supermarket and butcher meat cabinets across Australia this year. Consumers in Melbourne, producers in Longreach, saleyard operators across NSW and processors in Brisbane have all felt the impact: record cattle prices, turnoff and retail beef prices.

Despite many areas of the eastern states yet to receive significant relief from drought conditions, cattle prices across all categories reached record levels in the first half of 2015.

Export demand is so intense that less beef is available at home, with per capita consumption forecast to drop

from 30.6kg/person in 2014 to 25.7kg/person in 2015. Despite this, red meat still remains a popular and important choice of protein for Australians.

Driving strong export demand has been the lower Australian dollar, higher US cattle and beef prices and our safety and integrity systems, lifting demand for imported Australian beef.

Demand and prices also remain high for livestock exports, with volumes reaching 1.4 million head in 2014-15, 22 per cent above year-on-year.

Looking ahead, the historically high cattle turnoff of 2014 and 2015 will mean a much smaller cattle herd over coming years and a continuation of strong cattle prices and reduced availability of beef in the domestic market. In 2015, 76 per cent of beef production is expected to be exported. This is in addition to livestock exports which may reach 950,000 head at the end of 2015.

Lamb market and outlook

Record production and exports have also been features of the lamb industry in 2014-15. Although lamb and mutton prices aren't at the record levels of earlier this decade, they are historically high, as dry seasonal conditions keep the supply of lambs coming forward.

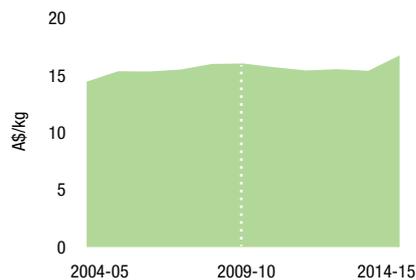
Another positive emerging trend has been marking rates – a measure of the reproductive performance of a flock – which appear to have increased considerably in recent years. Looking forward, this productivity improvement will pay dividends as Australia's core breeding flock declines.

The lower Australian dollar has made exports more attractive, putting pressure on domestic lamb consumption with per capita consumption forecast to average 8.5kg in 2015, 3 per cent lower year-on-year. Close to 63 per cent of our sheepmeat is exported where again, our high safety profile and traceability credentials help to underpin demand.

Goat market and outlook

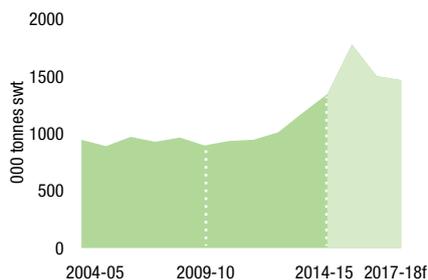
In the goat market, prices and production peaked at record levels in 2014-15. Most goats have been

Domestic retail beef prices



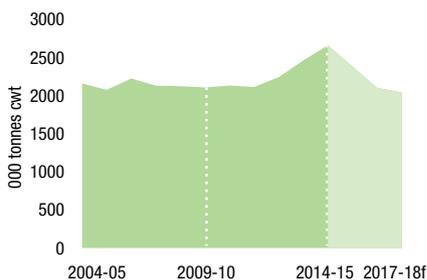
Source: ABS

Beef and veal exports



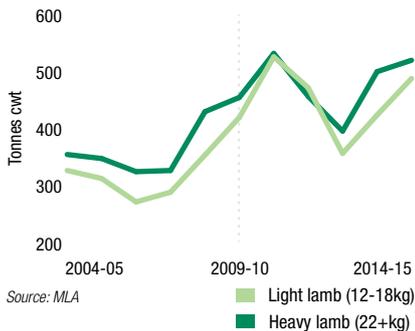
Source: Department of Agriculture and MLA forecasts f - forecast

Annual cattle production



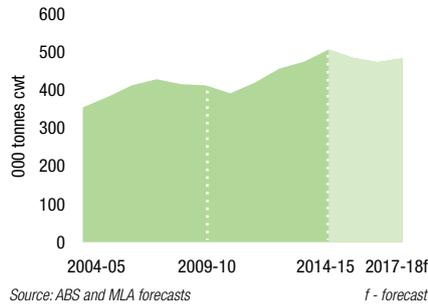
Source: ABS and MLA forecasts f - forecast

Light lamb and heavy lamb prices



Source: MLA

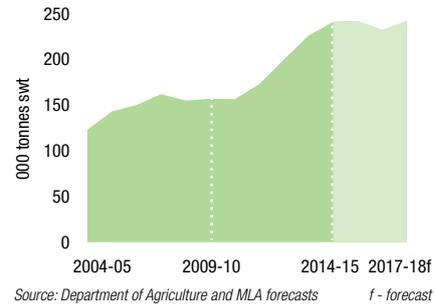
Annual lamb production



Source: ABS and MLA forecasts

f - forecast

Lamb exports



Source: Department of Agriculture and MLA forecasts

f - forecast

sourced from NSW and are then trucked to processing plants across NSW, Victoria and in Charleville, Qld.

The US remains the largest destination for Australian goatmeat, taking 56 per cent of exports. Our next biggest market destinations were Taiwan and Canada.

Board business

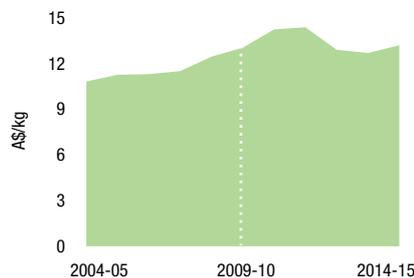
In a year when the industry has received these long awaited and well deserved higher returns, MLA has been working hard to deliver research and development and marketing activities to add value and prosperity to the industry. We have also spent the year listening to levy payers and changing the way we operate.

In whatever we undertake, consultation with industry is part of our processes. MLA is close to completing a full assessment of the automation of levy payments to voting entitlements, which will allow the industry to make an informed decision around costing and implementation challenges, for identifying all levy payers and not just MLA members, which is how the system we work within, currently operates. Most of the Research and Development Corporations, including MLA, have a register of levy payers who have elected to become members for free.

In MLA's case, we do not have access to a full list of levy payers, which is held by the Australian Government, who collects the levy. Identifying levy payers responds to a recommendation from the Senate Inquiry into grassfed levies.

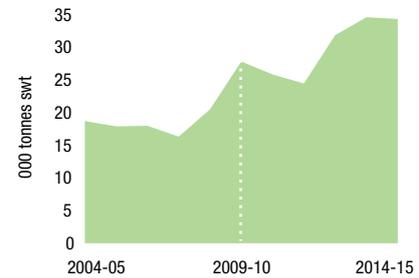
At last year's annual general meeting (AGM), members voted to make amendments to MLA's Constitution.

Domestic retail lamb prices



Source: ABS

Goatmeat exports



Source: Department of Agriculture

One of these was to change the composition of MLA's Board Selection Committee by reducing the number of MLA directors from three to two. Another change was that I, as MLA's Chair, would no longer chair the Selection Committee. Instead, members of the Selection Committee elected the Australian Lot Feeders' Association President as Chair of the Selection Committee.

A further change was to increase the number of grassfed cattle producer representatives on the Selection Committee from one to two people to give grassfed cattle producers greater representation and influence over the MLA Board selection process. MLA has been advertising this to producers and all nominees will be put forward to this year's AGM in Brisbane, for election by grassfed cattle producer members. This change demonstrates that the Board is committed to demonstrating an absolute focus on levy payers.

The MLA Board is a skills based board, but crucially, there are always board members who are also producers, to bring a direct understanding of levy payers to the table. Currently we have six livestock producers on the board

– including Managing Director Richard Norton.

MLA managing director Richard Norton will cover other areas where MLA has listened and changed in his report on pages 6-8.

MLA is a major funder of research, development and adoption in Australia that supports a vibrant red meat industry. We commission research on farm and in new technology and techniques to help producers improve their productivity, profitability and sustainability. I would like to acknowledge the Australian Government as our most valuable partner in this research, development and adoption, providing matching dollars for the research projects we manage.

In closing, I would also like to acknowledge the many hard working people across MLA and our partners. It has been a challenging year for many but the Board thanks everyone for their service and the many achievements that have been delivered for the industry.



Dr Michele Allan
Chair

Managing Director's Report



Richard Norton, Managing Director

Over the past 12 months I have witnessed a red meat industry that should be proud of what it has achieved by investing in itself – with the support of the Australian Government.

The Australian red meat industry has an extremely bright future with huge export demand and industry leaders who show a willingness to capture this potential through shared resources across the value chain.

This past year has also seen MLA embark on tremendous change.

While the Senate Inquiry into grassfed levies was continuing, MLA commenced a restructure of the entire company in response to concerns raised during the Inquiry, the Systems Review of 2013 and through my

discussions with levy payers and other stakeholders. The restructure was necessary for MLA to become more transparent, efficient and better aligned with the needs of industry.

I was encouraged to hear Minister for Agriculture, Barnaby Joyce, present the Government's response to the Inquiry in July 2015. Minister Joyce acknowledged that MLA – as the provider of research and development and marketing services to the grassfed cattle industry – can provide a solid basis for the future of these services to the red meat industry, with greater direction from grassfed levy payers. Minister Joyce also said the government would continue to allocate the current grassfed levy to MLA.

Being allocated a proportion of the levy by the Government is a privilege, not a right – MLA has a responsibility to use this levy efficiently and effectively to contribute to the profitability, sustainability and global competitiveness of levy payers. This means we need to continue investing in world-class research and development and marketing activities that make a difference.

MLA's year of change has involved four key areas:

Efficiency

Following MLA's restructure, more than \$6.5 million in fixed cost savings have been achieved in 2014-15 to be channelled back into research, development and marketing in future years.

Engagement

This year of change has been informed by hours of listening at over 40 MLA forums across the country where I held face-to-face discussions with more than 1,200 producers. In addition, my senior staff have attended many other industry events across Australia, taking the number of producers who we have engaged directly with to more than 5,000. Not only have I listened to concerns but I've spoken about MLA's role as the provider of R&D and marketing services to the red meat industry. I've also had the opportunity to bust some myths – one of the main ones being that MLA is the representative organisation for producers in Canberra. Our Deed of Agreement with the Australian Government clearly prohibits MLA from engaging in any agri-political activity or lobbying. Rather, the peak industry councils have the mandate to lobby and advance the interests of the industry in the policy and political arena.



Events attended by Managing Director Richard Norton in 2014-15

Jul	LambEx (Adelaide, SA)
Aug	AgForce board meeting (Brisbane, Qld), Pasture Update (Moora, WA) WA Beef Forum and Grower Group Alliance Forum (Perth, WA)
Sep	Stakeholder Forum for development of Meat Industry Strategic Plan (Sydney, NSW)
Oct	MLA roadshows (Rockhampton, Charters Towers, Georgetown, Longreach, Cloncurry and Roma, Qld), China and Japan trip with Minister of Agriculture and industry delegation, Pastoral Industry Advisory Group meeting (Mount Isa, Qld)
Nov	MLA annual general meeting (Sydney, NSW)
Dec	MLA marketing taskforce meetings (Sydney, NSW)
Feb	Holbrook Group (Holbrook, Vic), WA Farmers annual general meeting (Perth, WA)
Mar	AgForce events (Moura, Middlemount and Emerald, Qld)
Apr	Indonesia and Middle East industry delegation, Kimberley Cattlemen's Association (Broome, WA)
May	Beef Australia 2015 (Rockhampton Qld), 'Your Levy, Your Industry' forums (Casino, Tamworth, NSW; Wangaratta, Bairnsdale, Hamilton, Vic)
Jun	'Your Levy, Your Industry' forums (Bordertown, Clare, SA)

As Managing Director of MLA I'll continue to take every opportunity to get out among grassroots producers and listen to their concerns and ideas.

Consultation

When MLA makes a decision on how the levy should be allocated, this is always made in consultation with peak industry councils, industry taskforces and producers, whether it's for research, development or marketing.

Forums where levy payers and the wider industry have a direct say in how levies are spent and the direction of programs undertaken by MLA are:

- > Red Meat Co-investment Committee
- > Regional consultation model on research priorities (NABRC, SAMRC, WALRC)
- > Sheep and Beef Forecasting committees
- > Sheep Genetics Advisory Committee
- > MSA Taskforce and Pathways Committee
- > Resource Flock Steering Committee
- > Genetics Steering Committee
- > Region-specific global marketing and market access taskforces for beef and sheepmeat (Australia,

Japan, Korea, North America, Middle East, Europe/Russia, Indonesia, China and South Asia)

To enhance this, one of the steps towards greater consultation and transparency this year has been the creation of a regional consultation model to encourage more producers to have their say on the direction of research and development investment. A model is already in operation in northern Australia through NABRC. Similar committees are being established in Southern Australia (Southern Australian Meat Research Council – SAMRC) and in WA (Western Australian Livestock Research Council – WALRC). For more on this, read pages 73-74.

Also, as our chair Michele Allan mentioned in her report, the MLA Constitution has been changed to increase the number of grassfed cattle producer representatives on MLA's Board Selection Committee from one to two people (see pages 81-82) for more). I'm pleased that the nominees will be voted on at this year's annual general meeting so this change can be implemented.

MLA also consults with the Australian Government on its national and rural R&D priorities to ensure our projects are aligned with these priorities.

Transparency

MLA's renewed commitment to transparency extended to the digital world this year with our new-look website providing a clear breakdown of levy streams and key investments



across MLA's work program. I encourage you to visit it at www.mla.com.au. In addition, you will see more of our senior and expert staff presenting at forums and conferences around the county. Please take the opportunity to speak to them and ask questions if you cross paths.

Financial performance

At 30 June 2015 MLA reported a total revenue of \$205.7 million against expenditure of \$179.5 million. This resulted in the retained surplus growing to \$75.4 million. This is against a backdrop of high cattle turnoff in the past year. This year's higher levy income and retained earnings have been committed against key activities and programs over the next five years, in line with the *Meat Industry Strategic Plan 2020*, allowing programs to continue when we expect turnoff to drop significantly in the next two years and therefore the levy revenue to correspondingly drop.

For more on MLA's financial position refer to pages 92-124.

Program performance

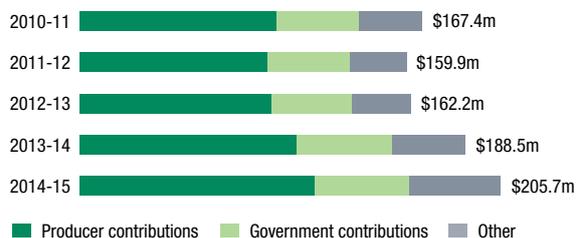
I'm pleased to present the *Report to Stakeholders* on pages 12-65 of this *Annual Report* which showcases the highlights, challenges, opportunities and the outlook of each of MLA's four strategic imperatives; and highlights from each of our 20 objectives and achievements, or otherwise, of milestones. This is an open account of the results of MLA's work program in 2014-15 which I encourage you to read.

I'm proud of what's been achieved in 12 months – although much of this work has been years in the making; the Japan and Korea free trade agreements entering into force and the signing of the agreement with China being just a few examples.

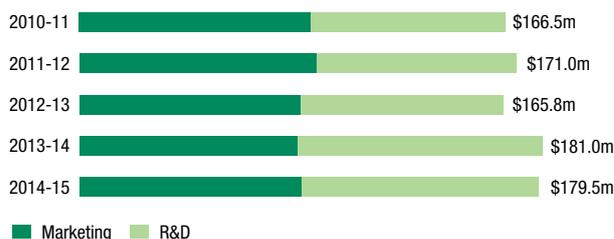
Our team

At MLA I'm very proud of the staff who work tremendously hard delivering research, development and marketing activities for levy payers. We have the skills, expertise and experience to drive results from

Revenue



Expenditure



Retained earnings by levy stream



programs that make a difference, and to help our industry prosper.

MLA has attracted experts across many fields, a number of whom are highly regarded in research circles around the world, such as Ian Jensen, MLA's Manager – Market Access Science and Technology, who is regarded as a leading authority on food safety research and was recently invited to an expert joint Food and Agriculture Organization (FAO) of the United Nations/World Health Organization (WHO) meeting on control of non-typhoidal salmonella in beef and pork meat.

Veronique Droulez, MLA's Nutrition Manager is a member of the International Meat Secretariat's Human Nutrition and Health Committee which meets annually to collaborate, including providing input into global nutrition policy. In 2014 Ms Droulez was invited to present at the WHO/FAO Rome Declaration on Nutrition.

MLA's Dr Tom Davison, Manager – Climate Change Research and Development, was recently appointed to the United Nations Commission for Agricultural Meteorology Expert Team to provide input into the impacts of climate variability on the livestock sector. This role will provide him a tremendous opportunity to learn about the work other countries are doing to adapt to climate variability.

Many of our workforce are from or have a close affinity with rural Australia, with more than half of our staff having a rural background. I hope you enjoy reading profiles of some of our staff and their connections with the land on page 9.

Richard Norton
Managing Director

Industry Insiders

More than 50 per cent of MLA's staff come from a rural background through family affiliation, previous industry experience or tertiary qualification. Here are the backgrounds of six staff:

Damon Holmes

Operations Manager, National Livestock Reporting Service

I grew up on a cattle property of close to 13,000 acres, located 25km from Theodore in Central Queensland, running a backgrounding operation for a small 1,000 head feedlot. I studied in Brisbane, completing a Bachelor of Economics.

I love to get home when I can during Christmas and will always have a strong affiliation with the land.

At MLA I manage 28 field staff across Australia who collect cattle and sheep saleyard data from 70 yards on a weekly basis to help producers make informed decisions about when to buy/sell or hold stock.



Mary Goodacre

Consultation Strategy Manager, On-farm Innovation and Adoption

I'm a partner in a 300ha merino and beef cattle breeding enterprise near Canowindra, NSW. I was born and raised in Canowindra, studied agriculture and worked for 20 years throughout rural Australia to fund the purchase of 'Goimbla' in 2002.

While I'm based in Sydney now, I relish every opportunity to work with livestock producers and get back into the yards.

At MLA I run the regional consultation strategy (see pages 73-74) to ensure grassfed beef and sheepmeat producers across Australia have direct input into setting MLA's research and development priorities.



Jen Peart

Market Coordinator, National Livestock Reporting Service

I am from a beef cattle property called "Bundaleer" in Central Queensland where my family runs an organic cell grazing operation. My grandparents drew and settled the block just over 50 years ago and still live on the property with us. We breed and fatten with approximately a quarter of the property planted down to leucaena. As a typical bush child, I went to a small school of about six children, boarding school in Toowoomba and did a Bachelor of Rural Science at UNE Armidale. I love getting home, although there are many jobs that Dad seems to have conveniently postponed on news of my pending arrival.



Sophie Fisher

Digital Content Coordinator, Communications and Stakeholder Engagement

I grew up on a property called 'Athlone' which is located at Gulargambone in NSW. It is a fourth-generation sheep and cropping enterprise spread over 4,100 hectares, running 9,000 sheep and 700ha of crops. The property is run by my parents Paul and Annette, brother Jock and sister-in-law Kirsty. I love heading home to the farm and try to get there as often as I can. When I am home I enjoy helping Dad out with mustering sheep, checking water and recently with the drought, feeding, but I am sure if you ask my brother he will tell you I prefer to make scones with Mum and then deliver them to the hard workers instead of doing the work!

I help look after MLA's website to ensure producers can clearly see how MLA is investing their levies.



Claire Austin

Project Officer, Value Chain Innovation

I grew up on my parents' mixed farm, located 28km from Gulargambone in north-west NSW running Poll Herefords, prime lambs and winter cereal crops. I went to boarding school for six years in Sydney, and then completed a Bachelor of Agricultural Science. I worked at NSW Farmers Association for three years before starting at MLA as the Stakeholder Relations Officer in 2010. While living in Sydney I always maintained my own cattle herd, which helped me get out of the city as much as possible.

I now live on my husband's family property near Trangie and Nyngan in central-west NSW. This business is run with his father and brother (whose wife, Bec Austin, also works for MLA). The business runs a backgrounding beef operation targeting the EU market and pasture-fed premiums, merino sheep as well as irrigated crops (depending on water allocation) and winter crops.



Kazu Mitsuhashi

Business Development Manager – Japan, International marketing

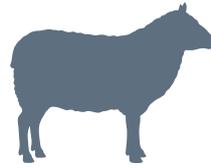
I've been working at MLA for three years following working for a food importing company. I belong to the foodservice team in Japan, working with senior manager Taka Nakayama. I support and organise workshops, seminars and exhibitions for/with key Japanese customers. I'm also responsible for the sheepmeat budget and sheepmeat trade, foodservice, retail and consumer activities. I also do business development – I'm always looking for new business opportunities for our stakeholders.

I've lived in Japan for 34 years and have lived in the US and Australia for one year each. Being Japanese helps me in my role as Japanese customs are sometimes different from Western customs.



Highlights from major projects MLA has led, contributed to or managed include:

MLA 2014-15 Highlights



World first

Sheep vaccine, Barbervax, the world's first vaccine for a gut-dwelling parasite of livestock, was commercially released (page 51).



More open trade

Free trade agreements were signed with China, Japan and Korea, delivering both immediate and ongoing tariff reduction benefits in these key export markets (page 19).

MSA growth continues

Uptake of Meat Standards Australia across the supply chain continues to grow, with record price premiums and numbers of cattle and sheep presented for grading (pages 24-25).



Supply chain feedback

The first commercial supply chain rollout of Livestock Data Link – supplying information and feedback from the processor to the producer – commenced (pages 48-49).

Less methane

The federally funded and MLA-managed National Livestock Methane Program found leucaena plantations in northern cattle systems can lift productivity by up to 22 per cent and lower methane emissions by up to 20 per cent (page 57).



New customers

12 new beef and 11 lamb customer accounts were secured in global markets (pages 34-39).

Global branding

MLA's new international *True Aussie* brand was rolled out across global markets (page 35).



Pest control

Two parkinsonia biological control projects offer potential solutions to a rampant weed problem in northern Australia and a new biological control has been discovered to manage rabbits (pages 56-57).

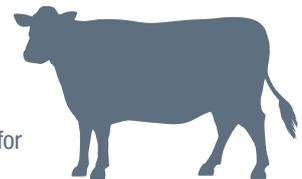
Campaign cut through

MLA's Australia Day lamb campaign was named 'TV Ad of the Year' and lamb sales rose 35 per cent in the week preceding Australia Day – one of our best results ever. MLA's *Better on Beef* campaign saw claimed consumption by mums increase 0.17 meals to 1.73 meals per week. The campaigns saw MLA win the 'Effective advertiser of the year' award at the Australian Effie Awards (pages 31 and 33).



Pain relief

Buccalgesic pain relief gel for calves was launched and NumNuts, a fast-acting pain-relieving local anaesthetic for lambs, was ready for commercialisation (pages 60-61).



Robotics adoption

Lamb automation technology is continuing to be developed and adopted and beef automation technology is being trialled (page 47).



Open communication

The new regional consultation model was established (see pages 73-74) and MLA's website was revamped with greater transparency about levy income and spend (page 53).

Better genetics

A new Brahman days-to-calving estimated breeding value has been developed to improve the reproductive performance of northern herds (pages 44-45).

