

Annual Investment Plan

2025–26



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Introduction

This *Annual Investment Plan* (AIP) has been developed to inform levy payers, peak industry bodies, the Australian Government and the wider industry about Meat & Livestock Australia's (MLA) planned work program in 2025–26.







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 new five-year *Strategic Plan 2030*. The AIP demonstrates alignment with the

Australian red meat industry through its own strategic plan, *Red Meat 2030* and the Australian Government's science and research priorities, and its rural research, development and extension priorities. It also outlines the programs, sub-programs, product groups, key performance indicators and budgets that will guide MLA's activities in 2025–26. Successful delivery of this plan will act as a stepping-stone towards achieving MLA's *Strategic Plan 2030*.

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

The six industry priorities outlined in *Red Meat 2030*

 Our people	People see being part of the Australian red meat and livestock industry as attractive now and into the future.
 Our customers, consumers and communities	People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.
 Our livestock	We set the standard for world class animal health, welfare, biosecurity and production practices.
 Our environment	We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.
 Our markets	We improve the economic resilience for our industry by increasing access to, and the performance of, existing and new markets.
 Our systems	We are a trusted brand because of our integrity systems, built on trust and respect that supports strong partnerships and sharing of information, reducing unnecessary industry and government regulation.

MLA's strategic priorities

MLA's *Strategic Plan 2030* lays out a bold roadmap to drive industry growth, trust, resilience and global competitiveness.

It will balance sustainability with productivity, technological innovation and market intelligence to create and capture value for all parts of the industry across our supply chain.

Vision

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

To achieve this vision, we commit to three key strategic priorities:



Optimising demand by expanding markets and creating and capturing value

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



Driving profitable, productive and sustainable growth

- Invest in research, development and adoption to ensure long-term success to enhance productivity and resilience for producers and the supply chain.
- Strengthen national traceability and quality assurance programs to reinforce Australia's global reputation and maintain our competitive advantage in premium markets.

- Accelerate the adoption of cutting-edge technology and innovation.
- Lead the industry's path to sustainability and contribute to Australia's net zero ambition.

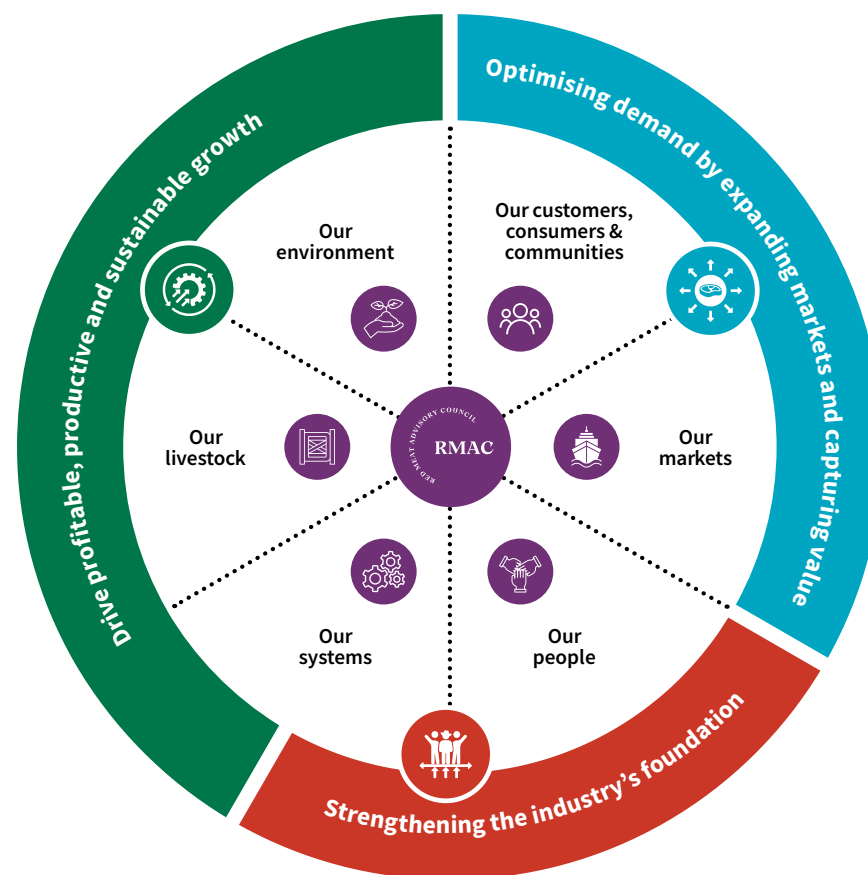


Strengthening the industry's foundation

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

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




Red Meat 2030 is the industry's 10-year strategic plan. It was the foundation of MLA's *Strategic Plan 2025* and will continue to guide MLA's strategic vision to 2030.



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

Aligning MLA's programs to the three strategic priorities

Table 1:

Program	Strategic priorities		
	 Optimising demand by expanding markets and creating and capturing value	 Driving profitable, productive and sustainable growth	 Strengthening the industry's foundation
Animal wellbeing		●	
Domestic market	●		
International markets	●	●	
Value realisation	●	●	
Eating quality research and development		●	
Environmental sustainability		●	
Feedlot		●	
Integrity systems		●	
Objective measurement		●	
Producer adoption		●	
Product and packaging innovation		●	
Productivity (off-farm)		●	
Productivity (on-farm)		●	
Capability building		●	
Communication			●
Livestock technology fund	●	●	
Corporate services			●

Budget summary

In 2025–26, MLA plans to invest \$328.6 million in research, development and marketing activities across 17 program areas.

Tables 2–4: Projected 2025–26 investment by industry priority, funding source and program (\$ millions)

*Total may not add up due to rounding








Table 2: Industry priorities		Total \$328.6 million*
	Our people	25.9
	Our customers, consumers and community	46.4
	Our livestock	103.6
	Our environment	37.9
	Our markets	59.4
	Our systems	34.3
	Our essential services	21.3


























Table 3: Funding source		Total \$328.6 million*
	Sheep levies	41.1
	Grainfed cattle levies	15.9
	Grassfed cattle levies	56.6
	Goat levies	0.8
	Government	102.3
	Australian Meat Processor Corporation (AMPC)	22.0
	LiveCorp	1.1
	External	88.7

Table 4: Program		Total \$328.6 million*
	Animal wellbeing	13.0
	Domestic market	23.7
	International markets	42.8
	Value realisation	19.3
	Eating quality research and development	3.3
	Environmental sustainability	24.2
	Feedlot	7.5
	Integrity systems	40.1
	Objective measurement	10.7
	Producer adoption	24.5
	Product and packaging innovation	3.6
	Productivity (off-farm)	37.3
	Productivity (on-farm)	31.5
	Capability building	6.9
	Communication	9.0
	Livestock technology fund	10.0
	Corporate services	21.3

Funding by industry priority

Tables 5–11: *Red Meat 2030* objectives, projected 2025–26 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.

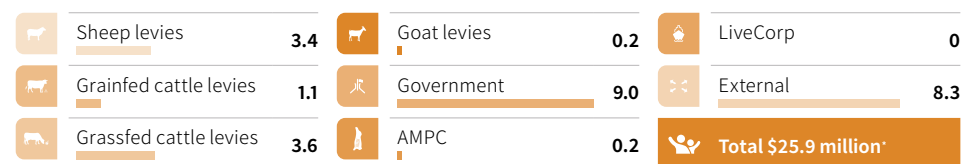


Table 6: Our customers, consumers and communities People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.

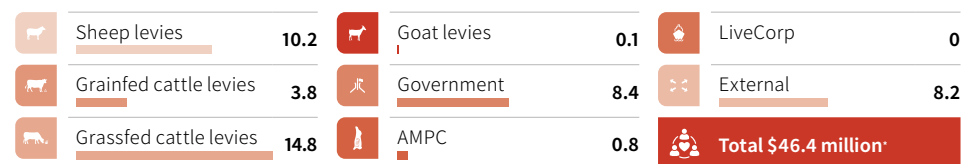


Table 7: Our livestock We set the standard for world class animal health, welfare, biosecurity and production practices.

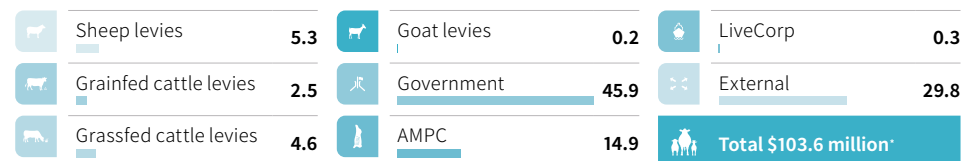


Table 8: Our environment We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.

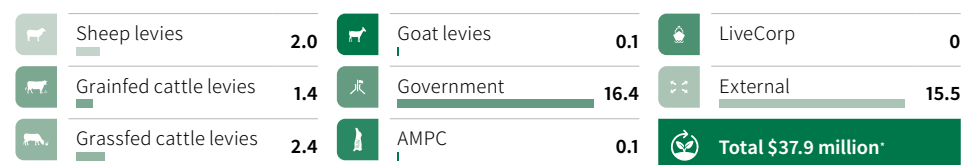


Table 9: Our markets We improve the economic resilience for our industry by increasing access to, and the performance of, existing and new markets.

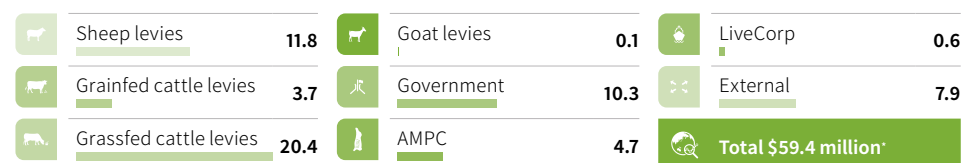


Table 10: Our systems We are a trusted brand because of our integrity systems, built on trust and respect that supports strong partnerships and sharing of information, reducing unnecessary industry and government regulation.

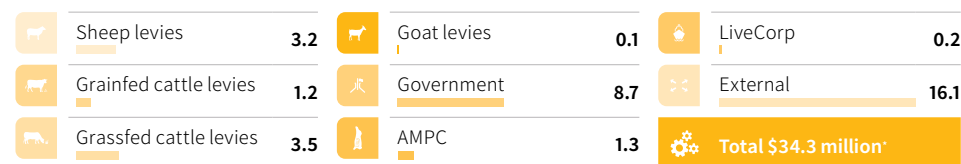
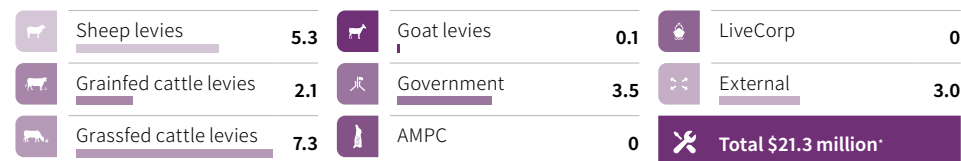


Table 11: Our essential services We continue to invest in the essential services which underpin the competitiveness of our industry and support the overall activity of the company.



Operating environment – opportunities and challenges

Over the past 18 months, Australia's red meat and livestock industry has maintained high livestock numbers, with steady global demand fuelling record export volumes. Domestic livestock markets remained stable, with supply and demand driving normal seasonal price trends.

Over the next three years, global red meat demand is expected to stay strong, and Australia is well-positioned to maintain high supply levels.

Throughout 2024 and continuing into 2025, weather patterns varied across the country. South Australia, Victoria and Tasmania faced dry, drought-like conditions, prompting producers to reduce stock. Northern Australia experienced mostly favourable seasons, supporting strong herd performance and high turn-off rates. Although early 2025 signalled a poor wet season, late rainfall revitalised feed availability. Some regions experienced flooding and stock losses. Western Australia and New South Wales reported mostly positive seasonal conditions and are expected to remain steady.

The cattle sector achieved record production in 2024, with 2.57 million tonnes of beef produced. This was driven by higher productivity and heavier average carcase weights. Productivity gains meant this result was achieved while processing around one million fewer animals than when the last record was set in 2014. Feedlots continued to perform well, producing more beef from fewer animals.

In the sheep sector, southern producers began destocking due to dry weather, while other regions focused on productivity gains. A growing focus on sheepmeat breeds has increased lambing rates, contributing to consistently high lamb production and slaughter volumes – now above 25 million head annually.

Opportunities

Market access

Australia exports approximately 77% of its beef and 80% of its sheepmeat production, driven by strong international demand. The Australian red meat and livestock industry continues to strengthen its competitiveness and secure access to premium global markets. Currently, 88% of Australia's red meat exports benefit from preferential access through an expanding network of free trade agreements. The Australia-UAE Comprehensive Economic Partnership Agreement further enhanced market opportunities. Ongoing negotiations with the European Union and India aim to deliver additional access and trade reform outcomes.

Food security and traceability

The growing global focus on food security and sustainable production offers opportunities for research and innovation in ambient supply chains – especially for remote communities and fragmented cold chain markets. Developing sustainable food production systems and reaching traditionally hard-to-access markets requires investment in agricultural productivity, infrastructure, social security and market expansion.

Clearly communicating the benefits of Australian red meat – such as verified country of origin, traceability and nutrition claims – supports its reputation for delivering a clean, quality protein source.

Innovation in value-added products such as dried red meat, collagen powders and nutraceutical ingredients will depend on traceability and origins verification to Australia. Australian red meat's provenance story is a key point of difference in our marketing strategy.

Adoption of research, development and adoption

The Australian red meat and livestock industry continues to prioritise the adoption of MLA's latest research and development. MLA's producer adoption program equips producers with resources to implement these improvements in ways that deliver value and maintain a producer-led focus. Livestock advisors play a vital role in guiding producers through the risks of adopting new practices. Building their capacity ensures greater uptake of MLA research, fosters data-driven decision making and supports the use of carcase feedback and animal performance insights. These approaches promote productivity gains alongside environmental benefits.

Global red meat deficit

The United States – the world's largest beef producer – is expected to begin rebuilding its herd in 2025 after five years of drought-driven destocking. The US cattle herd is currently at its lowest level in more than 70 years. A slow rebuild will lead to a significant decline in American beef production over the coming years, creating an estimated one million tonne shortfall and an opportunity for Australian red meat exports.

Sustainability

Australia's red meat producers continue to lead in adopting systems, technologies and practices that underpin world-class animal welfare and environmental performance. The red meat industry's operating environment continues to evolve in response to economic, social and environmental drivers. Climate variability affects Australia's grazing lands, but the beef and sheep feedlot sectors – as well as on-farm supplementation – help improve efficiency and reduce grazing pressure. These systems maintain a consistent food supply for both domestic and international markets.

The beef feedlot sector is operating at a record 1.65 million head capacity, with more than 68% shaded and aiming for full coverage by 2026.

The live export industry is strongly committed to animal welfare, recognising its importance for maintained market access, meeting community expectations and supporting regional supply chains in western and northern Australia. On all voyages, 19 welfare metrics are recorded daily to assess animal health, comfort and management effectiveness. The 2024 Sheep Sustainability Framework highlighted ongoing improvements in pain management during animal husbandry procedures.

The red meat industry has achieved a 78% reduction in net greenhouse gas emissions since the 2005 baseline, driven primarily by vegetation-based carbon sequestration. MLA continues to identify soil carbon opportunities through ground cover management and enhanced forage production.

Producers are exploring strategies that reduce costs through efficiency and generate new income streams via environmental markets. Climate resilience knowledge continues to improve, with producers accessing advanced decision-support software to assess sustainable carrying capacity and weather forecasting. According to the 2024 Australian Beef Sustainability Framework, 81% of producers have adopted practices to improve soil water retention.

Live export demand

Demand for live export cattle in 2024 was particularly strong in South-East Asia – up 31% on 2023 to just under 690,000 head. The industry continues working with government and commercial partners to maintain vital export supply chains – especially those servicing northern Australia.

Challenges

Volatile global trade

While global trade has always been dynamic, recent changes to trading barriers, patterns and partners will continue to impact Australia's red meat exports. As global markets are disrupted, it is likely that importing countries will seek new suppliers of red meat, adjust the volume of their imports as well as the mix of products purchased.

For the Australian red meat industry, this offers opportunities in new markets for product diversification and increased import volumes. Managing demand will require a careful balance of maintaining traditional partnerships while responding to demand elsewhere. Industry must remain nimble and adaptive to effectively manage changing market conditions.

Cost-of-living

Despite easing inflation in Australia and many key international markets, cost-of-living pressures continue to influence red meat consumption, particularly across the food sector. Consumers are changing their spending habits, favouring lower-cost retail options and cooking at home more frequently.

Cost-of-living challenges extend globally. In major importing countries, the rise in food prices has altered meat consumption patterns. Many consumers now choose smaller portion sizes or lower-cost proteins such as chicken and pork. Australia has maintained competitive market access and favourable customer preference, which resulted in strong export growth across all major markets in 2024 (excluding China). Price sensitivity, and the perception of good value, will continue to influence consumption globally.

Operating environment – opportunities and challenges

Live export

The Federal Government committed to phasing out live sheep export by sea by 1 May 2028. Exporters, producers and supply chain businesses face challenges, particularly in the WA sheep industry. MLA is continuing to support the sheep live export trade during the transition period.

MLA will have a role to play to assist industry with:

- diversification of 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

Indonesia continues to manage outbreaks of foot-and-mouth disease (FMD) and lumpy skin disease (LSD). Australia is currently free from FMD and LSD and it's our priority 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 Australia, there would be a significant impact on our meat and 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 result in severe economic losses to Australia's agricultural sector. Work is progressing to develop vaccines for both diseases that could be used in Australia in the unlikely event of an incursion.

Input costs

Rising input costs continue to challenge on-farm and processing operations. While fertiliser and fuel prices have eased from peak levels, other costs – including interest rates, machinery, and infrastructure – remain elevated. The processing sector faces labour shortages and increased energy costs, which affect profitability and operational efficiency. Many businesses are investing in automation, workforce development, and energy efficiency to manage cost pressures.

Sustainability

At a farm level, Australia has experienced climatic extremes, with drought conditions in southern regions and heavy rainfall and flooding across northern and central Australia. These conditions have affected the forage base, livestock health and performance, and overall farm profitability.

Globally, the pace of temperature change is accelerating. The 2024 calendar year was the first recorded year to exceed 1.5°C above pre-industrial levels. This shift brings increased severity of summer temperature events across Australia, highlighting the need for producers to adopt adaptation strategies such as improved genetics, enhanced feedbase management, water security, and shade and shelter.

At the national level, new climate-related financial disclosure legislation will require large Australian companies to publicly report on their climate resilience and emissions. The challenge for the red meat and livestock supply chain will be identifying low-cost, practical methods for measuring and reporting these emissions moving forward.

Sustainability requirements have emerged in several supply chains over the past year. The European Union has confirmed with international trading partners that its deforestation regulations will take effect from 30 December 2025. In parallel, some supply chains are setting their own sustainability commitments. These developments have intensified industry discussions around land management practices and assurance systems to support industry's sustainability credentials.

MLA has also adopted a product stewardship approach, demonstrating leadership in sustainable packaging and new federal packaging regulations. This proactive stance not only positions the industry to meet regulatory requirements but also fosters innovation and circularity, supporting a more sustainable future for Australian red meat production and packaging.

Programs

	Animal wellbeing	10		Producer adoption	37
	Domestic market.....	12		Product and packaging innovation.....	40
	International markets	15		Productivity (off-farm)	42
	Value realisation.....	20		Productivity (on-farm)	44
	Eating quality research and development.....	25		Capability building	50
	Environmental sustainability	27		Communication	53
	Feedlot	29		Livestock technology fund.....	58
	Integrity systems	32		Corporate services	60
	Objective measurement	35			

Graham Sharman, Glenn Innes NSW, is a professional livestock transport operator for StockTrans and was a contributor to the content development for the Livestock Transport Hub.



Program

Animal wellbeing

MLA's investment in animal wellbeing research, development, extension and adoption 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 2030 strategic priorities



Animal wellbeing

The animal wellbeing sub-program works to reduce the impacts of animal disease through the delivery of safe, effective and long-acting vaccines and therapeutics, reinforcing the premise that disease prevention is better than disease treatment.

The adverse impacts of human interventions on livestock wellbeing, such as surgical husbandry, will be reduced through ongoing research that looks to replace these techniques or mitigate the pain that they cause. This demonstrates our industry's commitment to continually improve the welfare of Australia's livestock.

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 for diseases such as lumpy skin disease, utilising modern technology (mRNA, novel delivery systems/antigens, sustained release formulations), and a project to develop a vaccine for infectious bovine keratoconjunctivitis ■ 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 ■ 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, validating best practice preparation prior to transport, improving welfare outcomes and reducing the prevalence of sheep pneumonia in flocks. <p>Program investments include the integration of effective adoption of producer on-farm focused outcomes, via extension or commercial adoption pathways.</p>

Key performance indicators in 2025–26

1. mRNA vaccine constructs for lumpy skin disease and foot-and-mouth disease and one other high impact endemic disease are developed and fully tested with virus challenge studies for efficacy and safety.
2. Deliver a 5% reduction in Trichomonas, Vibriosis and Pestivirus diseases across four northern pastoral enterprises as compared to 2023.
3. The scour worm vaccine antigens and expression system selected, immune phenotype understood, and vaccine delivery system determined.

Table 12: Projected 2025–26 investment by funding source – animal wellbeing (\$ '000)

*Total may not add up due to rounding

Sub-program	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Animal wellbeing	-	-	61	-	418	-	94	-	-	-	-	-	-	-	5,089	5,662	1,659	11,324	1,659	12,983
Total*	-	-	61	-	418	-	94	-	-	-	-	-	-	-	5,089	5,662	1,659	11,324	1,659	12,983

MLA's Product Development Executive and Culinary Chef, Julie Ballard, barbeques Australian lamb cutlets as part of a foodservice workshop in the Pilbara, WA. The workshop delivered butchery, culinary and nutrition education to ISS Facility Services Australia professionals, who create meals for 2,500 miners every day.



Program

Domestic market

MLA's investment in the domestic market program delivers value to participants across the supply chain, from providing timely livestock market reports and indicators, to insight-led customer and consumer programs that drive demand for red meat amongst current and future Australians.

Sub-programs

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

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Market knowledge (domestic)

MLA's marketing and promotion (domestic) sub-program delivers initiatives to ensure red meat is positioned as a protein of choice for consumers and customers. It also works to recruit future generations of Australian red meat consumers and influence domestic customers' decisions to improve retailing and menuing of Australian red meat.

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 datapoints 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 online) ■ 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 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 to and reflective of new market trends.</p>
Domestic market consumer insights	<p>The 'domestic market 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 2025–26

1. **High levels of satisfaction (above 85%) by industry stakeholders with MLA's market information services, sourced from the annual MLA Subscriber survey and with a baseline of 85%.**
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, based on Google Analytics and other data sources.**
3. **Revise market indicators to better represent the saleyard and online trading environments.**

Marketing and promotion (domestic)

MLA's marketing and promotion (domestic) sub-program delivers initiatives to ensure red meat is positioned as a protein of choice for consumers and customers, recruit future generations of Australian red meat consumers and influence domestic customer decisions to improve retailing and menuing of Australian red meat.

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 tailored key foodservice and retail customer plans supporting the butcher channel to over index on red meat through knowledge, resources and shopper experience improvement setting appropriate targets for promotional activities and conducting post evaluations delivering market development partnerships that co-fund and support eligible Australian businesses with activities that grow or defend the value of their Australian red meat share against competitor proteins.
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 future red meat consumers, such as younger and culturally-diverse demographics leveraging the strong emotional bonds consumers have with beef to continue to ensure 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 during the year, with 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 2025–26

1. Maintain consideration scores at 82% for beef and 57% for lamb, based on consideration as a proxy for demand and multi year data collected via the Domestic Consumer Tracker.
2. Maintain 'worth paying more' for beef at 33% and lamb at 28%, based on likely cost-of-living influences and data collected via the Domestic Consumer Tracker.
3. Customer development plans in place with key retail and foodservice customers, with at least two case studies completed that demonstrate impact.

Table 13: Projected 2025–26 investment by funding source – domestic market (\$ '000)

*Total may not add up due to rounding

Sub-program	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Market knowledge (domestic)	17	10	32	40	367	1,170	354	1,690	162	389	228	342	2	15	-	1,161	95	2,321	3,752	6,073
Marketing and promotion (domestic)	-	2	-	167	-	7,148	-	7,882	-	1,830	-	593	-	-	-	-	-	-	17,621	17,621
Total*	17	12	32	207	367	8,318	354	9,573	162	2,219	228	935	2	15	-	1,161	95	2,321	21,373	23,695

Cutting edge innovation in artificial intelligence has seen the development of a camera trained to automatically count and measure the weight of cattle from video images. The camera, which can also detect the breed of cattle, arose from a project funded by the Livestock Export Program (LEP), a collaboration between LiveCorp and MLA.



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 2030 strategic priorities



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	Initiatives within the 'economic access' product group include: <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	Initiatives within the 'technical access' product group include: <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 the Australian Meat Industry Council (AMIC) and government to avoid/alleviate/reduce non-tariff barriers to trade.

Key performance indicators in 2025–26

1. Industry positions/submissions prepared by MLA on priority trade defence and/or reform issues are acknowledged and acted on by government and support trade facilitation.
2. MLA makes a significant contribution to alleviating \$100 million worth of non-tariff trade barriers as part of the joint industry goal of \$1 billion between FY21 and FY30.

Market knowledge (international)

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

Product group	Core activities
International market insights	Initiatives within the 'international market insights' product group include: <ul style="list-style-type: none"> ■ monitoring macro trends ■ monitoring market and channel trends ■ monitoring competitors ■ regular reporting of red meat exports.
International consumer insights	Initiatives within the 'international consumer insights' product group include: <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 ■ undertaking market research of the consumer, shopper, trade, retail and foodservice sectors (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 and risks by understanding global markets and the evolving preferences of consumers and customers ■ 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 2025–26

1. Increase utilisation of the Global Insights online tool by 5% year-on-year, as measured by Google Analytics from a baseline of 7,500 annual views.
2. Complete at least two customer case studies and two MLA internal case studies that demonstrate the impact of MLA insights.
3. Partner with Research, Development and Adoption team to deliver at least one end-to-end initiative where insights have informed size potential and strategic direction.

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 2025–26

1. Net positive impact on customer preference for Australian red meat amongst customers attending an MLA event in international markets, based on a survey of event attendees.
2. Improvement in export market consumer preference above FY24 benchmarks for Australian beef (8.1/10) and lamb (8.5/10) derived from survey of international customers.

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 2025–26

1. Through surveys, maintain in-market stakeholder satisfaction (8.0/10) for trade insights and services provided by the livestock export program.
2. Produce one 'program of work' case study per region showcasing live export activities that have mitigated industry trade risk, improved industry's ability to maintain and grow market access, and/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 its 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 ■ driving 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, international development goals, University of New England (UNE) partnership project and lifecycle carbon assessment ■ communicating research, development and adoption outcomes and program performance to stakeholders ■ consulting with industry through the Livestock Export Research and Development Advisory Committee (LERDAC) ■ implementing the new Livestock Export Program research, development and extension (LEP RD&E) systems and processes, including investment management training of management committee personnel ■ implementing the LEP RD&E strategic goals ■ support adoption of practices to improve livestock performance through the livestock export supply chain.

Key performance indicators in 2025–26

1. Develop and trial methods to aggregate and interpret animal welfare measures for improved insights and decision making.
2. Completed R&D projects provide industry stakeholders with evidence-based insights that improve the cost efficiency and competitiveness of Australia's live cattle export supply chain.
3. Directly engage with at least 75% of livestock exporters (by volume) to support and demonstrate adoption of new best practice guidelines for bedding, lameness, thermal comfort and livestock management on vessels.
4. Use industry data, including LIVEXCollect and RD&E project outputs, to guide project development, inform RD&E priorities and support continuous improvement in livestock export practices. Progress measured by the number of projects that use or are informed by industry data.

Table 14: Projected 2025–26 investment by funding source – international markets (\$ '000)

*Total may not add up due to rounding

Sub-program	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Market access	1	6	2	26	27	579	26	968	12	226	15	370	-	17	-	83	-	166	2,192	2,358
Market knowledge (international)	-	5	-	22	20	945	84	1,100	4	250	-	-	-	-	-	107	-	215	2,322	2,537
Marketing and promotion (international)	-	99	-	292	-	8,124	-	19,294	-	3,087	-	179	-	-	-	-	2,012	-	33,088	33,088
Livestock export market activities	-	5	-	157	-	832	-	1,313	-	-	-	-	-	500	-	-	-	-	2,807	2,807
Livestock export (research and development)	-	-	24	-	268	-	208	-	-	-	-	-	500	-	-	1,000	-	2,000	-	2,000
Total¹	1	115	27	498	314	10,480	318	22,676	16	3,563	15	549	500	517	-	1,190	2,012	2,381	40,409	42,789

Initiatives like LAMBPLAN, MERINOSELECT and KIDPLAN are delivering world-class Sheep Genetics services.



Program

Value realisation

The value realisation program aims to fast-track supply chain adoption of research and development outputs and new technologies to deliver value across the supply chain. This program drives adoption of MLA's genetics and eating quality commercial services. The combination of genetics, livestock credentials, objective measurement technology, quality and yield traits, and brand specifications will determine future livestock value. Seamless two-way information flow across the supply chain – both feedback and forward sharing – will be key to unlocking the full value of data. Digital tools will deliver timely data across the supply chain to support decision making and value creation and capture incentives.

Sub-programs

- Genetics commercial services
- Carcase value
- Supply chain implementation

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Genetics commercial services

MLA's livestock genetics commercial services sub-program focuses on delivering world-class services to all red meat producers to help buyers and breeders integrate genetics into livestock production systems to better meet customer expectations through making genetic gains for traits of economic importance. These services include breeding values delivered through BREEDPLAN for cattle, Sheep Genetics for sheep and goats, multibreed genetic evaluations to enable comparison of animals across different breeds, and commercial genomic tools.

Product group	Core activities
Delivery of genetic tools and technologies	Delivery of breeding value services Initiatives within the 'delivery of genetic tools and technologies' product group include: <ul style="list-style-type: none"> ■ delivering world-class Sheep Genetics services such as LAMBPLAN, MERINOSELECT and KIDPLAN ■ ensuring the delivery and commercialisation of beef and sheep genomic tools to industry ■ ensuring effective and competitive commercialisation of BREEDPLAN and Sheep Genetics.
Adoption of genetic tools and technologies	Breaking through the barriers to adoption of genetic improvement technologies Initiatives within the 'adoption of genetic tools and technologies' product group include: <ul style="list-style-type: none"> ■ customised adoption programs to support the use of breeding values, addressing northern beef as a priority ■ 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 2025–26

1. All non-Merino breeds have comparable breeding values for productivity and sustainability traits from a new single multibreed evaluation.
2. Increase genetic progress across selection indexes in Sheep Genetics by three index points from a baseline weighted average index of 137.2.

Carcase value

MLA's carcase value sub-program involves Meat Standards Australia (MSA) commercial services components which include MSA program delivery and myFeedback adoption, uptake and usage. Carcase value traits measured in this program encompass eating quality, carcase and cut yields, as well as animal disease and defects.

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

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 ■ developing and continually improving 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 the MSA program ■ the MSA program and systems include additional carcase value traits such as animal disease and defect information and carcase and cut yield ■ MSA systems are expanded to capture yield specifications and other value traits as a part of boning runs to underpin brand structures, as well as continually improving functionality to enable data flow across the supply chain.
MSA business development	<p>Initiatives within the 'MSA business development' product group include:</p> <ul style="list-style-type: none"> ■ developing practice change programs with supply chains to improve on-farm and carcase outcomes, which include MSA and animal health and welfare. myFeedback will enable these programs as the primary source of carcase feedback ■ partnering with processors and brand owners to extract maximum value from the MSA program including eating quality, yield and animal disease and defect data ■ supporting the further education and confidence of supply chain participants to differentiate MSA brands in all markets, particularly international opportunities ■ partnering with brand owners to support continued producer improvement through long-term practice change programs ■ enabling industry to extract value through eating quality principles for sheepmeat, including the commercialisation of the MSA cuts-based model ■ ensuring greater capture of value from the whole carcase through other traits including carcase and cut yields, animal disease and defect and other value traits.

Key performance indicators in 2025–26

1. Price differentials for Meat Standards Australia compliant cattle demonstrate an annual return to the farm gate of more than \$300 million, compared to the FY25 baseline target of \$220 million.
2. 53% of the national adult cattle slaughter is Meat Standards Australia graded as a result of increasing grading numbers by 100,000 from FY25.
3. The first two sheepmeat supply chains sort carcasses using the Meat Standards Australia Sheepmeat model, representing 30% of national slaughter.
4. At least 4,500 producers access myFeedback as their primary source of carcase feedback information, as compared to 3,000 producers in FY25.

Supply chain implementation

MLA's supply chain implementation sub-program links research and development with the supply chain. It enables Digital Product Officers and Co-innovation Managers to make profitable impacts right along the supply chain in adoption of objective measurement, value traits, eNVD and genetics.

Product group	Core activities
Digital capability adoption	<p>Initiatives within the 'digital capability adoption' product group include:</p> <ul style="list-style-type: none"> ■ working with supply chains to support software upgrades and enhance digital literacy via the Digital Product Officer program.
Collaborative co-innovation capability adoption	<p>Initiatives within the 'collaborative co-innovation capability adoption' product group involve:</p> <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 sustainability, value creation and capture, high value foods and animal wellbeing ■ building human capability to better equip our industry to succeed in a highly competitive environment.
Supply chain objective measurement adoption	<p>The 'supply chain objective measurement adoption' product group supports the adoption of objective measurement-based solutions that can be applied to live animals or carcasses to measure traits describing compliance, productivity and carcass value.</p> <p>Outcomes from this product group are primarily delivered by MLA Donor Company investments and supported by producer levies and Australian Meat Processor Corporation (AMPC).</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ supporting the implementation of carcass measurement solutions and value/quality attributes that enhance Meat Standards Australia (MSA) and AUS-MEAT grading, including investigating opportunities for hot (pre-chiller) beef MSA grading, lean meat yield, and enabling adoption of the cuts-based sheepmeat model. It also includes companies using objective measurement data to underpin brand-based strategies ■ supporting the adoption of proven traceability solutions in abattoirs that deliver improved end-to-end traceability and integration from objective measurement data ■ supporting the adoption of proven supply chain feedback solutions that improve feedback and feed-forward and facilitate implementation of objective measurement enabled value propositions.

Key performance indicators in 2025–26

1. **Digital Product Officer program achieves 80% or more of the capability building social benefits as measured by MLA's triple bottom line framework against pre MLA investment baselines.**
2. **A minimum of 10 co-innovation program partners achieve 80% or more of their individual program partnership key performance indicators that reflect MLA strategic innovation priorities, as measured by case study based independent evaluations and pre MLA investment baselines.**
3. **Three processors adopt a new commercial system incorporating objective measurement data to demonstrate 'cut to market specification' added value.**
4. **At least two supply chains implement objective measurement-enabled systems and data feedback that enables new value capture models.**

continued next page

Table 15: Projected 2025–26 investment by funding source – value realisation (\$ '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 2025–26
Genetics commercial services	-	-	-	-	36	-	23	-	47	-	-	-	-	-	1,323	1,429	3,161	2,858	3,161	6,019
Carcase value	25	-	48	-	531	-	653	-	414	-	-	-	-	-	96	1,767	48	3,533	48	3,581
Supply chain implementation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3,982	3,982	1,759	7,964	1,759	9,722
Total*	25	-	48	-	567	-	677	-	461	-	-	-	-	-	5,400	7,178	4,968	14,355	4,968	19,323

Investments will enable all cattle and sheep pathways and production systems to be eligible for MSA grading.

Program

Eating quality research and development

The eating quality research and development program invests in initiatives to identify new traits and measures to explain variation in eating quality and carcass value, as well as research that will enable sheep and cattle to be Meat Standards Australia (MSA) graded. This includes new traits that may be measured on live animals and carcasses and includes the expansion of the understanding of red meat traits such as flavour. It will also expand the MSA sheepmeat cuts-based model to include new traits that describe eating quality and value of non-lamb products.

The program will leverage international partnerships in red meat research as a leader in eating quality, to expand our understanding of carcass value traits to inform improved on-farm and supply chain decisions and align these with consumer demands.

Sub-programs

- Eating quality research and development

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Eating quality research and development

MLA's eating quality research and development sub-program strives to develop new traits that describe eating quality and carcass value.

As a leader in global eating quality, the team will collaborate with partners in the aim to identify and capture greater value for the red meat supply chain.

Product group	Core activities
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 and expansion of the MSA sheepmeat cuts-based program ■ leveraging 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 2025–26

1. Identify at least one new trait that describes beef and/or sheepmeat eating quality variation.
2. Deliver research outcomes and associated implementation plan for a new cattle consignment pathway that is compliant with the Meat Standards Australia program.

Table 16: Projected 2025–26 investment by funding source – eating quality research and development (\$ '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 2025–26
Eating quality research and development	-	-	22	-	249	-	341	-	214	-	-	-	-	-	657	1,482	342	2,965	342	3,307
Total*	-	-	22	-	249	-	341	-	214	-	-	-	-	-	657	1,482	342	2,965	342	3,307

Program

Environmental sustainability

The environmental sustainability program invests in research, development and adoption activities to foster the natural capital base and improve grazing land stewardship and resource use intensity. This has beneficial impacts on global climate, food security and farm profitability.

The program also assists the supply chain to meet emerging sustainability requirements and opportunities along with delivery of the Australian Beef and Sheep Sustainability Frameworks. The Frameworks set out the key indicators of performance in sustainability and enable success to be recognised through evidence-based metrics. This empowers industry to continually improve and demonstrate its values to customers, investors and stakeholders.

MLA is committed to the measurement of the complete biogenic carbon cycle for grazing ruminants, an expansion of research in land development and management strategies, and grazing land stewardship. This includes a focus on farming system efficiency to lower operational costs, income diversification opportunities and improvements of the natural capital base that improves capital asset value.

The vast majority of investment is funded by MLA Donor Company, with levy investment guided by consultation with peak industry bodies and regional consultation.

Sub-programs

- Environmental sustainability

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



The Australian Beef Sustainability Framework's 2024 Annual Update demonstrates to investors and customers the beef industry's sustainability commitment and transparently reports its performance and progress with relevant and robust data.

Environmental sustainability

The environmental sustainability sub-program invests in research, development and adoption activities to foster the natural capital base and improve grazing land stewardship and resource use intensity with beneficial impacts on global climate, food security and farm profitability.

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"> ■ livestock carbon initiatives contributing towards Australia's net zero future for the national economy whilst improving or maintaining on-farm profitability: <ul style="list-style-type: none"> ▸ launching a global collaboration on building the complete farm system carbon cycle for grazing ruminants including changes in forage biomass and greenhouse gas flux in grazing systems ▸ continued development and evaluation of low-cost models to estimate carbon sequestration in soils and vegetation to increase the number of options available to Australian producers ▸ continued development of extensive grazing efficiency solutions (e.g. supplements and microbial products) that improve cost of gain and resource use intensity. ■ management and improvement strategies that help producers become resilient to climate change and variability as well as improve profitability. This could include water management, soil improvement, management of grazing systems, forage conservation, lot feeding and beneficial vegetation ■ the program also fosters emerging environmental credentials for the industry via the Environmental Credentials Platform and Sustainability Frameworks, including the exploration of state-based partnerships to promote climate resilience and best practice grazing land stewardship for key environmental and profitability outcomes.
Sustainability Frameworks	<p>MLA manages the Australian Beef Sustainability Framework (ABSF) on behalf of Cattle Australia (CA), the Australian Meat Industry Council (AMIC) and the Australian Lot Feeders' Association (ALFA). It manages the Sheep Sustainability Framework (SSF) on behalf of WoolProducers Australia (WPA) and Sheep Producers Australia (SPA). 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 industry's performance and progress with relevant and robust data annually, 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 the ABSF and SFF <i>Strategic Plans</i> and Work Plans' key priorities and activities and delivery of the ABSF and SSF <i>Annual Reports</i> ■ delivery of materiality assessments, insights and data to enable stakeholders (external and internal) to inform their sustainability commitments and pathways to market ■ creating clear linkages between performance as identified in the Sustainability Frameworks and investments into research, development and adoption.

Key performance indicators in 2025–26

1. Year-on-year increase in supply chain satisfaction with the Beef and Sheep Sustainability Frameworks as measured by a qualitative survey of participating stakeholders.
2. At least five validation site networks established to quantify long-term grazing management effects on carbon flux, profitability and environmental outcomes.
3. Commercial launch of one technology that lowers the cost of soil carbon sequestration measurement.

Table 17: Projected 2025–26 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 2025–26
Environmental sustainability	22	-	39	18	510	268	550	626	223	295	128	-	-	-	9,027	10,498	2,004	20,996	3,211	24,207
Total*	22	-	39	18	510	268	550	626	223	295	128	-	-	-	9,027	10,498	2,004	20,996	3,211	24,207



Manabotix ute with the Bunk Scanner.

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.

Sub-programs

- Feedlot productivity

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



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, immunobiologicals and probiotics to prevent feedlot disease and provide alternatives to medically important antimicrobials ■ development of a feeder cattle preparation program to communicate best practice management principles to cattle producers during cattle backgrounding to lower disease incidence upon feedlot entry ■ development of best practice guidelines on veterinary feed additive safety and usage ■ shade and shelter research projects to ameliorate the effects of wet weather and heat on feedlot cattle ■ development and extension to industry 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 and 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 automated feeding systems for feedlot cattle – bunk scanning, feed allocation and feed delivery ■ developing and evaluating sensor technologies for feedlot disease and heat load prediction, detection and diagnosis ■ commencement of a project to use computer vision to improve feedlot cattle heat load forecasting ■ adoption programs for feedlot automation including publications, communications, workshops, conferences, industry meetings, demonstration sites, extension officers, monitoring and evaluation activities ■ implementation of feedlot automation and technology evaluation partnerships with commercial lot feeders, and integration of research managers into partnerships so as to objectively evaluate and screen new opportunities.

Key performance indicators in 2025–26

1. **82.5% of National Feedlot Accreditation Scheme accredited feedlot capacity is covered by shade or shelter, an increase from the FY24 baseline of 70.4%.**
2. **30% of grainfed cattle slaughtered/production is from short duration lairage, an increase from the FY24 baseline of 21.8%.**
3. **Feedmetrix bunk management piloted at three feedlots for a 12-month period.**

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, live microbials, implants and novel application technologies ■ conducting feedlot cattle composition of gain 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 ■ exploration with lot feeders and brand owners on strategies to remove reliance on days on feed from label claims, instead focusing on objective carcase quality and productivity specifications.
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 microbiome and hydrogen utilisation 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 ■ developing or evaluating strategies to improve feedlot energy and water use efficiency ■ developing 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 Hub ■ funding development of labour indicators for the national feedlot industry ■ co-funding the Feedlot Research Manager Partnership for commercial feedlot research capability building and technology evaluation ■ adoption activities for feedlot labour including publications, communications, workshops, conferences, industry meetings, demonstration sites, training strategy officers, monitoring and evaluation activities.

Table 18: Projected 2025–26 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 2025–26
Feedlot productivity	-	-	-	-	-	-	-	-	1,934	456	-	-	-	-	1,320	3,254	525	6,508	981	7,489
Total*	-	-	-	-	-	-	-	-	1,934	456	-	-	-	-	1,320	3,254	525	6,508	981	7,489



Jessira Saunders, ISC Product Strategy Manager – Livestock Assurance and Feedback, takes a producer through new dashboard concepts for the uplifted NLIS database at Angus EXPO 2025.



Program

Integrity systems

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

Sub-programs

- Integrity systems
- Market access science

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



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 users of Integrity Systems Company's (ISC) products and services, and setting our services up to meet the needs of tomorrow, by leveraging technology to deliver a seamless and integrated customer experience.</p> <p>The key activities and enablers included within the 'product assurance and traceability systems' product group are:</p> <ul style="list-style-type: none"> ■ developing and transitioning to an uplifted National Livestock Identification System (NLIS) database and decommissioning of the legacy NLIS system ■ scoping and developing the integrity programs as a value creation vehicle for industry through verified credentials, connected datasets and the delivery of simple and seamless – yet sophisticated – technology and data solutions. ■ maintaining, reviewing and improving the integrity system rules and standards (National Livestock Identification System (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 electronic National Vendor Declaration (eNVD) system) ■ maintaining strong collaboration with third-party integrators utilising our Application Programming Interfaces (APIs) and supporting industry with required software upgrades ■ delivering robust and effective communication, extension and adoption programs to improve integrity system awareness, understanding and on-farm compliance with food safety, animal welfare and biosecurity ■ 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.
Data systems	<p>The 'data systems' product group focuses on the following activities:</p> <ul style="list-style-type: none"> ■ enhancing governance controls for the MLA data platform to support the connection of data sets and establish data access and sharing controls to allow participants to control how their data is shared and used ■ using the data platform to explore delivery of verified whole-of-life livestock credentials through the supply chain ■ protection and sharing of industry data through the use of digital passports, using technology enhancements to share information in place of data ■ increase the reporting and analytic capabilities across the MLA data platform to support real time analysis of connected data sets to inform product roadmaps and business priorities ■ enhanced data governance and data standards across national red meat traceability, carcase feedback and live animal inputs as an interconnected chain ■ creating consistent data collection and reporting to facilitate the accurate flow of data forward as well as back to producers to enable data-informed on-farm management decisions ■ comprehensive data catalogues and access policies enabling transparency and utilisation/exploitation of data assets ■ broader data interoperability via permissioned linkage of data with external data exchanges ■ application of artificial intelligence (AI) technologies to drive business efficiencies across operational areas like communications and compliance ■ using data science and AI/machine learning (ML) capability to deliver enhanced insights for MLA and industry ■ capability building to drive a data culture across MLA and industry.

Key performance indicators in 2025–26

1. The portion of digital consignments (electronic National Vendor Declaration) of total consignments increases to 50% from 37% in FY25.
2. 30% of Livestock Production Assurance accredited producers have completed an Animal Welfare Management Plan following the FY25 launch of the new Animal Welfare Management Plan requirement.
3. The new National Livestock Identification System platform is built and successfully deployed.
4. Pilot a successful use case for application of artificial intelligence (AI) to enhance MLA's research library and improve MLA decision making around R&D investments.
5. Data Governance Framework embedded across MLA, with 100% of MLA datasets having clearly defined data owners and 85% having complete and accurate metadata on the Data Hub, as measured via a self assessment survey.

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"> ■ maintenance and ongoing refinement of the suite of tools, calculators and shelf-life data sets that allow industry to adopt best practices in red meat supply chain management ■ identifying existing and potential non-tariff (technical) barriers and developing a recommended action plan to address these ■ maintaining the Meat Packaging Product Stewardship program that supports our red meat supply chain.

Key performance indicators in 2025–26

1. Review emerging market access barriers for three key Australian red meat markets.
2. At least 10 industry users engage with shelf life-cold chain management tools, from an FY25 baseline of five.

Table 19: Projected 2025–26 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 2025–26
Integrity systems	110	9	212	38	2,389	885	2,387	1,487	1,292	345	1,070	476	9	21	1,415	8,883	15,768	17,766	19,030	36,796
Market access science	8	-	15	-	170	-	164	-	75	-	106	-	1	-	911	1,449	456	2,898	456	3,353
Total*	118	9	227	38	2,559	885	2,551	1,487	1,367	345	1,175	476	9	21	2,327	10,332	16,224	20,664	19,485	40,149

Senior Research Engineer at Murdoch University, Renji Karayakallile Abraham, holding the microwave technology he demonstrated to participants at MLA Updates in Perth in October 2024.



Program

Objective measurement

Objective measurement (OM) of livestock and carcase attributes is an essential enabler for industry to improve grading accuracy, transparency and enable value creation and capture incentives. This underpins the industry *Red Meat 2030* goal to have a net positive benefit on sustainable farm profitability. These include unlocking decisions informed through data measurements across key traits to describe carcase value, such as lean meat yield, eating quality and health attributes.

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 LMY and eating quality traits 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 incentives 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 2030 strategic priorities



Objective measurement

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

These support key OM-enabled value propositions for both producers and other parts of the red meat supply chain.

Product group	Core activities
Supply chain objective measurement	<p>The 'supply chain objective measurement' product group supports the development, early adoption and implementation of technologies that can be applied to live animals or carcasses to measure traits describing productivity and carcase value.</p> <p>Outcomes from this product group are primarily delivered by MLA Donor Company investments and supported by producer levies, Australian Meat Processor Corporation (AMPC) and grant funds.</p> <p>Initiatives include:</p> <ul style="list-style-type: none"> ■ supporting the development, early adoption and implementation of emerging live animal technologies that focus on productivity, composition and welfare attributes for improved supply chain feedback ■ supporting the development, early adoption and implementation of carcase measurement solutions and value/quality attributes that enhance Meat Standards Australia (MSA) and AUS-MEAT grading, including investigating opportunities for hot (pre-chiller) beef MSA grading, lean meat yield, and enabling adoption of the cuts-based MSA sheepmeat model. It also includes companies using objective measurement data to underpin brand based strategies ■ 'fifth quarter' objective measurement technologies that support the grading and harvesting of red meat products, including offal, hides, skins, blood, bones, by-product and co-product raw materials, for processing into higher value products such as food and nutraceutical ingredients ■ supporting the development, early adoption and implementation of traceability solutions in abattoirs that deliver improved end-to-end traceability and integration from objective measurement data ■ supporting the development of enabling objective measurement tools that enhance supply chain efficiencies.

Key performance indicators in 2025–26

1. **Two new carcase yield measurement devices evaluated, in addition to the three yield devices commercially available as at FY25.**
2. **At least one new IMF lamb device accredited, in addition to the two commercially available devices as at FY25.**
3. **Complete at least three on-farm or feedlot trials of a live animal objective measurement technology and associated value proposition.**

Table 20: Projected 2025–26 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	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Objective measurement	3	-	38	31	275	201	125	51	85	27	176	-	-	-	3,652	4,355	1,643	8,710	1,953	10,664
Total*	3	-	38	31	275	201	125	51	85	27	176	-	-	-	3,652	4,355	1,643	8,710	1,953	10,664

Sammy Mitchell is participating in a five-year Producer Demonstration Site (PDS) project funded by MLA, Southern Farming Systems and Birchip Cropping Group. The PDS focuses on Victorian sheep producers utilising eID technology to make better informed management decisions.



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 2030 strategic priorities



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 on-farm implementation of research and development. The program does this through delivering awareness programs, training workshops, tools and resources to support adoption of practices relating, but not limited to, use of pain relief, feedbase utilisation, breeding and nutrition decisions, and business management. Producer adoption initiatives will also support resilient farm businesses through ensuring safe and supportive workplaces that attract and retain a skilled workforce, fostering a culture of wellbeing and long-term career sustainability.

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 of 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 ■ providing materials to help producers improve workforce safety and on-farm practices.
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 resources to support producer decision making and support workplace safety.
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, producer groups and supply chain partners 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 leadership 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 ■ updating of existing training resources with the latest research findings and tools for use by producers.

Key performance indicators in 2025–26

1. Deliver annual net benefit of \$85 million to red meat producers responsible for up to 180 million hectares, eight million cattle, nine million sheep and 300,000 goats, as compared to FY25 baseline of \$75.6 million impact on producers responsible for 199 million hectares, 6.1 million cattle, 7.7 million sheep and 114,076 goats.
2. Total FY26 producer engagement with 11,000 producers registered at MLA adoption activities, who value participation to their businesses at or above 7/10 via an adoption event survey.
3. Increase number of livestock advisors actively delivering MLA adoption programs by 20% from FY25 engagement baseline of 1,819 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"> ■ work with producers from all regions of Australia through a consultation framework to prioritise relevant research and development initiatives to inform research investment calls that incorporate clear pathways to producer adoption and practice change ■ facilitating participatory research through consultation with key stakeholders throughout the diverse regions of Australia ■ equip producers with a clear understanding of MLA’s <i>Strategic Plan 2030</i> and <i>Red Meat 2030</i> to ensure there is a link between regional producer 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 ■ continued delivery of a dedicated extension and adoption strategy to support the Livestock 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) program to deliver extension activities and adoption practices that reduce calf mortality, improve growth rates and guide 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.
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 ■ adopting optimised sheep production systems.
Goat productivity adoption	<p>Initiatives within the ‘goat productivity adoption’ product group include:</p> <ul style="list-style-type: none"> ■ demonstrating and supporting the transition from harvested rangeland to managed goat enterprises.
Feedbase adoption	<p>Activities within the ‘feedbase adoption’ product group include:</p> <ul style="list-style-type: none"> ■ increased use of research and demonstration sites situated within key production regions ■ use of workshops for producer and advisor training ■ production of legacy resources (e.g. best practice guides) to retain knowledge within the adoption ecosystem ■ development of more advisor capacity nationwide ■ 1:1 support to producers in certain projects and regions ■ use of on-farm research and producer advisory groups to integrate research, development and adoption activities and improve producer relevance of investments.

Table 21: Projected 2025–26 investment by funding source – producer adoption (\$ ‘000)

*Total may not add up due to rounding

Sub-program	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Producer adoption	68	-	178	-	2,090	-	2,179	-	-	-	-	-	-	-	6,884	11,398	1,674	22,796	1,674	24,469
Total*	68	-	178	-	2,090	-	2,179	-	-	-	-	-	-	-	6,884	11,398	1,674	22,796	1,674	24,469

There are red meat-related product development opportunities in key potential growth areas such as nutrition, functional foods, ageing population, snacking, pet food and circular economy waste usage.



Program

Product and packaging innovation

MLA's Product and Packaging innovation program explores, through eligible research, new products, usages and occasions for Australian red meat consumption. The program also investigates new packaging and business model innovations capable of transforming commodity red meat (and its components) into higher value products.

These activities underpin the industry's *Red Meat 2030* goal of having a net positive benefit on sustainable farm, processor and value adder profitability by providing today's and tomorrow's consumers with the highest quality, trusted source of protein.

New consumer trends, combined with new technology platforms, support the development of new value-adding products derived from the whole of the carcass.

By evolving from commodity meat trading to more value-adding, this program also contributes to changing the diversity of people in our industry with subject matter experts from adjacent sectors pivoting to the meat industry and making it a more inclusive place to work.

Sub-programs

- Product and packaging innovation

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Product and packaging innovation

MLA's product and packaging innovation sub-program invests in new product development – novel technologies and value chain innovations that disrupt and provide alternate high value solutions from the inclusion of low value 'fifth quarter' red meat.

This includes exploring new nutrition science research that generates and connects compelling wellbeing evidence for value adding, primarily 'fifth quarter' red meat and new usage and occasion consumption options.

Product group	Core activities
Innovative products, packaging and insights	<p>Initiatives within the 'innovative products, packaging and insights' product group include:</p> <ul style="list-style-type: none"> ■ engaging with food technology, packaging experts and value-adding enterprises to design and deliver at least three new product solutions that grow overall red meat sales and are aligned to global mega trends ■ exploring and partially validating new sustainable packaging materials and/or formats for red meat ■ developing insights and red meat related product development opportunities in key potential growth areas such as nutrition, functional foods, ageing population, snacking, pet food and circular economy waste usage.

Key performance indicators in 2025–26

1. 'Fifth quarter' new product/process improvement investments deliver incremental sales value of \$350 million across the value chain with \$25 million in net value-adding benefit captured by the red meat industry, an increase from the FY25 baseline of \$300m sales and \$1.75m value adding.
2. Collagen production capacity increased to an annual 250 tonnes in FY26, from a FY25 baseline of 160 tonnes.
3. Two new technology platforms evaluated for improved yields and/or producing a new product aligned to market trends.

Table 22: Projected 2025–26 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 2025–26
Product and packaging innovation	-	-	14	-	160	-	57	-	5	-	36	-	-	-	1,214	1,486	607	2,971	607	3,578
Total*	-	-	14	-	160	-	57	-	5	-	36	-	-	-	1,214	1,486	607	2,971	607	3,578



At least two hook tracking processor trials that demonstrate successful objective measurement-related traceability from slaughter to boning room will be completed.

Program

Productivity (off-farm)

The Productivity (off-farm) program has traditionally focused 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 year, MLA has transitioned to Australian Meat Processor Corporation (AMPC) the management and funding of boning and warehousing automation technology initiatives that seek to drive operational efficiency for processors. Despite no producer levies used, ongoing benefits from the past decade of MLA-led investments from this program are forecasted to deliver up to \$80 million annual productivity and cost saving benefits, 63% of which have been redistributed to producers over the long term.

Several legacy investments will be finalised this year, delivering improved hook tracking traceability solutions across several value chains which will allow producers to receive feedback on individual carcasses from processors adopting objective measurement technologies and sheep electronic identification roll out.

Sub-programs

- Productivity (off-farm)

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Productivity (off-farm)

Further research and development investments in boning automations, including robotics and imaging technologies for cutting lines and automation, have now transitioned to the Australian Meat Processor Corporation (AMPC).

Some short-term investments in processor traceability and data integration will continue in FY26, in collaboration with AMPC.

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"> processor hook tracking traceability solutions that support objective measurement value propositions and data feedback systems.

Key performance indicators in 2025–26

1. Complete at least two hook tracking processor trials that demonstrate successful objective measurement-related traceability from slaughter to boning room.
2. Technologies adopted in FY26 and previous years deliver \$80 million of increased productivity for the red meat industry, a decrease from the FY25 \$100 million KPI as a result of the program transitioning to AMPC.

Table 23: Projected 2025–26 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	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Productivity (off-farm)	-	-	-	-	-	-	-	-	-	-	18,132	-	-	-	400	18,532	200	37,064	200	37,264
Total*	-	-	-	-	-	-	-	-	-	-	18,132	-	-	-	400	18,532	200	37,064	200	37,264

As Australia's goat industry has grown, goats have emerged as the unlikely champions of weed control in Australia. Elisabeth Larsen runs a goat herd with a difference – producers across southern NSW can rent her goats to control weeds on their own properties. Image: Rob Evans

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 2030 strategic priorities



Beef productivity

The 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 and herd 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 2025–26

1. **24 additional beef businesses are engaged in the Northern Breeding Business ‘Pathways to Practice’ program, an increase from the FY25 baseline of 74 businesses.**
2. **The new Herdflow application for livestock reconciliation is used by at least 60 myMLA members.**
3. **75 southern and western businesses are engaged in facilitated learning groups through adoption activities derived from beef productivity R&D program investments.**

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 via the WA-focused SheepLinks program, which helps drive producer decisions on farm to inform production decisions and improve farm productivity and profitability, and is focused on sheep diversity 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 2025–26

1. Three demonstration sites completed focused on forage-related best practices in mixed farming regions.
2. Establishment of a multi-year integrated Research, Development and Adoption program of work focusing on the diversification of the Western Australian sheep industry.
3. Quantify the mortality of Merino ewes and implement best practice mitigation strategies on more than eight commercial properties.
4. A minimum of 200 producers are engaged in precision sheep management projects and are providing insights into management options and adoption barriers.

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 research and development	<p>Initiatives within the 'goat productivity research and development' 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.

Key performance indicators in 2025–26

1. A minimum of 20,000 additional goats and 15 additional goat properties participating in industry benchmarking projects, from an FY25 baseline of 13,000 goats and 15 properties.
2. At least two emission reduction demonstration sites established to quantify carbon and sustainable grazing management of goats in different agro-ecological zones.

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 of genetic and genomic technologies. These will equip both seedstock and commercial producers in sheep, and tropical and temperate cattle production systems with world-leading tools and services to make well informed breeding decisions. Research to address priorities that will advance livestock genetics will continue through 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 within the 'reference populations' product group 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 ongoing reference populations for easy-to-measure, harder-to-measure and future traits of importance ■ recording novel traits such as methane and feed intake on informative beef and sheep populations.
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 within the 'genetic improvement research and development' product group 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 ■ continuous improvement of analytical engines for BREEDPLAN and OVIS for enhanced analysis, including multibreed analysis capabilities such as combining the terminal and maternal LAMBPLAN evaluations into a single, largescale multibreed evaluation.

Key performance indicators in 2025–26

1. A new future focused industry co-investment model for reference populations designed, delivering two new reference projects for beef and sheep that will future proof genetic investments to date.
2. Deliver the first beef multibreed proof of concept analysis.

Feedbase production

MLA's feedbase production sub-program aims to protect pastures from threats, improve pasture productivity, and improve the adoption of feedbase innovations.

Product group	Core activities
Feedbase productivity research and development	<p>Activities within the 'feedbase productivity research and development' product group are summarised under two broad themes:</p> <p>Safeguarding feedbase resources:</p> <p>This investment theme seeks to protect the nationwide feedbase from soil degradation and pests that attack pastures. Key activities include:</p> <ul style="list-style-type: none"> ■ improved monitoring of land condition ■ developing techniques to address soil acidity ■ understanding and managing pasture dieback ■ developing new weed control options ■ improving soil nutrition to address legume productivity gaps. <p>Future feedbase design</p> <p>This investment theme aims to raise productivity of pastures nationwide. Key activities include:</p> <ul style="list-style-type: none"> ■ using novel and diverse pasture mixes (perennial or annual) to raise productivity and reduce greenhouse gas emissions ■ breeding of new pasture and forage species, including provision of variety/species comparison data through the Pasture Trial Network ■ development and delivery of agronomic packages for new varieties/species. ■ addressing pasture rundown through improved adoption of legumes ■ identification of new tools/sensors for more accurate pasture biomass measurements.

Key performance indicators in 2025–26

1. Establish >10 mixed farming research demonstration sites in New South Wales/Western Australia and engage at least 250 producers in showcasing opportunities to fill seasonal feed gaps.
2. An additional eight pasture dieback field days conducted across Queensland and New South Wales with more than 200 producers attending, as compared to the eight field days achieved in FY25.
3. Engage at least 650 producers and advisors in demonstrating the role of serradellas in the permanent pasture zone of south-east Australia through extension activities from R&D projects.

Digital agriculture

MLA's digital agriculture sub-program invests in infrastructure, decision support, ag-tech and data platform tools to boost feedbase, animal productivity, sustainability, wellbeing and traceability.

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"> ■ establish partnerships with enterprises wanting to develop and test ag-tech and dashboard decision tools/guidelines from deployed aerial platforms (satellite, drones) and ground devices, for livestock and pasture management to improve on-farm decisions in efficiency, animal welfare, safety, traceability and sustainability ■ work with on-farm productivity and adoption teams to explore opportunities for ag-tech, plus disseminate digital agriculture case studies to drive further awareness and validate value propositions to stakeholders.

Key performance indicators in 2025–26

1. At least 50 new producers trial and adopt drone mustering activities as a result of MLA supported industry training and skills development.
2. Foragecaster pasture/livestock predictive planning and management tool being trialled by 1,000 producers, an increase from 100 producers trialling a pre-commercial prototype in FY25.
3. Value proposition and adoption barriers assessed for virtual fencing technologies, based on three completed trial sites.

Table 24: Projected 2025–26 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 2025–26
Beef productivity	-	-	0	-	-	-	114	-	-	-	-	-	-	-	713	828	222	1,655	222	1,877
Sheep productivity	-	-	51	-	585	-	-	-	-	-	-	-	-	-	669	1,305	347	2,611	347	2,958
Goat productivity	201	-	-	-	-	-	-	-	-	-	-	-	-	-	757	959	-	1,917	-	1,917
Livestock genetics	-	-	-	-	1,373	-	987	-	-	-	-	-	-	-	3,269	5,629	141	11,258	141	11,399
Feedbase production	4	-	50	-	563	-	763	-	-	-	-	-	-	-	2,695	4,075	672	8,150	672	8,822
Digital agriculture	0.2	-	2	-	26	-	151	-	20	-	-	-	-	-	1,650	1,848	825	3,697	825	4,522
Total*	206	-	103	-	2,547	-	2,015	-	20	-	-	-	-	-	9,753	14,644	2,208	29,288	2,208	31,496



MLA supports the Zanda McDonald Award as part of industry capability building. Pictured is the 2025 Australian recipient of the award, sheep producer Jack O'Connor, 'Oxton Park', Harden, NSW. Jack shared the trans-Tasman award with Maegen Blom, from the New Zealand aquaculture industry.



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 2030 strategic priorities



Innovation capability building

MLA's innovation capability building sub-program engages with scientists, researchers, rural professionals and innovators in a range of capability building initiatives to accelerate innovation adoption and increase the industry's investment in innovation.

Key focuses include attracting and retaining skilled persons in the fields of animal welfare, sustainability, value creation and capture, big data and new products.

Product group	Core activities
People development	<p>Initiatives within the 'people development' product group include:</p> <ul style="list-style-type: none"> ■ the Intercollegiate Meat Judging Competition program ■ 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) ■ developing enhanced leadership capability to develop impactful industry leaders and ambassadors for MLA.
New value chain design	<p>Initiatives within the 'new value chain design' product group include:</p> <ul style="list-style-type: none"> ■ partner with emerging value chains to pilot new business models to explore higher, longer-term prosperity for producers – including (but not limited to) Indigenous entrepreneurship, models based on circular economy principles, modernising regional hubs and value creation and capture.

Key performance indicators in 2025–26

1. A minimum of 300 industry representatives participating in MLA-supported industry professional development and leadership development.
2. At least two pilots commenced relating to diversified value chain models.

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
Industry development	Initiatives within the 'industry development' product group include: <ul style="list-style-type: none"> ■ Red Meat Ambassador industry workshops for professional development to equip industry participants with skills to engage with the community and represent industry ■ Social Media Academy workshops to upskill industry participants to create engaging educational social media content for a community audience ■ knowledge shared by MLA and industry participants with fellow industry representatives.
Industry corporate affairs unit	Initiatives within the 'industry corporate affairs unit' product group include: <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, provides resources and tools to equip industry leaders, and helps to build capacity in peak industry bodies' (PIBs) policy development.
Peak industry body development	Initiatives within the 'peak industry body development' product group include: <ul style="list-style-type: none"> ■ annual service agreements with the production PIBs (Cattle Australia, Australian Lot Feeders' Association, Sheep Producers Australia, Goat Industry Council of Australia) to support delivery to producers and members related to consultation and may also include animal health/welfare and biosecurity, industry leadership and capability building, and adoption.

Key performance indicators in 2025–26

1. **85% of trained Red Meat Ambassadors and Social Media Academy participants use the strategies and skills from the training in their communications about the red meat industry. Measured through surveying Red Meat Ambassadors.**
2. **One crisis management simulation conducted with industry stakeholders by 30 June 2026.**
3. **Successful completion of all milestones in the peak industry body annual service agreements by 30 June 2026. Measured through reporting conducted in partnership with peak industry bodies.**

Table 25: Projected 2025–26 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 2025–26
Innovation capability building	6	-	108	6	85	20	160	19	47	19	44	-	-	-	500	950	272	1,901	335	2,235
Industry leadership and capacity building	1	106	3	103	39	1,574	64	1,944	20	640	8	56	-	3	-	135	-	270	4,426	4,696
Total*	7	106	111	109	124	1,594	224	1,963	67	658	52	56	-	3	500	1,085	272	2,171	4,761	6,931



Building stakeholder awareness and adoption of MLA programs will include targeted industry event sponsorships like LambEx.

Program

Communication

MLA's communication program builds trust, transparency and awareness of Australian red meat and its production, through strategic engagement with both community and industry stakeholders. The program plays a critical role in maintaining industry's social capital by proactively promoting the positive credentials of red meat production, as well as providing credible, evidence-based information on the role of red meat in a healthy diet.

Operating in a complex environment with a wide range of audiences – from levy payers and industry stakeholders to educators and the general public – this program ensures MLA's research, development and marketing outcomes are known, accessible, and understood. Through tailored, evidence-based communications, it helps stakeholders make informed decisions and supports the industry's long-term success.

Sub-programs

- Communication (community)
- Communication (stakeholder)
- Nutrition

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Communication (community)

MLA's communication (community) sub-program delivers the Australian Good Meat program which educates and engages the public about the Australian red meat and livestock industry to maintain trust and social capital. Key messaging focuses on animal welfare, environmental management and the role of red meat in a healthy, balanced and sustainable diet. It includes outreach to schools, teachers and students to provide educational resources on supply chain-wide topics.

Product group	Core activities
Community education	<p>The 'community education' product group includes the development of insights-driven, engaging digital content that maintains community trust in the industry's environmental sustainability, animal welfare credentials and the role of red meat in a healthy diet.</p> <p>Key initiatives include:</p> <ul style="list-style-type: none"> ■ community sentiment research and insights on community trust, social capital and audience segmentation ■ content development and optimisation for all Australian Good Meat communication channels, including: <ul style="list-style-type: none"> ▸ <i>Red Meat Green Facts Red Meat Health Facts</i>, videos, gifs, infographics, photos and animations ▸ Australian Good Meat website ongoing management through the creation of new, and enhancement of existing, content to ensure currency, relevance and engagement ▸ Search Engine Optimisation (SEO) to ensure searchability of content.
Community engagement	<p>The 'community engagement' product group focuses on utilising data and insights to nurture existing audiences and reach new, targeted community audiences to improve perceptions towards the industry.</p> <p>Key initiatives include:</p> <ul style="list-style-type: none"> ■ participation at events to educate and engage the community on the red meat and livestock industry's credentials ■ Australian Good Meat campaigns and digital engagement through social media channels and website ■ social media content publishing and community management through Australian Good Meat social channels ■ social media influencers and use of Red Meat Ambassadors to communicate key industry messages ■ amplification of Australian Good Meat content to target community audiences.
School education	<p>The 'school education' product group delivers curriculum-aligned teaching resources, digital learning programs, and wider educational initiatives to build industry knowledge. Key initiatives include:</p> <ul style="list-style-type: none"> ■ education networks: enhance school program outcomes through membership of the Primary Industries Education Foundation Australia (PIEFA), collaboration with Royal Show Societies, agriculture teacher associations, and industry and government organisations involved in education. Contribute towards the Research and Development Corporation (RDC) project collaboration 'National Food and Fibre School Education Strategy' ■ education resources: build education community industry knowledge and connections through the delivery of accessible, best practice curriculum-aligned teaching resources and digital learning programs ■ education adoption: drive awareness of school resources and digital learning programs using multi-channel marketing and promotional activities through collaborations, sponsorships, events, social media, digital advertising and campaigns.

Key performance indicators in 2025–26

1. **80% of attendees at an Australian Good Meat activation say they have an improved perception of the Australian red meat industry. Measured by surveys of activation participants at each event.**
2. **Reach more than 100,000 teachers with Australian Good Meat school education content. Measured by reach of communications on MLA education materials to teachers.**
3. **Stronger industry perceptions (of key metrics) amongst those who have seen Australian Good Meat content versus those who have not. Measured through focus groups and qualitative surveys with the baseline to be set in FY26.**
4. **Increase community trust in the red meat industry from 64% to 65%, based on community sentiment research.**

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
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 <i>MLA's 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 its mission and meet the needs of its stakeholders ■ delivery of reporting requirements for MLA's statutory performance review, as per <i>MLA's Strategic Plan 2030</i> and <i>MLA's Statutory Funding Agreement</i> with the Australian Government ■ delivery of communication campaigns that help to drive positive on-farm practice change and foster success by communicating adoption priorities.
MLA digital communications	<p>The 'MLA digital 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 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 ■ facilitation of MLA speakers at events ■ production of materials for use at MLA and sponsored events.

Key performance indicators in 2025–26

1. **Achieve and maintain a high level of satisfaction (80%) and positive feedback on MLA event activations, as measured by post-event surveys.**
2. **Increase MLA membership by 200 members from an FY25 June baseline of 55,500.**
3. **Maintain member satisfaction with customer service with a target score of 7.5/10, as measured by the MLA member survey results.**
4. **Improvement of 0.1/10 on the FY25 score in member satisfaction with MLA communications products and services, as measured by the MLA member survey.**

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Product group	Core activities
Media, corporate affairs and industry engagement	<p>The 'media, corporate affairs and industry engagement' product group covers MLA's activities to engage with industry stakeholders, including MLA members. Initiatives include:</p> <ul style="list-style-type: none"> ■ servicing and managing MLA's membership base ■ consolidating the key account management program internally ■ informing industry bodies of key activities and sharing key information with their members ■ quarterly consultation updates with peak industry bodies (PIBs) and Research and Development Corporations (RDCs) ■ engaging with key members and industry groups, memberships and subscriptions ■ ensuring MLA's corporate affairs activities are aligned with MLA's <i>Strategic Plan 2030</i> and directed to the achievement of MLA's purpose ■ managing MLA's media and public relations activities, delivering against an implementation plan to build a consistent narrative to demonstrate MLA's work and achievements and promote the credentials of the red meat industry ■ demonstrating thought leadership to ensure MLA has a prominent voice on strategically important industry issues, setting the news agenda ■ proactively identifying, developing and managing opportunities for the Managing Director and MLA senior leaders to contribute to industry debate, news commentary and similar forums of influence ■ facilitating media training for MLA staff and industry stakeholders ■ proactively identifying relevant issues and trends in the communications environment.

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 Australian Dietary Guidelines.</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 Australian Dietary Guidelines.
Nutrition communications	<p>The 'nutrition communications' product group provides health and nutrition professionals in clinical and non-clinical settings, 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 consumer material by general practitioners (GPs) and dietitians ■ effective integration of nutrition messaging through nutrition influencer channels and MLA marketing and communications programs that target consumers in retail and consumer media.

Key performance indicators in 2025–26

1. Maintain the percentage of general practitioners and dietitians who claim recommending red meat three to four times a week (or equivalent) at $\geq 48\%$, as measured by IQVIA Medibus Survey, with current FY25 baseline score set at 48%.
2. Maintain beef attribute score of 'makes healthy meals' above 50%, with multi year data collected via the Domestic Consumer Tracker. This perception fluctuates quarterly, with FY25 baseline currently at 53%.
3. At least 60% of general practitioners and dietitians agree that MLA's resources are relevant and credible, as measured by IQVIA Medibus Survey, with FY25 baseline set at 60%.

Table 26: Projected 2025–26 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	AMPCR	AMPCM	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Communication (community)	1	1	6	28	107	424	217	738	58	451	-	-	-	-	-	390	-	780	1,644	2,424
Communication (stakeholder)	2	3	14	66	241	983	475	1,616	127	988	-	-	-	-	-	859	-	1,718	3,656	5,374
Nutrition	5	2	9	7	102	157	98	264	45	61	58	85	1	4	-	317	-	634	580	1,214
Total*	8	6	29	101	450	1,564	791	2,619	230	1,500	58	85	1	4	-	1,566	-	3,133	5,879	9,012



Program

Livestock technology fund

Accelerated delivery of commercial solutions via a scaled equity investment model is a strategic portfolio opportunity for MLA and the Australian red meat industry. Under this program, MLA will invest up to \$10 million annually over five years via the MLA Donor Company in a red meat venture capital fund. This vehicle will provide meaningful and scalable support to early-stage tech companies as they develop innovative solutions that will benefit Australian producers and processors. It will link MLA's technical due diligence capability with a professional fund manager's experience in valuing and implementing equity investments.

The fund will focus on companies developing deep tech solutions for the Australian red meat sector. It will prioritise startups according to their potential domestic impact while maintaining a global investment mandate to provide optimal flexibility for attracting high quality innovations.

Sub-programs

- Livestock technology fund

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Livestock technology fund

The livestock technology fund sub-program will establish an early stage red meat-focused investment fund that will drive growth and sustainability in Australia's red meat and livestock industry by investing in global deep tech solutions that enhance productivity, efficiency and environmental stewardship.

Product group	Core activities
Venture science	<p>Initiatives within the 'venture science' product group include:</p> <ul style="list-style-type: none"> ■ development and implementation of internal venture investment approval processes and associated capabilities which will ensure MLA's successful participation in a red meat venture capital fund ■ scout, evaluate and progress to approval opportunities for equity investments in early-stage, deep tech companies in aligned areas.

Key performance indicators in 2025–26

1. Complete at least four equity investments that meet MLA's equity investment criteria.

Table 27: Projected 2025–26 investment by funding source – livestock technology fund (\$ '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 2025–26
Livestock technology fund	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,000	5,000	-	10,000	-	10,000
Total*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,000	5,000	-	10,000	-	10,000

Doug Piper, MLA's Business Manager – Retail and Corporate Butcher, presents a beef tomahawk rack at the launch of the North Sydney office's new kitchen which will showcase red meat to industry.



Program

Corporate services

The corporate services program assists MLA to foster the prosperity of the Australian red meat and livestock industry. Areas of responsibility include accounting and reporting, commercialisation, contracts, evaluation, financial planning and forecasting, human resources, information and communications systems, legal, office services and risk and compliance.

Sub-programs

- Corporate services

Red Meat 2030 priorities



MLA Strategic Plan 2030 strategic priorities



Corporate services

MLA's corporate services sub-program provides operational and business-orientated support services across the spectrum of MLA activities and operations by:

- effectively managing the levy and government matching investments through accounting, contracting, project management, foreign exchange management, intellectual property protection, commercialisation, 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 human resource frameworks to attract and retain a diverse and talented workforce.

Product group	Core activities
Board and executive	Initiatives within the 'board and executive' product group include providing strategic guidance for MLA and effective oversight of the management and performance of MLA in delivering its <i>Strategic Plan 2030</i> .
Legal	<p>The 'legal' product group provides full-service legal advice and support to the business, including:</p> <ul style="list-style-type: none"> ■ providing legal advice in a flexible delivery service model that supports the business and its preferred way of working. ■ providing advice on contract structuring ■ providing advice on intellectual property and managing MLA's intellectual property portfolios ■ custodianship of MLA's contract template library ■ supporting and partnering with the business to deliver on its Strategic Plan and annual investment portfolio through partnership, consultation with key stakeholders, collaboration and delivery of training and education.
Crisis management	<p>Initiatives within the 'crisis management' product group include:</p> <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	<p>The 'risk and compliance' product group includes activities that support MLA's risk management and compliance frameworks such as:</p> <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	<p>The 'finance' product group captures the stewardship role of effectively managing levy and non-levy investments. Initiatives include:</p> <ul style="list-style-type: none"> ■ management reporting to internal and external stakeholders ■ financial planning and analysis including the AIP 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).

Key performance indicators in 2025–26

Legal

1. Continue to provide full-service legal advice to the business.
2. Maintain MLA's templates (including agreements and other related templates) to ensure they remain current and fit-for-purpose.
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 FY26 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 of the business in respect to contract administration.

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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.
Commercialisation	The 'commercialisation' product group supports and provides advice on intellectual property (IP), licensing, knowledge and IP transfer, and commercialisation of research and marketing outputs. A key priority is further streamlining licensing and adoption of outputs from MLA investments, including technologies that require commercial partners to facilitate adoption and where the focus is on high impact products with appropriate IP protection.
Human resources	<p>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. This will develop our organisation for the future and drive transformational change for the industry. Initiatives include:</p> <ul style="list-style-type: none"> ■ programs that support a high-performance culture in order to deliver MLA's strategic and operational priorities ■ implementing strategic initiatives aimed at improving representation, fostering a culture of belonging, and ensuring equal opportunities for all employees ■ providing the frameworks and advice to support a safe and compliant work environment.
Information technology	<p>The 'information technology' product group provides information technology (IT) advice and support to the greater MLA group and across all facets of the technology platform including infrastructure, intranet, the customer relationship management (CRM) tool, websites, business intelligence, artificial intelligence, financials and project/contract management.</p> <p>The IT team's core focus is to ensure the technology platform is at all times both robust and scalable and one which the business can leverage off to achieve its objectives.</p>
Project and process improvements	<p>The 'project and process improvements' product group provides support and guidance to the greater MLA group on:</p> <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 2025–26

Evaluation

1. Development of a portfolio evaluation model as a basis for MLA investment decisions.
2. Deliver at least three sub-program evaluations as part of MLA's five-year rolling evaluation strategy.

Commercialisation

1. 90% or more of high/medium impact commercial ready products have commercial partners or an identified commercialisation pathway, as tracked by MLA's product hub database.

Human resources

1. MLA applies a continuous improvement approach to drive employee engagement to remain greater than or equal to the 2025 Australian Industry average of 70%, to support talent retention and drive organisational performance.
2. A goal of zero harm in an environment where everyone is physically and psychologically safe in the workplace.
3. Successfully deliver against initiatives outlined in our 'Reflect' Reconciliation Action Plan.

Information technology

1. Internal stakeholder satisfaction measures at 90% or more for MLA IT infrastructure and services, based on an annual survey of all MLA staff.
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 28: Projected 2025–26 investment by funding source – corporate services (\$ '000)

*Total may not add up due to rounding

Sub-program	Goat R	Goat M	Mutton R	Mutton M	Lamb R	Lamb M	Grassfed cattle R	Grassfed cattle M	Grainfed cattle R	Grainfed cattle M	AMPC R	AMPC M	LiveCorp R	LiveCorp M	External R	Government R	External Unmatched	Sum of R	Sum of M & Unmatched	Sum of AIP 2025–26
Corporate services	61	62	120	198	1,372	3,590	1,326	6,005	617	1,438	-	-	-	-	-	3,496	2,980	6,991	14,273	21,264
Total*	61	62	120	198	1,372	3,590	1,326	6,005	617	1,438	-	-	-	-	-	3,496	2,980	6,991	14,273	21,264

Detailed budget tables by funding sources

Table 29: Expenditure by funding source 2025–26, \$ '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	-	-	61	-	418	-	479	-	94	-	-	-	94	-	573	-	-	-	-	-	5,089	1,659	5,662	12,983
Domestic market	17	12	32	207	367	8,318	399	8,524	354	9,573	162	2,219	516	11,792	931	20,328	228	935	2	15	-	95	1,161	23,695
International markets	1	115	27	498	314	10,480	341	10,977	318	22,676	16	3,563	333	26,239	675	37,331	15	549	500	517	-	2,012	1,190	42,789
Value realisation	25	-	48	-	567	-	615	-	677	-	461	-	1,138	-	1,777	-	-	-	-	-	5,400	4,968	7,178	19,323
Eating quality research and development	-	-	22	-	249	-	271	-	341	-	214	-	555	-	826	-	-	-	-	-	657	342	1,482	3,307
Environmental sustainability	22	-	39	18	510	268	549	286	550	626	223	295	773	920	1,343	1,207	128	-	-	-	9,027	2,004	10,498	24,207
Feedlot	-	-	-	-	-	-	-	-	-	-	1,934	456	1,934	456	1,934	456	-	-	-	-	1,320	525	3,254	7,489
Integrity systems	118	9	227	38	2,559	885	2,785	923	2,551	1,487	1,367	345	3,917	1,832	6,821	2,764	1,175	476	9	21	2,327	16,224	10,332	40,149
Objective measurement	3	-	38	31	275	201	313	232	125	51	85	27	210	78	527	310	176	-	-	-	3,652	1,643	4,355	10,664
Producer adoption	68	-	178	-	2,090	-	2,268	-	2,179	-	-	-	2,179	-	4,514	-	-	-	-	-	6,884	1,674	11,398	24,469
Product and packaging innovation	-	-	14	-	160	-	174	-	57	-	5	-	62	-	236	-	36	-	-	-	1,214	607	1,486	3,578
Productivity (off-farm)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18,132	-	-	-	400	200	18,532	37,264
Productivity (on-farm)	206	-	103	-	2,547	-	2,650	-	2,015	-	20	-	2,035	-	4,891	-	-	-	-	-	9,753	2,208	14,644	31,496
Capability building	7	106	111	109	124	1,594	235	1,703	224	1,963	67	658	291	2,621	533	4,430	52	56	-	3	500	272	1,085	6,931
Communication	8	6	29	101	450	1,564	479	1,666	791	2,619	230	1,500	1,021	4,119	1,508	5,791	58	85	1	4	-	-	1,566	9,012
Livestock technology fund	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,000	-	5,000	10,000
Corporate services	61	62	120	198	1,372	3,590	1,492	3,788	1,326	6,005	617	1,438	1,943	7,443	3,496	11,293	-	-	-	-	-	2,980	3,496	21,264
Total*	535	310	1,050	1,200	12,000	26,900	13,050	28,100	11,600	45,000	5,400	10,500	17,000	55,500	30,585	83,910	20,000	2,100	512	560	51,222	37,413	102,319	328,621

Table 30: Income available by funding source 2025–26, \$ '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	375	236	1,149	1,298	11,211	27,270	12,360	28,568	11,848	47,135	4,658	9,565	16,506	56,700	29,241	85,504	-	-	-	-	-	-	-	114,745
Government	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	102,319	102,319
AMPC	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	20,000	2,100	-	-	-	-	-	22,100
LiveCorp	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	512	560	-	-	-	1,072
External R	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	51,222	-	-	51,222
External Unmatched	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	37,413	-	37,413
Total income*	375	236	1,149	1,298	11,211	27,270	12,360	28,568	11,848	47,135	4,658	9,565	16,506	56,700	29,241	85,504	20,000	2,100	512	560	51,222	37,413	102,319	328,872
Difference (to/from reserves)	-160	-74	99	98	-789	370	-690	468	248	2,135	-742	-935	-494	1,200	-1,344	1,594	-	-	-	-	-	-	-	250
Opening reserves	1,030	484	685	729	9,905	18,826	10,590	19,555	4,175	14,887	3,616	5,574	7,791	20,461	19,412	40,500								
Closing reserves (2025–26)	870	410	784	827	9,116	19,196	9,900	20,023	4,423	17,021	2,874	4,639	7,297	21,661	18,068	42,094								
% of revenue	232%	174%	68%	64%	81%	70%	80%	70%	37%	36%	62%	49%	44%	38%	62%	49%								



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