



RED MEAT UPDATES

TASMANIA

26 July 2024

MLA update and address

Andrew Cox
Meat & Livestock Australia

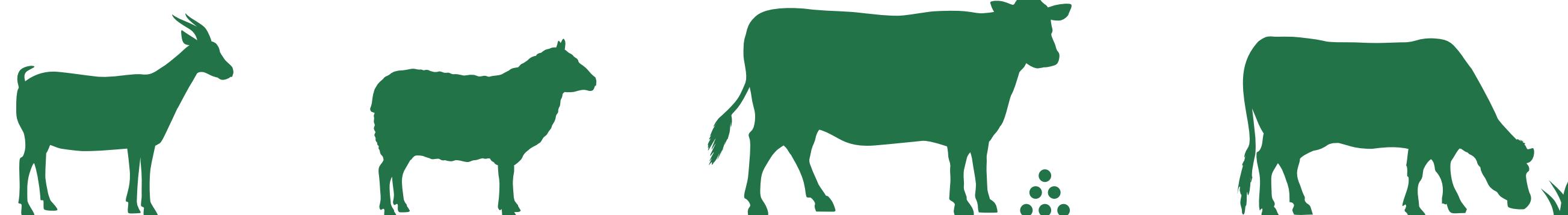


Red Meat Updates 2024

Andrew Cox

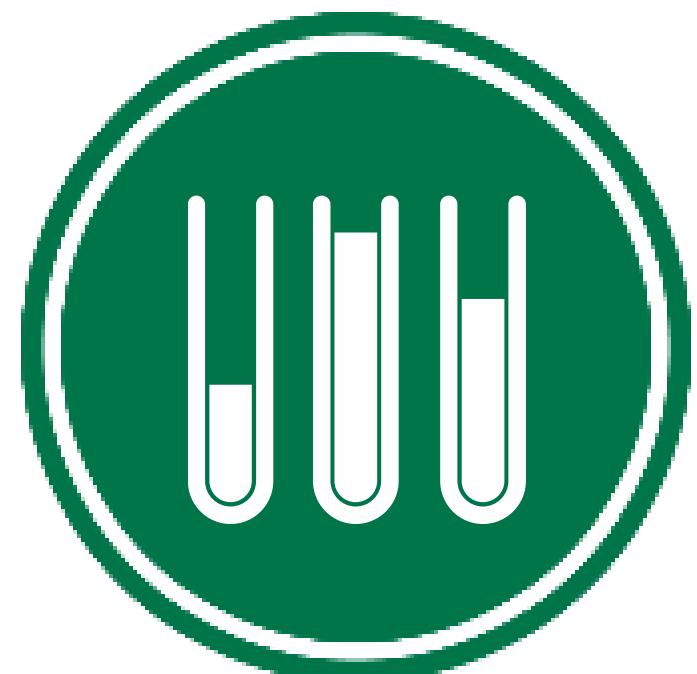
About MLA

Working in collaboration with the Australian Government and the wider red meat industry, MLA invests in initiatives that contribute to **producer profitability, sustainability and global competitiveness.**



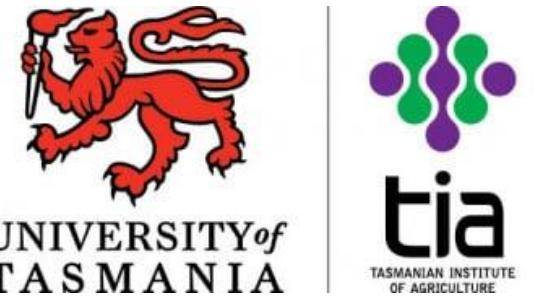
MLA's remit

- Research, development and adoption
- Marketing



Persistent perennials and Serradellas

1. Lamb production in the low/medium rainfall midlands – extending the season
2. Beef production in the North-west – improving winter pastures
3. Serradellas for new environments – developing a guide for producers



Fit to join – resources available



Average benefit \$4-8/ewe

INTERNAL



R&D Adoption:

1. Increase productivity, sustainability, profitability
 2. Practical training. Access to latest R&D
 3. Apply industry best practices
- Some MLA adoption programs in Tasmania:
Profitable Grazing Systems (PGS) and Producer Demonstration Sites (PDS)



New PDS: Improving lamb survival on leguminous pastures



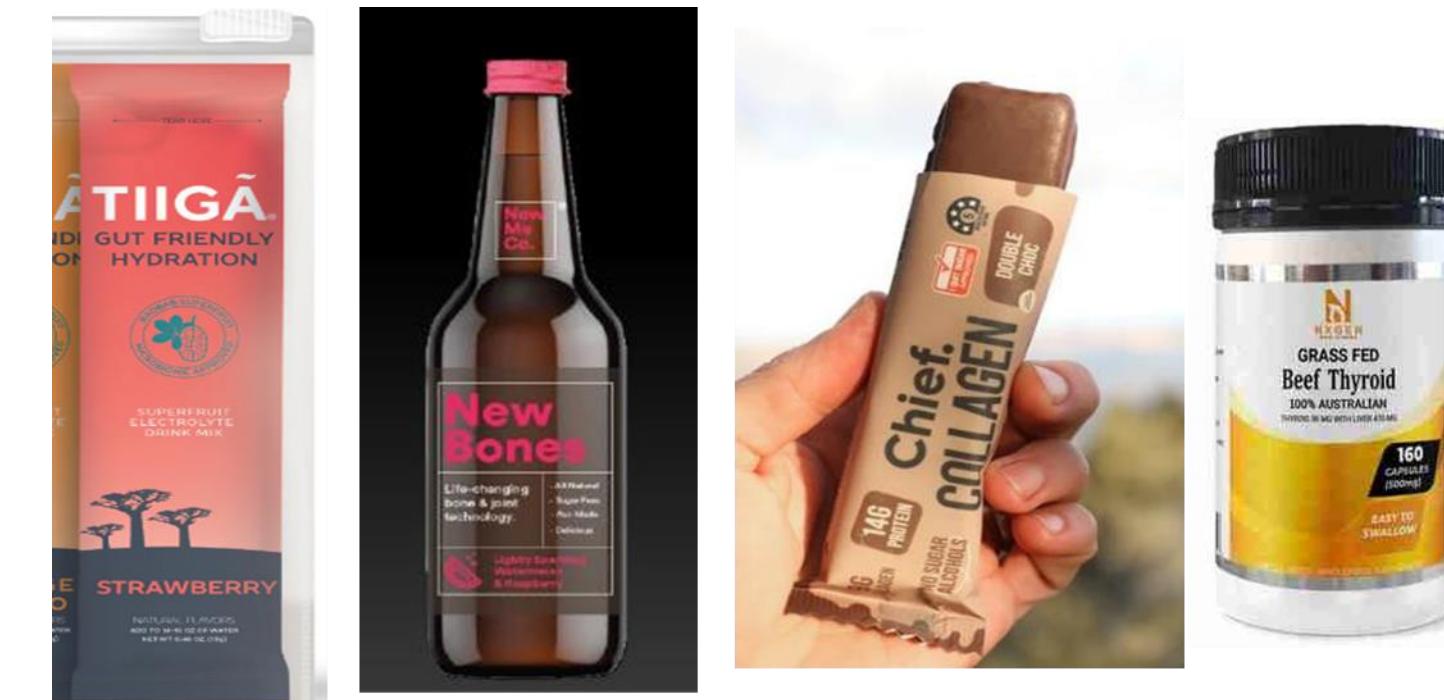
*For more information or to get involved
contact the project facilitator:*

Pinion Advisory
P:1300 746 466
E: admin@pinionadvisory.com



Other relevant R&D highlights:

Vaccine research – scour worm and mRNA tech



New product development – collagen, protein powders

Objective carcass measurement - probes and cameras



Meat Standards Australia (MSA)



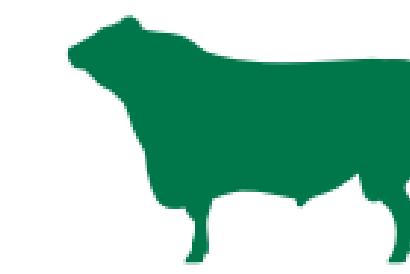
\$463 million

farm gate returns over
the past two years
(\$204 million in 2021-22
and \$259 million in 2022-23)



40,754

MSA registered
beef producers



6.64 million

head of cattle
presented for
MSA grading
[\(Figure 1\)](#)



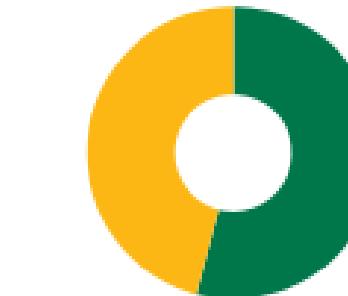
39

MSA licenced
beef processors



57.45

average
MSA Index
(2021-23)



54%

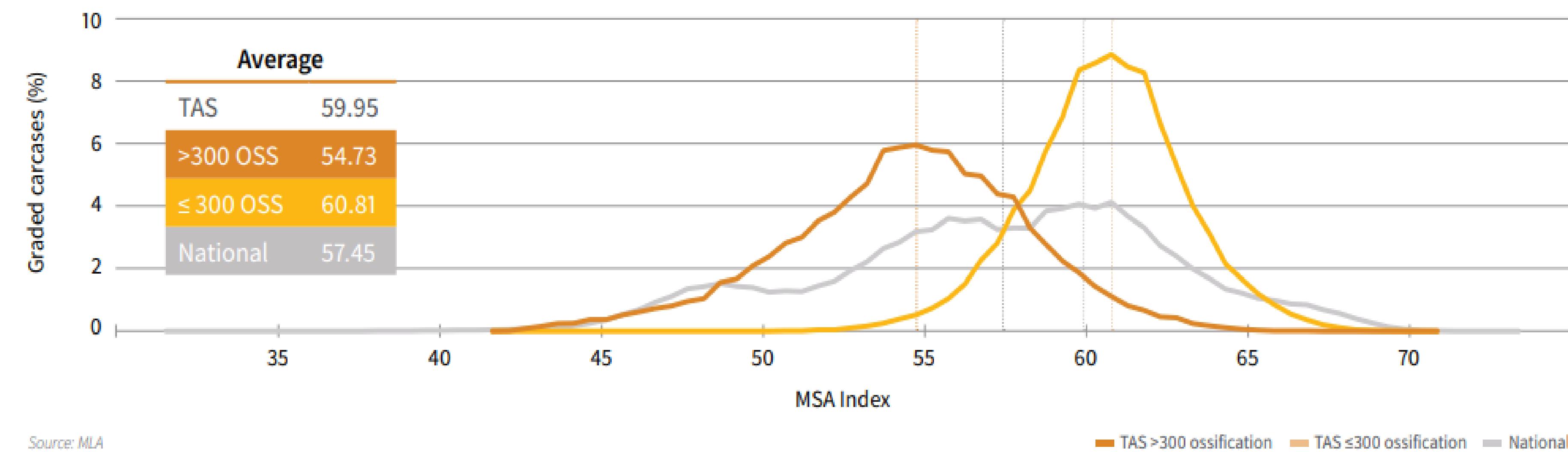
of the national adult
cattle slaughter that was
MSA graded
(2021-23)



194

MSA licenced
beef brands

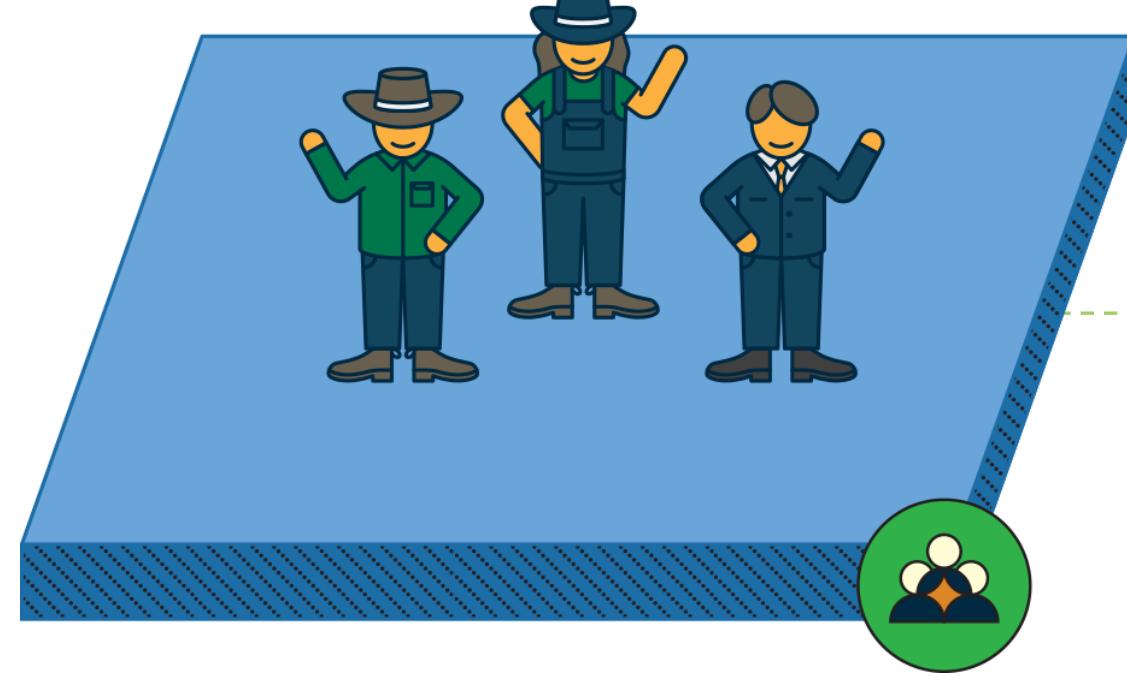
TAS MSA Index performance 2021-23



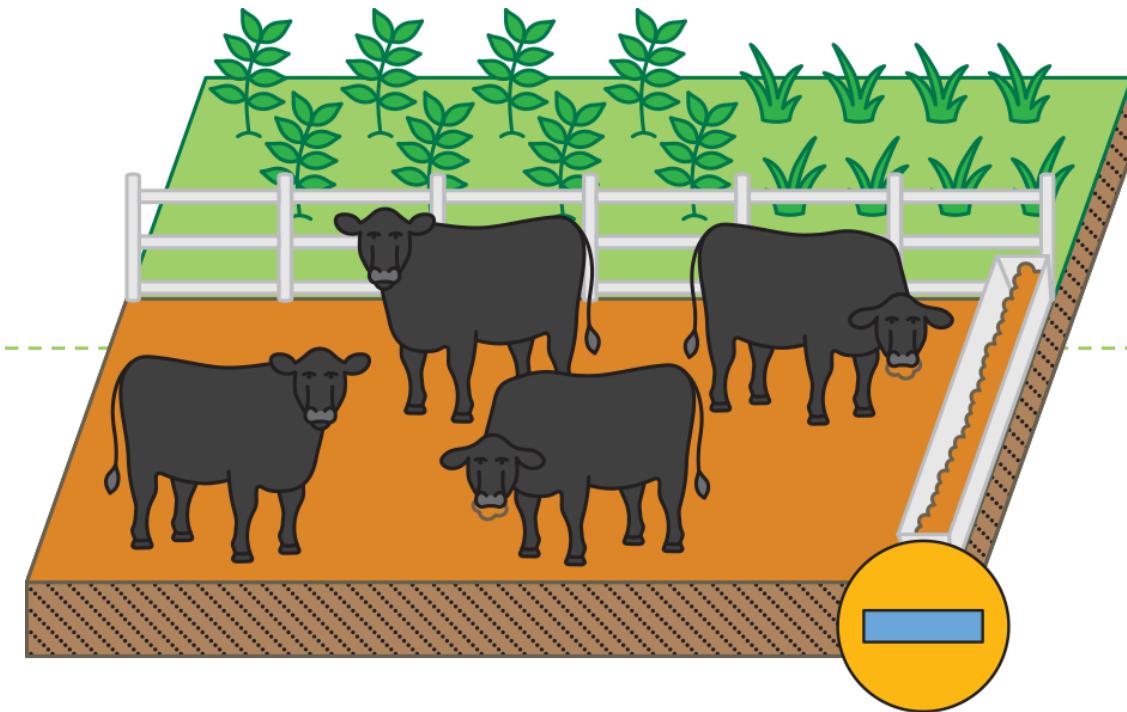
Meat Standards Australia



Achieving carbon neutrality by 2030

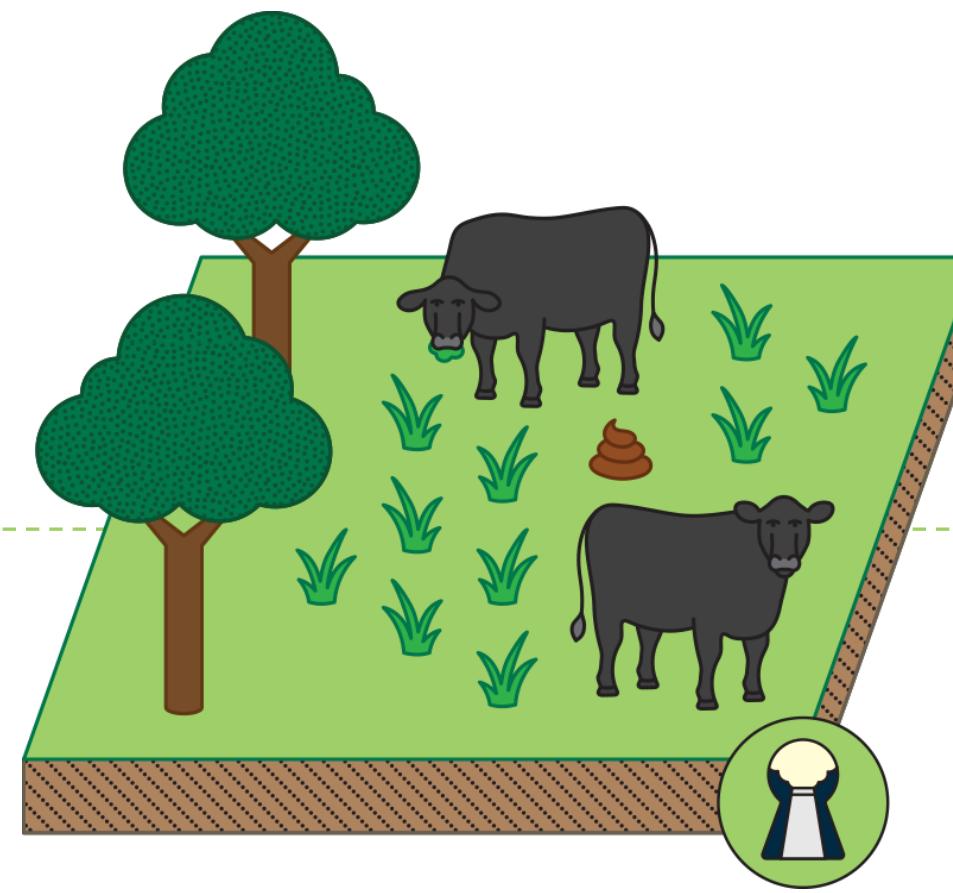


Industry leadership



GHG emissions avoidance

Grazing properties
Feedlots
Processing facilities



Carbon storage

Grazing properties



Integrated management systems

Rapid adoption
Carbon accounting
Measurement and reporting

Emissions reduction

Greenhouse gas emissions from the Australian red meat industry have

Fallen
78%

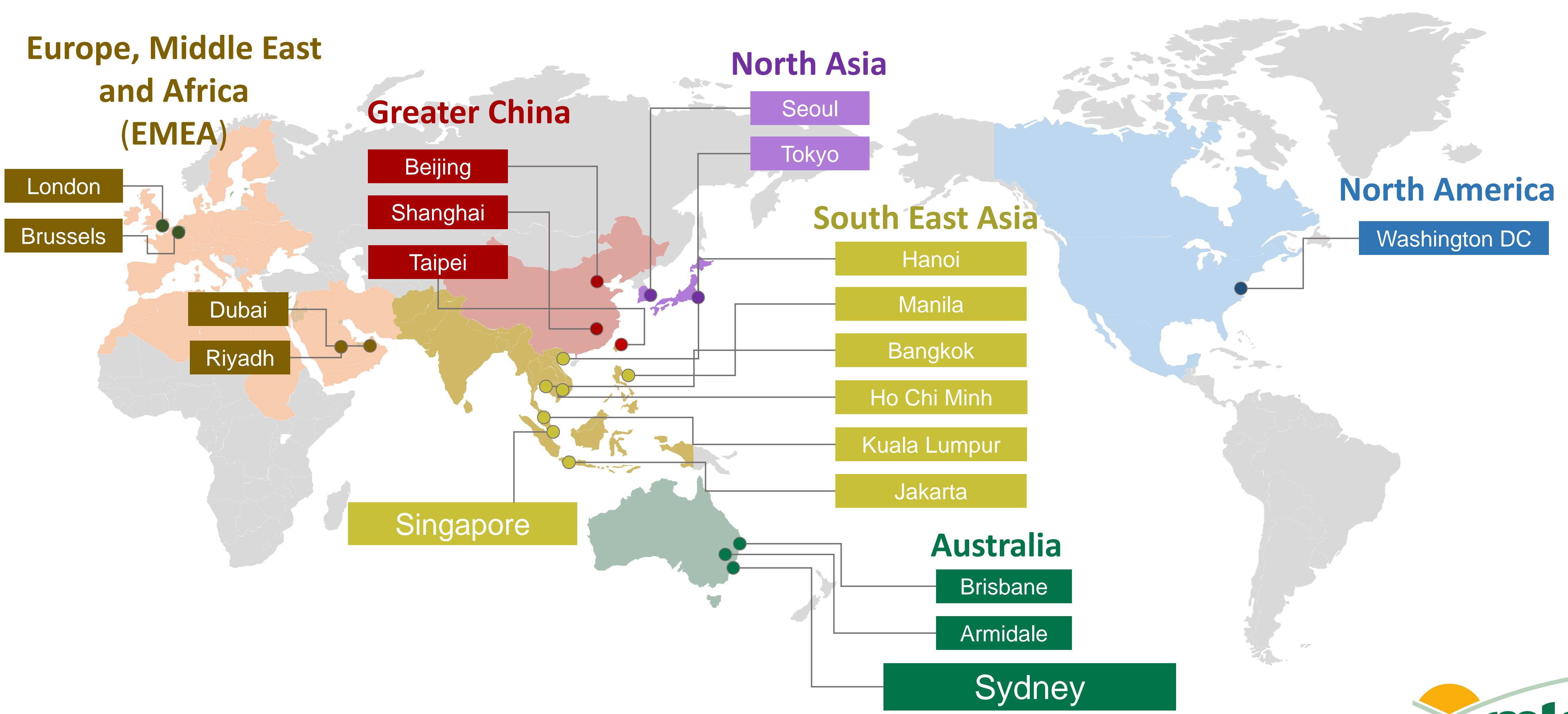
since 2005¹.

¹ MLA State of the Industry Report

Tools and resources



MLA's international network





World is a big place – and we can't feed everyone

4%



Australia's share of global production

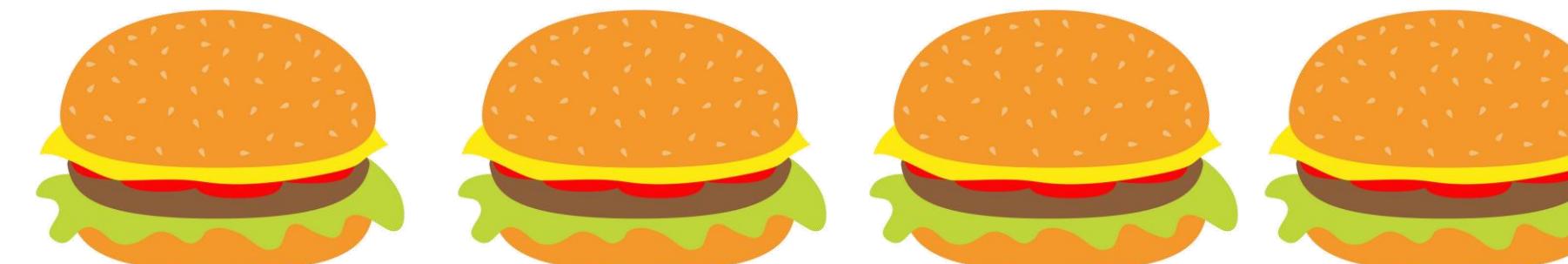
8 billion

Global population



The US will consume Australia's entire production in

2 months



Per person on the planet

5 demand drivers of food

Enjoyment



Health



Culture/Status



Convenience

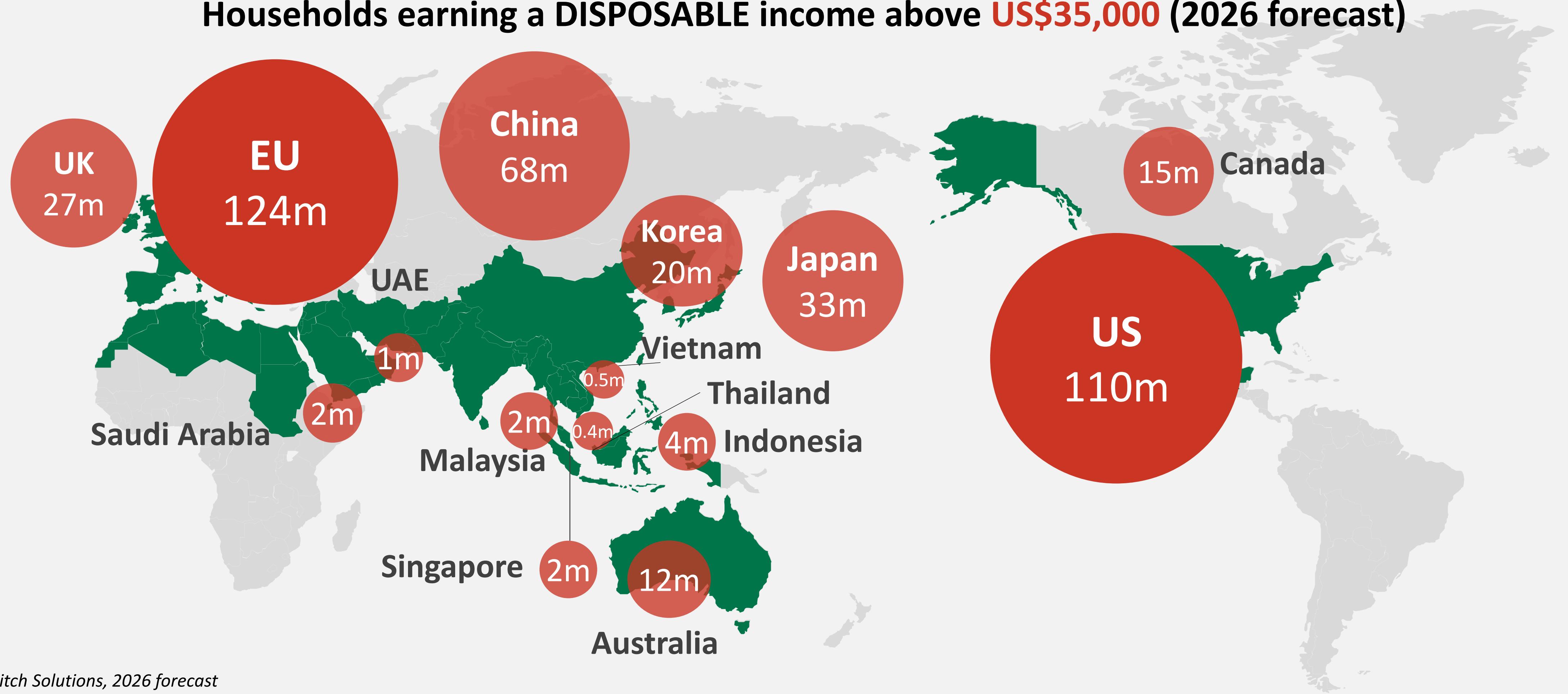


Integrity



Household income (forecast)

Households earning a DISPOSABLE income above **US\$35,000** (2026 forecast)



Source: Fitch Solutions, 2026 forecast

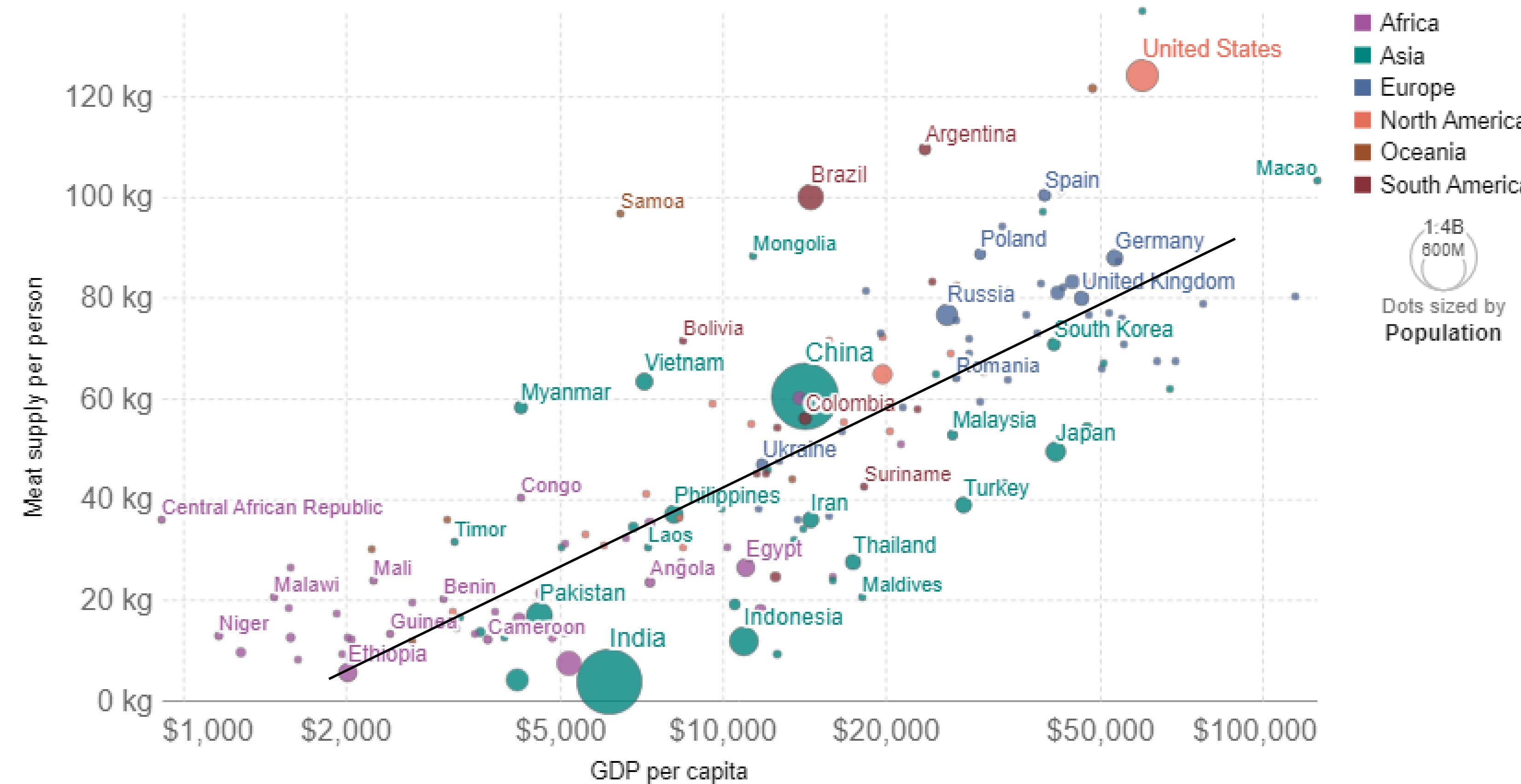
‘Ability to purchase’ is a better indicator

Affluence drives protein consumption

Meat consumption vs. GDP per capita, 2017

Our World
in Data

Average meat consumption per capita, measured in kilograms per year versus gross domestic product (GDP) per capita measured in constant international-\$. International-\$ corrects for price differences across countries. Figures do not include fish or seafood.



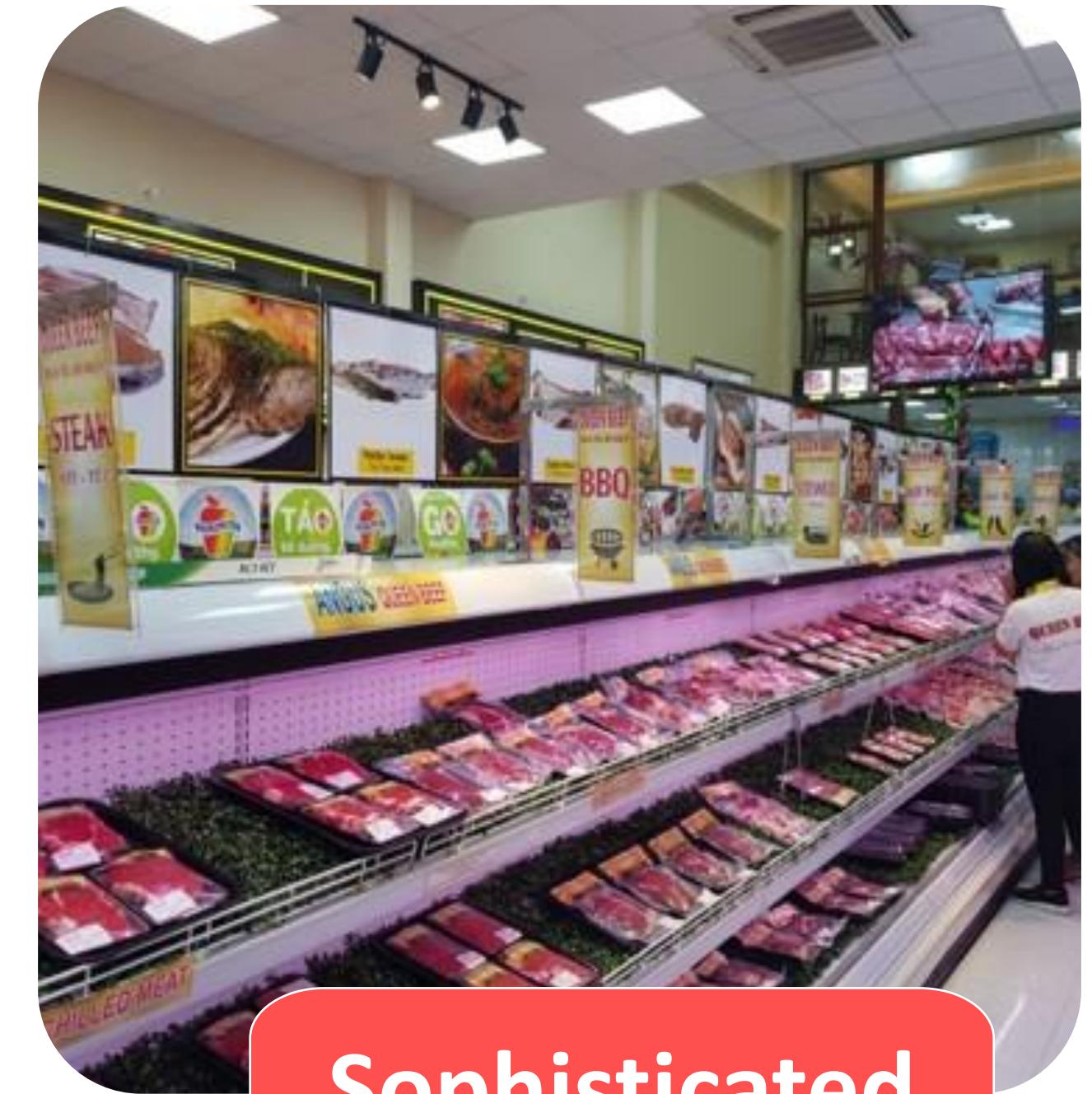
Affluence driving modernisation of retail



Traditional
wet
market

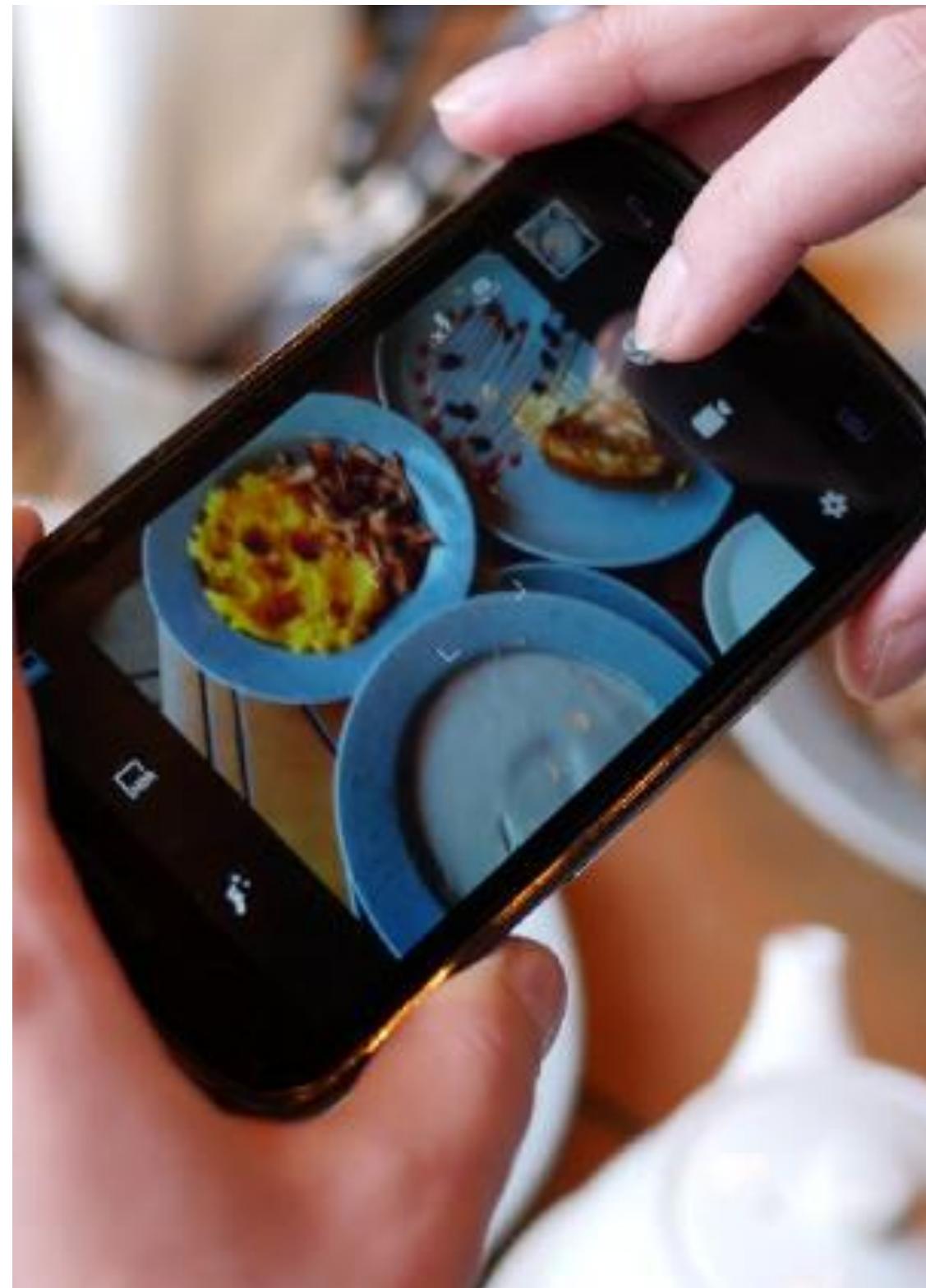
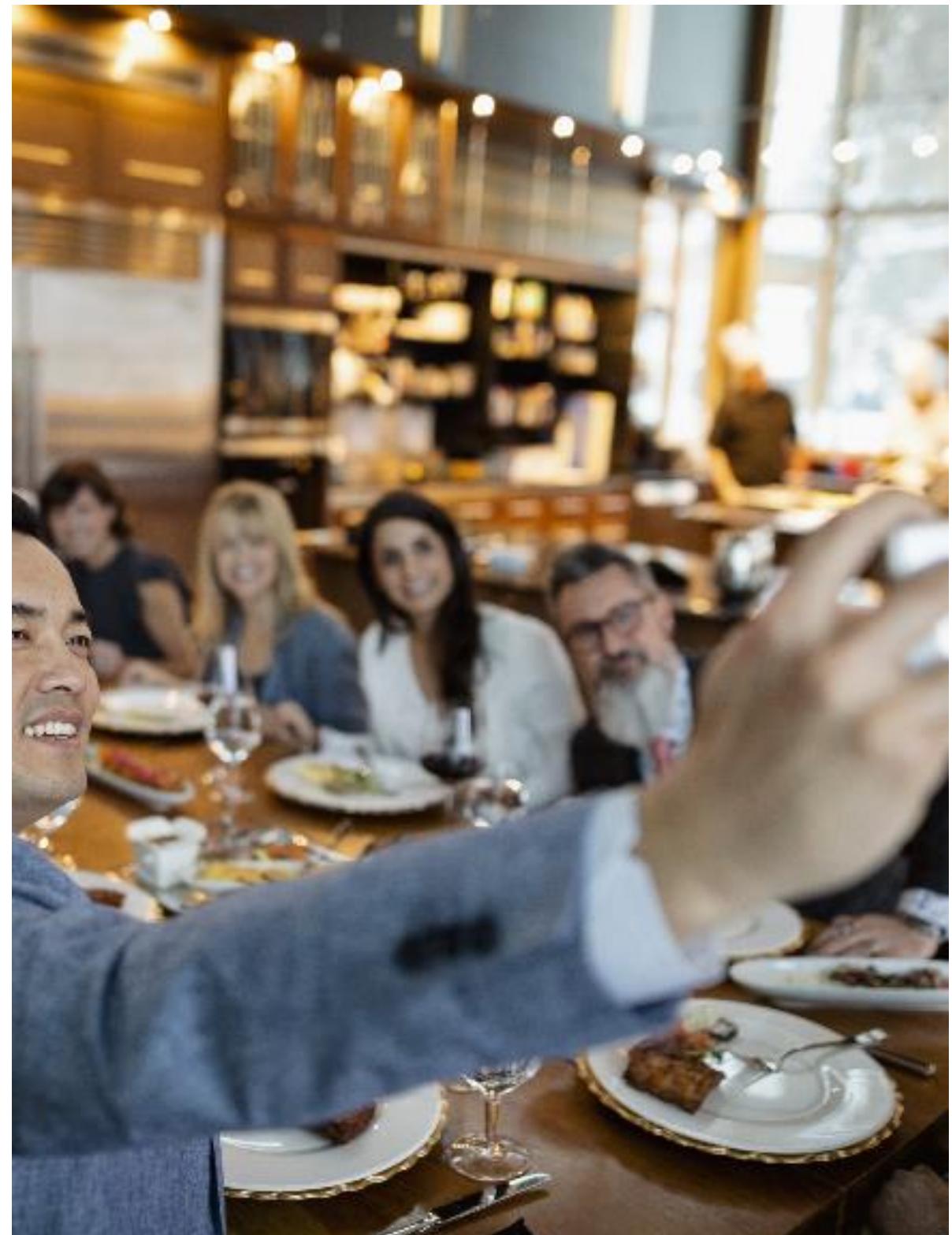


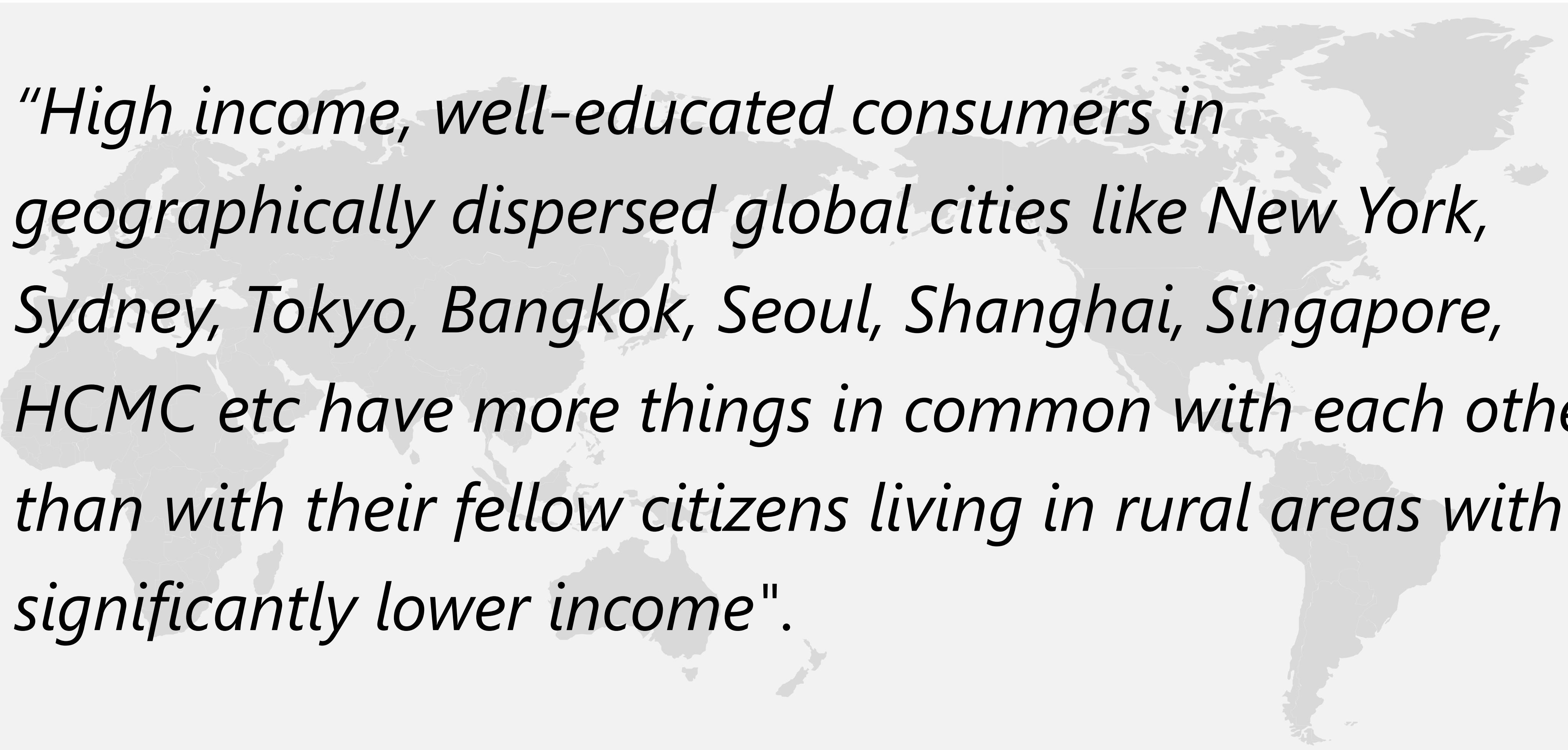
Local store



Sophisticated
modern
supermarket

Affluence driving premiumisation of a category



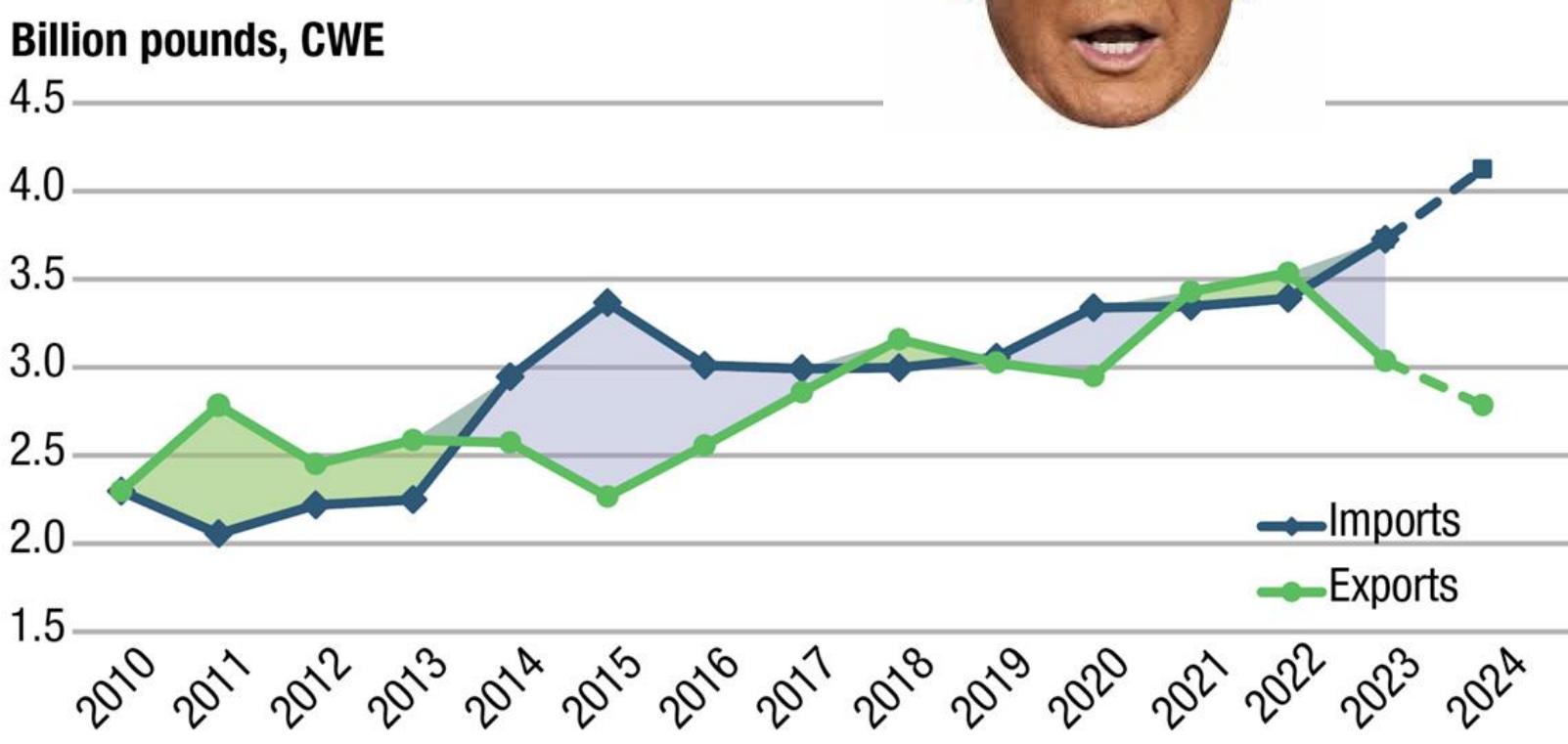


“High income, well-educated consumers in geographically dispersed global cities like New York, Sydney, Tokyo, Bangkok, Seoul, Shanghai, Singapore, HCMC etc have more things in common with each other than with their fellow citizens living in rural areas with significantly lower income”.





FIGURE 2 U.S. beef trade, 2010-24



KEY TREND 4

ANIMAL PROTEIN POWERS ON



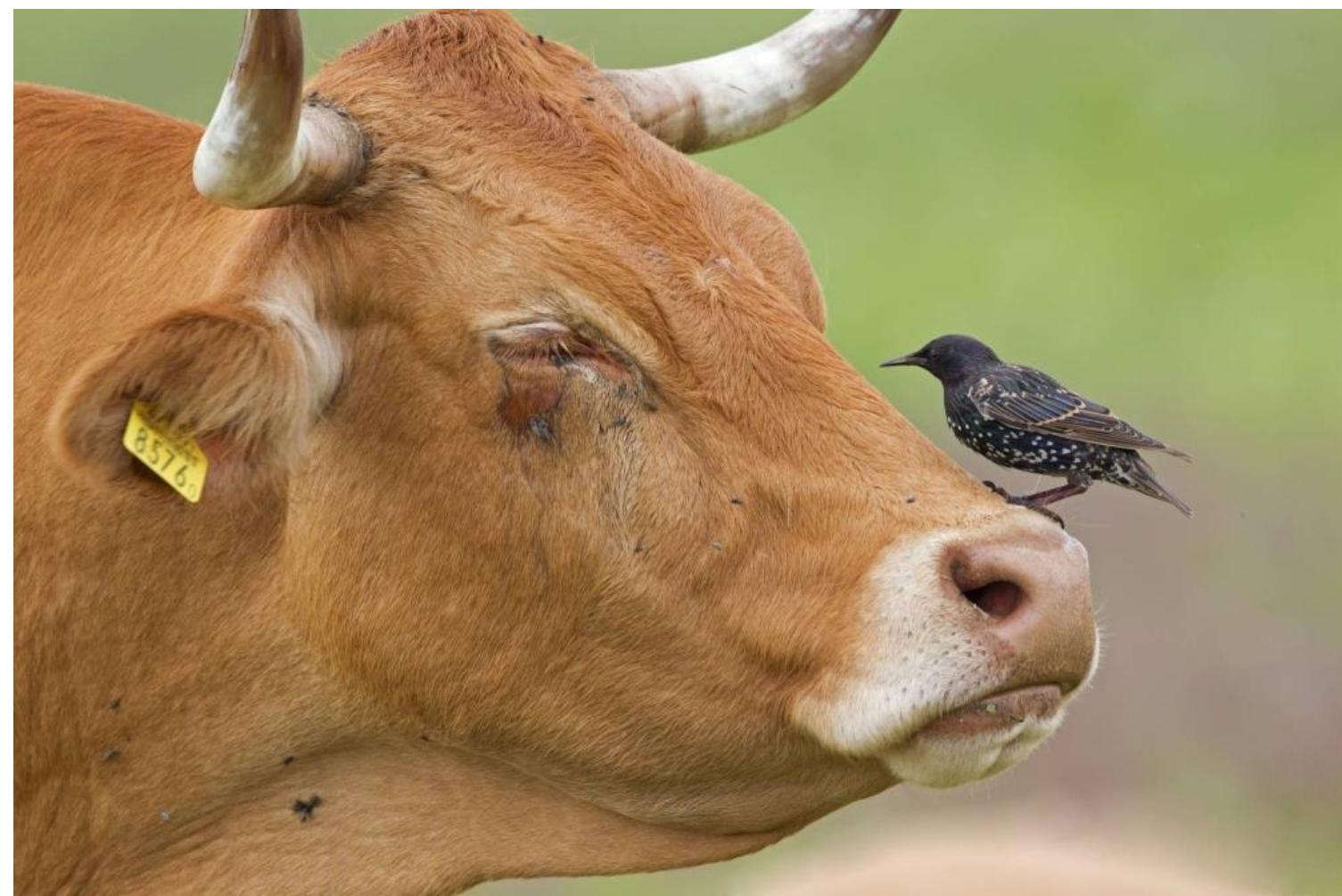
Science is revealing more positives for meat and dairy. Consumers welcome good news about animal protein!



Receding fear of fat is removing a negative around animal protein.



- ✓ Nutrient density
- ✓ Familiar & versatile
- ✓ Good taste & texture



Market Access

- Technical
- Economic
- Live export support
- Halal support



TARGET

- Key account/category management
- Tradeshows
- Retail promotions
- Foodservice promotions
- Exporter & Customer collaboration
- High Value foods support
- Insights adoption
- Licensing



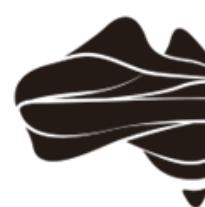
Aussie Meat Academy

Knowledge, Education, Inspiration

- Seminars
- Immersions
- E-learning
- Lambassador & Aussie Beef Mates events



LAMBASSADOR
of Aussie Lamb



AUSSIE BEEF
MATES

COO Brand

- Consumer campaigns
- Social and digital media
- PR
- Branded point-of-sale material



Market access



PROJECT 2: COOB (Country of Origin Branding).

Our logo found at the world's biggest and best retailers and foodservice operators



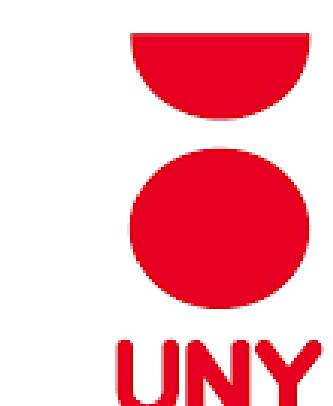
farmfoods



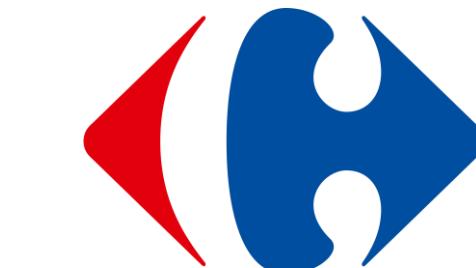
GSfresh



Home plus



Rakuten



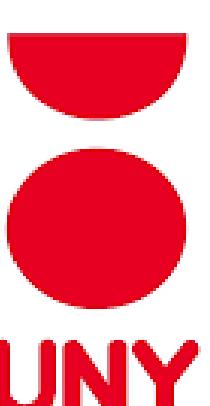
Carrefour



eMart



mercato



makro



COSTCO



SEIYU



E-MART TRADERS



Tops market

coupang

RANCH MARKET



Aeon Japan

- Largest international retail customer for Australian beef
- Topvalu Tasmanian beef brand established in 1974
 - 50-year anniversary this year
- MLA works closely with Aeon in Japan and elsewhere:
 - Cookpad recipe ideas (top right)
 - sampling
 - buyer education.



Japan TV promotion



International trade shows



400+

Business leads

98

Participant booths
coordinated

96%

Satisfaction rating

Market development partnerships



Export participants



Activities



Commercial
investment



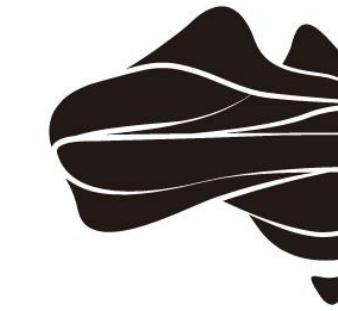
Launch of Darling Downs Gold into Emart stores Korea



Aussie Meat Academy



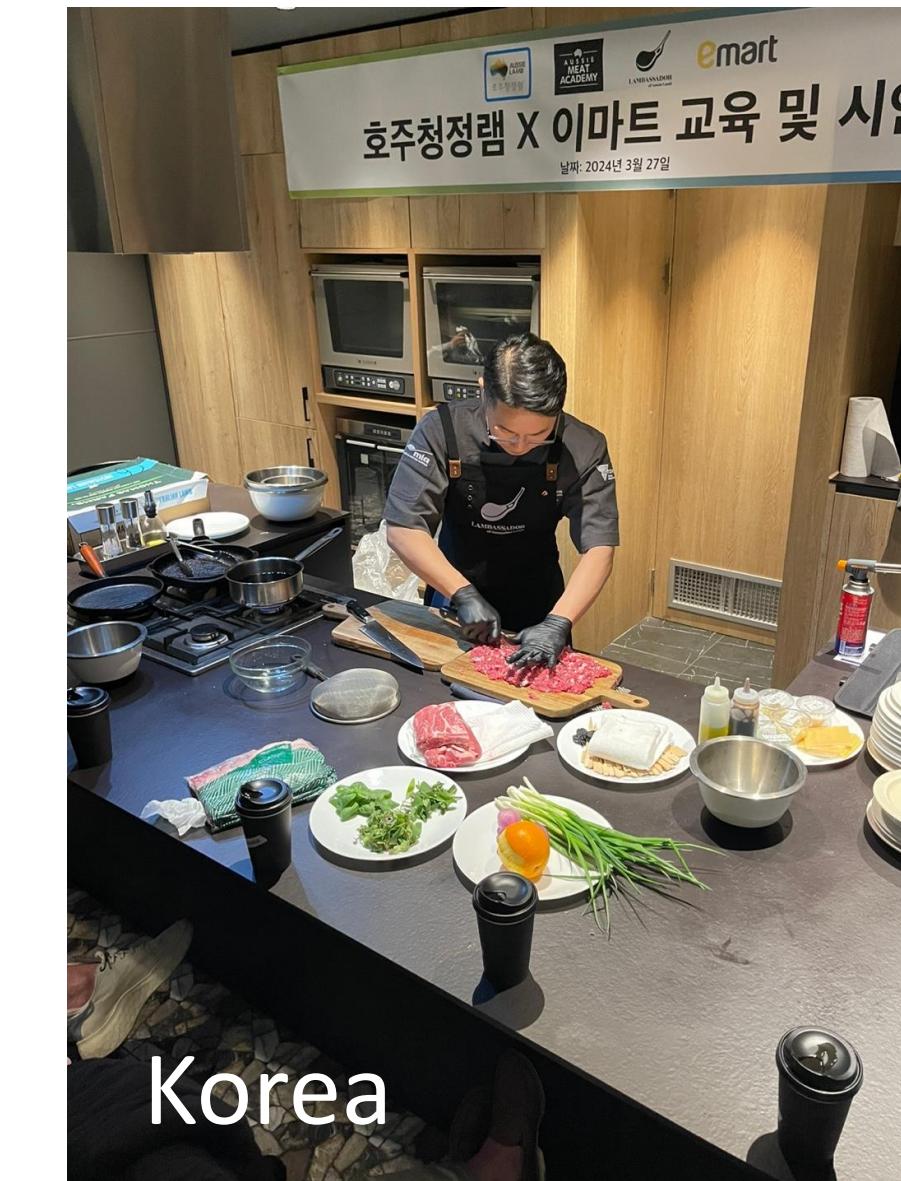
LAMBASSADOR
of Aussie Lamb



AUSSIE BEEF
MATES



Indonesia



Korea



Dubai

215

Global events
(YTD Q3)

24K

93%

Attendees

Event
satisfaction

MEAT AUSSIE BEEF MATE - ADRIAN CHONG

Influence

Chef **23** years

Worked at **7**
large hotel
groups

Experience in
mass catering
and banquets



“Visiting the slaughterhouse and learning step by step how beef is produced and exported was a real eye opener”

“The quality and price of prime cuts is high, so I started using all the secondary cuts, which is still premium Australian beef, but comes at a lower price. That way, local restaurants can afford to buy it, and customers can afford to pay.”



Results

Hosted **6** Events (FY24)

1,750 attendees

PR reach of **118k**

Social engagement of **10k**

A screenshot of a news article from Warta Oriental. The header features a large red "WO" logo and the text "Warta Oriental Online News Portal". Below the header, there are navigation links for "Muka Depan", "Tempatan", "Nasional", "English", "Kadazandusun", "Mandarin", and "Sukan". A red "TERKINI" button is on the left. The main content is an article titled "Local Chef gives a Masterclass on Queensland beef" with a sub-headline "Aaron-Wooi Yik beregu negar". The article is posted by "Warta Admin" on November 29, 2023, in English. At the bottom, there is a photo of a group of people gathered around a table with meat, likely attending the masterclass.



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