



25 July 2025

MLA Update and strategic plan

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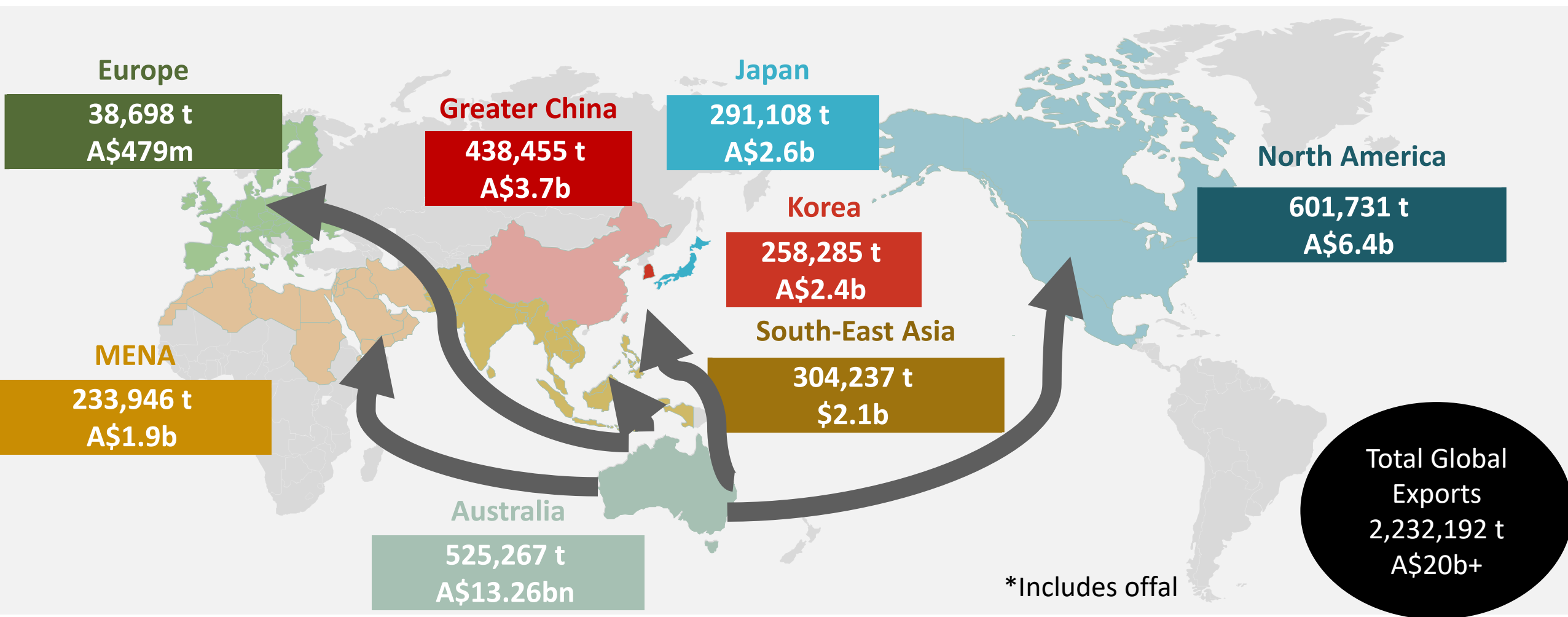


POLICY AND STRATEGY

SERVICE PROVIDERS



Global market overview: Total red meat exports*



Big opportunities ahead in trade agreements



Australia-UK FTA

	Beef	Sheep/ goat
Pre-FTA	3.7kt	13.3kt
Year 1	35kt	25kt
Year 10	110kt	75kt



Australia-India ECTA

- 30% tariff on sheep meat eliminated
- Treaty-level interim outcome with more comprehensive FTA discussions continuing.



Australia-UAE CEPA

- Negotiations concluded - likely to enter into force mid-2025
- 5% tariff on frozen beef and sheepmeat eliminated (chilled tariffs already 0%).

Impact of US on Global Trade

Australian Dollar to United States Dollar

0.6494

↑ 4.17%

+0.0260 6M

Jul 7, 10:20:24 PM UTC · Disclaimer

1D

5D

1M

6M

YTD

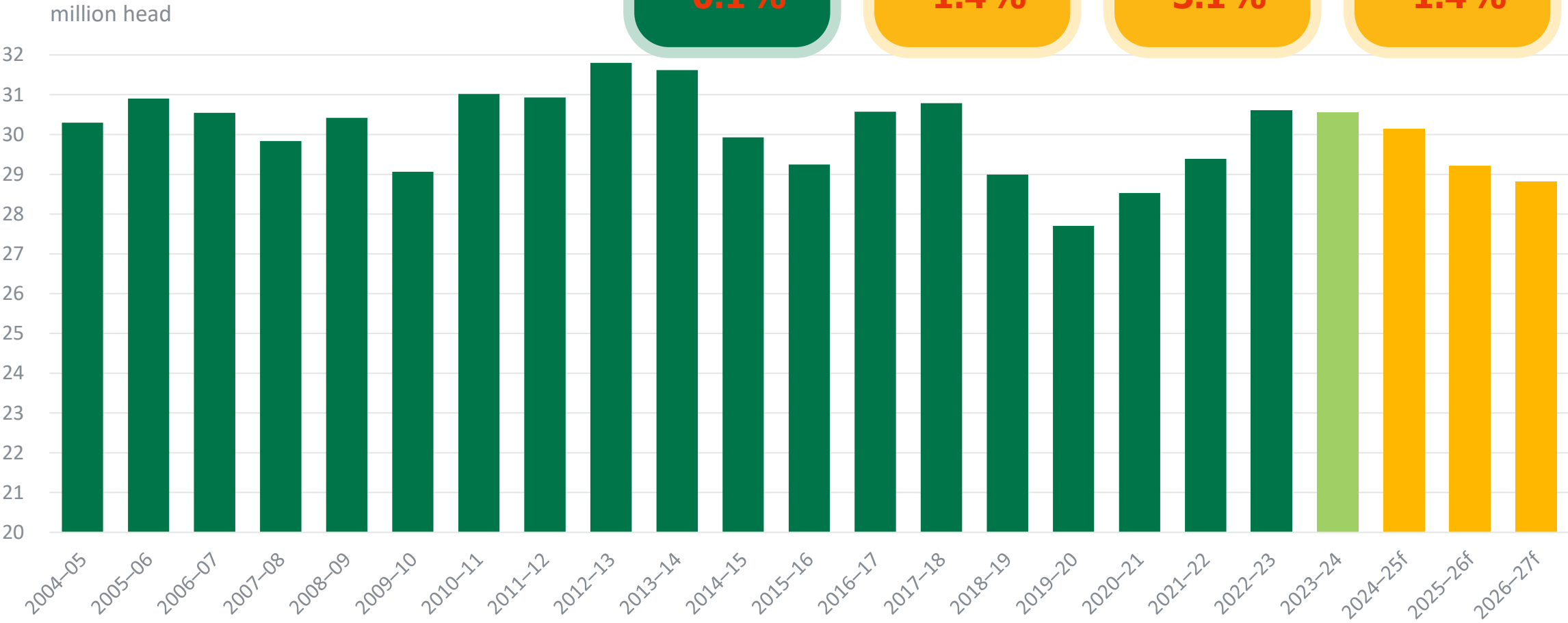
1Y

5Y

MAX

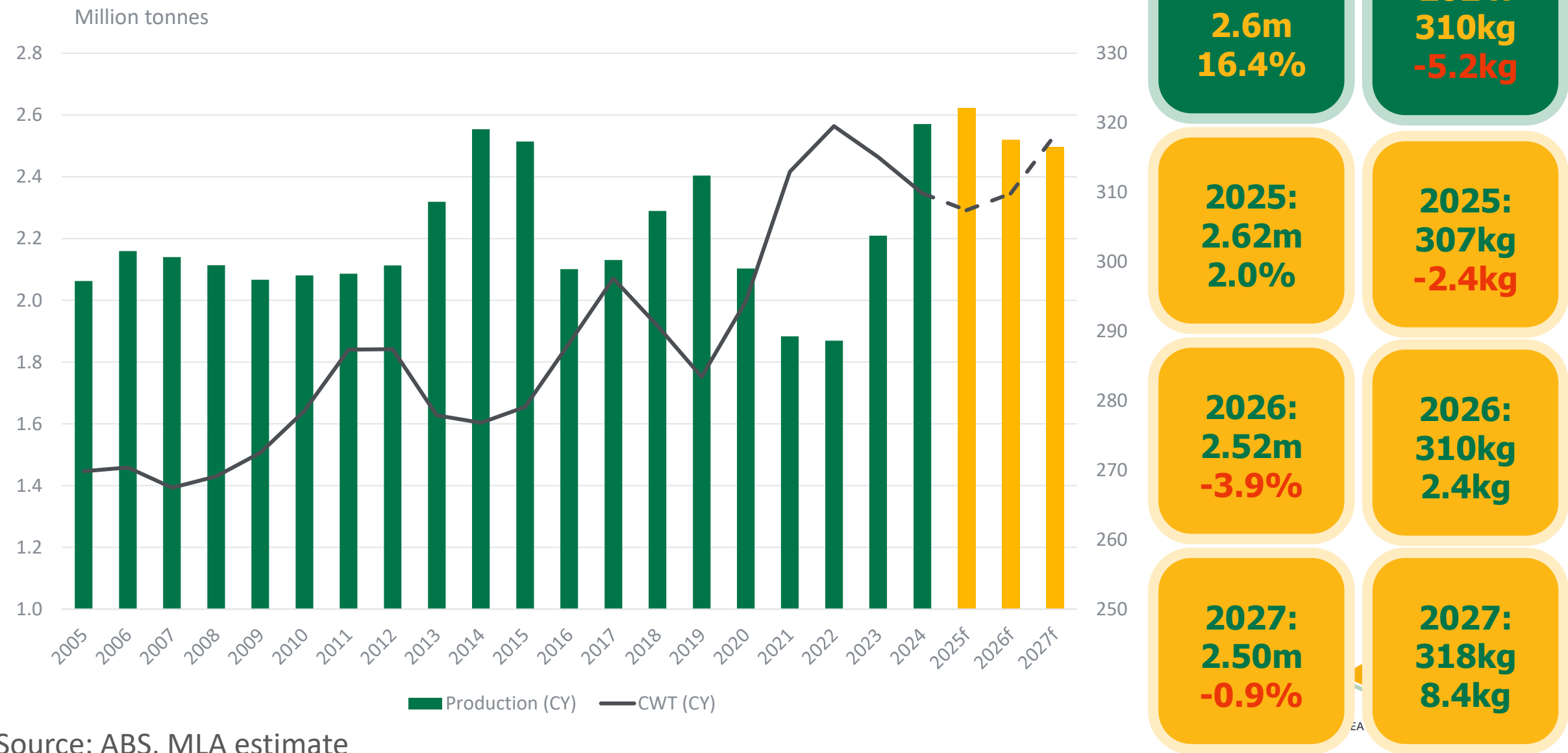


Herd

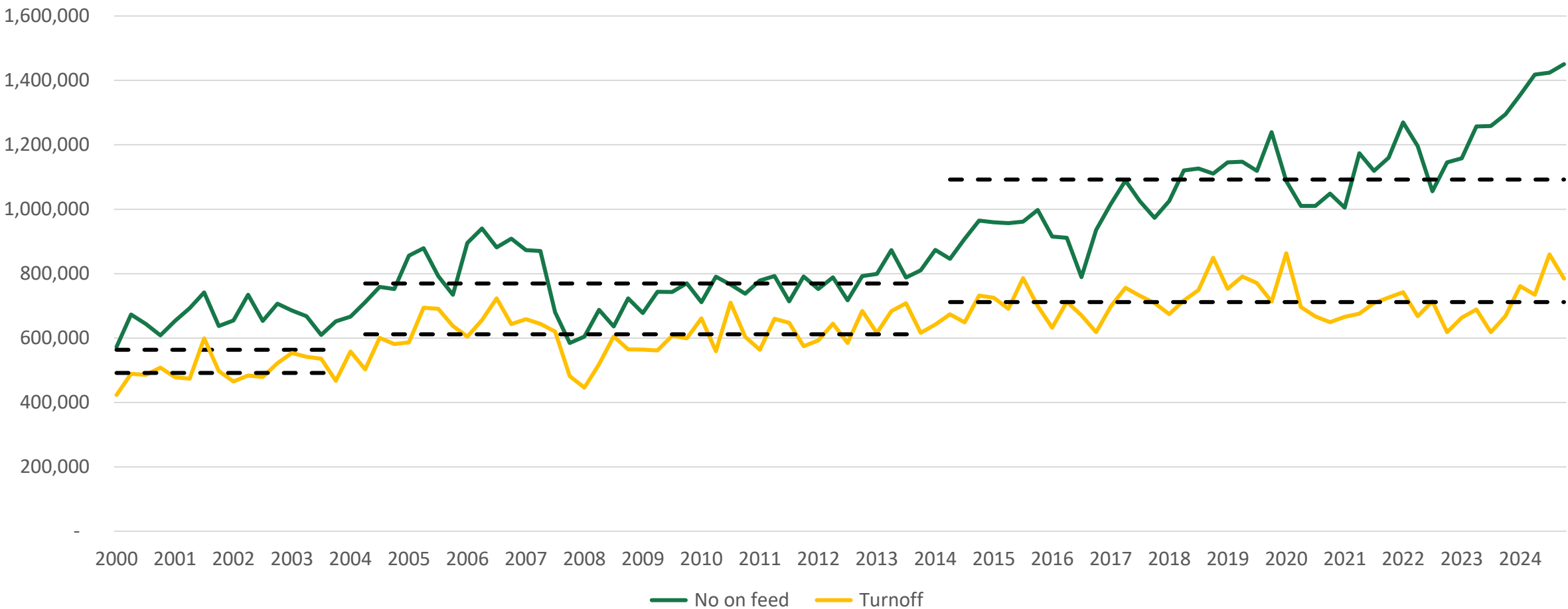


Source: ABS, MLA estimate

Production and carcase weights

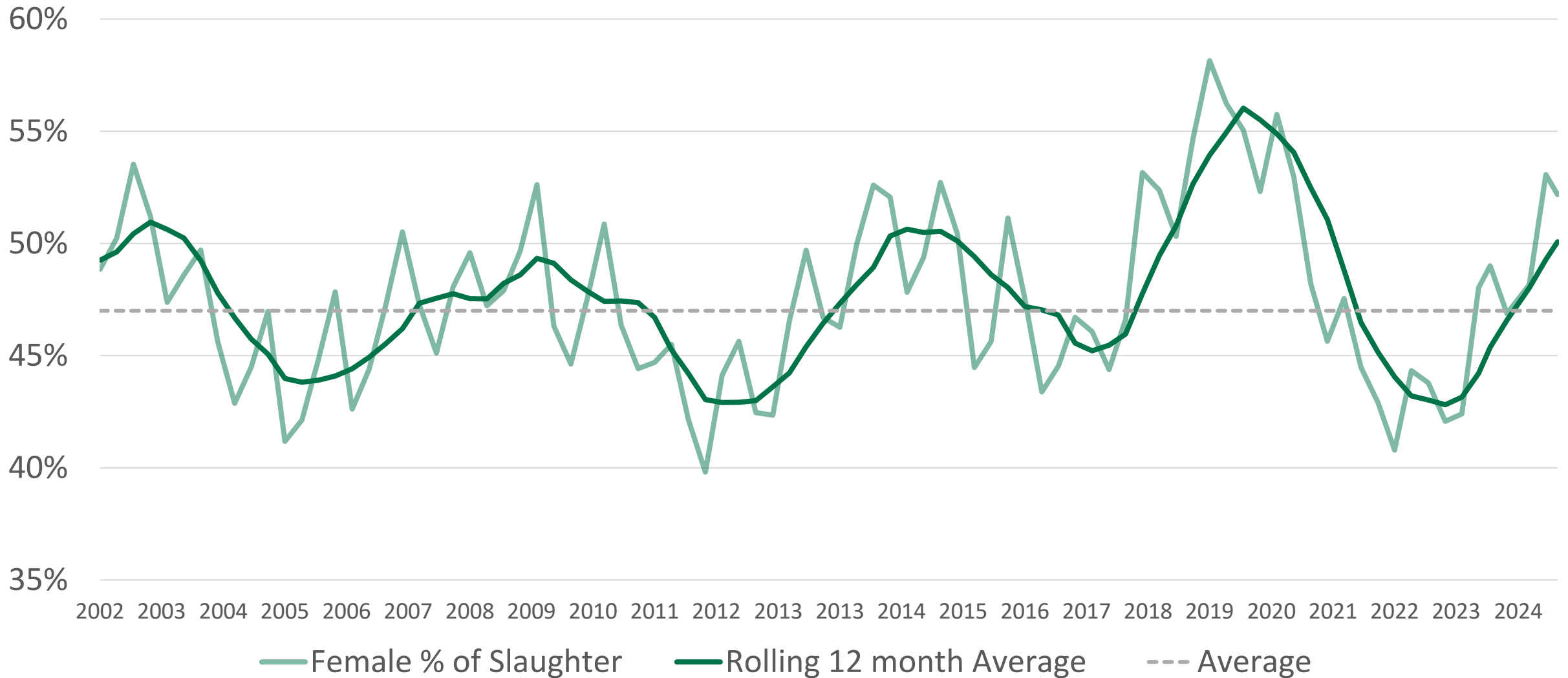


QTR turnoff vs number on feed



Source: ABS and ALFA/MLA
Number on feed = point in time. Turnoff = prior three months

Female slaughter rate



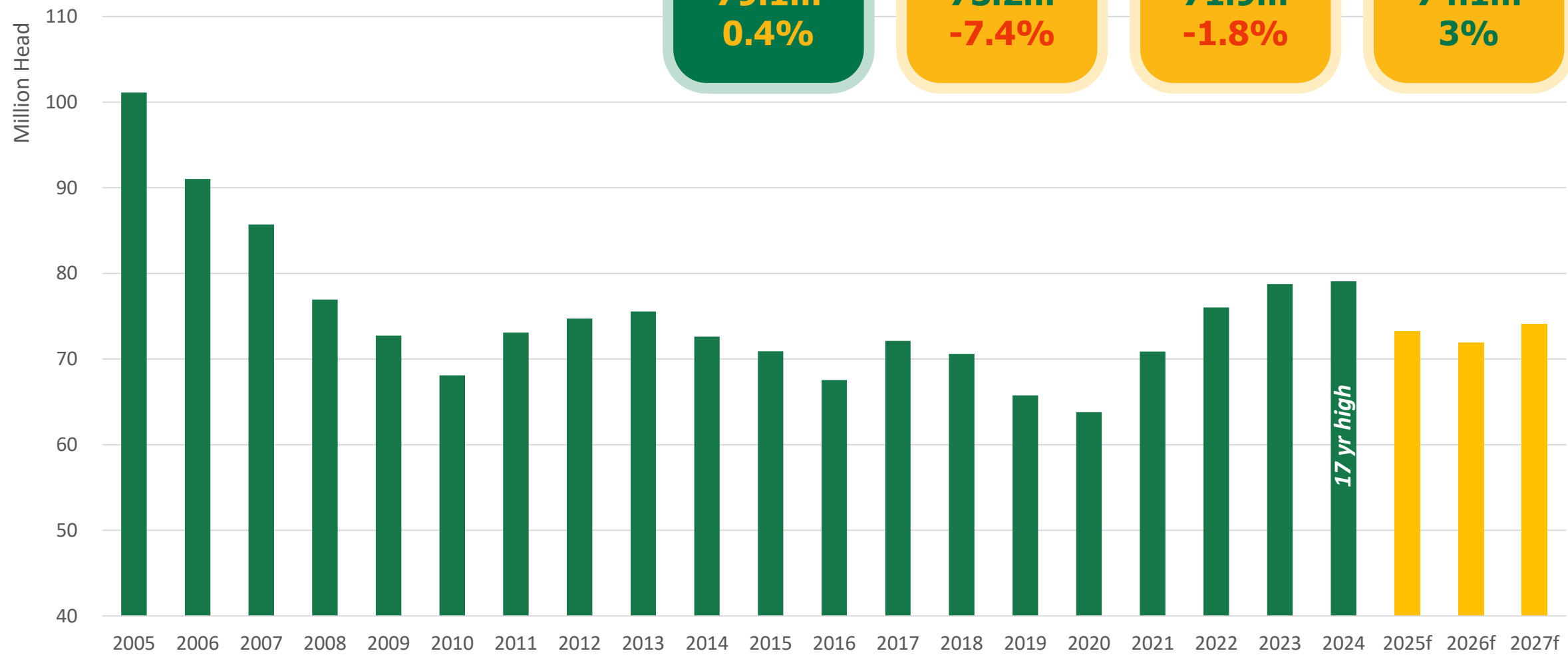
National sheep flock

2024:
79.1m
0.4%

2025:
73.2m
-7.4%

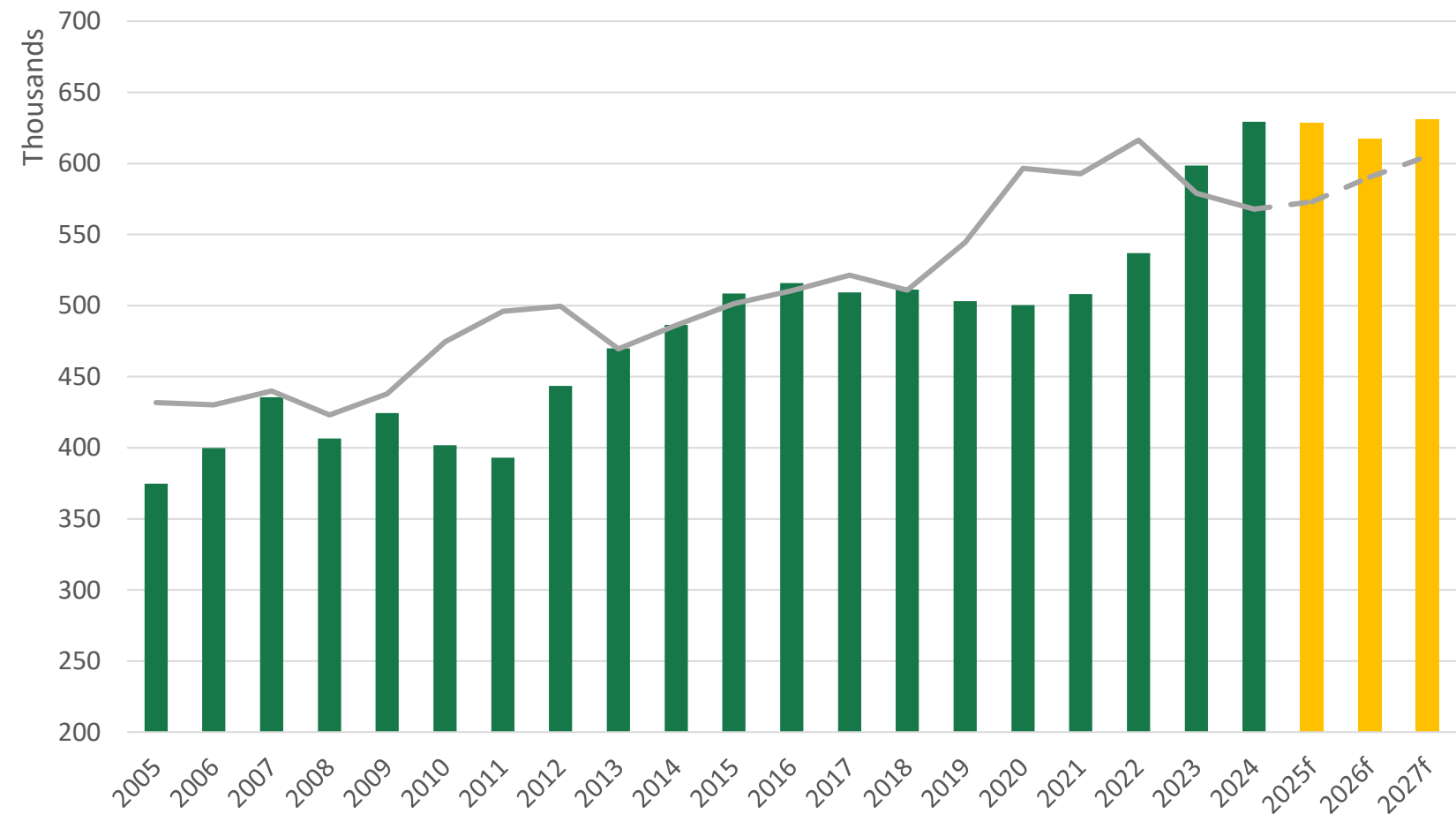
2026:
71.9m
-1.8%

2027:
74.1m
3%



Source: ABS, MLA Forecast

Lamb carcase weight and production



Source: ABS, MLA Forecast

Production	Carcase weights
2024: 629,000 5.2%	2024: 23.8kg -1.1%
2025: 629,000 -0.1%	2025: 24.0kg 0.5%
2026: 618,000 -1.8%	2026: 24.4kg 1.7%
2027: 631,000 2.2%	2027: 24.7kg 1.5%

A new strategic direction for MLA



A new strategic direction for MLA

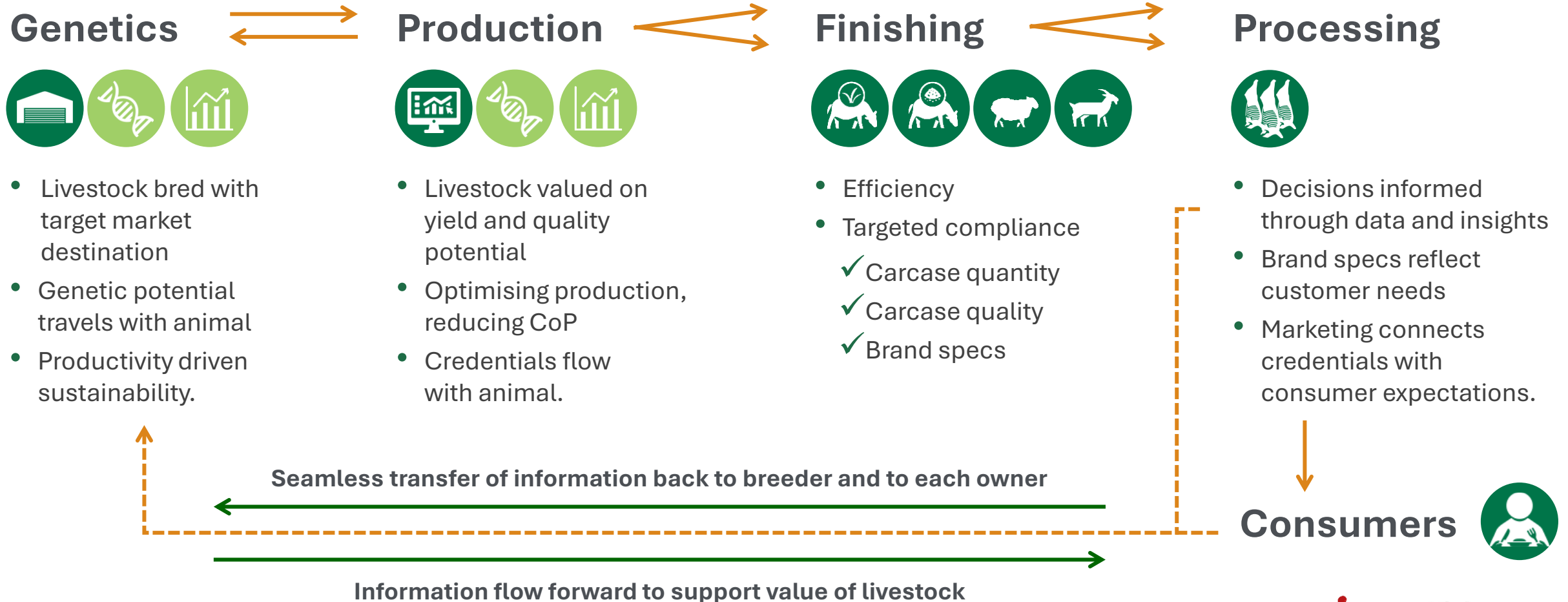
Productivity and profitability will underpin the sustainability and prosperity of our great industry

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

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



Value based marketing



Marketing innovations

AUSSIE BEEF

5.2m+ views
on YT & Socials in 2 weeks

AUSSIE BEEF

THE GREATEST



barbacoa

15:51

COMEDIANS + BUTCHERS
TALKING MEAT

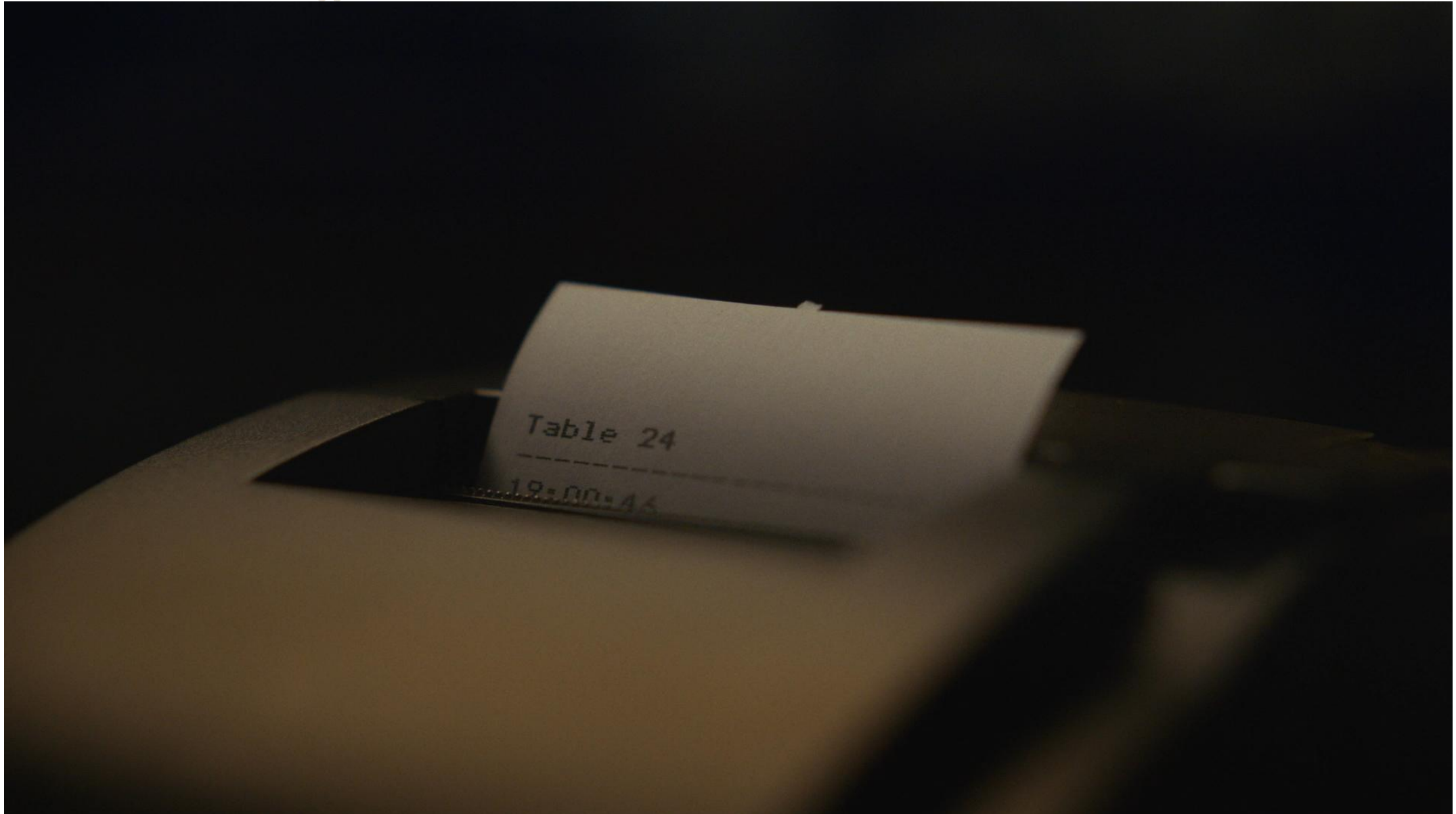


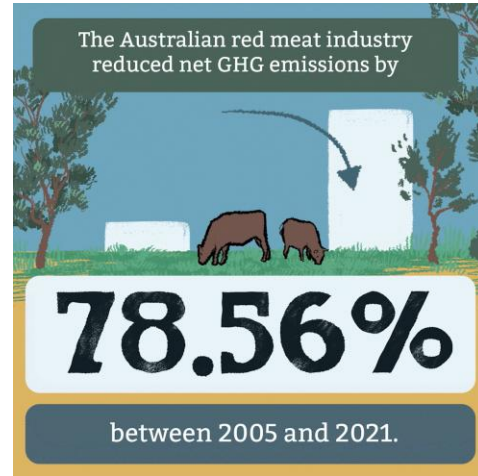
YOU'LL WANT SECONDS

AUSSIE BEEF



The Kitchen







NET greenhouse
gas emissions
reduced by
78%
since 2005

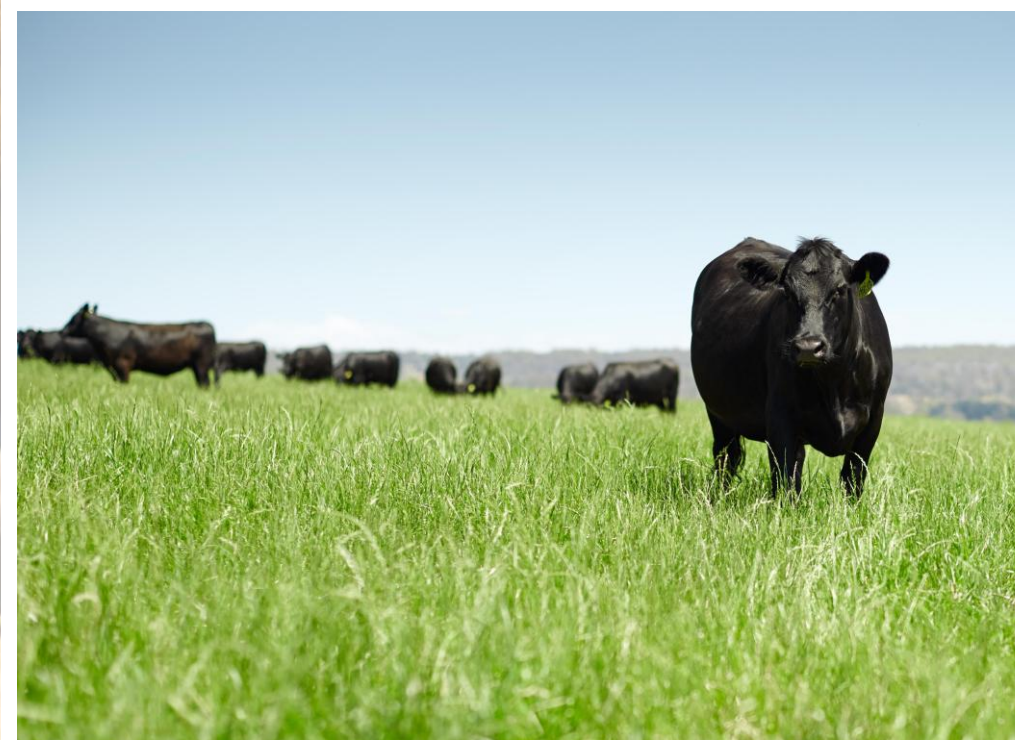
EMITS

31.08 Mt

CO₂-e per year



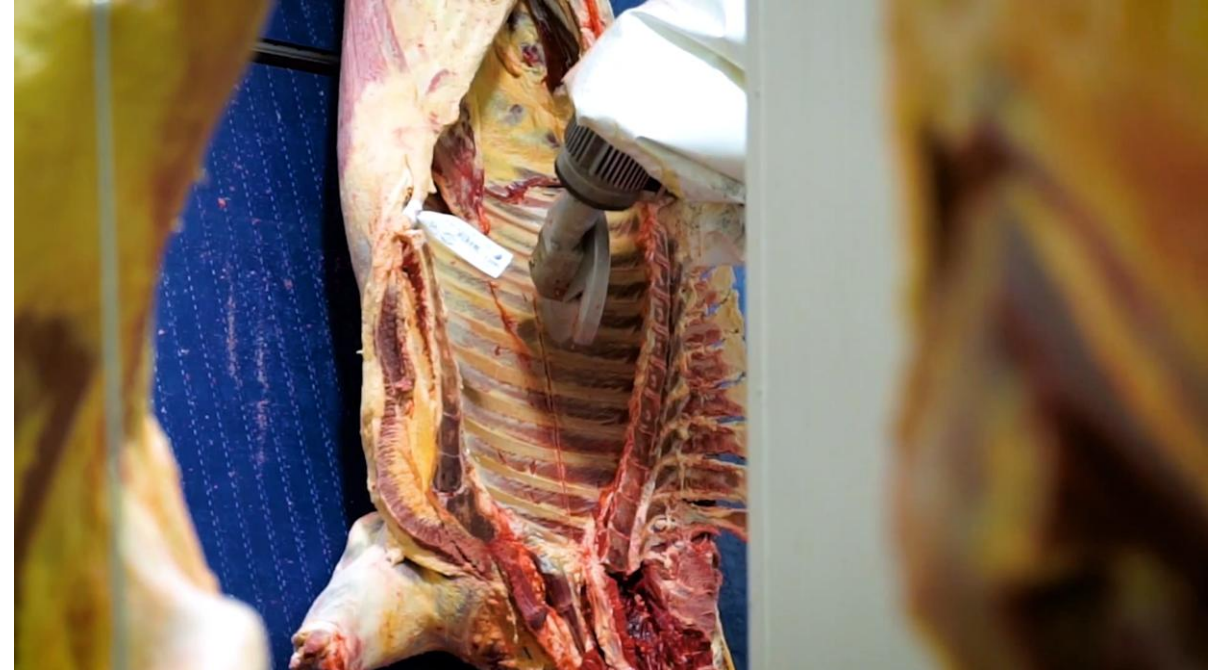
down from
145 Mt CO₂-e pa



Objective measurement – quality



Process sensing and automation



Innovations – upcycling lower value cuts and by-products

- 20% of the carcase delivers 80% of the value.
- New usages/occasions for red meat and by-products grows overall demand and carcase revenue.
- Powdered organ meat and collagen (hides/skins) – nutraceuticals.



A future-proofed NLIS



Multi-stage project to deliver a world-class livestock traceability platform by 30 June 2026, which will:

- deliver a fit-for-purpose and future-proofed livestock traceability system
- be easy to use and intuitive
- be flexible and scalable to support national rollout of sheep and goat eID
- work with other products including the eNVD
- strengthen biosecurity, food safety and market access





Thank you

Michael Crowley

MLA

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