



31 July 2026

MLA Update

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Meat & Livestock Australia

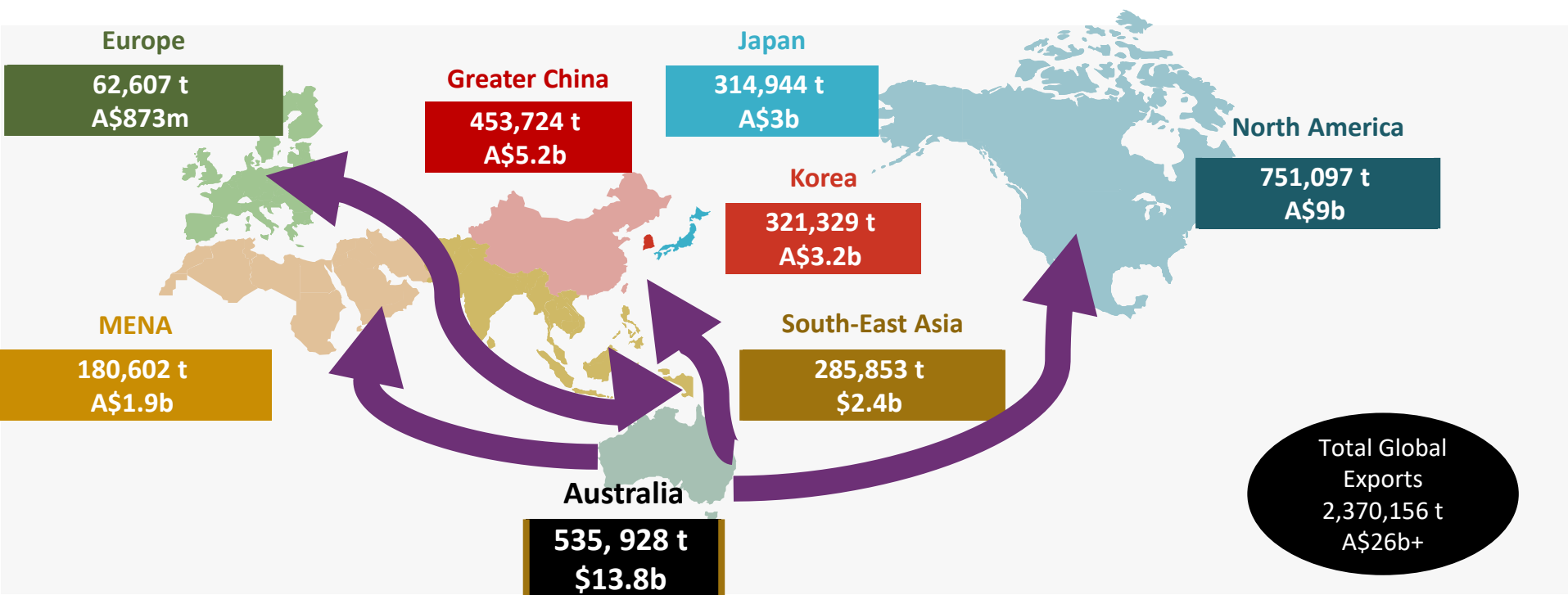


▲ POLICY AND STRATEGY ▲

▼ SERVICE PROVIDERS ▼



Australian red meat : FY26 total volume and value



•Source: ABS, DAFF, Trade Data Monitor, LLC (TDM), MLA. FY26. *Australian domestic volume is in shipping weight/wholesale weight and retail prices, export volumes are in shipped weight terms and wholesale prices.

Uncertain global trading environment



Triggering safeguards



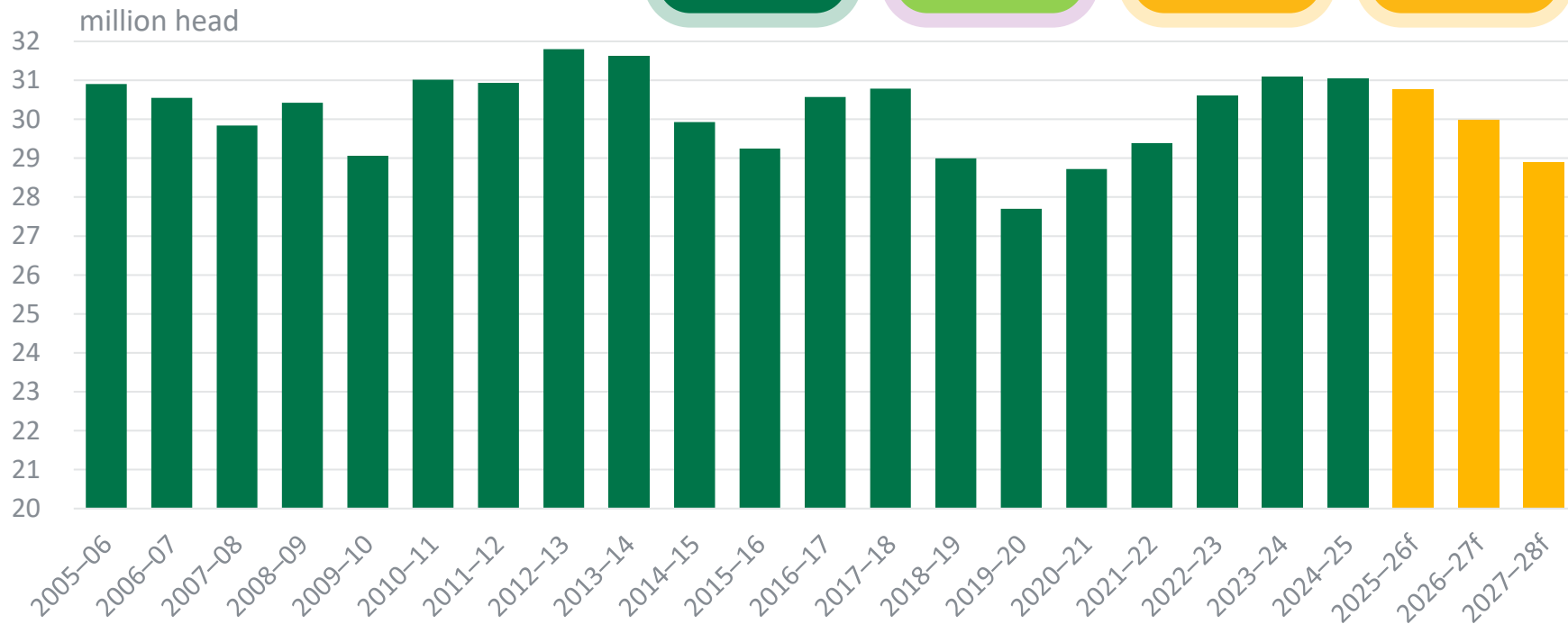
National cattle herd

2024-25:
31.1m
-0.1%

2025-26:
30.8m
-0.9%

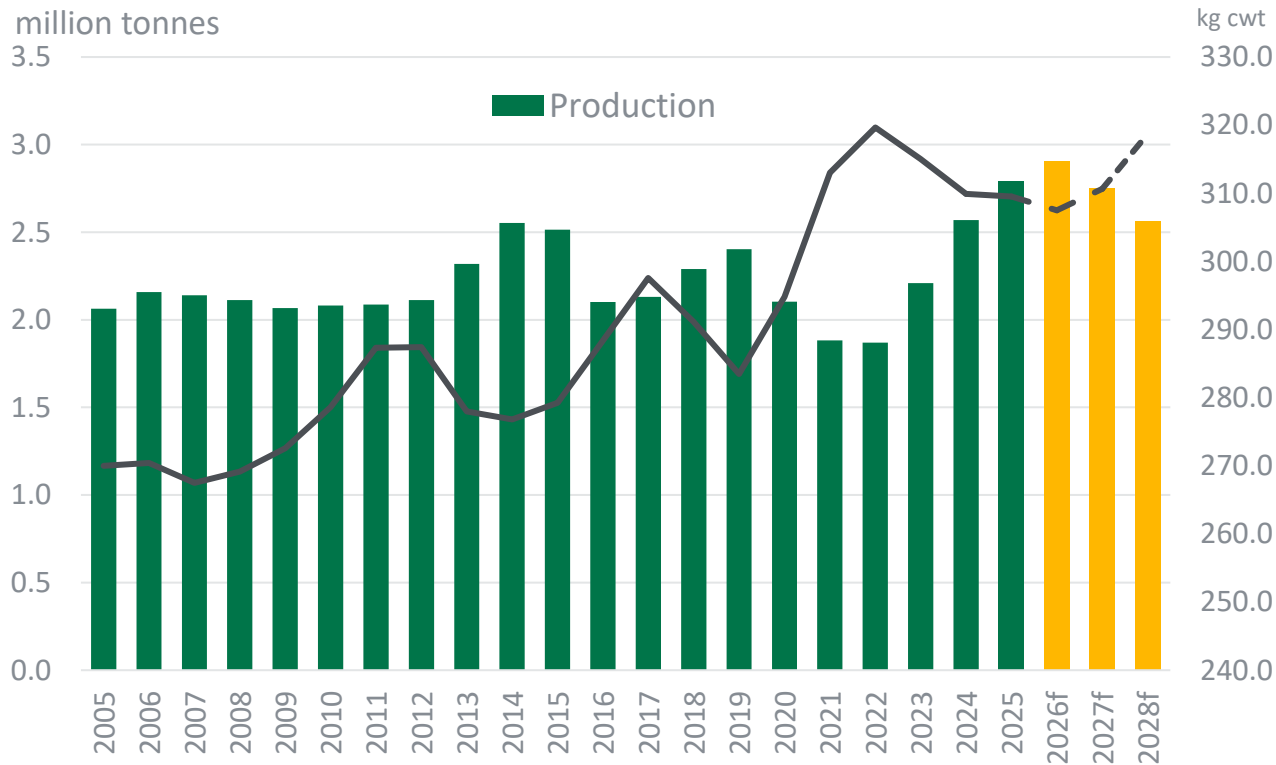
2026-27f:
29.9m
-2.6%

2027-28f:
28.9m
-3.6%



Source: ABS, MLA forecasts

Cattle carcase weights and beef production



Source: ABS, MLA forecasts. Years are in calendar year

Production Carcase weights

2025:
2.79m
8.7%

2025:
309.5kg
-0.4kg

2026f:
2.90m
4.1%

2026f:
307.5kg
-2.0kg

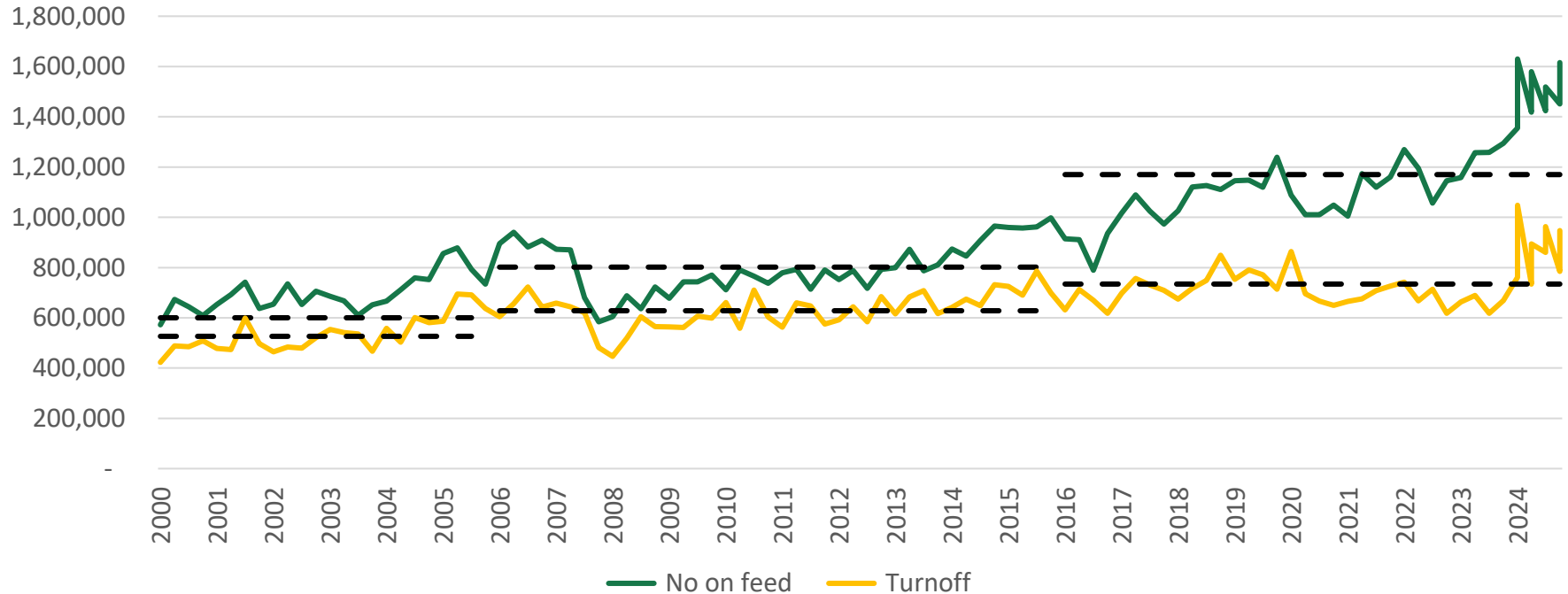
2027f:
2.75m
-5.3%

2027f:
310.6kg
3.1kg

2028f:
2.56m
-6.8%

2028f:
318.7kg
8.4kg

QTR Turnoff vs Number on feed



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

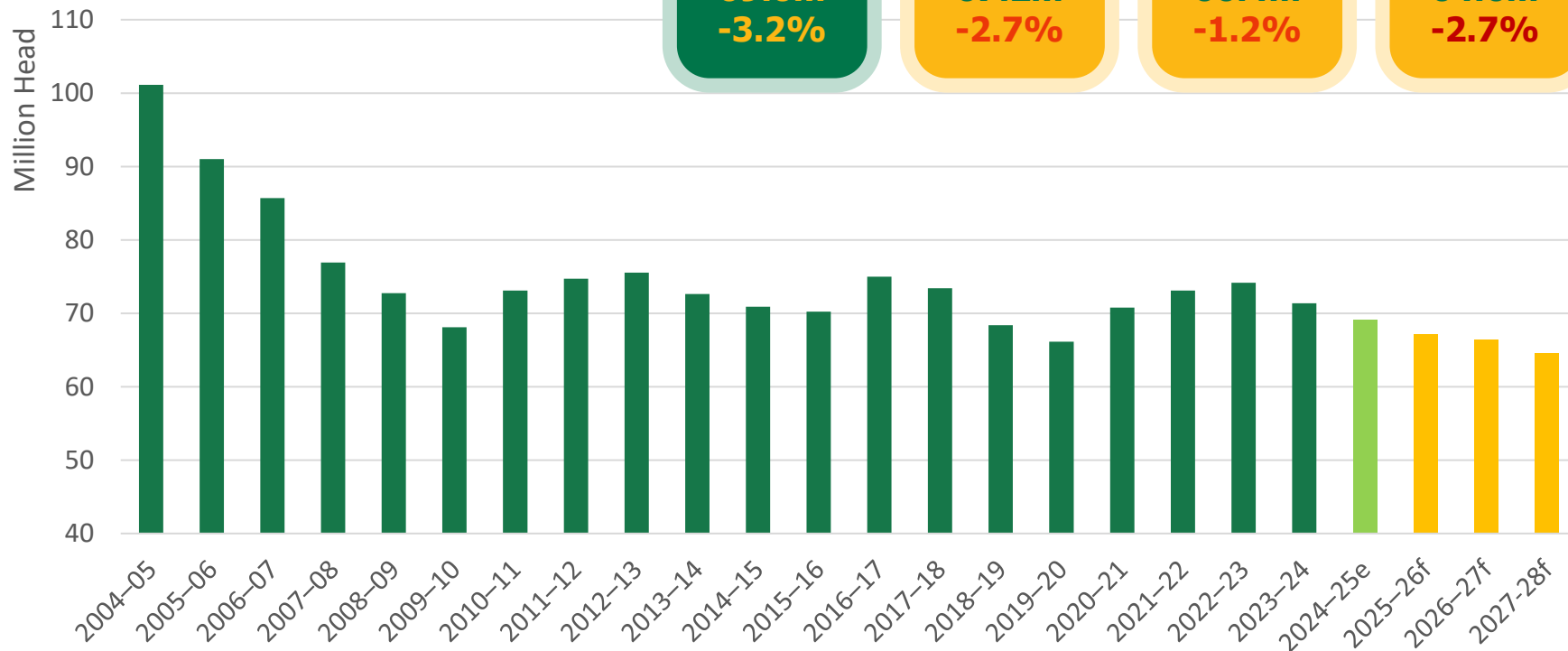
National sheep flock

2025:
69.0m
-3.2%

2026f:
67.2m
-2.7%

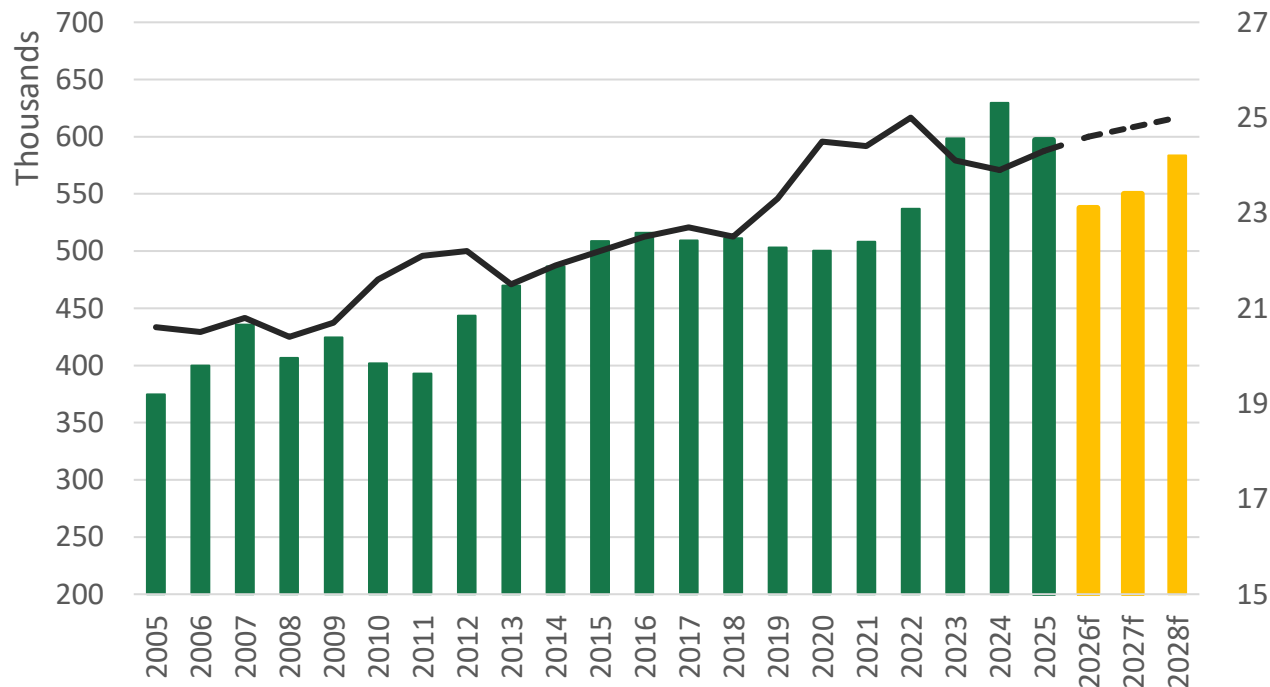
2027f:
66.4m
-1.2%

2028f:
64.6m
-2.7%



Source: ABS, MLA Forecast

Lamb carcase weight and production



Source: ABS, MLA Forecast

Production

Carcase weights

2025:
697,000
-5.2%

2025:
24.3kg
1.8%

2026f:
537,700
-9.9%

2026f:
24.6kg
1.2%

2027f:
649,900
2.3%

2027f:
24.8kg
0.8%

2028f:
583,600
6.1%

2028f:
25.0kg
0.8%

MLA's strategic direction – 1 year in



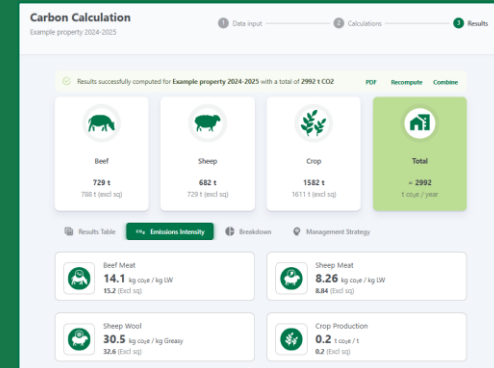
Contributing to Australia's net zero ambitions



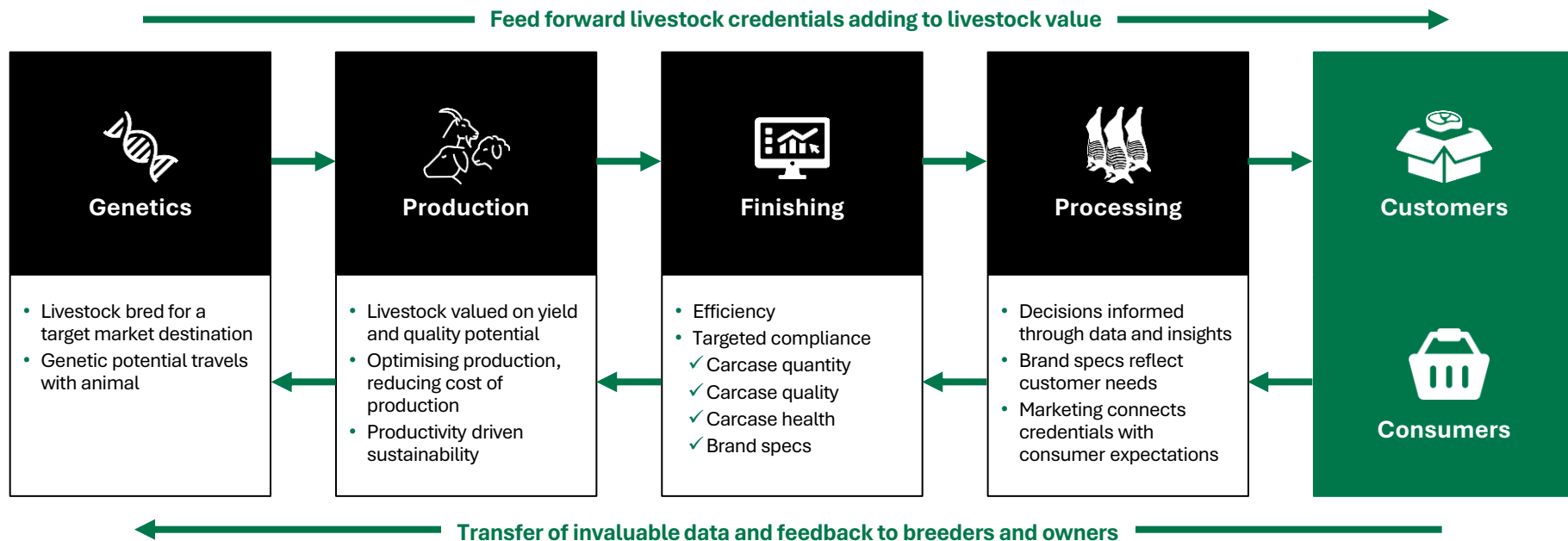
*Genetics, Supplements,
Feedbase*

Biogenic carbon cycle

*Data, tools and
technology*



Delivering value-based marketing



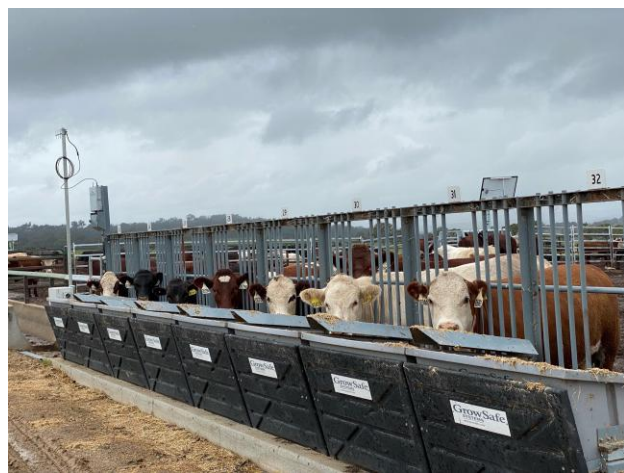
Cut surface grading cameras



Multibreed genetic evaluation and livestock credentials



- Genetic merit of animals can be compared across breeds
- Accelerated genetic gain for improved productivity
- New genomic products and faster delivery to industry



Driving demand through



Marketing



Market access



Australia-UK FTA

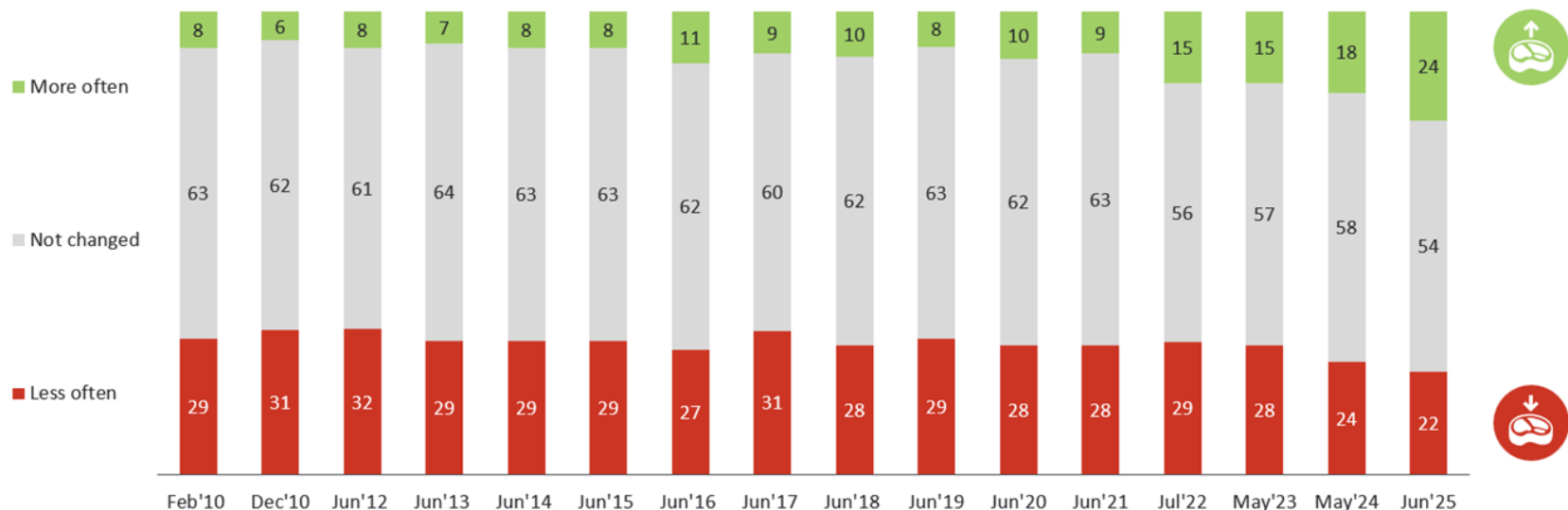
	Beef	Sheep/ goat
Pre-FTA	3.7kt	13.3kt
Year 1	35kt	25kt
Year 10	110kt	75kt

Social capital



The proportion of red meat increasers has continued to increase – the highest level since research began in 2010

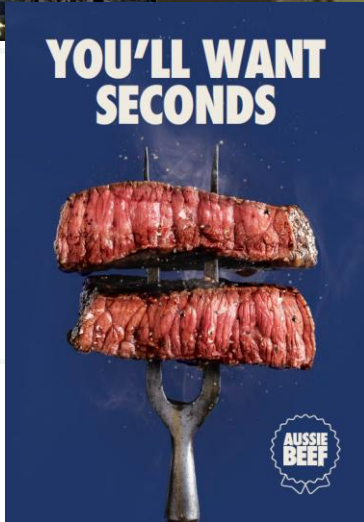
Red meat consumption vs. 1 year ago (%) – Among meat eaters



A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago?

Base n=(n=602-1431)

Marketing innovations



The Intern



FIFA WORLD CUP WEEKLY TRACKER

TOTAL TV (BVOD + TV) TRACKING

11/06/2026 – 23/07/2026

BVOD Value + Cost Delivered **\$1,678,035**

Planned 000s (TV + BVOD Planned WC 000s) **10,937,593**

Delivered 000s **24,521,040**

Tracking % **+124%**

TV TRACKING

11/06/2026 – 23/07/2026

Cost **\$464,100**

Planned 000s **4,293,149**

Delivered 000s **10,397,217**

Tracking % **+142%**



BVOD TRACKING

11/06/2026 – 23/07/2026

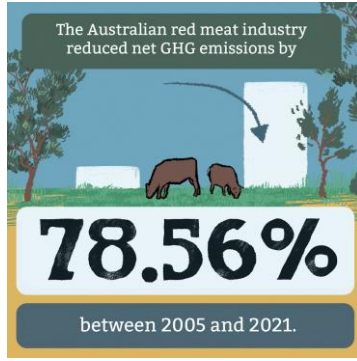
Value Delivered **\$1,213,935**

Planned WC 000s **6,644,444**

Total Delivered 000s including bonus **14,123,823**

Tracking % to Planned 000s **+112%**





Investing in our industry's people



Workforce of the future



Industry ambassadors



Accelerating adoption





Thank you

Michael Crowley

MLA

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