

Australian Beef Sustainability Framework

ANNUAL UPDATE 2026

ABOUT THIS UPDATE

THE 2026 ANNUAL UPDATE HAS BEEN PREPARED WITH REFERENCE TO THE GLOBAL REPORTING INITIATIVE (GRI) STANDARDS.

Specifically, it has applied the GRI principles, general disclosures and material topics; GRI 13: Sector Standard for Agriculture, Aquaculture and Fishing; and, the topics considered to be material by the Australian beef industry. Independent assurance of our application of the materiality principle was undertaken this year. Further details on the scope of this work is provided in the independent assurance statement in Appendix A. Unless otherwise stated, further information presented in the Annual Update has not been externally assured. Certain data points are the subject of specific external and third-party assurance standards and this is noted where the data appears.

Unless otherwise stated, this report presents information for the period of 1 July 2025 to 30 June 2026. Where information is re-stated, it is noted in the text where the data appears.

Australian Beef Sustainability Framework

The Australian Beef Sustainability Framework (ABSF) is an initiative of the Australian beef industry to set out its key indicators of performance in sustainability. It enables success to be recognised through evidence-based metrics and empowers the industry to continually improve and demonstrate its values to customers, investors and stakeholders. It shows the industry's intent to be accountable and to accurately tell the story of the Australian beef industry, further underpinning long-term market access.

The ABSF:

- Promotes industry transparency and progress to customers and the community
- Informs industry investment for continuous improvement in areas most important to our stakeholders
- Helps protect and grow access to investment and finance by providing evidence of performance and improvement
- Fosters constructive relationships with stakeholders to work collaboratively on improvement.

The ABSF does not:

- Establish or endorse measurement systems at an individual business level
- Provide an accreditation or certification system
- Endorse prescriptive management practices
- Create additional compliance or reporting burdens for individual businesses.

WHAT IS BEEF SUSTAINABILITY?

Beef sustainability is the production of beef in a manner that is socially, environmentally, and economically responsible. We do this through the care of natural resources, people and the community, the health and welfare of animals, and the drive for continuous improvement.

AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK VISION

A thriving Australian beef industry that strives to continuously improve the wellbeing of people, animals, and the environment.

The Australian beef industry in the spirit of reconciliation acknowledges the Australian Aboriginal and Torres Strait Islander peoples throughout Australia. We recognise their continuing connection to the land, waters and seas, and their enduring care for country. We pay our respects to their elders, past, present and emerging, as we share in the custodianship of our nation's resources for the benefit of all people.



CONTENTS

About this Update....02
Contents....03
Highlights and Challenges....04
Letter from the Chair....05
Markets Profile....06
Market and Regulatory Forces....07
The Australian Beef Sustainability Framework....09
Best Animal Care....10
Environmental Stewardship....19
Economic Resilience....35
People and Community....46
Materiality....58
Governance....60
Steering Group....62
Sustainable Development Goals....63
Global Roundtable for Sustainable Beef....65
Stakeholder Engagement....66
Glossary....68
Appendix A: Independent Assurance Statement....70
Appendix B: Standards Context Index....72

HIGHLIGHTS

Enhanced vegetation monitoring has provided a more accurate picture of Australia's grazing landscapes, revealing record levels of forest cover **(97 MILLION HECTARES)** and reinforcing the beef industry's strong stewardship of forests and woodlands.

The percentage of feedlot cattle with access to shade continues to rise, reaching **75.1%** in **2025**.

ABS National Ecosystem Accounts recorded that the amount of threatened species habitat has been stable across Australia between 2010 and 2023; with the extent of some habitats **DOUBLING** over this time period.[1]

Non-tariff trade barrier reductions reached **$862 MILLION** since 2020, maintaining strong progress towards the Red Meat 2030 target of **$1 BILLION.**

Community support for the live export sector reached its highest level yet, increasing from 2.89 in 2019 to **3.14** in **2025** (on a one to five scale).

Domestic transport data has been collected for more than 9 million cattle transported to export-registered abattoirs in 2025. Only **0.01%** were implicated in welfare incidents.



CHALLENGES

Routine adoption of pain relief remains an opportunity for further progress, with **34.5%** of producers currently using pain relief as standard practice.

Workplace safety remains a key challenge, with the processing-sector loss time injury frequency rate rising from **23.1** to **30.7** per million hours worked.

Evolving EPBC Act reforms created ongoing uncertainty for producers, highlighting the need for greater regulatory clarity and practical guidance on environmental obligations.

Geopolitical instability and changing global trade settings increased supply chain uncertainty, disrupted trade flows, and added pressure to export logistics and costs.

[1]Australian Bureau of Statistics, National Ecosystems Accounts, experimental estimates 2026, https://www.abs.gov.au/statistics/environment/environmental-accounts/national-ecosystem-accounts-experimental-estimates/latest-release



LETTER FROM THE CHAIR – 2026 ANNUAL UPDATE

WELCOME TO THE AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK 2026 ANNUAL UPDATE.

This year's Update marks another important point in the evolution of the Australian Beef Sustainability Framework—and, for me personally, the conclusion of my term as Chair of its Steering Group.

Over the past year, the environment in which Australian beef operates has continued to change. Sustainability expectations are increasingly connected with market access, trade, finance, regulation and the information required throughout increasingly data-driven supply chains. What was once often discussed primarily in terms of sustainability commitments is increasingly being tested through evidence.

That makes the fundamental purpose of the ABSF as important today as it has ever been.

The Framework exists to provide an evidence-based account of the Australian beef industry's sustainability performance: recognising progress where it has occurred, identifying where further work is required, and allowing industry to respond to customers, markets, investors and the Australian community with credible information.

Last year's update represented an important step in that evolution. An extensive materiality assessment refreshed the issues most significant to the industry and its stakeholders, including animal health and welfare, biosecurity, market access, climate resilience, emissions, traceability, food safety, workplace safety and the economic contribution of our industry. This year's update builds upon that work and provides another year of evidence against the Framework's four enduring themes—Best Animal Care, Environmental Stewardship, Economic Resilience, and People and the Community.

Importantly, the value of the Framework is not determined by whether every indicator moves in the direction we would like. Credibility comes from reporting the evidence as it is. Where performance improves, we should recognise it. Where it remains steady, we should understand why. And where the evidence identifies challenges, the responsibility is to acknowledge them and continue working on practical improvement.

This matters because sustainability reporting is no longer occurring separately from the commercial environment in which Australian beef operates. Expectations around climate disclosure, traceability, environmental credentials, animal welfare and supply-chain transparency are increasingly influencing regulation, investment and access to some of our most valuable markets.

Australian beef therefore benefits from having a credible, industry-led evidence base that reflects Australian production systems while remaining capable of engaging with international expectations. The ABSF's role has never been to impose another certification scheme or additional compliance burden on individual businesses. Its strength has instead been its ability to bring together evidence from across the supply chain and provide a transparent account of our collective performance.

2026 also marks a transition in how the Framework will be managed. Industry has determined that from 2027 the ABSF will operate through a more streamlined model, with greater responsibility residing through the industry's peak bodies and existing structures, while retaining the Annual Update and the Framework's underlying evidence base.

As the current governance arrangements conclude, it is appropriate to recognise the considerable contribution made by all members of this, and previous Steering Group, and those who have supported its work. They have brought independent expertise, industry experience and, importantly, a willingness to engage constructively with difficult issues. That contribution has helped strengthen both the evidence contained within the Framework and the credibility with which it can be presented.

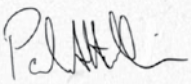
The structures supporting the ABSF may evolve, but the principles underpinning it should endure, being relevance, inclusivity, credibility, practicality, and transparency.

As I conclude my term as Chair, I want to thank my fellow Steering Group members. We should also recognise the many producers and supply-chain participants who have contributed information and experience, our researchers and technical experts, the industry organisations that provide data and expertise, and everyone who has participated in the Framework's development.

It has been a privilege to contribute to this work.

Australian beef has a remarkable story to tell, however ultimately our reputation will not rest on how strongly we tell that story. It will rest on our ability to substantiate it.

That, in my view, remains the enduring value of the Australian Beef Sustainability Framework.



Patrick Hutchinson
Chair, Steering Group,
Australian Beef Sustainability Framework

MARKETS PROFILE

WHILE AUSTRALIAN RED MEAT CONSUMPTION HAS REMAINED RELATIVELY STABLE IN RECENT YEARS, THE LONGER-TERM TREND INDICATES A GRADUAL DECLINE IN PER CAPITA CONSUMPTION.

Despite this, Australia remains the world's third-largest beef-consuming nation[2], with per capita beef consumption averaging 21.93 kilograms in 2025. Beef continues to be a staple in Australian households, with 91% purchasing beef during the year. It is the second-largest fresh meat category in Australia, trailing the leading category by just 2.4%.

In 2025, Australia's top three beef export destinations (in weight terms) were:

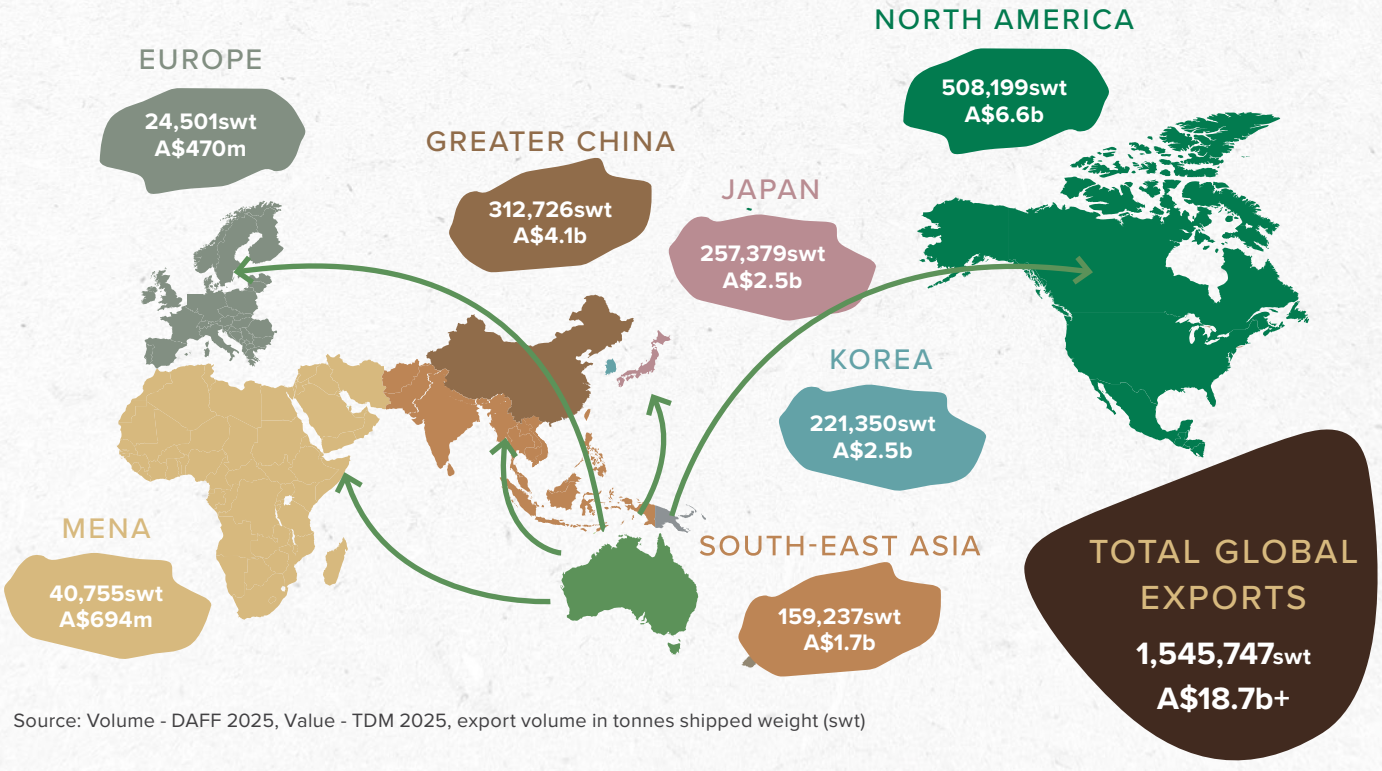
- United States of America (US) – 453,292 tonnes shipped weight (swt) (29.3% of total exports).
- China – 272,940 swt (17.7%).
- Japan – 257,379 swt (16.7%).

Australia's top three live cattle export destinations in 2025 were:

- Indonesia – 583,408 head (73.7%)
- Vietnam – 84,837 head (10.7%)
- China – 32,208 head (4.1%).

Australian beef exports reached more than 90 countries in 2025, with the US being the largest market in both volume and value.

AUSTRALIAN BEEF EXPORTS 2025: VOLUME IN TONNES SWT & VALUE IN A$



Source: Volume - DAFF 2025, Value - TDM 2025, export volume in tonnes shipped weight (swt)

[2] OECD, OECD-FAO Agricultural Outlook 2024-2033, https://data-explorer.oecd.org/, Series: Human Consumption, Beef & Veal.

MARKET AND REGULATORY FORCES

GEOPOLITICS ESCALATION

The escalation of conflict in the Middle East during 2026 disrupted established trade routes and increased freight, insurance and logistics costs for Australian red meat exporters. Although demand for Australian Halal-certified beef in Gulf markets remained strong, shipping interruptions, airspace closures and uncertainty surrounding the Strait of Hormuz created operational challenges. Exporters faced shipment delays, route changes and higher costs. However, Australia's diversified export portfolio helped mitigate the overall impact, with some product redirected to alternative markets.

At the same time, exports to the US grew strongly. Demand was supported by a reduced US cattle herd, driven by prolonged drought conditions, as well as disruptions to global trade flows associated with Middle East instability. These factors increased reliance on imported beef and may contribute to longer-term structural changes in US beef supply, supporting ongoing demand for Australian beef in the US and other key markets, including China.[3,4]

Despite the introduction of US tariffs on Australian beef, strong demand and high US beef prices largely offset their direct impact. Export volumes and values to the US remained robust, demonstrating the resilience of the Australian beef industry. However, the imposition or removal of tariffs between other trading nations can also influence Australian markets by altering global trade flows, competitiveness, and supply-demand dynamics. These shifts can increase or decrease demand for Australian beef and affect domestic and export prices, highlighting that the impacts of trade policy often extend well beyond the countries directly involved.

Trade access continued to present both opportunities and risks. New agreements, including the Australia–United Arab Emirates Comprehensive Economic Partnership Agreement, improved market access, while geopolitical tensions, tariff changes and varying import requirements reinforced the importance of maintaining diversified export markets and addressing non-tariff trade barriers.

EPBC ACT REFORMS

Australia's environmental regulatory framework is undergoing significant change following amendments to the *Environment Protection and Biodiversity Conservation 1999* (EPBC) Act. The reforms introduce new national environmental institutions, including the National Environmental Protection Agency and Environment Information Australia, alongside the development of National Environmental Standards to guide environmental decision-making. They also bring changes to assessment and approval processes, environmental offset requirements, information and reporting obligations, and compliance arrangements. As implementation progresses, these reforms are expected to influence how land use, development and environmental management activities are assessed across the agricultural sector, further shaping the regulatory landscape in which Australian beef producers operate.

[3] Bendigo Bank Agribusiness (2026) Australian Agriculture Export Report 2025-26. Australian Agriculture Export Report

[4] Bittmann T., Zamani O., Loy J.-P., Ortega D. L. and Anders S. (2025) Short- and long-term drought impacts on the U.S. beef value chain, Environmental Research Letters, 20(7), 074062, https://doi.org/10.1088/1748-9326/ade45d

CATTLE AUSTRALIA'S LAND MANAGEMENT COMMITMENT

Cattle Australia's (CA) Land Management Commitment (LMC), released in September 2024, has continued to gain recognition during 2025-26 as the beef industry's basis for demonstrating responsible vegetation management in a manner that is practical, science-based and aligned with emerging market and policy expectations. The LMC has been increasingly referenced in industry, government and supply chain discussions relating to sustainability reporting, nature-positive policies and environmental market access. Adoption has primarily occurred through its integration into industry advocacy and producer engagement activities, with growing recognition of the need for nationally consistent approaches to measuring and reporting land management outcomes. As governments progress reforms to environmental and biodiversity policy, the LMC has provided a foundation for ensuring Australian cattle producers can demonstrate the coexistence of beef production, biodiversity conservation and sustainable land management. The commitment continues to support industry efforts to maintain market access, reduce duplication in reporting requirements and strengthen the recognition of producers as active managers of Australia's natural landscapes.

Scan the QR CODE to download the Land Management Commitment

SUSTAINABILITY DISCLOSURES

Supply chain strategies and commitments continue to evolve. International reporting initiatives such as the Taskforce on nature-related Financial Disclosures are expecting companies to voluntarily report on their nature related risks and opportunities, while some customers are asking for further clarity regarding on-farm biodiversity measurement.

Industry continues to engage proactively with all parts of the broader supply chain including State, Territory, and Federal Governments to manage any potential risks associated with noncompliance, ensuring ongoing market access, and avoiding negative impacts on productivity where compliance requirements constrain production decisions.

The first Climate Related Financial Disclosure reports have been released by large businesses. Several large businesses have missed targets or have scaled back their commitments. One large multinational will no longer have targets for Scope 3 emissions and is instead focusing on emissions intensity within its own operations (Scopes 1 and 2).

Producers and supply chain participants have faced changes to regulation and reporting requirements. From European Union (EU) deforestation regulations to the tightening of modern slavery laws across the whole value chain for Australian brands, it is a complex space to navigate. Australia's low-risk classification under the EU Deforestation Regulations (EUDR) is expected to reduce the compliance burden when the regulation begins to apply from 30 December 2026 in a limited export market. However, EU beef producers, exporters and supply chains still need to provide information to demonstrate due diligence and traceability. The EUDR also presents challenges due to its reliance on European definitions and risk frameworks, which do not always align with Australian ecosystems, land management practices, or vegetation classifications, creating additional interpretation and reporting complexities.



THE AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK

THE AUSTRALIAN BEEF INDUSTRY IS COMMITTED TO A TRANSPARENT, SUSTAINABLE PATHWAY OF BEST PRACTICE THROUGH THE VALUE CHAIN.

The ABSF tracks performance of the industry against a series of indicators under four themes: Best Animal Care, Economic Resilience, Environmental Stewardship, and People and the Community. Within these themes the industry has identified 26 priority issues.

BEST ANIMAL CARE

- Animal Husbandry & Handling
- Biosecurity
- Processing Practices
- Livestock Transport
- Animal Health & Welfare

ENVIRONMENTAL STEWARDSHIP

- Biodiversity
- Soil Health
- Feed Base Production & Pasture Management
- Balance of Tree & Grass Cover
- Greenhouse Gas Emissions & Carbon Capture
- Water
- Waste
- Feed Sourcing

ECONOMIC RESILIENCE

- Climate Resilience
- Profitability & Productivity
- Market Access
- Traceability Across the Value Chain
- Rural Economic & Community Contribution
- Partnerships & Industry Collaboration

PEOPLE & COMMUNITY

- Food Safety & Quality
- Nutrition & Food Security
- Work Health & Safety
- Labour Practices
- Diversity & Inclusion
- Antimicrobial Stewardship
- Workforce Development & Capacity Building

CHANGES FROM PREVIOUS UPDATE

- Change of Indicator 1.3 – as seedstock data is no longer available, producer survey data has been utilised to identify the percentage of producers who are selecting cattle with the polled gene.
- Change of Indicator 4.2 – the industry continues to work towards collecting data for domestic transport. Until then, a subset of data is being used to track domestic transport to export-registered abattoirs.
- Change of Indicator 5.1 – producer awareness of Australian Animal Welfare Standards for Cattle is no longer being measured. This has been changed to reflect the requirement for producers in LPA to have an approved Animal Welfare Management Plan.
- Removal of Indicator 7.2 – levels of soil carbon: Accurate data at an industry level is currently not feasible.
- Change of Indicator 10.5 – processors use more renewable energy than just biogas. The indicator has been updated to reflect other sources of renewable energy.

TRENDS

Each indicator's historical data has been analysed to determine if it is significantly trending between 2017 and the most recently available data. A 0.75 coefficient of determination has been applied to determine the reports trend-classification rule. Graphs of historical data are available on the ABSF website.

● = Improvement, or maximum limit reached ● = Steady ● = Decline

N/A = Data is unable to be trended, or is a new indicator

BEST ANIMAL CARE

THE AUSTRALIAN BEEF INDUSTRY IS GUIDED BY THE FIVE DOMAINS OF ANIMAL WELFARE: NUTRITION, ENVIRONMENT, HEALTH, BEHAVIOUR, AND MENTAL STATE. THIS ENSURES THE INDUSTRY CAN AIM TO PROVIDE ALL CATTLE WITH AN ENVIRONMENT IN WHICH THEY CAN THRIVE.

Looking after cattle properly remains central to the Australian beef industry.

Australia is mainly a pasture-based cattle industry. Around one-third of cattle are finished through a feedlot, with these cattle generally spending the majority of their lives grazing on pasture before entering the feedlot.

Over the past year, the industry continued working to strengthen animal welfare standards across the supply chain. The Australian Government progressed the renewed Australian Animal Welfare Strategy (AAWS), which aims to provide a consistent and practical approach to animal welfare across Australia.

Industry also continued investing in training and assurance programs. The Australian Lot Feeders' Association (ALFA) trained 109 new Animal Welfare Officers and ran workshops for 142 feedlot professionals. These covered practical issues including fit-to-load requirements, heat-load management, antimicrobial stewardship, and cattle receival methods.

Heat management remains an important focus. Feedlots continued investing in shade, with around 75% of cattle on feed now having access to shade. This is a practical improvement that supports cattle comfort and reduces welfare risks during periods of extreme heat.

Biosecurity is also a key part of animal welfare. The ongoing risk of foot-and-mouth disease (FMD), lumpy skin disease (LSD) and other animal diseases, reinforces the need to remain prepared. Across the industry, significant investment has continued in biosecurity planning and implementation. Producer training and extension programs have been delivered to ensure animal health is protected, welfare outcomes maintained and Australia's cattle industries are safeguarded from emerging disease threats. A key message of these training programs is that biosecurity plans need to work on an ordinary day, not just during an audit or emergency, and that clear processes for property entry, livestock movement and induction are generally more useful than a detailed plan that staff and contractors do not understand or use.



ANIMAL HUSBANDRY & HANDLING

Good animal husbandry and handling are fundamental to cattle health and welfare. Practices should meet Australian regulations and align with international best practice, including minimising the need for invasive procedures and providing appropriate pain relief when required.

ID	INDICATOR	DATA	TREND
1.1	Percentage of producers using appropriate pain relief for invasive husbandry practices.	**34.5%** (2025)	●
1.2	Percentage of cattle receiving appropriate pain relief for invasive husbandry practices.	**26.6%** (2025)	●
1.3	Percentage of producers intentionally breeding livestock to be naturally polled.	**76.1%** (2025)	**N/A**

DATA EXPLAINED

1.1 – 1.2 Source: Meat & Livestock Australia[5]

The Australian beef industry remains committed to the pursuit of non-invasive replacements for invasive surgical procedures (dehorning, disbudding, castration, and spaying). Until these are available, the industry aspires to 100% use of effective and appropriate pain mitigation for these procedures by 2030. Data from the MLA 2025 Producer Survey has been used to update this indicator. As respondents could report undertaking multiple procedures, 838 producers reported a total of 1,131 procedures, of which pain management was used in 390 cases. This represents approximately 26.6% of the national herd receiving appropriate pain relief when undergoing these procedures.

1.3 Source: Meat & Livestock Australia[6]

This indicator has been changed to reflect a reliable data source which will be collected biennially.

Polled cattle contain a genetic trait preventing the growth of horns. Horns can cause injury to other cattle and to people, and are often removed by disbudding, dehorning, or tipping. This is not needed for polled animals. Producers intentionally breeding livestock to be naturally polled indicates industry progress and would likely be reflected in the national herd. Adoption rates may vary between breeds and production systems. In some sectors, including Wagyu, breeding decisions often involve balancing selection for the polled trait with other commercially important genetic characteristics.

Data from the MLA 2025 producer survey showed that 546 of 838 producers always breed livestock to be naturally polled, while a further 91 sometimes breed livestock be naturally polled.

SNAPSHOT OF ACTIVITIES

Practical animal welfare planning

The Animal Welfare Management Plan became a Livestock Production Assurance (LPA) requirement from 23 June 2025, with auditing of the requirement commencing on 1 September 2025. It gives producers a simple way to record their current welfare practices and identify where improvements can be made. CA helped develop the plan to make sure it is practical and workable on farm.

Feeder Cattle Guide

In May 2026, MLA released a best practice guide on feeder cattle preparation to consolidate industry knowledge into a practical resource for producers. Covering weaning, vaccination, backgrounding and transport, the guide aims to improve cattle health and welfare and feedlot performance, while supporting more consistent supply chain outcomes and stronger producer returns.

[5] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

[6] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

BIOSECURITY

Australia's beef industry depends on effective biosecurity at every stage of the supply chain. This priority focuses on managing the risk of infectious diseases, invasive pests, or weeds to safeguard the industry, environment, animals, and people.

ID	INDICATOR	DATA	TREND
2.1	Percentage of Australian cattle properties covered by a documented On-farm Biosecurity Management Plan	**86%** (2025)	●

DATA EXPLAINED

2.1. Source: Meat & Livestock Australia[7]

From 1 September 2026, all producers completing accreditation or reaccreditation in LPA must provide a copy of their biosecurity plan if they have not done so previously. This change will ensure that 100% of LPA accredited producers have a biosecurity plan in place by 1 September 2028.

An On-Farm Biosecurity Management Plan covers how producers:

- Check the health of the livestock coming onto the property
- Inspect introduced livestock for signs of illness on arrival and quarantine them appropriately
- Monitor livestock regularly and act quickly to signs of illness or disease
- Reduce the risk of livestock straying on or off the property
- Keep records of livestock transfers and the movement on equipment, vehicle, and visitors
- Use any other practices to reduce the risk of disease spreading.

This indicator is measured through the LPA program. Not all LPA accredited producers are audited every year. Instead, LPA conducts targeted audits based on risk and of a sample of randomly selected producers annually. Random audits are used to ascertain the conformity rate and trends across the entire population of LPA-accredited producers. Using random audit data delivers a more accurate conformity rate than targeted audits, which are more likely to find issues and skew the interpretation of the data.

To improve conformity, Integrity Systems updated the LPA accreditation process to include a self-assessment in 2024, as well as a prompt for producers to complete or provide their biosecurity plan when undertaking accreditation. Since 1 September 2024, the biosecurity plan prompt has seen over 43,000 cattle producers complete or update their biosecurity plan. Additionally, Integrity Systems has an outside-of-audit process to send reminders and if required, corrective action requests (CARs) to producers with no biosecurity plan on file.

SNAPSHOT OF ACTIVITIES

Indonesian vaccination program

More than 110,000 local cattle, sheep and goats have been vaccinated against FMD and LSD in Indonesia funded by a series of Australian Government grants and delivered by LiveCorp with local partners. Workshops have also been run to improve smallholder farmers' understanding of how to recognise, treat, and protect against the diseases. The program is protecting the farmers' livelihoods, creating buffer zones around feedlots holding imported Australian-bred cattle, strengthening Australia's reputation as a trusted partner, and playing an important role in Australia's biosecurity efforts.

[7] Meat & Livestock Australia, Livestock Production Assurance Audits

SNAPSHOT OF ACTIVITIES

Feedlot Biosecurity

The ALFA Biosecurity Hub strengthened industry biosecurity capability through simulation training and updates to the National Feedlot Accreditation Scheme (NFAS), introducing new biosecurity requirements that became auditable from 1 July 2026. The changes aligned feedlot operations with national biosecurity obligations and emergency animal disease preparedness. Additional capability-building initiatives included new Feedlot TECH courses covering feed allocation, office administration, maintenance and biosecurity, thereby supporting best-practice management across the sector.

Preparing for lumpy skin disease

CA supported industry preparedness for LSD through hosting a producer webinar, in collaboration with the Department of Agriculture, Fisheries and Forestry, to raise awareness and assist in producer's understanding of the exotic disease. While Australia remains free of LSD, this session highlighted the need for ongoing vigilance and awareness, serving as a reminder of the importance of Australia's continued collective focus on national preparedness.

CA also worked closely with DAFF in designing vector research projects. These projects will strengthen emergency animal disease preparedness, improve understanding of disease transmission risks, support biosecurity monitoring, and help protect cattle health, welfare and market access in the event of an outbreak. DAFF's project: "Assessing the feasibility of testing trapped pooled insects for lumpy skin disease virus" runs from June 2025 to December 2026. CA is pursuing further research of this type to compliment DAFF's project, to include Culicoides and biting flies.



PROCESSING PRACTICES

Cattle should be treated humanely at all processing facilities, whether in Australia or overseas. Industry assurance systems help ensure processing practices meet Australian regulations and standards and align with international best practice.

ID	INDICATOR	DATA	TREND
3.1	Percentage of cattle processed through an establishment accredited under the Australian Livestock Processing Industry Animal Welfare Certification System (AAWCS)	**97.79%** (2025-26)	
3.2	Percentage of exported cattle processed through an Exporter Supply Chain Assurance System (ESCAS) accredited establishment	**100%** (2025)	

DATA EXPLAINED

3.1. Source: Meat & Livestock Australia, Aggregated slaughter numbers from AAWCS-accredited processing establishments

AAWCS is an independently audited certification program used by Australian livestock processors to demonstrate compliance with industry best practice animal welfare standards, from the receival of livestock to the point of humane processing. Australia's AAWCS-accredited processing facilities accounted for 7,727,254 of the 7,902,203 cattle processed in FY2026. This represents 97.79% of the total cattle slaughter.

3.2. Department of Agriculture, Fisheries and Forestry[8]

Australian companies which export livestock internationally under feeder and slaughter protocols are required to have an Exporter Supply Chain Assurance System (ESCAS) in place. This covers animal welfare, control and traceability through the supply chain, and is independently audited. Department of Agriculture, Fisheries and Forestry (DAFF) consignments and non-compliance data was used to gather data for this indicator.

There was one self-reported notification in August 2025 involving cattle, where appropriate corrective actions were implemented by the exporters and no additional regulatory action was taken by the department.

SNAPSHOT OF ACTIVITIES

AI-enabled animal welfare monitoring

The Australian Meat Processor Corporation (AMPC) has partnered with Impetus Animal Welfare to trial artificial intelligence (AI) systems in Australian red meat processing facilities to strengthen animal welfare monitoring and reporting. The completed projects demonstrated that AI monitoring can provide more complete and accurate data on welfare indicators than manual intermittent observation. The use of sensor devices in addition to CCTV footage improved attribution accuracy and confidence in AI monitoring than using CCTV footage alone. Where findings from AI monitoring were actively reviewed, linked to corrective actions, and used to inform operational and infrastructure decisions, it showed improvements in animal welfare. However, management systems, not technology alone, were the main determinant of whether welfare outcomes improved.

[8] Department of Agriculture, Fisheries and Forestry, ESCAS investigations, https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/livestock/compliance-investigations/investigations-escas

LIVESTOCK TRANSPORT

Livestock transport is a critical stage in safeguarding cattle health and welfare. Handling and transport procedures comply with Australian regulations and standards and align with international best practice.

ID	INDICATOR	DATA	TREND
4.1	Total mortality rate of cattle exported on sea voyages	**0.04%** (2025)	●
4.2	Percentage of cattle involved in Animal Welfare Incident Reports when transported to export-registered abattoirs	**0.01%** (2025)	**N/A**

DATA EXPLAINED

4.1. Source: Department of Agriculture, Fisheries and Forestry[9]

Every six months, the Federal Minister must table in Parliament a report from the Department that includes livestock mortalities on every sea voyage. In accordance with the requirements of the *Export Control Act 2020,* the report relates only to information provided to the Secretary or a delegate during the reporting period, whether or not the voyages occurred during the reporting period. This data indicates there were 310 cattle mortalities from 773,731 head exported in 2025 (0.04%).

4.2. Source: Department of Agriculture, Fisheries and Forestry[10]

This data reflects a portion of domestically transported cattle, as industry continues to work on collecting industry-wide data.

9,352,560 cattle were transported to export-registered abattoirs between 1 January 2025 and 31 December 2025. Of these, 1,281 cattle were implicated in welfare incidents reported to state and territory animal welfare authorities. This does not indicate mortality, as animal welfare incident reports include further animal welfare related criteria.

This equates to 0.01% of all cattle transported to export abattoirs, consistent with the outcomes from 2019 to 2024.

There is a current AMPC project to develop digital guidance material and a standardised reporting form for animal welfare incidents that are identified at meat processing establishments. This will ensure the digital guidance material and reporting form are practical, user-centred, and improve consistency in animal welfare incident reporting across meat processing establishments. Similar work is underway with a major saleyard and transit yard.

[9] Department of Agriculture, Fisheries and Forestry, Reports to Parliament, https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/live-animal-export-statistics/reports-to-parliament

[10] Department of Agriculture, Fisheries and Forestry, 2025 Licensed Export Abattoir Dataset

SNAPSHOT OF ACTIVITIES

Bedding, lameness and thermal comfort in live export
Funded through the Livestock Export Research Development and Extension (RD&E) Program, best-practice guidance was developed to improve cattle welfare during live export voyages. Drawing on research, industry data and expert consultation, the resources provide practical guidance on bedding management, lameness prevention and thermal comfort, supporting training, decision-making, and evidence-based animal husbandry across the livestock export supply chain.

Webinar series on live export health and welfare
A webinar series provided evidence-based training for shipboard stockpersons and Australian Accredited Veterinarians on antimicrobial use, eye disease, lameness, and bovine respiratory disease. The sessions connected industry personnel with veterinary experts, strengthening animal health decision making and welfare outcomes during livestock export voyages. The webinar series was funded by the Livestock Export RD&E Program.

Assessing animal welfare
The way animal welfare is assessed within the livestock export supply chain is being advanced through a project developing an evidence-based framework that combines multiple welfare indicators into a single assessment model. Funded by the Livestock Export RD&E Program and led by the University of Western Australia, the project integrated animal, environmental and operational data, providing a more consistent and transparent approach to welfare evaluation. It further demonstrated the feasibility of integrated welfare assessment and delivered a minimum viable product to support welfare improvement, benchmarking, and informed decision-making.



ANIMAL HEALTH & WELFARE

Ensuring the welfare of livestock along the value chain and the maintenance of high welfare standards is focused on the application of the five domains: nutrition, environment, health, behaviour and mental state.

ID	INDICATOR	DATA	TREND
5.1	Percentage of Australian cattle properties with an approved Animal Welfare Management Plan	**16%** (2025)	**N/A**
5.2	Percentage compliance with National Feedlot Accreditation Scheme Animal Welfare Requirements	**91.5%** (2025)	🟡
5.3	Percentage of feedlot capacity with access to shade	**75.1%** (2025)	🟢
5.4	Percentage of producers vaccinating for clostridial diseases	**75.89%** (2025)	🟡
5.5	Percentage of producers undertaking low stress stock handling training	**16.5%** (2025)	🟡

DATA EXPLAINED

5.1. Source: Meat & Livestock Australia[11]

From 1 September 2025, LPA accredited producers are required to have an Animal Welfare Management Plan demonstrating how they meet the Australian Animal Welfare Standards and Guidelines for Cattle. The plan also ensures relevant animal welfare training is completed through the LPA and that all staff involved in animal husbandry have access to the current guidelines

This data represents the first four months of implementation, from official launch in September 2025 to 31 December 2025. 16% of LPA cattle producers had completed an animal welfare management plan, with 100% of producers expected to have a plan by 1 September 2027.

5.2. Source: NFAS Audits[12]

This is an increase from the previous year's data of 90.04%, when numerous new animal welfare requirements had been implemented in 2024. In 2025, 8.5% of non-conformances related to procedures or items that require documented evidence or supporting documentation. Audit findings indicate that the physical animal welfare requirements are being met.

5.3. Source: Australian Lot Feeders' Association[13]

In June 2020, 810,376 cattle had access to shade in Australian feedlots, representing 56.3% of the constructed capacity of National Feedlot Accreditation Scheme (NFAS) accredited feedlots. By December 2025, this number has increased to 1,328,681 cattle representing 75.1% of the constructed capacity. As many market categories enable cattle turn-off multiple times per year, this increased adoption has resulted in 2,584,861 additional cattle benefiting from the provision of shade. This growth in cattle with access to shade has occurred during a period of considerable growth in the Australian feedlot industry. Overall constructed capacity of NFAS accredited feedlots has increased from 1,439,069 head in June 2020 to 1,768,503 head in December 2025, a 23% increase in cattle capacity.

[11] Meat & Livestock Australia, Livestock Production Assurance Audits
[12] National Feedlot Accreditation Scheme, Feedlot Auditing
[13] Australian Lot Feeders' Association, *ALFA Year in Review 2025-26*

DATA EXPLAINED

5.4. Source: Meat & Livestock Australia[14]

When used correctly as part of a property health plan, vaccines can help prevent common endemic livestock diseases, leading to improved animal health, welfare, and productivity. Vaccines may also be used as part of industry biosecurity programs to limit the spread of, or help eradicate, emergency animal diseases. This data from 2025 represents 636 producers who vaccinate against clostridial diseases (not including botulism) out of 838 survey respondents. Approximately 23% of respondents vaccinate additionally for botulism.

5.5. Source: Meat & Livestock Australia[15]

Low stress handling is important to farming enterprises, helping to improve health and wellbeing for livestock, occupational health and safety for the producer, and meat quality for the consumer. This indicator directly relates to the Global Roundtable for Sustainable Beef target of increasing the percentage of producers who have undertaken cattle handling training.

This data comes from the 2025 producer survey, where 415 respondents stated that they learned animal husbandry practices from formal courses, including 138 who attended low stress livestock handling courses or workshops.

SNAPSHOT OF ACTIVITIES

- **Feedlot Research for Accelerated Adoption Program**
  MLA and ALFA launched the $45 million Feedlot Research for Accelerated Adoption (RAAD) Program to accelerate innovation and adoption across Australia's feedlot sector. Delivered through the MLA Donor Company, the five-year program embeds research within commercial feedlots to generate practical, industry-relevant evidence. Initial projects focus on shade and shelter systems, with future investment targeting animal welfare, productivity, automation, and sustainability to improve business performance and resilience.

- **Precision bovine microbiome modulation**
  Working with world-leading experts in rumen biology and microbiome research, this project is investigating how beneficial microbes can be used to improve rumen function. The goal is to develop probiotic solutions that enhance animal productivity while supporting efforts to reduce methane emissions.

- **Animal Welfare Management Plan**
  In collaboration with the red meat industry, MLA's Integrity Systems has implemented initiatives through the LPA program to ensure animal welfare outcomes are continuously improved. From 1 September 2025, LPA-accredited livestock producers are required to have an Animal Welfare Management Plan to demonstrate how they meet the Australian Animal Welfare Standards and Guidelines for Cattle. As of June 2026 (nine months post launch), 28% of cattle producers have an Animal Welfare Management Plan in place, with 100% of producers expected to have a plan by 1 September 2027.

- **Australian Animal Welfare Strategy**
  The Australian Government has invested $5 million from 2023 to 2027 to develop a renewed Australian Animal Welfare Strategy (AAWS). The renewed AAWS is establishing a nationally coordinated, science-based framework for animal welfare, led jointly by the Australian Federal, State and Territory governments. It aims to strengthen animal welfare outcomes, meet community and international expectations, and demonstrate Australia's commitment to evidence-based livestock management. For the cattle industry, the strategy is important for maintaining community trust, supporting market access, and reinforcing Australia's reputation as a producer of high-quality, responsibly managed beef.

[14] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

[15] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

ENVIRONMENTAL STEWARDSHIP

THE AUSTRALIAN BEEF INDUSTRY IS COMMITTED TO DEMONSTRATING ITS NET POSITIVE CONTRIBUTION TO NATURE, WHILE CONTRIBUTING TO AUSTRALIA'S NET-ZERO AMBITIONS, IN ALIGNMENT WITH THE AUSTRALIAN GOVERNMENT'S 2050 COMMITMENTS.

Environmental stewardship continued to strengthen across the Australian cattle industry during 2025-26, with a growing focus on demonstrating measurable outcomes that support both productive beef businesses and healthy natural systems. As market, regulatory, and community expectations evolve, the industry is increasingly investing in credible data, science-based solutions, and transparent reporting to showcase its contribution to nature and climate outcomes.

Reducing livestock methane remains a key priority in support of Australia's net-zero by 2050 ambitions. Major investments through initiatives such as the Australian Government's Methane Emissions Reduction in Livestock program and the Zero Net Emissions Agriculture Cooperative Research Centre, are accelerating the development and commercial testing of methane-reduction technologies, feed additives, forage systems, and whole-of-farm emissions accounting tools. These initiatives are helping producers identify practical pathways to lower emissions while maintaining productivity and profitability. Further, improving understanding of the biogenic carbon cycle is a key priority for the Australian beef industry to support credible emissions reporting and informed climate policy.

Emerging research is also highlighting the important role biodiversity can play in emissions reduction and ecosystem health. Studies examining the benefits of dung beetles demonstrate how natural systems may contribute to lower greenhouse gas emissions, improved soil health, and enhanced pasture function, reinforcing the close relationship between environmental stewardship and productive grazing enterprises.

The industry is also demonstrating responsible resource management. Research shows Australian feedlots remain relatively low-volume, high-value water users, supporting efficient food production, water security, and climate resilience.

Strong traceability systems, land stewardship practices, and Australia's low-risk classification under the EUDR further demonstrate the cattle industry's environmental credentials. Collectively, these investments and initiatives reflect a proactive commitment to achieving net positive outcomes for nature while contributing to Australia's broader net-zero objectives and maintaining access to premium global markets.



BIODIVERSITY

The Australian beef industry aims to ensure the conservation and enhancement of plant and animal species, genetic diversity, and natural ecosystems, including controlling and minimising the spread of invasive, non-native species. This priority encompasses the capacity of farmers to contribute to biodiversity enrichment and the protection of remnant native vegetation at scale, and recognises opportunities for biodiversity enrichment that promote productivity and animal wellbeing.

ID	INDICATOR	DATA	TREND
6.1	Percentage of cattle-producing land managed for biodiversity outcomes through active management	**70.34%** (2025)	●

DATA EXPLAINED

6.1. Source: Meat & Livestock Australia[16]

This figure represents the area of land where on-farm management activities directly contribute to positive environmental and biodiversity outcomes. The measured activities align with the sustainability recommendations from government agencies, regional NRM organisations, and other land management groups. These results include both environmental management and active grazing management, such as fencing, weed and pest control, paddock spelling, and water access management.

The most common practices were weed control (90% of respondents), control of pest animals (69%), and destocking or spelling pastured areas (57%).

SNAPSHOT OF ACTIVITIES

- **Accessing nature-based markets**
  Commonwealth Scientific and Industrial Research Organisation (CSIRO) and MLA are supporting several PhD students investigating the barriers and opportunities for northern beef producers to participate in nature-based markets. An economic analysis is also being conducted of Emerging Environmental Services Markets in the Australian beef sector.

- **EPBC Act changes and land management**
  Following the 2025 changes to the EPBC Act, CA developed a guide setting out the main issues for cattle producers. CA has also been working directly with senior government and National Environmental Protection Agency (EPA) staff, requesting regulatory clarity, highlighting the legal risks and investment freezes facing producers.

[16] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

CASE STUDY

LANDSCAPE-SCALE CONSERVATION THROUGH THE CHANNEL COUNTRY THREATENED SPECIES PARTNERSHIP

Protecting threatened species through coordinated action

The Channel Country Threatened Species Partnership (CCTSP) is bringing together pastoral businesses, Traditional Owner groups, conservation organisations, government agencies, and regional natural resource management organisations, to trial a landscape-scale approach to threatened species conservation across Western Queensland. The partnership focuses on improving outcomes for species including the greater bilby, kowari, night parrot, and plains-wanderer, through coordinated monitoring and feral cat management across property boundaries.

Paraway Pastoral Company (Paraway) is a key contributor to the partnership through its South Palparara and Davenport Downs properties, which host long-term ecological monitoring sites. Together with other project partners, Paraway has supported the deployment of wildlife cameras and acoustic monitoring equipment to build a stronger understanding of threatened species populations, predator activity and ecosystem condition across the Channel Country.

The project demonstrates how productive grazing enterprises can contribute to biodiversity conservation, while maintaining commercial operations. Monitoring has confirmed the continued presence of threatened species on participating properties, including greater bilbies and kowaris, reinforcing the importance of pastoral landscapes in supporting Australia's unique wildlife.

Innovation supporting conservation outcomes

The partnership combines ecological monitoring with coordinated feral cat management, which is recognised as an important action for reducing predation pressure on native wildlife. More than 4.5 million images have been collected across the partnership's monitoring network, with artificial intelligence helping process and analyse large datasets to improve understanding of species distribution and inform adaptive management.

Beyond conservation outcomes, the project is building regional capability through training, knowledge sharing, and collaboration between land managers, Traditional Owner rangers and conservation practitioners. Continued investment in monitoring will support long-term evaluation of conservation outcomes and help guide future management across one of Australia's most ecologically significant rangeland regions.



Paraway representative Megan Munchenberg participating in feral cat control training alongside Lake Eyre Basin Rangers

SOIL HEALTH

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

Healthy soils underpin productive and resilient beef production. Maintaining soil health requires responsible fertiliser and chemical use, along with careful management of soil nutrients, water retention, carbon storage, and topsoil quality.

ID	INDICATOR	DATA	TREND
7.1	Percentage of cattle producers adopting practices to improve soil water retention	**76.4%** (2025)	●

DATA EXPLAINED

7.1. Source: Meat & Livestock Australia[17]

The MLA 2025 producer survey is used to gain an understanding of the percentage of cattle producers adopting practices to improve soil water retention, such as increasing organic matter and keeping the soil covered, implementing wind breaks to reduce evaporation from topsoil, greater grazing rotation, management of stocking rates, stubble management, or undertaking conservation tillage practices. This data represents 640 of 838 respondents who stated that they implement practices to improve soil water retention.

SNAPSHOT OF ACTIVITIES

Liming soils

A research project conducted in partnership between MLA and the New South Wales Department of Primary Industries and Regional Development (DPIRD) which aims to assess the benefits of lime and organic materials to livestock production, soil condition (acid soils) and climate mitigation in south-eastern Australia is nearing completion. The project aims to generate data to guide on-farm management of acidic soils supporting contemporary grazing systems, assess the impact of change in acid soil status (increase or decrease) on feed quality, and inform the soil organic carbon (SOC) sequestration potential of pasture species and mixes.

Soil nutrition

MLA has invested in two soil nutrition projects underway in NSW and Victoria with CSIRO and Meridian Agriculture, which aim to improve productivity in legume-based pastures. Conservative estimates suggest improved sulphur (S) and phosphorus (P) nutrition could improve profitability by $30/ha. Initial workshops have been well received by producers.

Australian carbon credits supporting farmers

Three pilot farm sites are undertaking projects to determine accumulation of Australian Carbon Credit Units (ACCUs) using soil improvement methods. These pilot projects are demonstrating that improved pasture and grazing management can increase SOC while delivering broader farm benefits. Practices such as rotational grazing, multi-species pastures and pasture improvement enhanced soil condition, increased biomass production and supported carbon sequestration. The projects also highlight how healthy soils can improve farm resilience, productivity and profitability, while contributing to emissions reduction and long-term environmental sustainability. Soil carbon projects registered under the ACCU Scheme have officially surpassed 1 million hectares of active Australian farmland.

Livestock Sector Method

The Australian Government has asked MLA to act as the proponent for the development of the Livestock Sector ACCU Method. The proposed method aims to provide a credible, high-integrity framework for generating emissions reductions across the livestock sector. The scope includes pasture-based and feedlot beef cattle, sheep and dairy production systems, with abatement opportunities expected to be generated through methane-reducing feed additives, low-methane genetics and management practice change, all of which will be underpinned by a transparent science-based estimation approach.

[17] Meat & Livestock Australia, National Beef Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

FEEDBASE PRODUCTION & PASTURE MANAGEMENT

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

High-quality forage, healthy pastures, and effective groundcover management underpin productive and resilient livestock systems. Maintaining these resources involves optimising plant health and productivity, managing weeds and pests, and sustaining or enhancing the natural capital required for long-term production.

ID	INDICATOR	DATA	TREND
8.1	Percentage of natural resource management regions achieving healthy groundcover thresholds	**76.9%** (2025)	●

DATA EXPLAINED

8.1. Source: Meat & Livestock Australia[18]

This calculation is based on 40 of the 52 NRM regions achieving a regionally appropriate healthy groundcover threshold on average throughout the year. This is a change from previous years reporting where the groundcover was measured in the late dry season (September as per available imagery). For rangeland regions in semi-arid parts of Australia, the threshold is 50% groundcover. This increases to 70% for coastal and tropical regions and 80% for high-rainfall regions.

BOM data for 2025 shows Australia recorded its fourth-warmest year on record, with national rainfall 8% above average, although rainfall distribution was highly uneven, with above-average conditions across much of Queensland and northern Australia and below-average rainfall across large parts of southern Australia.[19]

In a grazing context, these conditions likely supported improved groundcover growth and persistence across much of northern and eastern Australia due to favourable rainfall and above-average soil moisture, while groundcover in many southern grazing regions was constrained by below-average cool-season rainfall and declining water availability.

In the late dry season 2025, 85% of NRM regions across the Great Barrier Reef catchment achieved ground cover levels of 70% or greater, meeting the Great Barrier Reef catchment management target.

Further information on healthy groundcover thresholds is available from Leys et al. (2020).[20]

SNAPSHOT OF ACTIVITIES

- **Pasture improvement and climate resilience**
  Investments in mixed-species annual forages, perennial pasture legumes, and diverse pasture systems are improving feed quality, pasture productivity, and seasonal resilience. Research has demonstrated the potential for greater biomass production, extended growing seasons, and improved adaptation to variable climatic conditions, while providing producers with practical guidance on establishing more productive and resilient pasture systems.

- **Pasture management and producer capability**
  A range of initiatives are helping producers and advisers make more informed pasture and grazing management decisions. New decision-support tools, advisor training programs, and projects focused on grazing grain crops, are improving access to practical knowledge, strengthening advisory capability, and supporting the adoption of pasture management practices that enhance productivity and profitability.

[18] Meat & Livestock Australia, VegTrends, https://vegtrends.mla.com.au/, Haizea Analytics
[19] Bureau of Meteorology, Annual Climate Statement 2025, https://www.bom.gov.au/climate/current/annual/aus/2025/
[20] Leys, J, Howarth, J, Guerschman, J, Bala, B & Stewart, J, 2020, Setting Targets for National Landcare Program Monitoring and Reporting Vegetation Cover for Australia

SNAPSHOT OF ACTIVITIES

Pest and weed management innovation

Emerging technologies and research are improving the management of weeds and pasture pests. Advances in drone-based weed mapping are increasing the speed and efficiency of monitoring invasive species. On-farm Integrated Pest Management (IPM) trials are testing new approaches to controlling pasture mealybug and reducing the impacts of pasture dieback, thereby supporting more sustainable pasture systems.

Reside, A, et al. (2024)[21] found that the number one threat to Australia's nature and biodiversity is invasive animals, plants, and diseases. The estimated costs of an in-situ recovery of terrestrial and freshwater threatened species in Australia would cost $583 billion dollars per year for 30 years if all strategies were implemented, with the management of invasive weeds making up 81% of the total cost.

Steak and Wood Project

The Steak and Wood project is testing silvopasture management (integration of trees, forage, and grazing livestock) to sequester carbon and improve production outcomes. So far, a 24% improvement in pasture productivity (dry matter (DM) / ha/ yr) has been demonstrated under alley-based silvopastoral systems compared to open pasture, at a trial site in Central Queensland.



[21] Reside, AE, Carwardine, J, Ward, M, Yong, C, Venegas Li, R, Rogers, A, Wintle, BA, Silcock, J, Woinarski, J, Lintermans, M, Taylor, G, Pintor, AFV & Watson, JEM, 2025, The cost of recovering Australia's threatened species. *Nature Ecology & Evolution, 9*(3), 425-435.

BALANCE OF TREE & GRASS COVER

The focus is on improving the impact of the beef industry's land management practices on forests, recognising existing regulations, and strengthening vegetation resilience, as measured by national forest and woodland indicators.

ID	INDICATOR	DATA	TREND
9.1	Extent of primary forest on cattle grazing properties	**62,987,000 ha** (2025)	●
9.2	Extent of secondary forest on cattle grazing properties	**34,434,000 ha** (2025)	●
9.3	Extent of primary woodland on cattle grazing properties	**8,762,000 ha** (2025)	●
9.4	Extent of secondary woodland on cattle grazing properties	**75,602,000 ha** (2025)	●

DATA EXPLAINED

9.1 – 9.4 Source: Meat & Livestock Australia[22]

The data for these indicators have changed from previous iterations, with the industry now using the Australian Woody Cover Change (AWCC) layer. The new AWCC dataset provides a significant improvement over the previous National Forest and Sparse Woody Vegetation (NFSWV) dataset because it more accurately detects woody vegetation, particularly sparse woodland that dominates many Australian grazing landscapes. Against an independent airborne LiDAR benchmark, AWCC-Filtered achieved substantially higher agreement and mapped 97% of the reference woody area compared with only 70% for NFSWV. The new methodology also removes year-to-year classification "flicker" through temporal filtering, applies a consistent national definition of woody cover, and includes a primary versus secondary vegetation attribution that allows users to distinguish long-undisturbed vegetation from regrowth and cyclical vegetation management.

Compared to 2024, the data reveals an increase of more than four million hectares of woody vegetation (forest and woodlands) on cattle grazing lands nationwide. Ninety-seven million hectares of forest was recorded on cattle grazing land, the highest recorded since 1990. This has come at a time of near record production, demonstrating that beef production and forest cover are not mutually exclusive.

The improvement trend for primary forest is achieved through primary woodlands increasing their canopy cover percentage to be captured as a forest. This is likely to also explain some of the losses associated with the declining trend in primary woodland.

In terms of forest loss, approximately 191,000 hectares of primary and secondary forest were lost across national cattle grazing lands between 2024 and 2025.

The grazing industry continues to demonstrate a commitment to responsible land stewardship, recognising the importance of balancing natural capital management with food production.

Further, there is evidence that the area of land under grazing is reducing. In Queensland alone, there has been a net decline of grazing land of 4% since 1999.

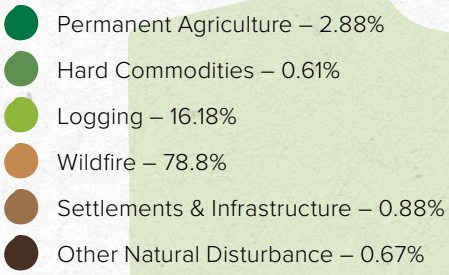
[22] Meat & Livestock Australia, VegTrends, https://vegtrends.mla.com.au/, Haizea Analytics

SNAPSHOT OF ACTIVITIES

Australian beef industry Land Management Commitment
CA continues to use the LMC in its policy work and discussions with stakeholders. It considers international frameworks, including the United Nations Food and Agriculture Organization (UN FAO), the Accountability Framework initiative, and the EUDR. Importantly, it also recognises how Australia's extensive grazing systems operate and how land use is defined here.

Drivers of vegetation loss
The World Resources Institute shows the primary drivers of tree cover loss in Australia and Oceania are from wildfire and forestry activities, both with a high potential for natural recovery and regeneration.[23] For greater context, under the Australian Land Use and Management Classification, most of the grass-fed beef in Australia is produced on "Classification 2 land type: Production from Relatively Natural Environments, Grazing Native Vegetation".

Drivers of tree cover loss in Australia, 2001-2025 (World Resources Institute)



Food & Agricultural Organization Ranking
The United Nations Food and Agriculture Organization ranked Australia as Number Two for reforestation with an average net gain in forest area between 2010-2020 of 446,000 hectares per year, utilising their threshold for forests. Globally, Australia has the seventh largest forest area.[24]

DEFINITIONS

FOREST - Woody vegetation with >20% canopy cover reaching 2m high with a minimum area of 0.2ha.

WOODLAND - Woody vegetation with 5-20% canopy cover.

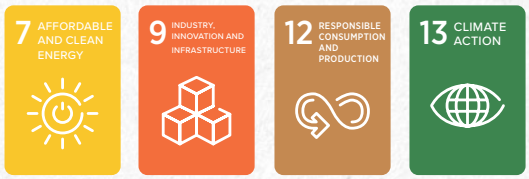
GROUNDCOVER - Non-woody vegetation, such as a grassland.

PRIMARY - Refers to forest or woodland present in 1988.

REGROWTH/SECONDARY - Refers to forest or woodland recurring on an area of land that has been previously disturbed.

[23] World Resources Institute, Forest Loss Drivers Data Trends, https://www.wri.org/insights/forest-loss-drivers-data-trends
[24] Food and Agriculture Organization of the United Nations, 2020, Global Forest Resource Assessment 2020.

GREENHOUSE GAS EMISSIONS & CARBON CAPTURE



An accurate picture of the beef industry's greenhouse gas emissions profile includes the generation, mitigation, and sequestration of emissions. On farm, this includes rumination, energy consumption, vegetation management, feed sourcing, sequestration, and soil carbon. For the value chain it also includes reducing energy consumption by adopting more efficient technologies, practices, and processes, while incorporating renewable energy generation to further reduce emissions.

ID	INDICATOR	DATA	TREND
10.1	Percentage total CO_2e reduced by beef industry from a 2005 baseline (GWP100)	**62.21%** (2024)	●
10.2	Net Mt of CO_2e emitted by the beef industry (GWP100)	**48.87** (2024)	●
10.3	Kg CO_2e emitted per kg liveweight when raising beef (GWP100)	**12.1kg** (2024)	●
10.4	Kg CO_2e emitted per tonne hot standard carcase weight (HSCW) when processing beef (GWP100)	**339kg** (2024)	●
10.5	Percentage onsite processing energy demand delivered by renewables.	**14.3%** (2024)	●
10.6	Carbon sequestered in on-farm vegetation (Mt CO_2e)	**-1.52** (2024)	●
10.7	Percentage of producers who generate and/or use renewable energy	**62%** (2025)	●

DATA EXPLAINED

10.1. Source: Meat & Livestock Australia[25]

The industry continues to monitor its net emissions reduction from beef and land use-related emissions. A baseline year of 2005 has been chosen as it aligns with the Paris Agreement. This metric is calculated through the GWP100 metric, a standardised practice recognised by the Intergovernmental Panel on Climate Change (IPCC).

Historic data has been restated, and a decrease in 2024 of 62.21% since the baseline year is a greater reduction than the restated 2023 figure of 53.46%.

10.2. Source: Meat & Livestock Australia[26]

Annual net emissions from beef have decreased by 80.44 Mt CO_2e since 2005. This decrease is largely driven by an increase in carbon sequestration in on-farm vegetation, and less emissions from land use change.

Beef production accounted for 10.48% of national emissions in 2024. Australia has reduced agricultural emissions more, percentage-wise, than most other developed countries in the last 30 years.[27]

[25] Meat & Livestock Australia, Red meat greenhouse gas emissions update 2024, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/b.cch.2126-final-report_final.pdf

[26] Meat & Livestock Australia, Red meat greenhouse gas emissions update 2024, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/b.cch.2126-final-report_final.pdf

[27] Department of Agriculture, Fisheries and Forestry, 2023, Environmental sustainability and agri-environmental indicators - international comparisons, https://www.agriculture.gov.au/abares/products/insights/environmental-sustainability-and-agri-environmental-indicators

DATA EXPLAINED

10.3. Source: Australian Meat Processor Corporation[28]

This data comes from the Life Cycle Assessment (LCA) result for the two years to 2024. recording 12.1 kg CO_2e per kg liveweight for cattle from the beef herd, excluding land use and land-use change. This is 4.7% below the recalculated result for the five years to 2020. An updated LCA is intended to be undertaken in 2027. The reduction in emissions was primarily associated with decreased enteric methane emissions, which declined in absolute terms from 14.7kg CO_2e kg LW-1 to 10.4kg CO_2e kg LW-1. The proportion of methane in the emission profile declined from 90% of total impacts in 1985 to 83% in 2024, partly in response to better herd efficiency reducing methane contributions, and partly because the intensity of production increased, resulting in larger contributions from carbon dioxide associated with energy use and purchased inputs. When beef from dairy herds is accounted for, this further decreases to 11.9kg.

Australia's emissions intensities are some of the lowest on average for cattle, and specialist beef production, compared to major developed country producers and exporters.[29]

10.4. Source: Australian Meat Processor Corporation[30]

Like all manufacturing facilities, meat processing plants use energy to operate, primarily from electricity, natural gas, coal, and diesel. This indicator tracks performance in reducing the intensity of Greenhouse Gas (GHG) emissions associated with processing. Improvements in GHG emissions intensity also contribute to reducing the carbon footprint of red meat products, although the contribution of red meat processing is small in relation to the full product life cycle. This indicates a reduction of 137kg since 2022, likely due to the processing plants operating closer to capacity and maximising efficiencies.

An updated Environmental Performance Review will be undertaken in 2027.

10.5. Source: Australian Meat Processor Corporation[31]

Methane and other gases can be captured during wastewater treatment at processing facilities to create biogas, which is used in the facility. This indicator now includes solar, which is expected to increase in the near future.

When analysing the source of energy across processors, this shows the use of on-site coal has halved since 2020, further assisting in reducing emissions intensity when processing beef.

10.6. Source: Meat & Livestock Australia[32]

In 2024, emissions from land use, land-use change and forestry (LULUCF) were greater than the volume of carbon sequestered in on-farm vegetation, resulting in a net emissions outcome from the landscape. Carbon sequestration can vary significantly between years due to vegetation dynamics, land-use change and climatic conditions that affect vegetation growth, recovery and carbon storage.

10.7. Source: Meat & Livestock Australia[33]

This data comes from a survey commissioned by MLA where: 52% of the respondents stated they used renewable energy generated themselves, 14% used renewable energy from an energy retailer, and 38% didn't generate or buy any renewable energy.

[28] Australian Meat Processor Corporation, Sustainability Reporting Uplift Project Final Report, https://ampc.com.au/media/z3ibdmri/ampc-awi-sustainability-uplift-report.pdf

[29] Department of Agriculture, Fisheries and Forestry, 2023, Environmental sustainability and agri-environmental indicators - international comparisons, https://www.agriculture.gov.au/abares/products/insights/environmental-sustainability-and-agri-environmental-indicators

[30] Australian Meat Processor Corporation, Environmental Performance Review 2024, https://ampc.com.au/media/kh0kxh1e/ampc-final-report-epr2024-final.pdf

[31] Australian Meat Processor Corporation, Decarbonisation Pathways Update 2025, https://ampc.com.au/media/favorqnv/au-26103-rpt-001-r20-ampc-final-report-word.pdf

[32] Meat & Livestock Australia, Red meat greenhouse gas emissions update 2024, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/b.cch.2126-final-report_final.pdf

[33] Meat & Livestock Australia, National Beed Producer Survey of Sustainability Practices, https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/a.bsf.0006-final-report-beef-producer-sustainability-26-06-26.pdf

SNAPSHOT OF ACTIVITIES

PhD projects

CSIRO and MLA are supporting several PhD students to investigate opportunities for reducing methane emissions, including delivery mechanisms for emerging livestock cattle feed supplements into extensive grazing systems in Australia, how beneficial soil microbes influence the production of methane-reducing compounds in medic pasture legumes during periods of water stress.

Collaborative Co-Innovation Program

Australian Country Choice (ACC), in collaboration with MLA, has adapted the previous CN30 Co-Innovation Program to apply a broader sustainability lens and to establish effective metrics and systems to guide ACC's sustainability work. ACC has identified the need to continue to expand on the design, and to further develop, pilot and implement a strategic plan that aligns with the ABSF for application across their business priority areas.

Greenhouse gas emissions from live export

GHG emissions across Australia's live cattle export supply chain have been quantified, providing an updated benchmark to support industry decarbonisation efforts and sustainability reporting. The assessment found that the carbon footprint of cattle exported to Indonesia decreased by approximately 25% to 17.1kg CO_2e kg LW-1 from the previous benchmark (22.8kg CO_2e kg LW-1 in 2011), driven largely by improvements in herd productivity, genetics, management and overall production efficiency. The study showed that the export phase contributes only a small proportion (approximately 4%) of total supply chain emissions.[34]

Resource recovery and emissions reduction from processing

AMPC partnered with Tessele Consultants to investigate anaerobic co-digestion and bioresource recovery technologies that can convert organic waste streams from red meat processing into renewable energy and valuable nutrient products. Modelling and pilot-scale research demonstrated the potential to reduce processing emissions, improve energy resilience, recover nutrients for beneficial reuse, and support the transition towards a more circular and low-emissions red meat industry. Facility-scale modelling indicated emissions reductions of up to 68%, highlighting the potential role of resource recovery infrastructure in the sector's decarbonisation pathway.

Mapping methanogens

Bovotica is developing microbiome-based technologies to reduce enteric methane emissions from cattle while improving feed efficiency. It is doing this by identifying and enhancing naturally occurring rumen microorganisms associated with lower methane production. Research has mapped methanogen communities within the rumen microbiome of Australian cattle and identified promising microbial strains for further development as targeted probiotic products.

Vaccines for methane reduction

MLA has entered into a partnership with New Zealand biotechnology company Lucidome Bio to develop a world-first methane vaccine for cattle, with a target efficacy of 30% reduction in methane yield and neutral or positive effects on productivity. Development is expected to be completed in late 2028.

Leasing solar

Paraway Pastoral has demonstrated the environmental and economic benefit of transitioning to lease-model solar and battery power for remote cattle stations, representing huge cost savings on diesel and a reduction of approximately 800t of CO_2e on their annual emissions estimate.

Dung Beetles

Research published in 2026 highlighted the role of dung beetles in reducing GHG emissions from grazing systems. The study found that cattle dung colonised by dung beetles produced 85% less methane and almost 18% lower total GHG emissions than dung without beetles, demonstrating the potential for naturally occurring ecosystem services to support emissions reduction in Australian beef production. The findings reinforce the importance of considering biodiversity and invertebrate activity in efforts to improve the environmental performance of grazing systems.[35]

[34] LiveCorp, Livestock export life cycle carbon assessment, https://livecorp.com.au/report/2nSGjojnVa2u7chvuJHS95

[35] Holley, J, Brummell, M & Andrew, N, 2026, Introduced dung beetles suppress methane emissions from cattle dung and alter the temporal dynamics of greenhouse gas flux, Ecological Entomology, 1–11. Available from: https://doi.org/10.1111/een.70112

SNAPSHOT OF ACTIVITIES

Advancing Understanding of the Biogenic Carbon Cycle

Recognising the importance of science-based climate policy, the Australian beef industry is investing in new research to strengthen understanding of the biogenic carbon cycle in grazing systems and improve the accuracy of farm-level carbon reporting. Led by the University of Sydney, a project spanning 12 farms across diverse regions of Australia is measuring how carbon moves through soils, pastures, trees and livestock using advanced technologies including eddy covariance towers, chamber measurements and remote sensing. The research aims to better understand carbon storage and emissions dynamics, account for regional differences in climate, soils and vegetation, and improve knowledge of the role native and introduced plant species may play in methane mitigation and carbon sequestration.

This work aligns with Cattle Australia's strategic priorities to improve understanding of the natural biogenic carbon cycle, recognising that enteric methane is a short-lived greenhouse gas recycled through natural systems and that its climate impact depends on both the quantity and trajectory of emissions over time. It also supports efforts to better quantify the positive environmental contributions of livestock production, including the conversion of naturally occurring biomass into high-quality protein, support for soil carbon sequestration, biodiversity outcomes and broader ecosystem services.

Importantly, the project will contribute to a more transparent, robust and scientifically informed approach to assessing and reporting the industry's contribution to Australia's greenhouse gas emissions profile. By generating science-backed data on whole-farm carbon balances, the findings are expected to provide producers with clearer insights into emissions and sequestration pathways, support practical management decisions that improve both productivity and sustainability, and help inform pathways towards climate neutrality with a focus on actual warming outcomes. Findings and tools developed through the project will be progressively shared with industry to support knowledge transfer and the broader adoption of science-based carbon management practices.

Understanding sequestration

Recent research is providing encouraging evidence of the carbon sequestration potential of Australian grazing systems. Shirvan et al. (2024) found that, across multiple New South Wales beef properties monitored over three years, "a hectare of livestock pastures offset more than the CH_4 produced by the average beef cattle in the present study", highlighting the capacity of productive pasture systems to act as carbon sinks. Complementing this, Villalobos et al. (2025) found that satellite and ground-based observations suggest methane emissions across Australia and New Zealand may be around 25% lower than estimates reported in traditional inventories. Together, these studies demonstrate the importance of both carbon sequestration and improved emissions measurement in understanding the climate impacts of grazing livestock systems.[36, 37]

[36] Shirvan, M, Gonzalez, L & Burgess, J, 2024, `Fluxes of greenhouse gases from pastures and methane emissions from beef cattle in Australia', Journal of Animal Science, vol 102, no. 3, pp. 322 -323.

[37] Villalobos, Y, Canadell, JG, Keller, ED, Briggs, PR, Ford, P, Harman, IN, et al., 2025, Methane and nitrous oxide budgets for Australasia: A regional assessment of natural and anthropogenic sources and sinks, Global Biogeochemical Cycles, vol. 39.

WATER



Managing and conserving water resources throughout the beef supply chain can be enhanced by water use efficiency in feed production, livestock processing, and pasture management. This includes reducing wastage, implementing recycling systems, and adhering to water standards and regulations to minimise environmental impact.

ID	INDICATOR	DATA	TREND
11.1	Litres of water used per kilogram of liveweight for raising cattle	**400L** (2024)	●
11.2	Kilolitres of water used per tonne HSCW when processing beef	**7.5kL** (2024)	●

DATA EXPLAINED

11.1. Source: Australian Meat Processor Corporation[38]

Total freshwater consumption of 400L/kg LW-1 in 2024 is 71% lower than the 1985 baseline. Over the 40 years, the dominant trends were the decline in losses associated with drinking water supply and the substantial decline in pasture irrigation, which was partly countered by an increase in irrigation requirements for feedlot ration production. In the most recent period, declines were observed in irrigation water for pasture production and drinking water relative to beef production, the latter of which declined in response to improved herd efficiency. Losses associated with irrigation water supply were also found to decline compared to the previous analysis period, but losses from on-farm drinking water supply were estimated to have increased.

An updated LCA is intended to be undertaken in 2027.

11.2. Source: Australian Meat Processor Corporation[39]

The 2024 water use intensity of 7.5kL/t HSCW is a 9.6% decrease from the 2022 figure of 8.3kL/t HSCW. This decrease is likely due to the higher throughput of processing cattle, leading to increased water use efficiency. For water intake, town water was the most important source (77%), followed by local groundwater (bore water) at 15%, and direct withdrawal from surface water (8%). 16% of water intake is then recycled for further use, being 4% higher than recycled water in 2022.

An updated Environmental Performance Review will be undertaken in 2027.

[38] Australian Meat Processor Corporation, Sustainability Reporting Uplift Project Final Report,https://ampc.com.au/media/z3ibdmri/ampc-awi-sustainability-uplift-report.pdf

[39] Australian Meat Processor Corporation, Environmental Performance Review 2024, https://ampc.com.au/media/kh0kxh1e/ampc-final-report-epr2024-final.pdf

SNAPSHOT OF ACTIVITIES

New environmental method for water quality improvement

EcoMarkets Australia received approval to register and launch the Grazing Livestock Management (GLM) Method under the Australasian Catchment Water Improvement Standard (ACWIS), a national environmental market framework that rewards landholders for activities that improve water quality outcomes. The GLM Method enables livestock producers to generate water improvement credits through grazing management practices that reduce sediment and nutrient losses from agricultural landscapes. MLA supported the establishment of the first pilot sites under both the Reef Credits and ACWIS schemes, helping test and demonstrate the application of the method in commercial grazing systems.

Water-quality results across reef catchments

The latest Reef Water Quality Report Card[40] showed improvement across several grazing catchments. The Murray catchment received a 'very good' pesticide-risk rating, fine sediment fell in the Endeavour and Murray catchments, and dissolved inorganic nitrogen was lower in the Burdekin catchment. Freshwater floodplain wetlands were reported to be in good condition across all catchments, and the rate of natural wetland loss had slowed. Additionally, a recent paper from James Cook University and CSIRO identified declining trends of dissolved inorganic nitrogen and suspended sediments, most likely associated with recent land management interventions.[41]

Water use in the feedlot industry

A 2026 MLA-funded study examined water use within Australia's feedlot industry, providing new evidence on the role, scale and value of water in feedlot operations. The analysis found that water is a critical input for cattle health and wellbeing, with stock drinking water accounting for the majority of feedlot water use. It also demonstrated that feedlots are a relatively low-volume, but high-value water user compared with many other agricultural sectors. The findings provide an important evidence base to inform future water policy, planning, and resource allocation discussions affecting the beef industry.[42]



[40] Queensland Government, Reef Water Quality Report Card, https://reportcard.reefplan.qld.gov.au home?report=overview&year=63feba8962a7eebd85fb06ac

[41] James, C, Kuhnert, P, Lewis, S, Bartley, R, Lawrence, E, Strauss, J, Mann, R, Turner, R & Bainbridge, Z, 2026, Water quality trends in river catchments draining to the Great Barrier Reef: an analysis of ~40 years of data, https://www.sciencedirect.com/science/article/pii/S0301479726018190

[42] Meat & Livestock Australia, 2026, B.FLT.2000 - MLA Feedlot Regional Investment Study, Deloitte Access Economics

WASTE

Waste is generated at every stage of the beef value chain, from on-farm production to processing. Better management can reduce landfill, recover valuable resources, and support a more circular economy.

ID	INDICATOR	DATA	TREND
12.1	Kg solid waste to landfill per tonne HSCW when processing beef	**3.6kg** (2024)	●

DATA EXPLAINED

12.1. Source: Australian Meat Processor Corporation[43]

This represents a 71.6% decrease from 2022, likely due to the higher throughput of processing cattle leading to increased efficiency. This indicator tracks performance in reducing solid waste production and landfill burden. By reducing waste sent to landfill, red meat processors can limit demand for replacement materials and the environmental impacts associated with solid waste disposal and contribute to a circular economy. Most waste generated by red meat processors is organic, comprised mainly of paunch solids, manure and yard wastes, as well as sludge and pond crusts from wastewater treatment plants. Organic waste is almost entirely processed into other beneficial products, such as compost. In rare cases, often related to scale and location and where rendering is not possible, organic waste can also include non-commercial animal parts.

An updated Environmental Performance Review will be undertaken in 2027.

SNAPSHOT OF ACTIVITIES

- **Northern Rivers Circularity Hub Project**
  The project is developing a scalable, place-based circular economy model that strengthens regional resilience, drives resource efficiency, and creates new value across multiple industry sectors. The initiative is mapping regional waste and resource flows, identifying circular economy opportunities, and designing a governance framework that balances cooperative ownership with commercial viability. By partnering with emerging value chains and piloting innovative business models, MLA is building capability to support more diversified and sustainable value chains.

- **Red Meat Packaging Stewardship Forum and Framework**
  This initiative brings together industry stakeholders to promote collaboration, innovation, and the adoption of circular economy principles that improve resource efficiency while considering productivity, consumer expectations, and market access requirements. Complementing this work, MLA published *A Practical Guide to Managing On-Farm Waste*, providing producers with practical actions to reduce, reuse, recycle, and responsibly dispose of common farm wastes. Together, these initiatives support improved environmental outcomes, strengthen stewardship across the value chain, and contribute to a more circular and sustainable livestock industry.

[43] Australian Meat Processor Corporation, Environmental Performance Review 2024, https://ampc.com.au/media/kh0kxh1e/ampc-final-report-epr2024-final.pdf

FEED SOURCING

Feed sourcing was identified as a new priority for the ABSF through the Materiality Assessment process and was announced in the previous Annual Update.

Work has commenced to establish baseline data to better understand feed sourcing practices across the Australian beef industry and to inform future reporting.

A 2026 study undertaken by MLA provides the first consolidated industry baseline of feed volumes, ration composition and procurement across Australian grass-fed and grain-fed beef production systems.

Of the estimated 6.51 million tonnes of purchased feed assessed, approximately 97% was sourced domestically, highlighting the industry's strong reliance on Australian feed supply chains. The study examined a broad range of feed commodities used across production systems, including cereal grains, oilseed products, forage, supplements and by-products.

The results demonstrated the important role of grain and supplementary feeds in supporting productivity, particularly during periods when seasonal conditions limit pasture availability. Wheat and barley were the largest components of the industry-average feedlot ration, reflecting their significance as key energy sources for Australian beef production.

The study found that Australian beef is a net producer of human-edible protein. For grain-finished beef, the calculated Net Protein Contribution was 3.0, meaning a feedlot-finished animal produces approximately three times the high-quality human-edible protein it consumes over its life. The study attributes this partly to the substantial use of feed ingredients that are not human edible.

The study also highlighted the diversity of feed inputs used across regions and production systems. Feed sourcing decisions are influenced by factors including seasonal conditions, availability, cost, nutritional requirements, transport logistics and market demand.

Maintaining reliable access to feed is expected to remain an important consideration for the beef industry. Factors such as climate variability, changing land use, biofuel demand, global commodity markets and input costs may influence future feed availability and affordability. As production systems continue to evolve, demand for grain and supplementary feed sources is expected to remain an important component of both grass-fed and grain-fed beef production.

The complementary nature of Australia's grass-fed and grain-fed production systems supports industry resilience by providing producers with multiple pathways to respond to changing seasonal, market and supply conditions.



ECONOMIC RESILIENCE

THE INDUSTRY IS COMMITTED TO AN ECONOMICALLY VIABLE AND RESILIENT SUPPLY CHAIN, AND AIMS TO DOUBLE THE VALUE OF BEEF PRODUCTS AND SERVICES FROM 2020 LEVELS BY 2030, TO ENSURE ONGOING PROFITABILITY.

The 2025-26 season reinforced that strong cattle prices and export demand do not always translate into profitability at the farm level. While Australian beef production, exports, and cattle turn-off reached high levels, producer profitability remained heavily influenced by input costs, seasonal conditions, and business management decisions. Rising fuel, fertiliser, feed, labour, finance costs, and increased costs with reporting obligations and regulation burden placed pressure on margins, increasing the importance of understanding production costs and making timely management decisions.

As a result, benchmarking and financial analysis became increasingly important tools for cattle businesses. Measures such as cost of production, gross margins, carrying capacity, and working capital requirements helped producers assess profitability, manage risk, and evaluate investments in infrastructure, pasture improvement, and productivity gains. The season highlighted the importance to businesses of adapting quickly to changing seasonal and market conditions to maintaining productive and profitable operations.

Global demand remained a major strength for Australian beef, underpinned by the industry's strong reputation for quality, traceability, and integrity. However, international trade continued to be influenced by tariffs, trade tensions, exchange rate movements, and evolving customer requirements, reinforcing the importance of maintaining a diverse portfolio of export markets.

The live export sector also strengthened its market position through research examining long-term competitiveness in Southeast Asia, particularly Indonesia and Vietnam. The work highlighted Australia's advantages in biosecurity, traceability, reliability, and animal welfare, and identified opportunities to improve supply chain efficiency and better align products with customer needs. New market opportunities also emerged, with breeder cattle exports resuming to Mexico and Türkiye, and a new market opening in Iraq, contributing to market diversification and export resilience.

Grain-fed beef continued to play an increasingly important role in Australia's cattle industry. This has been supported by ongoing investment in feedlot infrastructure, productivity, and supply chain capability. Growth in feedlot capacity, cattle on feed, and grain-fed exports reflected strong domestic and international demand, while capability programs focused on animal welfare, workforce development, environmental performance, and market access.

At the same time, producers showed growing interest in supplementary income opportunities including carbon projects, renewable energy, and natural capital markets. While these opportunities may provide additional revenue streams, their long-term value depends on how well they complement core cattle production systems. The season reinforced that the Australian cattle industry's competitiveness will continue to rely on balancing productivity, profitability, environmental performance, and market access in an increasingly complex operating environment.

CLIMATE RESILIENCE

Climate Resilience addresses climate change impacts, risks, and opportunities to ensure long-term economic sustainability and compliance with disclosure requirements. This includes preparing for, and responding to, extreme weather events such as droughts, floods, and fires, which are increasing in both frequency and severity due to climate change. It also involves building resilience to both physical and transitional climate-related risks.

ID	INDICATOR	DATA	TREND
13.1	Climate-adjusted average annual growth rate in Total Factor Productivity compared to the base year of 100 (1988/89)	**105** (2024-25)	

DATA EXPLAINED

13.1. Source: Department of Agriculture, Fisheries and Forestry[44]

The Australian Bureau of Agricultural and Resource Economics and Sciences estimates Total Factor Productivity (TFP) of Australian farms to measure the efficiency of the industry over time. While this is important data (see Profitability & Productivity), annual TFP numbers are heavily impacted by seasonal variability. Looking forward, the predicted impacts of climate change, including lower rainfall in southern Australia and more severe droughts and floods, will obscure underlying trends in farm performance. Climate-adjusted productivity aims to account for these climate change effects. It models the effect of climate conditions (such as rainfall and temperature) on TFP and then calculates climate-adjusted productivity with the effects of climate removed. Increases in climate-adjusted productivity show the industry is increasing productivity despite the impacts of climate; that is, it is adapting and showing resilience to climate change. An index of 105 indicates climate-adjusted total factor productivity 5% above the 1988-89 baseline.

SNAPSHOT OF ACTIVITIES

Qld Pasture Resilience program

A pilot 'Stepping Stones' workshop on matching stocking rates to forage supply was developed by the Queensland Department of Primary Industries to improve landscape productivity. It was delivered to producers in North Queensland as part of the Qld Pasture Resilience program. The workshop was effective and well received by participants.

Sustainable grazing pathways

A joint research project between MLA and Australian Wool Innovation (AWI) assisted Buchanan Downs in demonstrating how climate resilience can be strengthened through improved herd productivity, grazing management, and land stewardship. By investing in fencing, water infrastructure, nutrition, and genetics, the business increased reproduction rates from 53% to 73%, while reducing breeder numbers, lowering emissions intensity, and maintaining productivity. Improved grazing management has also contributed to higher groundcover and reduced bare ground, increasing the property's resilience to drought, rainfall variability, and other climate-related challenges.

[44] Department of Agriculture, Fisheries and Forestry, Australian Farm Productivity, https://www.agriculture.gov.au/abares/research-topics/productivity/agricultural-productivity-estimates

SNAPSHOT OF ACTIVITIES

Knowledge gap analysis

A comprehensive gap analysis has been undertaken to identify the knowledge, capability and information needs of Australia's livestock industry for GHG emissions reporting. Funded by an Australian Government grant, the project combined a review of existing research and resources with consultation across the supply chain, including exporters, regulators, suppliers, veterinarians, and auditors. It provides a foundation for future extension, training, and emissions-reduction initiatives that will help the sector respond to emerging sustainability and reporting requirements.



PROFITABILITY & PRODUCTIVITY

Profitability and productivity underpin the long-term viability of businesses across the beef value chain. It encompasses farm and processor output value, cost of production, and genetic advancements to enhance herd quality and reproduction. It also includes the industry's rate of return and its impact on operator livelihoods across the beef value chain.

ID	INDICATOR	DATA	TREND
14.1	Total Factor Productivity compared to the base year of 100 (1977/78)	**130** (2024-25)	
14.2	Cost of beef produced on Australian farms (HSCW) - c/kg AUD	**531c/kg** (2024-25)	
14.3	Farm business profit at full equity (expressed as rate of return) » Including capital appreciation	**9.1% - All Producers** **18% - Top 25% Producers** (2024-25)	
14.4	Farm business profit at full equity (expressed as rate of return) » Excluding capital appreciation	**1.2% - All Producers** **3.2% - Top 25% Producers** (2024-25)	

DATA EXPLAINED

14.1. Source: Department of Agriculture, Fisheries and Forestry[45]

Productivity measures how much output is produced for a given set of inputs. In the context of beef cattle, 'output' refers to the value of all the final consumer products produced from a beef carcase. This includes meat and offal, hides and leather, rendered products such as tallow and gelatin, through to sophisticated medicines and pharmaceuticals.

Inputs include everything used to produce beef cattle. This includes land, capital, labour, feed, supplements, veterinary drugs, and chemicals, as well as research into better genetics and reproductive material. It captures the whole supply chain, including transport services, as livestock need to be moved between properties to realise their final value.

TFP growth means the whole supply chain is producing more valuable carcases for a given set of inputs, or is producing the same value carcases, using less inputs. This enables the whole supply chain to benefit, including consumers. Finding buyers willing to pay higher prices for particular products is key to improving productivity. Productivity growth is generally measured over the long term as these measures can produce some counterintuitive results in the short term. In times of severe drought, herds being liquidated can result in TFP growth, and likewise, during a herd rebuilding phase with the return of abundant pastures, TFP growth can fall.

[45] Department of Agriculture, Fisheries and Forestry, Australian Farm Productivity, https://www.agriculture.gov.au/abares/research-topics/productivity/agricultural-productivity-estimates

DATA EXPLAINED

14.2. Source: Department of Agriculture, Fisheries and Forestry[46]

Containing the cost of producing beef relative to key competitors is an important factor in remaining internationally competitive and economically sustainable. As finished cattle prices in each country are volatile, depending on seasons, international demand, and exchange rates, the trend is more important than annual data.

Data for earlier years have been restated, with historical cost of production data updated to reflect the value of the 2025-26 dollar.

- 2023-24: 505 c/kg
- 2022-23: 551 c/kg
- 2021-22: 620 c/kg
- 2020-21: 557 c/kg
- 2019-20: 535 c/kg

14.3 – 14.4. Source: Department of Agriculture, Fisheries and Forestry[47]

This is a five-year rolling average ending FY2024-25. This indicator shows both rate of return including capital appreciation (land value appreciation) and excluding capital appreciation. This rate of return represents the ability of the business to generate a return on all capital used by the business, including that which is borrowed or leased. Snapshot of Activities This is measured by weighted average farm business profit at full equity divided by opening capital. The inclusion of net capital appreciation (other than that caused by changes in land values) is important, as cattle farms can be foregoing profit today by investing in herd build up. To overcome the impact of normal year-to-year volatility, this indicator is calculated as a five-year rolling average.

SNAPSHOT OF ACTIVITIES

- **Return on investment calculator for processors**
  AMPC launched a new return-on-investment (ROI) calculator to help red meat processors evaluate the financial benefits of adopting innovations, technologies, and capital upgrades. The tool provides a standardised framework for assessing investments across areas such as processing efficiency, workplace safety, sustainability, and market access. This supports evidence-based decision-making and the adoption of improvements that can strengthen industry performance.

- **Long-term competitiveness in Southeast Asia**
  Research combining market benchmarking, supply chain analysis, and industry consultation was undertaken to identify opportunities to improve supply chain efficiency, market segmentation, customer alignment, and value creation, providing an evidence base to support decision-making and future competitiveness initiatives. Findings highlighted Australia's competitive advantages in biosecurity, traceability, reliability, and animal welfare, while recognising emerging challenges from lower-cost competitors, changing market requirements, and the increasing diversity of Australia's cattle herd.

[46] Department of Agriculture, Fisheries and Forestry, Financial performance of broadacre farms, https://www.agriculture.gov.au/abares/research-topics/surveys/financial-performance-broadacre-farms
[47] Department of Agriculture, Fisheries and Forestry, Financial performance of broadacre farms, https://www.agriculture.gov.au/abares/research-topics/surveys/financial-performance-broadacre-farms

MARKET ACCESS

Increasing market access and overcoming trade barriers are essential to the Australian beef industry's success. Proactive industry investment helps address international export regulations, including tariff and non-tariff barriers.

ID	INDICATOR	DATA	TREND
15.1	Total reduction (from 2020) of non-tariff trade barriers on red meat	**$862m** (2025-26)	●
15.2	Percentage value share of Australian beef exports covered by one or more preferential trade agreements	**94% Beef / 96% Live Ex** (2025-26)	●

DATA EXPLAINED

15.1. Source: NTB Database plus MLA Calculations

Non-tariff barriers (NTBs) such as import restrictions, accreditation requirements for export establishments, labelling rules, or unnecessary sanitary measures can impose significant delays and additional costs on Australian red meat exports. Alleviating NTBs is therefore critical to improving international competitiveness and expanding market access. The approval by China of numerous Australian beef processing establishments, enabling access for both chilled and frozen beef products, is an example of the benefits delivered through the removal of NTB impacts. This indicator reflects the Red Meat 2030 success indicator of reducing the impact of NTBs relative to the 2020 baseline. In 2025-26, the cumulative value of NTB alleviation since 2020 increased to $862 million.

Note: *The total NTB alleviation value incorporates both beef and sheep meat outcomes.*

15.2 Source: Department of Foreign Affairs and Trade, and Department of Agriculture, Fisheries and Forestry[48]

Preferential and free trade agreements (FTAs) provide Australian red meat exporters with market access beyond that available under multilateral World Trade Organization commitments. These agreements have significantly reduced tariff and quota barriers across many export markets, strengthening the international competitiveness of Australian beef and live cattle exports. The proportion of exports covered by FTAs can fluctuate from year to year depending on the value and volume of trade to individual destinations. Australia has recently concluded negotiations with the European Union, with entry into force of the agreement anticipated in 2027. Once implemented, the proportion of beef exports covered by an FTA will increase, although the impact is expected to be modest initially due to the 10-year phase-in of the additional 30,600 tonne (carcase weight) beef quota. This indicator reflects the Red Meat 2030 success indicator of pursuing preferential access into new and existing markets.

[48] Department of Agriculture, Fisheries and Forestry, Australian red meat export statistics, https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/meat/statistics

SNAPSHOT OF ACTIVITIES

Geolocation sharing tool

To comply with the EUDR, exporters of Australian beef and beef products must provide the geolocations of all properties where cattle have been raised to European importers. The LPA program has introduced a geolocation sharing tool to enable cattle producers to provide the information needed for EUDR. Sharing geolocations will support Australian beef supply chains in meeting EUDR traceability requirements. As of August 2026, some 9,768 producers have opted to share their geolocation.

Renewed live export markets

In 2025, the livestock export industry resumed shipments of breeder cattle to Mexico and Türkiye for the first time in almost a decade, while a new market opened in Iraq for feeder and slaughter cattle.



RURAL ECONOMIC & COMMUNITY CONTRIBUTION

8 DECENT WORK AND ECONOMIC GROWTH

The beef industry makes an important economic and social contribution to rural and regional Australia. This includes creating jobs, investing in local infrastructure and essential services, and engaging with communities, including First Nations peoples.

ID	INDICATOR	DATA	TREND
16.1	Total people employed directly or indirectly in the beef industry	**362,389** (2024-25)	🔴
16.2	Beef farming, feedlot, and processing contribution to Gross Domestic Product (GDP)	**$15.09b** (2024-25)	🟡
16.3	Getting involved in the community index of Australian beef graziers	**3.39** (2025)	🟡

DATA EXPLAINED

16.1. Source: Meat & Livestock Australia[49]

A total of 126,371 people were directly employed in the beef industry, in addition to a further 236,018 people in businesses servicing the red meat and livestock industry. The majority (85%) of meat and livestock industry employees live in rural and regional areas, assisting with decentralisation and not contributing to infrastructure pressure in capital cities. Just over 60% of meat processing employment and 95% of all beef cattle, sheep and feedlot production employment are located outside capital cities.

16.2. Source: Meat & Livestock Australia[50]

Industry value-add is the overall value of goods and services produced by businesses in an industry and is also known as contribution to gross domestic product (GDP). This is a substantial increase from the previous financial year, driven primarily by higher cattle prices, increased slaughter and feedlot turnoff, near-record beef production, and strong export demand.

16.3. Source: University of Canberra[51]

The extent of a person's involvement in local community activities is a mean score for taking part in community events, from (1) never or almost never, to (7) all the time. The score of 3.39 for beef graziers relates to how frequently respondents attend community events such as farmers markets, community festivals, meetings, or social events of local clubs and groups, and are involved in sporting teams. This is above the Australian average of 3.13.

[49] Meat & Livestock Australia, State of the Industry Report 2026, https://www.mla.com.au/soti
[50] Meat & Livestock Australia, State of the Industry Report 2026, https://www.mla.com.au/soti
[51] University of Canberra, Regional Wellbeing Survey, https://www.regionalwellbeing.org.au/the-data-tables/

SNAPSHOT OF ACTIVITIES

National Survey: Live Exports and the Australian Community

Community support for the livestock export industry has reached its highest level yet, according to the latest in a long-running series of national surveys. The average level of acceptance has gone from 2.89 in 2019 to 3.14 (out of five) in 2025. More than 80% of participants in the 2025 survey agreed the industry makes an important economic contribution to Australia, while 70% agreed it helps overseas countries ensure their citizens have access to safe sources of meat. Three quarters of respondents agreed the benefits of the industry outweigh costs or are equal.

Economic contribution to rural communities

MLA released the 2025 Regional Feedlot Investment Study, which quantified the feedlot sector's contribution to rural and regional Australia. The study found the industry contributed $4.6 billion to GDP and supported approximately 24,000 jobs in 2023–24, reinforcing the importance of feedlots to regional economies, employment, and supply chain resilience.



PARTNERSHIPS & INDUSTRY COLLABORATION

Partnerships and industry collaboration continued to play a critical role in accelerating sustainability outcomes across the Australian cattle industry.

Collaborative programs involving producers, industry bodies, researchers, and technology providers focused on developing, testing, and scaling practical solutions that improve productivity, environmental performance, and business resilience.

Across Australia, Producer Demonstration Sites (PDS), producer networks and co-innovation partnerships were vehicles for trialling emissions reduction strategies, improving herd productivity, enhancing soil and natural capital outcomes, and adopting new technologies. Projects explored areas such as genetics, digital agriculture, soil carbon, regenerative farming practices, virtual fencing, emissions management, and feedlot sustainability, and generated real-world evidence to support broader industry adoption.

Industry investment also supported innovation through the development of new technology pathways, including a dedicated livestock technology venture fund and collaborative research programs designed to accelerate commercial uptake of emerging solutions. At the same time, partnerships between MLA, producers, advisers, and research organisations strengthened knowledge sharing and capability building through initiatives such as pasture trials, decision-support tools, and advisor networks.

Collectively, these collaborations are helping build a more connected, innovative, and resilient cattle industry, ensuring producers have access to practical tools, trusted information, and scalable solutions that support long-term productivity, sustainability, and competitiveness.

A partnership between the livestock export industry and Indonesia's feedlot industry is delivering capacity building workshops to improve the capability of smallholder farmers to slow the spread of FMD and LSD. Since 2022, more than 1,500 local government officials and smallholder farmers have participated at events across six Indonesian provinces, improving biosecurity, protecting livelihoods, and increasing vaccination rates for Indonesian livestock. The program is being funded by Australian Government grants and managed by LiveCorp.

TRACEABILITY ACROSS THE VALUE CHAIN

Improving traceability is a priority for the entire value chain, from sourcing and production, to processing and trade.

This includes safeguarding environmental, animal, and social conditions (including human rights), throughout the value chain. It also enables transparency and clear communication of sustainability impacts.

The Australian beef industry has the following assurance and auditing regimes related to traceability, food safety, food quality, and animal welfare:

- Livestock Production Assurance (LPA) – on farm assurance
- National Vendor Declaration (NVD)
- National Livestock Identification System (NLIS) – identification and traceability
- National Feedlot Accreditation Scheme (NFAS)
- Exporter Supply Chain Assurance System (ESCAS)
- Australian Livestock Processing Industry Animal Welfare Certification System (AAWCS)

Projects are being implemented across supply chains to support industry in making claims regarding environmental, animal welfare, and social credentials.

One such example is the beef industry traceability pilot led by SEAOAK Consulting, MLA and industry partners, testing how farm-level sustainability credentials can be captured once and shared through the supply chain. The pilot integrated multiple data systems to support market confidence, sustainability reporting, and proof of environmental credentials, including deforestation-free supply chain requirements. Early results indicate sustainability and traceability information increased buyer confidence and influenced purchasing decisions, highlighting the role of verified credentials in maintaining market access.



PEOPLE & COMMUNITY

THE BEEF INDUSTRY IS COMMITTED TO BEING TRUSTED, ATTRACTIVE TO A DIVERSE WORKFORCE, BEING A SOURCE OF PRIDE FOR AUSTRALIANS, AND TO CONTINUING TO MAKE A POSITIVE CONTRIBUTION TO THE FOOD SECURITY OF AUSTRALIAN AND INTERNATIONAL COMMUNITIES.

The Australian beef industry delivers significant social value to communities through the production of safe, nutritious food, the creation of regional employment opportunities, and ongoing investment in people, skills and animal care. In return, the industry relies on the knowledge, trust, and contribution of producers, workers, researchers, consumers, and rural communities to remain productive, sustainable, and globally competitive.

Food safety and quality remain foundational to the industry's social licence and market success. Through programs such as LPA, producers continue to demonstrate high standards of food safety, traceability, biosecurity and animal welfare, helping maintain confidence among domestic and international customers. Recent updates to the LPA program's associated training requirements further strengthen assurance systems and support continuous improvement across the supply chain.

The industry also makes an important contribution to nutrition and food security by supplying high-quality protein and essential nutrients to Australian and global consumers. With strong export performance and a reputation for safe, reliable products, Australian beef continues to contribute to global food security, while supporting regional economies throughout the country.

A strong workforce is essential to the industry's future. Across 2025-26, significant investments were made in workforce development and capacity building to attract, train, and retain skilled workers. Industry-led initiatives such as Feedlot TECH expanded access to training, education, and career pathways, while new courses in areas including biosecurity, livestock health, maintenance, and feed management strengthened workforce capability and workplace safety.

Workplace health and safety, labour practices and workforce wellbeing remain ongoing priorities. Industry training, accreditation programs, and best-practice guidance help ensure workers have the skills, knowledge, and support needed to operate safely and effectively. Stronger training pathways also improve employment opportunities in regional and rural communities.

The industry's commitment to antimicrobial stewardship and animal welfare further demonstrates the connection between people, animals, and community expectations. Ongoing education, veterinary oversight and welfare initiatives support responsible livestock management, helping preserve the effectiveness of critical medicines and maintaining high standards of animal care.

Diversity and inclusion are also increasingly recognised as important components of industry resilience. By encouraging participation from a broader range of people, backgrounds, and skillsets, the industry can strengthen innovation, leadership, and succession planning.

Ultimately, the relationship between the beef industry and the community is mutually beneficial. The industry provides food, employment, and regional prosperity, while community expectations, workforce capability, research partnerships, and consumer trust drive improvement in the industry's long-term sustainability.



FOOD SAFETY & QUALITY

Delivering safe, high-quality Australian beef depends on strong standards and reliable assurance systems. Industry practices and traceability protect product integrity across the value chain, from production through to the final customer.

ID	INDICATOR	DATA	TREND
17.1	National Average Meat Standards Australia Index	**58.66** (2025-26)	
17.2	Overall compliance with the National Residue Survey and Australian and International Standards for Cattle	**99.98%** (2023-24)	

DATA EXPLAINED

17.1 Source: Meat & Livestock Australia

Meat Standards Australia (MSA) was developed by the Australian red meat industry to improve the eating quality consistency of beef. To date, the system is based on almost 1.8 million untrained consumer taste tests by more than 250,000 consumers from 13 countries and considers factors that affect eating quality from the paddock to plate. The MSA index is a single number (between 30 and 80) and the standard national measure of the predicted eating quality and potential merit of a beef carcase. It is a consistent benchmark which can be used across all processors and geographic regions, and over time. It reflects the impact on eating quality of management, environmental, and genetic differences between cattle at the point of slaughter. Compliance rates vary throughout the production regions of Australia according to seasonal conditions. To be compliant for MSA grading, carcases must have a minimum of 3mm rib fat, adequate fat coverage, a maximum pH of 5.70 and other requirements. In 2025–26, overall compliance with MSA minimum requirements was 96.1% nationally, up from 2024-25 when compliance reached 94.8%.

17.2 Source: Department of Agriculture, Fisheries and Forestry[52]

This data is repeated from the previous year, as National Residue Survey (NRS) data for beef has not been publicly released.

The NRS has been testing tissue samples from Australian cattle for a range of pesticides, veterinary medicines, and environmental contaminants since the early 1960s. The program ensures beef exports satisfy Australian certification and importing country requirements, supports industry quality assurance initiatives, and enables domestic meat processing facilities to satisfy state and territory government regulatory authority licensing requirements. The 5,337 samples collected for cattle products achieved a 99.98% compliance rate.

SNAPSHOT OF ACTIVITIES

Advancing food safety

AMPC-supported research is helping strengthen food safety systems across Australia's red meat processing sector through the application of emerging technologies and enhanced monitoring approaches. Recent projects have demonstrated the potential for AI to support hygiene and safety compliance monitoring, providing processors with new tools to improve food safety outcomes, strengthen operational decision-making, and maintain consumer confidence in Australian red meat products.

[52] Department of Agriculture, Fisheries and Forestry, National Residue Survey 2023-24 Annual Summary, https://www.agriculture.gov.au/sites/default/files/documents/nrs-summary-english.pdf

NUTRITION & FOOD SECURITY

2 ZERO HUNGER

The aim of the Nutrition & Food Security priority is to support the beef industry's contribution to food security by providing sufficient safe and nutritious food. It also recognises beef's role as a source of high-quality protein and essential nutrients within a balanced, healthy diet.

NUTRITION INFORMATION*	PER 150G SERVE*
GOOD SOURCE^	
Protein	**34.3g**
Iron	**3.1mg**
Zinc	**6.7mg**
Vitamin B12	**1.4µg**
SOURCE^	
Omega-3 fatty acids	**48.2mg**
Riboflavin (B2)	**0.29mg**
Niacin (B3)	**7.5mg**
Pantothenic acid (B5)	**0.54mg**
Vitamin B6	**0.21mg**
Magnesium	**38mg**
Phosphorus	**328mg**
Selenium	**16µg**

* Average nutrition information per 150g serve raw weight of four major beef cuts.

^ Foods that are a 'good source of protein' have more than 10g per serve; 'good sources' of essential nutrients have 25% or more and 'sources', 10% or more of the recommended daily intake (RDI) as defined for labeling purposes in the Australian Food Standards (1.2.7).

DATA EXPLAINED

Lean beef is a nutrition powerhouse. A 150g serving (raw weight) of Australian beef contains 12 essential nutrients recommended for good health. It is an excellent source of bioavailable iron and zinc, with red meat having more iron and zinc than poultry and fish. As it is predominantly grass-fed, Australian beef is also a source of Omega-3. Australian beef with low levels of marbling and trimmed of fat has less than 3% fat, around 1% saturated fat and is naturally low in sodium. Beef provides a significant amount of protein, with a 150g serving containing approximately 34g.

SNAPSHOT OF ACTIVITIES

International nutrition and food security

The contribution of Australia's livestock exports to food security and nutrition in key international markets has been quantified by the Livestock Export RD&E Program, with Indonesia identified as a leading example. The research found that Australian feeder cattle contribute approximately 83,660t of beef and 8,335t of edible offal annually to the Indonesian food system (equivalent to 1.4 billion meals)[53], supporting access to high-quality animal protein for more than 32 million consumers. As demand for beef grows and domestic supply remains constrained, Australian cattle will continue to play an important role in strengthening food security, dietary diversity and nutrition outcomes. It complements Indonesia's local production systems and contributes to the nation's broader food security objectives.

Red Meat Recovery for Food Relief

A partnership was formed between End Food Waste CRC, RMIT University, MLA and Foodbank to examine meat recovery from farm-to-retail supply chains for use as food relief. By identifying barriers and enablers to recovery, the partnership aims to increase access to red meat for people lacking food security. The project found that more collaboration between food relief agencies and the meat industry is required to improve industry education on the donation process, provide food safety guidance to enable confidence to donate, and leverage existing supply chains to strengthen access in regional communities.

Global Impact

Around the world, an estimated 1.3 billion people rely on livestock such as cattle and sheep for their livelihoods. There is a significant need to increase the productivity of livestock production to help lift people out of economic and food poverty.[54]



[53] Calculated using tonnes of beef and offal divided by the recommended red meat intake of 65g/day.

[54] Commonwealth Scientific and Industrial Research Organisation, 2025, FutureFeed, https://www.csiro.au/en/research/animals/livestock/futurefeed

WORK HEALTH & SAFETY

8 DECENT WORK AND ECONOMIC GROWTH

Ensuring healthy and safe conditions for people in the Australian beef industry includes addressing mental health, occupational injuries and illness, and exposure to chemicals. This priority considers the systems, workplace practices, and support needed to manage these risks and protect worker wellbeing across the supply chain.

ID	INDICATOR	DATA	TREND
18.1	Notifiable fatalities (five-year totals)	**Farms – 35** **Feedlots – 0** **Processing – 0** (2021-25)	
18.2	Lost Time Injury Frequency Rate (number of claims per million hours worked)	**Farms – 10.1** **Processing – 25.4** (2024-25)	
18.3	Global Life Satisfaction Index of Australian beef graziers	**68.28** (2025)	

DATA EXPLAINED

18.1 Source: Safe Work Australia[55]

Fatalities data is derived from the Work-related Traumatic Injury Fatalities database (TIF), which includes information on all work-related fatalities in Australia. This database collates information sourced from workers' compensation data, fatality notifications from Australia's various WHS authorities, and information in the National Coronial Information System. The TIF data is based on small numbers and can be volatile. Aggregating the data over five years reduces concerns over data volatility.

18.2 Source: Safe Work Australia[56]

Lost Time Injury Frequency Rate (LTIFR) refers to the number of lost time injuries (injuries that occurred in the workplace that resulted in an employee's inability to work the next full work day) that occurred in a given period. The LTIFR is calculated across all livestock farms and meat processing facilities. The calculator uses National Dataset for Compensation Based Statistics data to determine the number of lost time injuries in each industry, and data from the Australian Bureau of Statistics (ABS) Labour Force Survey to determine the number of hours worked.

The farm's result is based on ANZSIC code 014, and includes beef, sheep, feedlots, mixed grain, and livestock, rice, and other grain farms.

The processing result is based on ANZSIC code 111, which includes all meat and meat product manufacturers.

18.3 Source: University of Canberra[57]

The Global Life Satisfaction (GLS) score is calculated based on respondents rating their satisfaction with their life 'as a whole' on a scale of 'completely dissatisfied' (0) to 'completely satisfied' (10).

Scores are multiplied by 10 to give an index of 0 to 100. The score of 68.3 for beef graziers compares to the overall GLS for Australians of 64.8.

While this continues a decline in GLS for Australia, it is a reflection of current attitudes worldwide, with the World Happiness Report noting six of the top 10 countries ranked by happiness have also experienced declines to 2025.[58]

[55] Safe Work Australia, Work-related fatalities data, https://data.safeworkaustralia.gov.au/our-datasets/work-related-fatalities-data
[56] Safe Work Australia, Workers' compensation injury frequency rates, https://data.safeworkaustralia.gov.au/interactive-data/topic/workers-compensation-injury-frequency-rates
[57] University of Canberra, Regional Wellbeing Survey, https://www.regionalwellbeing.org.au/the-data-tables/
[58] World Happiness Report, https://data.worldhappiness.report/table

SNAPSHOT OF ACTIVITIES

Rural Safety & Health Alliance[59]

A diverse industry-wide partnership between AgriFutures Australia, Cotton Research and Development Corporation, Grains Research and Development Corporation, AWI, Dairy Australia, Australian Pork Limited, Australian Eggs, and MLA is providing coordinated leadership to improve health, safety, and wellbeing outcomes across Australia's primary industries. The Alliance delivers practical research, development, extension, and innovation initiatives designed to reduce workplace injuries and fatalities on farms. The Alliance is responsible for the development and national coordination of health and safety strategies, and works with organisations including Farmsafe Australia, Safe Work Australia, and leading research institutions.

Processor investment into safety

AMPC has invested in a dozen projects since 2024 relating to; processor Work Health and Safety, Worker Wellbeing, Safety Incident Reporting and Management, Active Safety Monitoring improvements using AI, and implementation of exoskeletons to aid in the relief of physical work effort. These projects have developed multiple resources in the form of training webinars, instruction manuals, workplace workshops, demonstration of mechanical aids, and other interactive materials. AMPC continues to work with industry on multiple safety initiatives.

Virtual reality simulation-based training

MLA is investing in innovative safety solutions to address farm machinery incidents which remain a leading cause of fatalities on farms. The project evaluates the effectiveness of Virtual Reality (VR) simulation-based training to improve hazard awareness, decision-making, and safe operating practices among cattle producers. By providing immersive, practical learning experiences, the initiative moves beyond traditional training approaches in order to strengthen safety outcomes.

[59] Rural Safety & Health Alliance, https://rsha.com.au/

LABOUR PRACTICES

8 DECENT WORK AND ECONOMIC GROWTH

Fair and responsible labour practices protect workers across the Australian beef industry. This includes respecting freedom of association, safeguarding the rights and wellbeing of seasonal and casual workers, and protecting all workers from modern slavery.

ID	INDICATOR	DATA	TREND
19.1	Fair Work Ombudsman Compliance Notices Issued	**Farms – 1** **Feedlots – 0** **Processing – 3** (2025-26)	●

DATA EXPLAINED

19.1. Source: Fair Work Ombudsmen

The Fair Work Ombudsman (FWO) is responsible for promoting compliance with Australian workplace laws. It educates people about their rights and responsibilities at work and can resolve workplace issues. Most of the time, breaches of the Fair Work Act 2009 invoke a civil penalty or fine. When an employer doesn't cooperate with a Fair Work Inspector to fix a breach, the FWO can issue a compliance notice instead of starting legal proceedings. Four compliance notices were issued out of approximately 52,000 agricultural businesses involved with cattle in Australia in 2025/26.

The data for the 2024-25 period has also been recorded as farms – 2, feedlots – 0, and processing – 2.

The results are based on ANZSIC code 0142 (Beef Cattle Farming (Specialised)), 0143 (Beef Cattle Feedlots (Specialised)), and 1111 (Meat Processing).

SNAPSHOT OF ACTIVITIES

- **Clear employment obligations**
  Cattle businesses operate under the Fair Work Act 2009, the National Employment Standards and the Pastoral Award. Together, these set the minimum requirements for pay, hours, leave, classifications, and employment conditions. Work health and safety laws also require businesses to identify risks and provide a safe place to work.

- **Getting the Pastoral Award right**
  The Pastoral Award (MA000035) sets the wages, classifications, and conditions that apply to much of the livestock workforce. For farm businesses, the practical focus is making sure employees are classified correctly, paid the right rate, and understand their conditions.

DIVERSITY & INCLUSION

Commitment to fostering a workplace and industry that values and promotes diversity in beliefs, backgrounds, and identities, while ensuring equitable opportunities, fair treatment, and an inclusive culture for everyone. This includes upholding non-discrimination, embracing gender, cultural, and religious diversity, and supporting First Nations people.

ID	INDICATOR	DATA	TREND
20.1	Percentage of women and men in the workforce	**32.1%** **67.9%** Beef farms; **33.7%** **66.0%** Beef feedlots; **29.2%** **70.8%** Processors (2021)	
20.2	Age breakdown of the workforce	**9.5%** 15-24; **16.4%** 25-34; **16.1%** 35-44; **17.4%** 45-54; **19.2%** 55-64; **21.4%** 65+ (2021)	**N/A**
20.3	Percentage of Indigenous employment in the workforce	**2.1%** (2021)	

DATA EXPLAINED

20.1-20.3. Source: Australian Bureau of Statistics[60]

Data from the ABS 2021 Census has been used as the data source for the diversity priority, utilising the four-digit level of Industry Employment (INDP) categories. The Census provides the best overview of the diversity and inclusion of the Australian beef industry. The 2026 Census was conducted on 11 August 2026. Initial results are scheduled for June 2027, with employment-related data scheduled for October 2027.

[60] Australian Bureau of Statistics, Find Census Data, https://www.abs.gov.au/census/find-census-data

SNAPSHOT OF ACTIVITIES

Australian workforce landscape assessment

This assessment is identifying key gaps in, and systemic barriers to, gender diversity and disability inclusivity within the Australian red meat industry. These projects synthesise evidence derived from desktop reviews and stakeholder interviews to examine workforce metrics and, where quantifiable, benchmark these against comparable industries. The reports will outline priority areas such as data collection, professional networks, leadership development, skills and retention, and cultural capability, and offer a framework of opportunities for future investment for a more inclusive and sustainable workforce.

Meat Business Woman of the Year

The Meat Business Woman of the Year Award is a new national award established to recognise a woman with 10 or more years' experience who has made a significant and sustained contribution to Australia's meat industry. The inaugural award was presented to Amanda Carter from AMPC, recognising her unwavering commitment to developing people, strengthening workforce capability, and creating pathways for the next generation of industry leaders. This award is in addition to the existing One to Watch award, which supports young, aspirational women in the meat industry.

Global Gender Research

The 2026 Meat Business Women Gender Representation Report[61] highlights the importance of attracting, retaining and developing a diverse workforce to support the long-term sustainability and resilience of the meat and food manufacturing sectors. The report found women represent 32% of the global meat and poultry workforce and identified opportunities to strengthen participation and progression pathways, particularly into leadership roles, helping the industry build broader talent pipelines and address ongoing workforce and skills challenges.



[61] Meat Business Women, 2026, Gender Representation Report

ANTIMICROBIAL STEWARDSHIP

Maintaining the effectiveness of antimicrobials depends on their responsible and appropriate use. Strong stewardship helps reduce the risk of antimicrobial resistance and protect both human and animal health.

ID	INDICATOR	DATA	TREND
21.1	Percentage of feedlots covered by an antimicrobial stewardship plan	**97.9%** (2025)	●
21.2	Percentage of compliance with antibiotic Maximum Residue Limits	**100%** (2022-23)	●

DATA EXPLAINED

21.1. Source: NFAS Audits[62]

The antimicrobial stewardship guidelines for the Australian cattle feedlot industry are now included as a requirement of the NFAS, which has been in operation in the Australian feedlot industry for more than 30 years. The 97.9% data related only to beef feedlots accredited under the NFAS. 2.41% of audited feedlots did not use antimicrobials, therefore not requiring an antimicrobial stewardship plan.

21.2. Source: Department of Agriculture, Fisheries and Forestry[63]

This data is repeated from the previous two years, as National Residue Survey (NRS) data for beef has not been publicly released.

Targeted animal product residue monitoring programs, such as those for antibiotics, are designed to meet management objectives or monitor potential chemical residues that could pose a risk for access to export or domestic markets. All animal product residue monitoring programs are designed, operated, and reviewed by the NRS.

SNAPSHOT OF ACTIVITIES

- **Stewardship plans in practice**
  Antimicrobial stewardship remains a requirement under the NFAS. Plans are reviewed every six to 12 months (depending on feedlot size) and signed off by a consulting veterinarian. In practical terms, the focus is on good diagnosis, clear treatment protocols, accurate records and reviewing results so antimicrobials are not used as a substitute for sound animal health and feedlot management.

- **Better information on antimicrobial use**
  Work has progressed on a National Veterinary Antimicrobial Usage System. The pilot was aimed at building a clearer national picture of how antimicrobials were used across livestock sectors. Better data will help the industry identify where use can be reduced or refined and demonstrate responsible practice with evidence.

- **Food supply research**
  A government-funded project led by Food Standards Australia New Zealand (FSANZ) continued investigating antimicrobial-resistant bacteria in the Australian food supply. This work linked what happens on farm and in feedlots with the wider human-health discussion and reinforced the need for a whole-of-supply-chain approach. The survey of more than 4,000 retail meat samples found low levels of antimicrobial resistance to antibiotics of high importance to human health, with around two-thirds of bacterial isolates showing no resistance to any antibiotics tested.[64]

[62] National Feedlot Accreditation Scheme, Feedlot Auditing
[63] Department of Agriculture, Fisheries and Forestry, National Residue Survey 2023-24 Annual Summary, https://www.agriculture.gov.au/sites/default/files/documents/nrs-summary-english.pdf
[64] Food Standards Australia New Zealand, 2026, National Surveillance of Antimicrobial Resistant Bacteria in Raw Retail Beef, Chicken and Port Meat.

WORKFORCE DEVELOPMENT & CAPACITY BUILDING

13 CLIMATE ACTION

Developing a capable and adaptable workforce requires attracting talent, providing diverse career pathways, and enhancing training and education programs, particularly for beef production and processing. Achieving this will improve employee retention, address skilled labour shortages, attract young workers, and upskill people in technological advancements and regulatory reporting.

ID	INDICATOR	DATA	TREND
22.1	Number of traineeships and apprenticeships enrolled and completed	(Commenced / Completed) **Farms – 639 / 458** **Feedlots – 10 / 10** **Processing – 2,059 / 1,173** (2025)	●
22.2	Percentage of industry workforce with a higher education qualification	**22.4%** (2021)	●
22.3	Number of participants undertaking MLA, LiveCorp, AMPC, or peak industry council training	**14,911** (2025)	●

DATA EXPLAINED

22.1. Source: National Centre for Vocational Education Research[65]

The way this data has been analysed has shifted this year to create greater accuracy in reporting. Four-digit ANZSIC codes are now being used to extract the data from the database in order to remove courses which were not cattle related. The codes used to collate the data are:

- Farms: 0144, 0142, 0145
- Feedlots: 0143
- Processing: 1111, 1113

22.2. Source: Australian Bureau of Statistics[66]

The ABS 2021 Census showed that 22.4% of employees have obtained a higher education qualification. This includes diploma and advanced diploma, bachelor's degree, graduate diploma and graduate certificate, and postgraduate degrees.

23.2. Source: Compiled from Australian beef industry bodies

Training events and courses are functions of MLA, LiveCorp, AMPC, and the peak industry councils. This includes LiveCorp's in-market training in Indonesia, professional development courses, and MLA's suite of adoption programs including Profitable Grazing Systems, Producer Demonstration Sites, and EDGE Network courses.

[65] National Centre for Vocational Education Research, VOCSTATS, https://www.ncver.edu.au/research-and-statistics/vocstats
[66] Australian Bureau of Statistics, Find Census Data, https://www.abs.gov.au/census/find-census-data

SNAPSHOT OF ACTIVITIES

Workforce development in Indonesia

A project funded by the Livestock Export RD&E Program highlighted the significant role of Australian livestock exports in supporting workforce development and capability building across Indonesia's cattle supply chain. Through partnerships between industry, government, and educational institutions, more than 14,000 participants have engaged in training programs since 2021 covering animal welfare, biosecurity, animal health, feedlot management, slaughter practices, and supply chain efficiency. Australian-supported initiatives have included Animal Welfare Officer certification, biosecurity training, technical workshops, student exchange programs, and industry scholarships. These investments have strengthened workforce skills, enhanced industry professionalism, and supported the long-term development of a more productive, resilient, and sustainable Indonesian livestock sector.

Strengthening regional communities

Research funded by AMPC and conducted by CQUniversity highlighted the important role red meat processors play in supporting regional communities through employment, skills development, education partnerships, and community engagement initiatives. The project found that, while processors make significant social contributions beyond their core business operations, there is an opportunity to better measure and communicate these impacts to demonstrate the sector's value to local communities and strengthen public trust.

MLA investment in producer adoption

MLA delivered adoption activities to 17,755 beef, sheep, and goat producers, who together manage a total of 18 million cattle (64% of the national cattle herd) and 188m ha. These activities included participation in awareness raising activities such as BeefUp Forums, FutureBeef and PDS webinars; training workshops such as Nutrition EDGE, Business EDGE, Carbon EDGE and Breeding EDGE; and, practice change programs such as PDS and Profitable Grazing Systems (e.g., Heifers for Profit). Further, MLA's adoption program invested in increasing the skills and knowledge of livestock advisors through its Livestock Advisor Updates, Livestock Advisor Essentials, and partnerships with AgNVet and RMA Network. As a result of these investments there has been a 29% increase in the number of livestock advisors delivering MLA adoption programs from the 2024-25 baseline.

Professional development and leadership opportunities

Industry organisations are investing in structured leadership and professional development programs to strengthen workforce capability, retain talented people and create clearer pathways into management and industry leadership roles.

ALFA supports workforce attraction, retention and leadership development across the grain-fed beef sector through a staged professional development pathway that includes its Emerging Leaders, MPM and Executive Leaders programs. Complementing this, the ALFA Future Feeders Network (FFN) engages and empowers the next generation of industry professionals by providing opportunities to explore career pathways, build skills, expand networks and contribute to the sector's future. Together, these initiatives aim to develop capable leaders who will help drive a sustainable, profitable and community-valued grain-fed beef industry, underpinned by high standards of animal welfare and environmental stewardship.

The Australian Intercollegiate Meat Judging Association (ICMJ) is helping attract and develop the next generation of red meat professionals through its national and northern conferences, competitions, workshops and careers expos. These programs combine technical education in meat quality and carcase evaluation with professional development, networking and direct exposure to employers across the red meat supply chain.

CA's National Beef Leaders (NBL) program is providing another pathway for emerging leaders in the grass-fed cattle sector. Seven participants completed the 2025/26 program, undertaking development in leadership, industry representation, policy, corporate governance and media engagement.

Together, these initiatives provide development opportunities at different career stages, helping build the technical, commercial and leadership capability required to support a skilled, adaptable and resilient beef industry workforce.

ALFA's Margin and People Management Program

The Program continued to offer valuable insights as it reached its 18th cohort. The program is run twice yearly and tailored for cohorts of up to 12 lot feeders and industry professionals, with each group convening three times for interactive sessions led by multiple facilitators. Its purpose is to provide participants with an in-depth understanding of modern feedlot business management. ALFA doubled the number of graduates in the Margin & People Management Program from 12 to 24 over two programs annually. ALFA also delivered a webinar on discovering the value of manure, with the recording now accessible as a resource on Feedlot TECH, the feedlot industry's eLearning platform.

MATERIALITY

THE ABSF REGULARLY REVIEWS KEY TOPICS AND AREAS OF FOCUS TO ENSURE IT CONTINUES TO ADDRESS THE BEEF INDUSTRY'S MOST SIGNIFICANT IMPACTS, RISKS AND OPPORTUNITIES.

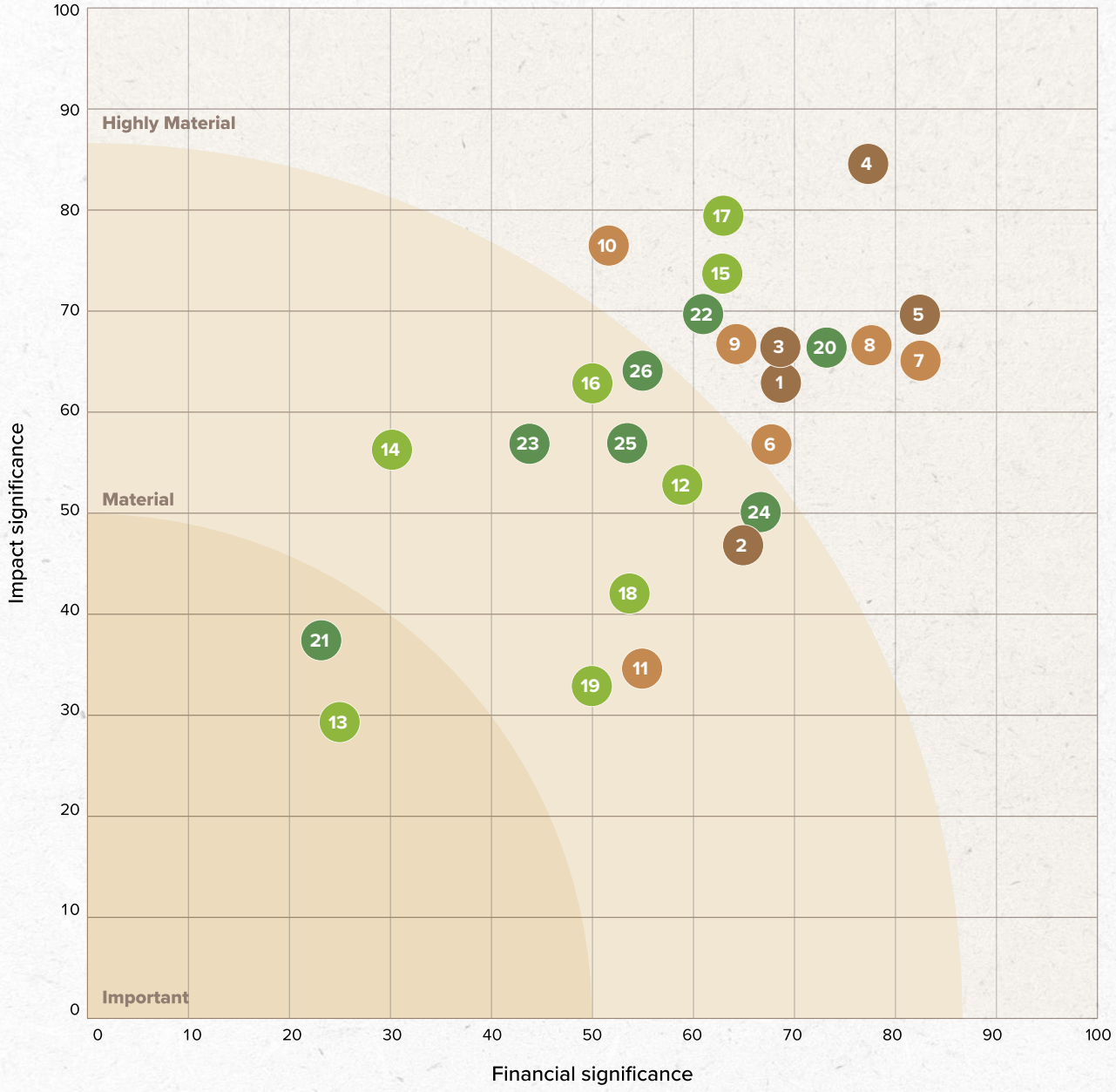
Conducting a double materiality assessment, which considers both the financial risks to the industry and the environmental and social impacts it creates, offers a range of strategic benefits for the Australian beef sector. It aligns the ABSF with emerging global reporting standards, such as the EU Corporate Sustainability Reporting Directive (CSRD), GRI, and IFRS standards, helping to maintain market access and regulatory readiness in global export markets. It also improves risk management by proactively identifying social and environmental risks that could have financial or reputational impacts for the industry.

The most recent assessment was completed in 2025, with the material priorities identified and their scores seen in the matrix on the next page. To ensure that industry's materiality assessment is robust, this work was independently assured in 2026. The independent assurance statement can be found in Appendix A.

Scan the QR CODE to download the full Materiality Assessment Report 2025



MATERIALITY MATRIX



Best Animal Care

1. Animal husbandry & handling
2. Processing practices
3. Livestock transport
4. Animal health & welfare
5. Biosecurity

Economic Resilience

6. Profitability & productivity
7. Market access
8. Climate resilience
9. Traceability across the value chain
10. Rural economic and community contribution
11. Partnerships & industry collaboration

Environmental Stewardship

12. Water
13. Waste
14. Soil health
15. Deforestation
16. Biodiversity
17. Greenhouse gas emissions and carbon capture
18. Feed base production and pasture management
19. Feed sourcing

People & Community

20. Food safety and quality
21. Diversity and inclusion
22. Work, health & safety
23. Nutrition & food security
24. Labour practices
25. Antimicrobial stewardship
26. Workforce development and capacity building

GOVERNANCE

THE ABSF IS AN INITIATIVE OF THE AUSTRALIAN BEEF INDUSTRY AND IS GOVERNED BY AN ADVISORY BOARD AND STEERING GROUP (SG).

The ABSF Advisory Board appoints the SG, which is an independent body whose members are chosen for their individual skills, expertise, and ability to operate strategically using a whole-of-industry lens.

When determining SG membership, consideration is given to ensuring that northern and southern cattle farming systems are adequately represented. Members are not appointed as representatives of any bodies, companies, or organisations, ensuring the SG remains independent, objective, and non-partisan. The SG members are each appointed for a specified term, ensuring knowledge rollover. The purpose, composition, role, and term of the group is periodically reviewed by the ABSF Advisory Board. MLA acts as Secretariat to assist the SG. The SG Chair is not an executive of any industry body or MLA.

APPROVE	ADVISORY BOARD					
	CA CATTLE AUSTRALIA		ALFA		AMIC	
DIRECT	ADVISORY BOARD					
CONSULT	**Consultative Committee**		**Industry Forum**		**Subject matter experts**	
SUPPORT	mla MEAT & LIVESTOCK AUSTRALIA	AMPC	Government Departments	Data Custodians	Research institutions	Industry bodies

ROLES AND RESPONSIBILITIES

APPROVE	DIRECT	CONSULT	SUPPORT
- Responsible for the governance of the ABSF - Provide strategic direction and oversight of the ABSF, ensuring science-based objective representation of the industry - Approve recommendations made by the Steering Group - Appoint the Steering Group and Steering Group Chair	- Make recommendations on the design, development, and delivery of the ABSF - Identify sustainability priority areas - Develop and implement strategic and communications / engagement plans	- Share information, identify emerging issues and opportunities, and provide feedback to the ABSF - Participate in engagement and research activities where appropriate	- MLA and AMPC fund, support, and coordinate key activities, secretariat services - Provide support through research and development of the ABSF and industry sustainability activities - Promote the ABSF as the source of truth where possible

THE ABSF IS UNDERPINNED BY FIVE GUIDING PRINCIPLES: RELEVANCE, INCLUSIVITY, CREDIBILITY, PRACTICALITY, AND TRANSPARENCY. THESE PRINCIPLES GUIDE THE SG DECISIONS AROUND IMPLEMENTATION, ENGAGEMENT, AND REPORTING.

Relevance	Inclusivity	Credibility	Practicality	Transparency
The priority is important to our customers, the community and the Australian beef industry, and is within the industry's scope of influence.	The constructive views of industry, customers, consumers, government and community groups as to how industry can continuously improve performance will be considered.	Decisions about themes, priorities, indicators and recommendations are grounded in evidence. They can, or have the potential to be, monitored and managed.	Indicators are realistic. The industry is able (within scope of influence) to make changes that represent value to the value chain through continuous improvement.	The industry can provide an open and honest picture of performance using the most appropriate data.

STEERING GROUP

The responsibilities of the SG include:

- Data gathering, management, and reporting
- Industry consultation
- Goal promotion
- Advice on research, development, and adoption
- Materiality reviews
- Synthesising research
- Developing priorities and indicators
- Representing industry's sustainability journey



PATRICK HUTCHINSON
Chair
Director, Gibraltar Strategic Advisory



JACOB BETROS
Secretariat
Manager – Sustainability Credentials, Meat & Livestock Australia



AMY BROOKS
Group, Safety, Training and Development Manager, Stockyard Beef



BRYCE CAMM
CEO, Camm Agricultural Group



OLIVIA LAWSON
Director & Co-Principal, Paringa Livestock Pty Ltd



JESSICA MITCHELL
Livestock Supply Chain Manager, Greenham Australia



PAUL MCDOUGALL
Manager – Natural Capital, Paraway Pastoral Company



KARI MOFFAT
Sustainability Manager, AAM Investment Group



BRAD ROBINSON
Manager (Sustainability), Mort & Co Ltd



SCOTT STRACHAN
Head of Sustainability and Environment, Harvest Road Group

SG MEMBERS

SUSTAINABLE DEVELOPMENT GOALS

THE 17 UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS (SDGS) PROVIDE AN URGENT CALL FOR ACTION BY ALL COUNTRIES TO WORK TOWARD A SHARED BLUEPRINT FOR PEACE AND PROSPERITY FOR PEOPLE AND THE PLANET, NOW AND INTO THE FUTURE.

Multiple key supply chain stakeholders align their business and operational decisions to the SDGs. By understanding how the SDGs align with the ABSF, the Australian beef industry can better illustrate and communicate how it is contributing to sustainability in a global context.

The below diagram depicts which SDGs align with the ABSF. Within this report, adjacent to each ABSF priority heading in this update, are the associated SDGs pertaining to it. The ABSF addresses SDGs:

2 - zero hunger

5 - gender equality

6 - clean water and sanitation

7 - affordable and clean energy

8 - decent work and economic growth

9 - industry, innovation and infrastructure

10 - reduced inequalities

12 - responsible consumption and production

13 - climate action

14 - life below water

15 - life on land

17 -partnerships for the goals



CASE STUDY

AUSTRALIAN LIVESTOCK EXPORTS CONTRIBUTING TO INTERNATIONAL DEVELOPMENT GOALS

A 2026 project funded through the Livestock Export RD&E Program, a collaboration between LiveCorp and MLA, quantified the contribution of Australian livestock exports to the UN SDGs across key destination markets including Indonesia, Vietnam, Kuwait, and China. The project developed a framework linking livestock export outcomes to global sustainability priorities, demonstrating how the trade contributes to food security, economic development, capacity building, animal health and welfare, responsible production, and international partnerships.

The research found that Australian livestock exports deliver benefits extending well beyond the export transaction itself. In Indonesia alone, Australian feeder cattle supplied more than 91,000t of beef and offal in 2024, supporting the dietary needs of an estimated 32.1m people while generating approximately A$929m in wholesale revenue. Across destination markets, livestock exports supported employment, infrastructure investment, skills development and improved access to high-quality protein, aligning strongly with SDG 2 (Zero Hunger), SDG 8 (Decent Work and Economic Growth) and SDG 17 (Partnerships for the Goals).

The project also highlighted the role of long-term industry partnerships in driving continuous improvement in animal welfare and biosecurity outcomes. Since 2021, more than 14,000 Indonesians have participated in Australian-supported training programs focused on animal welfare, biosecurity, and supply chain management, while Australian assistance has supported the vaccination of more than 400,000 cattle against FMD and LSD. These investments demonstrate how the Australian beef and livestock industries contribute to sustainable development outcomes both domestically and throughout regional supply chains.

Scan the QR CODE to read the full report



A wet market in Indonesia

GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF

GLOBAL ROUNDTABLE FOR® SUSTAINABLE BEEF

THE ABSF IS A MEMBER OF THE GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF (GRSB) WHICH ENVISIONS A WORLD WHERE BEEF IS A TRUSTED PART OF A THRIVING FOOD SYSTEM AND IN WHICH THE BEEF VALUE CHAIN IS ENVIRONMENTALLY SOUND, SOCIALLY RESPONSIBLE, AND ECONOMICALLY VIABLE. THE ABSF HAS SAT ON THE GRSB BOARD OF DIRECTORS SINCE 2024, ALONG WITH CA.

The GRSB's mission is to advance, support and communicate continual improvement in sustainability of the global beef value chain through leadership, science, and multi-stakeholder engagement and collaboration. The GRSB has 100 members across 15 countries, and represents producers, processors, allied services and industries, retailers, civil society organisations, national roundtables, and observers. The ABSF provides resources and expert advice to the GRSB.

In 2021, the GRSB released three global goals to be reached by 2030:

1. Animal health and welfare – provide cattle with an environment in which they can thrive through best practices
2. Climate – reduce the net global warming impact of beef by 30%
3. Nature positive – ensure the beef value chain is a net positive contributor to nature

Over the past year, the GRSB has released three key reports.

1. HEALTHY HERDS FOR SUSTAINABLE PRODUCTION

This report explores how improving cattle health can deliver a 'triple win' for climate, food systems, and rural livelihoods. Developed by HealthforAnimals and the GRSB, it sets out five core principles for aligning animal health with sustainability goals and shares real-world examples of progress from around the world. The report offers practical guidance for policy makers, industry leaders, and development partners seeking to build a healthier, more resilient livestock sector.

2. POSITION PAPER ON THE ROLE OF BEEF IN SUSTAINABLE, NUTRITIOUS DIETS

Developed through collaboration between GRSB members and independent experts in nutrition, sustainability, and development, the paper positions sustainable beef as a cornerstone of resilient and inclusive food systems by underscoring its role in human nutrition, livelihoods, environmental stewardship, and the economy.

3. NATURE POSITIVE PRODUCTION AND ITS MEASURABLE IMPACT ON THE BEEF SUPPLY CHAIN

The report provides guidance designed to support producers and value chain partners working across different regions and contexts. It does not prescribe a single method but instead draws on established global frameworks to support alignment and comparability in how nature-related outcomes are understood and applied. Its release reflects a broader effort across the GRSB network to strengthen how nature outcomes are measured, communicated, and improved over time.

STAKEHOLDER ENGAGEMENT

THE AUSTRALIAN BEEF INDUSTRY IS COMMITTED TO ENGAGING WITH A WIDE RANGE OF STAKEHOLDERS WITH AN INTEREST IN ITS OPERATIONS AND WHO CAN AFFECT OR BE AFFECTED BY IT.

The industry recognises that those within and outside the industry must work together for a sustainable future.

Engaging with industry stakeholders ensures the ABSF is measuring, reporting, and addressing the issues in which the Australian beef industry and community are interested, and which genuinely influence the sustainability of Australian beef production. As a result, industry representatives and stakeholders can make more informed decisions based upon information gathered by the ABSF.

Over the course of the year, industry bodies have hosted many large events involving a range of stakeholders.

MLA UPDATES

MLA Updates 2025 was the organisation's flagship annual industry event. Held in Adelaide under the theme "Towards 2030: Driving prosperity through productivity, profitability and sustainability", the event brought together producers, researchers, industry leaders and stakeholders to explore emerging opportunities, research outcomes and practical innovations across the Australian red meat supply chain. More than 470 people attended, making it one of the largest MLA Updates events to date. The event demonstrated how collaboration between producers, researchers and industry bodies is helping build a more sustainable, resilient and profitable Australian beef sector as it works towards its 2030 goals.

LIVEXCHANGE

The live export industry's premier conference, LIVEXchange, was held in Perth in 2025. Around 300 delegates attended, including live cattle exporters, farmers, government decision-makers, suppliers and service providers from all over Australia, as well as cattle importers and other international visitors. The two-day program showcased an impressive line-up of speakers who delved into some of the factors shaping live exports, including the latest developments in shipping and transport technology, new approaches to animal welfare, and community sentiment. This was complemented by networking and trade exhibitions, providing plenty of opportunities to renew friendships and create new partnerships. LIVEXchange highlighted the resilience of the industry, as well as the strong demand for quality Australian livestock to support food security and nutrition in key markets.

CATTLE CONNECT

Cattle Connect is CA's flagship annual event and in 2025 it was held in Dalby, QLD, on 11-12 November. The expanded two-day program brought together close to 500 delegates from across the beef supply chain, including producers, processors, researchers, industry leaders and service providers. The event featured conference sessions, panel discussions, agtech demonstrations, trade exhibits, and livestock handling workshops. The event was highly relevant to the sustainability of the Australian beef industry, providing a platform to discuss challenges and opportunities affecting the sector's long-term viability. Topics included methane measurement and emissions reduction, biosecurity, investment in research and development, sustainable production systems, and the role of markets and consumers in shaping industry outcomes. Delegates also explored emerging technologies and innovations designed to improve productivity, profitability and environmental performance.

MEAT PROCESSING AND EXPORT CONFERENCE

MPEC25 was hosted by the Australian Meat Industry Council (AMIC) on the Gold Coast, QLD, and brought together more than 350 delegates from Australia and overseas representing the meat processing, exporting and allied service sectors. The conference focused on major industry issues including global trade disruption, market access, animal welfare, supply chain resilience, manufacturing competitiveness and sustainability. Key discussions covered sustainability credentials in export markets, animal welfare leadership, resilient supply chains, evolving regulatory requirements and maintaining market access in a changing global environment. The conference also highlighted innovation, technology adoption and manufacturing resilience as critical enablers of a profitable and sustainable beef supply chain.

AMPC INNOVATION SHOWCASE

The AMPC Innovation Showcase 2025, held in Brisbane on 10-11 September, brought together around 400 delegates from Australia's red meat processing sector to explore the latest advances in research, technology and innovation. The event featured presentations, workshops and demonstrations covering automation, artificial intelligence, traceability and processing technologies aimed at improving industry performance and competitiveness. The showcase was highly relevant to the sustainability of the beef industry, highlighting practical solutions to reduce environmental impacts while improving productivity and profitability. Key topics included GHG emissions reduction, water recycling and reuse, energy efficiency, animal welfare and supply chain traceability. AMPC also showcased industry achievements in reducing emissions and water intensity, demonstrating how innovation can support a more sustainable and resilient beef processing sector. By encouraging the adoption of new technologies and best practices, the event helped strengthen the long-term sustainability and global competitiveness of Australia's beef industry.

PARLIAMENTARY FRIENDS OF AUSTRALIAN RED MEAT

Parliamentary Friends of Australian Red Meat 2026 was a non-partisan industry engagement event held at Parliament House, Canberra, bringing together politicians and red meat industry representatives to discuss the importance of Australia's sustainable red meat sector. The event was hosted by Speaker Milton Dick MP and supported by Parliamentary Friends co-chairs Senators Susan McDonald and Raff Ciccone. By strengthening relationships between industry and government, the event supported the informed policy discussions required for a sustainable and resilient beef industry.

FUTURE FEEDERS FORUM AND SOIREE

The inaugural ALFA Future Feeders Network (FFN) Forum and Soirée, held on Wednesday 17 September 2025 in Toowoomba, brought together emerging and established leaders from across Australia for a day of learning, networking, and inspiration. The event showcased the strength and ambition of Australia's feedlot workforce, including a focus on career development, industry innovation, and connection. Attendees were treated to a rich program of presentations and panel discussions.



GLOSSARY

AAWCS
Australian Livestock Processing Industry Animal Welfare Certification System. An independently audited certification program used by Australian livestock processors to demonstrate compliance with the industry best practice animal welfare standards.

ABS
Australian Bureau of Statistics

ALFA
Australian Lot Feeders' Association. The peak national body for the Australian cattle feedlot industry.

AMIC
Australian Meat Industry Council. The peak council that represents retailers, processors, exporters and smallgoods manufacturers in the post-farm-gate meat industry.

AMPC
Australian Meat Processing Corporation. The Rural Research and Development Corporation that supports the red meat processing industry throughout Australia.

Antimicrobial Resistance (AMR)
The ability of a microbe to resist the effects of medication that once could successfully destroy the microbe. Microbes include bacteria, viruses and other microscopic organisms.

Antimicrobial Stewardship (AMS)
A set of practices aimed at ensuring responsible use of antimicrobials to prevent resistance and maintain efficacy in both human and animal health. Required under the NFAS for feedlots.

Biosecurity
Measures and protocols to prevent the introduction and spread of pests and diseases in livestock. Includes documented biosecurity plans, simulation exercises, and international partnerships.

Biogenic Methane
Methane produced by biological processes, such as enteric fermentation in cattle. It has a shorter atmospheric lifespan than fossil-based methane and is central to split gas accounting.

CA
Cattle Australia. The national peak body for the Australian grass-fed beef.

Canopy cover
The fraction of ground area covered by the vertical projection of tree crown perimeters.

Carbon Sequestration
A process of capturing and storing atmospheric carbon dioxide, which has the potential to mitigate climate change.

Carcase
The body of an animal after being dressed (removal of head, feet, hide and internal organs).

Castration
Removal of the testicles of a bull by either surgical or non-surgical methods.

CO_2e
Carbon dioxide equivalent, a standard unit for measuring greenhouse gas emissions.

CSIRO
Commonwealth Scientific and Industrial Research Organisation. An Australian federal government agency responsible for scientific research.

DAFF
Department of Agriculture, Fisheries and Forestry.

Disbudding
The destruction or excision of horn-producing cells before they attached to the skull.

Dehorning
The removal of horns from cattle. It is a labour-intensive, skilled operation with important animal welfare implications, and is totally avoidable by breeding polled (hornless) cattle.

EUDR
European Union Deforestation Regulation – EU legislation requiring traceability and due diligence to ensure products are not linked to deforestation. Australia is classified as a low-risk country under this regulation.

ESCAS
Exporter Supply Chain Assurance System. An Australian Government regulatory program based on four principles: animal welfare, control through the supply chain, traceability through the supply chain and independent auditing.

Fair Work Ombudsman (FWO)
The Australian government agency responsible for enforcing workplace laws. Issues compliance notices for breaches of employment standards.

Feedlotting
The process of feeding cattle on grain in a feedlot, where cattle are fed a high protein grain-based diet to reach exact market specifications, before being supplied to processors.

FMD
Foot-and-Mouth Disease is a serious and highly contagious animal disease that affects all cloven-hoofed animals. FMD is a disease of animals, not humans and is a different disease than hand, foot, and mouth disease which is common in young children. FMD is not transmitted to humans by eating affected meat.

GDP
Gross Domestic Product. The total monetary or market value of all the finished goods and services produced within a country. Also known as Industry Value Add.

GHG
Greenhouse gas. The gases in the atmosphere which absorb wavelengths of radiation that a planet emits.

GRSB
Global Roundtable for Sustainable Beef. A global, multi-stakeholder initiative that advances sustainability of the global beef value chain through leadership, science and multi-stakeholder engagement and collaboration.

GWP100
Global Warming Potential over 100 years - A metric used to compare the climate impact of different greenhouse gases over a 100-year period. Used in ABSF emissions reporting.

HSCW
Hot Standard Carcase Weight. Used to describe the weight of an animal, particularly when the animal is sold directly from a farm to an abattoir.

LCA
Life Cycle Assessment. A technique to assess environmental impacts associated with a product across a supply chain.

LPA
Livestock Production Assurance. The Australian livestock industry's on-farm assurance program covering food safety, animal welfare and biosecurity. It provides evidence of livestock history and on-farm practices when transferring livestock through the value chain.

LiveCorp
The service provider and research body for the Australian livestock export industry.

LULUCF
Land Use, Land Use Change and Forestry - A category of emissions and sequestration related to land management, now more accurately attributed to grazing in national inventories.

LSD
Lumpy Skin Disease is an acute to chronic, highly infectious, generalised skin disease of. The disease is caused by a poxvirus and is believed to be mechanically transmitted mostly by a range of arthropods, including biting insects and ticks.

Materiality
The principle of reporting against and addressing the industry's most material issues. These are issues with a direct or indirect impact on an organisation's ability to create, preserve or erode economic, environmental and social value for itself, its stakeholders and society at large.

Maximum Residue Limits
The maximum concentration of an agrochemical permitted legally in a foodstuff.

MERiL
Methane Emissions Reduction in Livestock - A federally funded program evaluating feed additives and technologies to reduce methane emissions from cattle.

MLA
Meat & Livestock Australia - A producer owned industry service provider that provides marketing and research and development services to cattle, sheep and goat industries.

MSA
Meat Standards Australia. A grading system for meat that has met strict eating quality criteria.

NVD
National Vendor Declarations. A form that documents the movement of livestock when they are bought, sold or moved off a property. This form accompanies all such movements.

NFAS
National Feedlot Accreditation Scheme. An independently audited quality assurance scheme initiated by ALFA that includes quality assurance, welfare and other components.

NLIS
National Livestock Identification System. Australia's system for identifying and tracing cattle, sheep and goats.

Non-Tariff Barriers (NTBs)
Trade restrictions that are not tariffs, such as labelling requirements, quotas, or sanitary regulations, which can affect market access.

NRM Region
Natural resource management region. Australia has 54 NRM regions, which are defined by catchments and bioregions.

Many activities of organisations and ecosystem services within the NRM regions are vulnerable to impacts of climate change.

Paris Agreement
An international agreement under the United Nations Framework Convention on Climate Change, dealing with the mitigation of greenhouse gas emissions, adaptation to climate change, and climate change-related finance. The Paris Agreement commits members to the long-term goal of keeping the increase in global average temperatures to well below 2°C above pre-industrial levels, and to limit the increase to 1.5°C.

Polled cattle
Livestock, including cows and bulls, born without horns due to the poll gene for which they can be selectively bred.

Red Meat 2030
A 10-year strategic plan for Australia's red meat businesses, developed in consultation with industry and government.

Safe Work
Safe Work Australia - An Australian government statutory body established to develop national policy relating to work health and safety and workers' compensation.

SDG
Sustainable Development Goals. A set of 17 goals which are an urgent call for action by all countries - developed and developing - in a global partnership. Spaying The surgical procedure of removing the ovaries.

TFP (Total Factor Productivity)
A measure of output relative to all inputs used in production, indicating efficiency and economic performance. Used to assess climate resilience and profitability.

Traceability
The ability to track livestock and beef products through the supply chain to ensure safety, quality, and sustainability. Supported by systems like NLIS and NVD.

APPENDICES

APPENDIX A: INDEPENDENT ASSURANCE STATEMENT

INDEPENDENT ASSURANCE STATEMENT

To the Stakeholders of Meat & Livestock Australia Limited ("MLA")

Limited Assurance Conclusion

Based on the procedures we have performed and the evidence we have obtained, nothing has come to our attention that causes us to believe the materiality assessment ("Subject Matter Information"), including the underlying methodology within the scope of our limited assurance engagement, as disclosed in MLA's Australian Beef Sustainability Framework (ABSF) Annual Update 2026 ("the Report") for the period of 1st July 2025 to 30th June 2026, is not fairly presented and prepared, in all material respects, in accordance with the Reporting Criteria.

Scope of the Assurance Engagement

Our assurance engagement did not extend to any other information included in the Report, nor to information relating to prior reporting periods. We have not performed any procedures on such information and, accordingly, do not express a conclusion thereon.

Reporting Criteria

The Subject Matter Information was prepared and reported in accordance with AA1000 Accountability Principles 2018 – *Materiality Principles* - issued by AccountAbility.

MLA's Responsibilities

Management of MLA was responsible for:

- Selecting and establishing suitable Reporting Criteria for preparing the Subject Matter Information subject to assurance.
- Preparing and presenting the Subject Matter Information in accordance with the Reporting Criteria.
- Designing, implementing, and maintaining internal controls relevant to the preparation of the Subject Matter Information that are free from material misstatement whether due to fraud or error.
- Advising us of any known or suspected issues related to the Subject Matter Information.

Our Responsibilities

Bureau Veritas Australia Pty Ltd ("Bureau Veritas") was responsible for:

- Planning and performing the engagement to obtain the intended level of assurance about whether the Subject Matter Information is free from material misstatement, whether due to fraud or error.
- Forming an independent conclusion based on the procedures performed and evidence obtained.
- Reporting our conclusion to the Directors of MLA.

Bureau Veritas was not involved in the preparation of the Report. We have maintained our independence and performed the engagement in accordance with the relevant ethical requirements applicable to assurance engagements.

Summary of Work Performed

Our limited assurance engagement on the Subject Matter Information was conducted in accordance with ISSA 5000 *International Standard on Sustainability Assurance, General Requirements for Sustainability Assurance Engagements* issued by the International Auditing and Assurance Standards Board (IAASB) and informed by Bureau Veritas' standard procedures and guidelines for external verification and assurance of ESG Information and Sustainability Reports.

Our work was planned and executed in a manner designed to produce the intended level of assurance and to provide a sound basis for our conclusions.

The procedures we performed were based on our professional judgement and included enquiries, observation of processes performed, inspection of documents, analytical procedures, evaluating the appropriateness of quantification methods and reporting policies, and agreeing or reconciling with underlying records. In undertaking our assurance engagement, our procedures comprised:

- Review of the suitability and application of the Reporting Criteria used as the basis for preparing the Subject Matter Information subject to assurance;
- Enquiries of MLA representatives to obtain an understanding of, and evaluate the design and implementation of, the processes, systems and internal controls used to identify, collect, analyse, score and report material topics, including stakeholder engagement, desktop review inputs and materiality scoring methodologies;
- Review of documentary evidence including stakeholder engagement records, workshop outputs, benchmarking analysis, literature reviews and scoring methodologies; and
- Review of overall presentation of the materiality assessment results within the Report, including the materiality matrix, topic prioritisation and disclosures.



Inherent Limitations and Exclusions

The procedures performed in a limited assurance engagement vary in nature and timing from, and are less extensive than, those performed in a reasonable assurance engagement. In particular, a limited assurance engagement involves less detailed testing and does not require the practitioner to obtain the same level of understanding of internal controls as a reasonable assurance engagement. Consequently, the level of assurance obtained in a limited assurance engagement is substantially lower than that which would have been obtained had a reasonable assurance engagement been performed. Even a reasonable assurance engagement, while providing a high level of assurance, does not guarantee that all material misstatements will be detected.

Excluded from the scope of our work is any assurance of information relating to:

- Activities outside the defined reporting period.
- Statements of commitment to, or intention to undertake future actions by MLA
- Statements of position, opinion, belief and/or aspiration by MLA.
- Financial data audited by an external third party.
- Other sites and/or activities not included in the scope.

This independent assurance statement should not be relied upon to detect all errors, omissions or misstatements that may exist within the Report.

Statement of Independence, Impartiality, Competence

Bureau Veritas is a leading provider of Testing, Inspection and Certification (TIC) services. Bureau Veritas operates a quality management system and applies a Code of Ethics that includes requirements relating to integrity, objectivity, professional competence, confidentiality and the management of conflicts of interest.

Bureau Veritas maintains policies and procedures designed to safeguard its independence and impartiality in the conduct of assurance engagements. Throughout this engagement, Bureau Veritas remained independent of MLA and complied with the applicable ethical requirements relevant to assurance engagements.

No member of the assurance team has any business relationship with MLA, its Directors or Management beyond that required for the performance of this engagement. We confirm that there were no conflicts of interest that could impair our independence or objectivity

The assurance team was selected based on its qualifications, experience and industry expertise, including experience in the independent verification and assurance of environmental, social and governance (ESG) information, greenhouse gas emissions data, and associated management systems and reporting processes.

Bureau Veritas Australia Pty Ltd
3rd November 2026

Bureau Veritas

Jeremy Leu
Executive General Manager, Perth, Australia



APPENDIX B: STANDARDS CONTEXT INDEX

This Index provides a navigation of the content of the Australian Beef Sustainability Framework (ABSF) Annual Report 2026 to selected disclosures in common standards including the Global Reporting Initiative (GRI), the Taskforce on Nature-related Financial Disclosures and the ISSB (International Sustainability Standards Board) 2026, *Exposure Draft: Proposed Amendments to the SASB Standards and the IFRS S2 Industry-based Guidance*, IFRS Foundation. The ABSF Annual Update has not been prepared in accordance with these standards. Many disclosures are addressed only partially.

GRI CONTENT INDEX	
STATEMENT OF USE	Meat & Livestock Australia has prepared the information cited in this GRI content index, on behalf of Cattle Australia, the Australian Lot Feeders Association and the Australian Meat Industry Council (as the parties responsible for the Australian Beef Sustainability Framework), for the period 1 July 2025 to 30 June 2026 with reference to the GRI Standards.
GRI 1 USED	GRI 1: Foundation 2021
APPLICABLE GRI SECTOR STANDARD(S)	GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022

GRI STANDARD	DISCLOSURE	LOCATION	SECTOR STANDARD
GENERAL DISCLOSURES			
GRI 2: General Disclosures 2021	2-1: Organisational details	https://cattleaustralia.com.au/ https://www.feedlots.com.au/ https://amic.org.au/ https://www.mla.com.au/	
	2-3: Reporting period, frequency and contact point	Page 2 and back cover	
	2-4: Restatements of information	Page 2	
	2-5 b (i), (ii): External assurance	Pages 2, 45 and Appendix A	
	2-6 a, b (i): Activities, value chain and other business relationships	Pages 6-8	https://www.sustainableaustralianbeef.com.au/
	2-7 b (iv): Employees	Pages 42 and 53	

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
GENERAL DISCLOSURES				
GRI 2: General Disclosures 2021	2-9 a,b,c (i), (ii), (iv), (v): Governance structure and composition	Pages 60-62	https://www.sustainableaustralianbeef.com.au/	
	2-10 a, b (iii), (iv): Nomination and selection of the highest governance body		https://www.sustainableaustralianbeef.com.au/	
	2-11: Chair of the highest governance body	Page 60	https://www.sustainableaustralianbeef.com.au/	
	2-14: Role of the highest governance body in sustainability reporting		https://www.sustainableaustralianbeef.com.au/	
	2-15 a: Conflicts of interest		https://www.sustainableaustralianbeef.com.au/	
	2-17: Collective knowledge of the highest governance body		https://www.sustainableaustralianbeef.com.au/	
	2-22: Statement on sustainable development strategy	Pages 2, 9 and 63-65		
	2-29 a (i), (ii): Approach to stakeholder engagement	Pages 66-67	https://www.sustainableaustralianbeef.com.au/	
MATERIAL TOPICS				
GRI 3: Material Topics 2021	3-1: Process to determine material topics	Pages 58-59	https://www.sustainableaustralianbeef.com.au/	
	3-2 a: List of material topics	Page 59	https://www.sustainableaustralianbeef.com.au/	

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
EMISSIONS				
GRI 3: Material Topics 2021	3-3 c, d, e Management of material topics	Pages 27-20	https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/b.cch.2126-final-report_final.pdf	13.1.1
GRI 305: Emissions 2016	305-4 a, b GHG emissions intensity	Pages 27-28	https://ampc.com.au/media/z3ibdmri/ampc-awi-sustainability-uplift-report.pdf https://ampc.com.au/research-development/industry-excellence/2024-environmental-performance-review/	13.1.5
	305-5 a, b, c, e Reduction of GHG emissions	Page 27	https://www.mla.com.au/globalassets/mla-corporate/research-and-development/final-reports/2026/b.cch.2126-final-report_final.pdf	13.1.5
BIODIVERSITY				
GRI 3: Material Topics 2021	3-3: c,d,e Management of material topics	Page 20	https://www.mla.com.au/research-and-development/Environment-sustainability/biodiversity-and-vegetation/	13.3.1
SOIL HEALTH				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Page 22	https://www.mla.com.au/extension-training-and-tools/feedbase-hub/healthy-fertile-soils/	13.5.1
PESTICIDES USE				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Page 47	https://www.agriculture.gov.au/agriculture-land/farm-food-drought/food/nrs	13.6.1
WATER AND EFFLUENTS				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 31-32	https://ampc.com.au/research-development/industry-excellence/2024-environmental-performance-review/	13.7.1
FOOD SAFETY				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 45 and 47	https://www.mla.com.au/meat-safety-and-traceability/	13.10.1
GRI 416: Customer Health and Safety 2016	416-2 a: Incidents of non-compliance concerning the health & safety impacts of products and services	Pages 52 and 55	https://www.agriculture.gov.au/agriculture-land/farm-food-drought/food/nrs	13.10.3
ANIMAL HEALTH AND WELFARE				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 11-18	https://www.mla.com.au/research-and-development/animal-health-welfare-and-biosecurity	13.11.1

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
ANIMAL HEALTH AND WELFARE				
GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022	13.11.2 Report the percentage of production volume certified to third-party animal health and welfare standards and list these standards.	Page 14	https://www.ausmeat.com.au/ https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/livestock/exporters/escas https://aawcs.com.au/	3.11.2
NATURAL ECOSYSTEM CONVERSION				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 8, 25-26 and 34		13.4.1
GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022	13.4.4 Size in hectares, the location, and the type of natural ecosystems converted since the cutoff date on land owned, leased, or managed by the organization.	Pages 25-26		13.4.4
OCCUPATIONAL HEALTH AND SAFETY				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 50-51		13.19.1
GRI 403: Occupational Health and Safety 2018	403-9 a(i), (iii), e: Work-related injuries	Page 50		13.19.10
TRAINING AND EDUCATION				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 17-18, 46, 51 and 56-57		14.8.3
GRI 404-2: Training and Education 2016	404-2 a: Programs for upgrading employee skills	Pages 56-57		14.8.3

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
CLIMATE ADAPTATION AND RESILIENCE				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 36-37		13.2.1
GRI 201: Economic Performance 2016	201-2 a. (i) Financial implications and other risks and opportunities due to climate change	Page 36	https://www.agriculture.gov.au/abares/research-topics/productivity/agricultural-productivity-estimates	13.2.2

TNFD CONTENT INDEX

CORE GLOBAL METRIC	DISCLOSURE METRIC	LOCATION
C1.0: Total spatial footprint (km²)	Total surface area controlled/ managed by the organisation, where the organisation has control (km²)	https://cattleaustralia.com.au/wp-content/uploads/2024/09/CA-LMC-Paper-WEB_FINAL.pdf
C1.1 Extent of land/ freshwater/ocean-use change	Extent of land/freshwater/ ocean ecosystem use change (km²) by: • Type of ecosystem; and • Type of business activity	Pages 31-32
C4.0 Measures against unintentional introduction of invasive alien species (IAS)	Proportion of high-risk activities operated under appropriate measures to prevent unintentional introduction of IAS, or low-risk designed activities	Pages 10, 12-13, 20 and 23-24

ISSB (International Sustainability Standards Board) 2026, *Exposure Draft: Proposed Amendments to the SASB Standards and the IFRS S2 Industry-based Guidance,* IFRS Foundation Content Index

CODE	METRIC	LOCATION
FB-MP-160a.5 Land Use & Ecological Impacts	(1) Total spatial footprint of operations, (2) area disturbed and (3) area restored	https://cattleaustralia.com.au/wp-content/uploads/2024/09/CA-LMC-Paper-WEB_FINAL.pdf Pages 20 and 25-26
FB-MP-250a.6 Food Safety	Processes, controls and procedures to ensure food safety throughout the value chain	Pages 45, 47 and 55
FB-MP-320a.1 Workforce Health & Safety	(1) Number of fatalities and (2) total recordable incident rate for (a) employees and (b) non-employee workers; (3) average hours of health, safety and emergency response training	Page 50
FB-MP-410a.3 Animal Health & Welfare	Percentage of production certified to a third-party animal welfare standard	Pages 10,14, 17 and 45
	Description of animal welfare strategy, including targets, procedures and value chain integration	Pages 10-18 and 45
	Description of risks and opportunities related to biosecurity, including strategies for disease management	Pages 10 and 12-13

© November 2026 Meat & Livestock Australia Limited ABN 39 081 678 364. All rights are expressly reserved. Requests for further authorisation should be directed to info@mla.com.au. Care has been taken to ensure the accuracy of the information contained in this publication. However, MLA, MDC and ISC ("MLA Group") do not accept responsibility for the accuracy, currency or completeness of the information or opinions contained in this publication. This publication is intended to provide general information only. It has been prepared without taking into account your specific circumstances, objectives, or needs. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.







Australian Beef
Sustainability Framework

FOR FURTHER INFORMATION PLEASE CONTACT:

absf@redmeatandlivestock.com.au