



Australian Beef
Sustainability
Framework

Annual
Update **2021**



RMAC

ABOUT



this report

The Australian Beef Sustainability Framework (ABSF) was developed by the Australian beef industry to meet the changing expectations of customers, consumers, investors, and other external stakeholders. This is achieved by identifying opportunities for the beef industry to improve and to showcase its sustainability credentials, through tracking performance against industry priorities.

Not only does this deliver important information as to how industry can strive for continual improvement, but it also provides a scorecard to demonstrate the sustainability credentials of industry against key priorities to customers, consumers, investors, and other external stakeholders.

This is a summary version of the full 2021 Annual Update, and represents the entire Australian beef value chain, including farms, feedlots, transport, processing, and export. Since 2017, considerable work has been undertaken to optimise indicators and collect the required data to map industry's performance. This is achieved through extensive consultation and the industry programs outlined in the full update. The result is a customer-facing document which aims to:

- » Promote industry transparency and progress to customers and the community

- » Advise industry investment for continuous improvement in areas most important to our customers and stakeholders
- » Help protect and grow access to investment and finance by providing evidence of performance and continuous improvement
- » Foster constructive relationships with stakeholders to work collaboratively on continuous improvement.

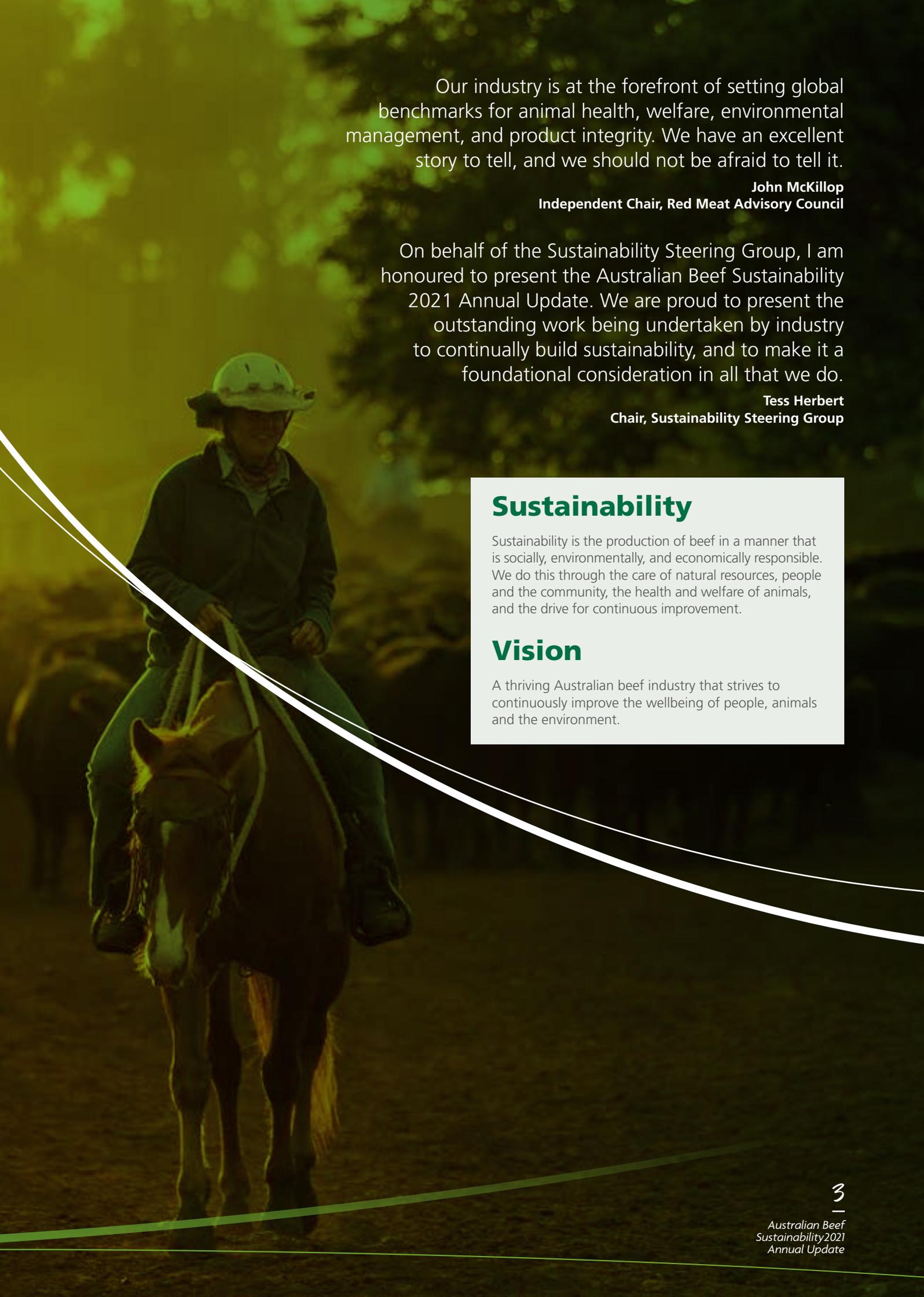
The Framework does not:

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

The full 2021 Annual Update is available for download from www.sustainableaustralianbeef.com.au

The ABSF is driven by industry, and led by an independent Sustainability Steering Group (SSG). Peak Industry Councils (Australian Livestock Exporters Council, Australian Lot Feeders' Association, Australian Meat Industry Council, and the Cattle Council of Australia) have provided valuable feedback, both on this update and on the other work of the Framework.





Our industry is at the forefront of setting global benchmarks for animal health, welfare, environmental management, and product integrity. We have an excellent story to tell, and we should not be afraid to tell it.

John McKillop
Independent Chair, Red Meat Advisory Council

On behalf of the Sustainability Steering Group, I am honoured to present the Australian Beef Sustainability 2021 Annual Update. We are proud to present the outstanding work being undertaken by industry to continually build sustainability, and to make it a foundational consideration in all that we do.

Tess Herbert
Chair, Sustainability Steering Group

Sustainability

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.

Vision

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

HIGHLIGHTS



Despite herd rebuild, the Australian beef industry has halved its CO₂e emissions since 2005, recording a reduction of 51.46% in 2018.



Regular pain relief usage for cattle has risen to 30% from 21%.



Australia continues to be free from World Organisation for Animal Health Official Diseases.



The processing sector reduced the amount of CO₂e emitted per tonne Hot Standard Carcase Weight by 8.1% when processing beef, and further reduced water usage by 7.9%.



Producers rated their global life satisfaction at 79.45 out of 100, indicating an increase in quality of life from previous years.



Responses to the producer sustainability survey increased four-fold to over 1,100.



Awareness of Animal Welfare Standards for cattle has risen to 97.3% from 73%.

CHALLENGES



The processing sector has faced export bans and continues to work through non-tariff trade barriers.



Drought-impacted livestock supply caused the early short-term closure of processing plants.



The ongoing response to COVID-19 created issues in sourcing labour in regional communities.



Rapid and effective responses to changing health advice kept the beef supply chain operational during the COVID-19 emergency.



Floods and fire continue to impact farmers and the animals they care for in many parts of the country.

THE AUSTRALIAN BEEF

Sustainability Framework



THE AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK IS MADE UP OF:

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THEMES

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PRIORITY AREAS

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PRIORITIES

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INDICATORS



Animal welfare

The wellbeing and health of animals is of paramount importance to producers and the entire beef value chain. Each year, industry invests in research, development, and adoption programs to ensure high standards of animal welfare and to continually identify and develop ways to do things better.

Good animal welfare is entrenched in our industry's standards and guidelines, and has led to Australia becoming a world leader in animal welfare.

The animal welfare theme of the ABSF was developed with the five domains of animal welfare in mind, and continues to be a key demonstrator of industry's commitment to sustainable practices.

PRIORITIES

Enhance animal wellbeing

1. 1.1 Competent livestock handling
- 1.2 Safe livestock transport
- 1.3 Animal husbandry techniques
- 1.4 Humane processing

Promote animal health

2. 2.1 Maintain healthy livestock
- 2.2 Minimise biosecurity risk



Economic resilience

Economic health is intrinsically linked to the overall performance and capability of any business, and thus is an important measure of sustainability.

Australia is one of the largest exporters and most efficient producers of beef in the world, however it is important to understand how profitability delivers resilience against unexpected shocks such as drought and market change, which can have flow-on effects to environmental performance and animal welfare.

The ABSF reports on economic resilience by focusing on aspects of reducing costs to industry, which are higher than our major global competitors, and boosting productivity. As global demand for Australian beef increases, expanding the industry's access to international markets will support more strong and profitable beef businesses.

PRIORITIES

Enhance profitability and productivity

3. 3.1 Profitability across value chain
- 3.2 Farm, feedlot and processor productivity and cost of production

Optimise market

4. 4.1 Barriers to trade
- 4.2 Product integrity



Environmental stewardship

As a major land steward, the beef industry shares a close and important relationship with the environment in which it operates, and prospers through maintaining a thriving ecosystem and healthy soil, vegetation, water, and air.

The beef industry is, therefore, ideally positioned to contribute to the ecological health of the Australian landscape by implementing sustainable land management and grazing practices.

Australian beef producers are committed to fulfilling their role as environmental stewards, while nurturing their surrounding ecosystems to foster productivity.

The ABSF also highlights how industry is adapting to the changing environment.

PRIORITIES

Improve land management practice

5. 5.1 Minimise nutrient and sediment loss
- 5.2 Balance of tree and grass cover

Mitigate and manage climate change

6. 6.1 Manage climate change risk
- 6.2 Climate change adaptation and preparedness
- 6.3 Efficient use of water

Minimise waste

7. 7.1 Solid waste to landfill from processing



People and the community

A safe, healthy, and capable workforce, together with prosperous and resilient regional communities, is essential to the sustainability of beef production.

The ABSF reports how the industry promotes a safe, healthy, and growing workforce, and how it provides greater access to skills and labour.

The beef industry also supports human health across Australia and the world by providing safe and nutritious food, while increasing the prosperity of rural and regional communities.

PRIORITIES

Produce nutritious and safe food

8. 8.1 Beef is eaten as part of a healthy balanced diet
- 8.2 Food safety
- 8.3 Antimicrobial stewardship

Build workplace capacity

9. 9.1 Education and training
- 9.2 Diversity in the workforce

Ensure health, safety and wellbeing of people in the industry

10. 10.1 Health and safety of people in industry
- 10.2 Wellbeing of people in the industry

SCORECARD



The Sustainability Steering Group constantly seeks alternative data sources where increased reputability is required. Where possible, these changes have been implemented in the scorecard metrics, and the data sources identified in the explanation.

Not all indicators have existing data sources. To address this, the ABSF engages producers annually through a producer sustainability survey. This year, with thanks to industry support, the survey received over 1,100 responses, up from 254 in 2019. This increase in responses allows the industry to be more confident in the figures it is presenting against indicators.

The agricultural industry, by nature, will experience varying trends due to external forces, and this scorecard aims to be transparent around the data to improve industry performance.

Some indicators have had to change slightly due to variations in data gathering mechanisms. These are:

- 1.3a** Reworded to reflect producer sustainability survey
- 2.2b** Reworded to reflect the declaration from the World Organisation for Animal Health (OIE)
- 3.1a** Reworded to reflect what is being expressed
- 4.2a** Reworded to align with consumer surveys
- 6.3a** Reworded to reflect how the data is presented
- 9.1b** On-the-job training removed as the subjective nature of the indicator made it impossible to measure



ANIMAL WELFARE

Indicator	Data	Data Timeframe	Trends
PRIORITY AREA 1: ENHANCE ANIMAL WELLBEING			
PRIORITY 1.1: COMPETENT LIVESTOCK HANDLING			
1.1a The percentage awareness of the Australian Animal Welfare Standards for Cattle.	97.3%	2020	Upward, Improvement
1.1b The percentage compliance with National Feedlot Accreditation Scheme (NFAS) Animal Welfare requirements.	94.7%	2020	Downward, setback
1.1c Percentage awareness of the Australian Animal Welfare Standards for Sleyards and Depots.	93.45%	2020	Not Applicable
PRIORITY 1.2: SAFE LIVESTOCK TRANSPORT			
1.2a Number of powered vehicles and trailing equipment which operate under TruckSafe Animal Welfare.	603 - Powered Vehicles 1844 - Trailing Equipment	2020	Upward, Improvement
1.2b The percentage of reportable incidents of shipboard mortalities.	0.11%	2020	Flat, No Change
PRIORITY 1.3: ANIMAL HUSBANDRY TECHNIQUES			
1.3a The percentage of producers breeding livestock to be naturally polled.	70.84%	2020	Not Applicable
1.3b Percentage of industry regularly using pain relief when undertaking aversive husbandry practices.	30.00%	2020	Upward, Improvement
PRIORITY 1.4: HUMANE PROCESSING			
1.4a The percentage of cattle slaughtered through an establishment accredited under the Australian Livestock Processing Industry Animal Welfare Certification System (AAWCS).	97.87%	2020	Upward, Improvement
1.4b The percentage compliance with Exporter Supply Chain Assurance System (ESCAS).	99.99%	2020	Upward, Improvement





ANIMAL WELFARE

Indicator	Data	Data Timeframe	Trends
PRIORITY AREA 2: PROMOTE ANIMAL HEALTH			
PRIORITY 2.1: MAINTAIN HEALTHY LIVESTOCK			
2.1a Vaccination rates for clostridial diseases.	72%	2020	Flat, No Change
PRIORITY 2.2: MINIMISING BIOSECURITY RISK			
2.2a The percentage of Australian cattle properties covered by a documented biosecurity plan.	91%	2020	Upward, Improvement
2.2b Australia continues to be free from the World Organisation for Animal Health (OIE) Official Diseases.	100%	2020	Flat, No Change



ECONOMIC RESILIENCE

Indicator	Data	Data Timeframe	Trends
PRIORITY AREA 3: ENHANCE PROFITABILITY AND PRODUCTIVITY			
PRIORITY 3.1: PROFITABILITY ACROSS VALUE CHAIN			
3.1a Farm business profit at full equity (expressed as a rate of return to total capital).	ALL Producers: 5.6% Top 25%: 9.5%	2016-2020	Upward, Improvement
PRIORITY 3.2: FARM, FEEDLOT AND PROCESSOR PRODUCTIVITY AND COST OF PRODUCTION			
3.2a Total farm productivity	120.9	2016-2020	Downward, Setback
3.2b Cost of beef produced on Australian farms. (US c/kg cwt sold)	608.1 USD cwt	2020	Upward Setback
3.2c Average cost of cattle processing per head.	\$360.62	2016	No Trend Applicable
PRIORITY AREA 4: OPTIMISE MARKET			
PRIORITY 4.1: BARRIERS TO TRADE			
4.1a Market Access Index.	19.8	2020	Downward, Improvement
4.1b Costs of technical trade barriers.	\$1.742 billion p.a	2020	Downward, Improvement
PRIORITY 4.2: PRODUCT INTEGRITY			
4.2a The percentage of Australian consumers who agree in relation to Australian beef: – I trust the safety of this meat – Is full of flavour – Is consistently high quality	60% safety 59% flavour 48% quality	2020	Flat, No Change



ENVIRONMENTAL STEWARDSHIP

Indicator	Data	Data Timeframe	Trends		
PRIORITY AREA 5: IMPROVE LAND MANAGEMENT PRACTICES					
PRIORITY 5.1: MINIMISE NUTRIENT AND SEDIMENT LOSS					
5.1a	Number of days per year soil covered by vegetation.	No data available	No data available	Not Applicable	—
5.1b	Soil health.	No data available	No data available	Not Applicable	—
5.1c	Water quality.	No data available	No data available	Not Applicable	—
PRIORITY 5.2: BALANCE OF TREE AND GRASS COVER					
5.2a (i)	Percentage cattle producing land set aside for conservation or protection purposes.	3.02%	2018-2019	Upward, Improvement	↗
5.2a (ii)	Land managed by beef producers for conservation outcomes through formal arrangements.	No data available	No data available	No data available	—
5.2a (iii)	Percentage cattle-producing land managed for environmental outcomes through active management.	47.22%	2020	Downward, Setback	↘
5.2b (i)	Percentage national forest cover gain.	0.75%	2018-19	No trend applicable	—
5.2b (ii)	Percentage national forest cover loss.	1.15%	2018-19	No trend applicable	—
5.2b (iii)	Percentage national woodland cover gain.	3.23%	2018-19	No trend applicable	—
5.2b (iv)	Percentage national woodland cover loss.	3.36%	2018-19	No trend applicable	—
5.2b (v)	Percentage of regions achieving healthy ground cover thresholds.	57.4%	2019	No trend applicable	—
PRIORITY AREA 6: MITIGATE AND MANAGE CLIMATE CHANGE					
PRIORITY 6.1: MANAGE CLIMATE CHANGE RISK					
6.1a	kg CO ₂ e emitted per kg liveweight when raising beef.	12.6kg	2019	Downward, Improvement	↘
6.1b	kg CO ₂ e emitted per tonne Hot Standard Carcase Weight (HSCW) when processing beef.	397 kg CO ₂ -e / t HSCW	2020	Downward, Improvement	↘
6.1c	Carbon captured and re-used in processing.	5.8% of energy use	2020	Downward, Setback	↘
6.1d	Carbon sequestration.	No data available	No data available	No trend applicable	—
6.1e	Percentage total CO ₂ e reduced by beef industry from a 2005 baseline.	51.46%	2018	Flat, No Statistical Change	→





ENVIRONMENTAL STEWARDSHIP

Indicator	Data	Data Timeframe	Trends
PRIORITY AREA 6: MITIGATE AND MANAGE CLIMATE CHANGE			
PRIORITY 6.2: CLIMATE CHANGE ADAPTATION AND PREPAREDNESS			
6.2a Producer confidence in having the information, tools, technologies and resources (both business and biophysical) to be able to adapt to change over time.	4.68 (out of 7)	2020	Downward, Setback
PRIORITY 6.3: EFFICIENT USE OF WATER			
6.3a Litres of water used per kilogram of liveweight for raising cattle.	486 L/kg	2019	Downward, Improvement
6.3b Kilotres of water used per tonne Hot Standard Carcase Weight (HSCW) when processing beef.	7.9KL per tonne HSCW	2020	Downward, Improvement
PRIORITY AREA 7: MINIMISE WASTE			
PRIORITY 7.1: SOLID WASTE TO LANDFILL FROM PROCESSING			
7.1a Kilograms of solid waste per tonne Hot Standard Carcase Weight (HSCW) when processing beef.	11.9kg per tonne HSCW	2020	Upward, Setback



PEOPLE AND THE COMMUNITY

Indicator	Data	Data Timeframe	Trends
PRIORITY AREA 8: PRODUCE NUTRITIOUS AND SAFE FOOD			
PRIORITY 8.1: BEEF IS EATEN AS PART OF A HEALTHY BALANCED DIET			
8.1a The percentage of consumers in Australia who consider beef part of a healthy balanced diet.	55%	2020	Flat, No change
PRIORITY 8.2: FOOD SAFETY			
8.2a The percentage of product exported that a market found unacceptable in terms of food safety-related indicators.	USA 0.0205%	2020	Flat, No change
PRIORITY 8.3: ANTIMICROBIAL STEWARDSHIP			
8.3a The percentage of feedlots covered by an antibiotic stewardship plan.	62.48%	2020	Upward, Improvement
PRIORITY AREA 9: BUILD WORKFORCE CAPACITY			
PRIORITY 9.1: EDUCATION AND TRAINING			
9.1a Number of traineeships and apprenticeships enrolled and completed.	Commenced: Farm: 1022 Feedlot: 39 Meat processing: 3800 Completed: Farm: 2576 Feedlot: 33 Meat processing: 2167	2019	Upward, Improvement
9.1b Percentage of industry participants with a higher education qualification.	34.70%	2020	Flat, No change
PRIORITY 9.2: DIVERSITY IN THE WORKFORCE			
9.2a The percentage of women and men in the workforce.	Farms & Feedlots: Female - 39.6% Male - 60.4% Processing: Female - 25.7% Male - 74.3%	2020	Flat, No change
9.2b The age breakdown of the workforce.	18-24: 14.7% 25-34: 14.7% 35-44: 13.2% 45-54: 16.8% 54-64: 19.3% 65+: 21.4%	2020	No trend Applicable
9.2c The percentage Indigenous representation in the workforce.	2.80%	2020	Downward, Setback
PRIORITY AREA 10: ENSURE HEALTH, SAFETY AND WELLBEING OF PEOPLE IN THE INDUSTRY			
PRIORITY 10.1: HEALTH AND SAFETY OF PEOPLE IN THE INDUSTRY			
10.1a Notifiable fatalities.	Farms: 35 Feedlots: 0 Processing 2	2015-2019	Downward, Improvement
PRIORITY 10.2: WELLBEING OF PEOPLE IN THE INDUSTRY			
10.2a Global Life Satisfaction (GLS) Index.	79.45 (out of 100)	2020	Upward, Improvement







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AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK

FOR FURTHER INFORMATION PLEASE CONTACT:

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