



RED MEAT

2030

A shared vision and direction for Australia's red meat and livestock businesses



an-fry a
re steak

Step 5

When moisture starts to appear on top
of the steak (2-3 minutes) flip it over
and, again, don't touch.



“WE ARE PROUD OF
OUR INDUSTRY AND
CONSUMERS FEEL
GOOD ABOUT US AND
OUR PRODUCTS...”

What will our world look like in 2030?

Red Meat 2030 is about where our industry is now, and where it needs to be in the future.

Red Meat 2030 (formerly the Meat Industry Strategic Plan), is the strategic plan for Australia's red meat businesses. It will transform and cement our industry as one of people, profit and purpose, which delivers on our place in the Australian way of life.

In developing Red Meat 2030, people from industry and government have worked together to set the priorities and identify ways we can work together to achieve a successful future.

Red meat is good for human lives, and Red Meat 2030 is first and foremost about people – the people that live, work and own red meat businesses – and those within our community that consume our product and benefit from our industry.

It will be our people – our industry and customers – who empowers us to deliver excellence in the management of our livestock, our environment, our systems and our markets to 2030.

These are the vital ingredients for us to double the value of red meat by 2030, and be the trusted provider of the highest quality protein.

Red Meat 2030 is a dynamic plan with the ability to respond to risks and harness opportunities as they emerge.

We can be proud that the Australian red meat industry continues to evolve, maintaining and improving the things that set us apart from our competitors.

We strive to be a world-leading, sustainable and people-centred industry delivering high value, high quality products to Australia and the world.

For businesses, Red Meat 2030 will deliver a prosperous industry that you can be proud of. For our loyal red meat consumers, we hope you feel as good about eating red meat, as we do about producing it.



Don Mackay

**Independent Chair
Red Meat Advisory Council (RMAC)**



OUR VISION

Together, we will double the value of Australian red meat sales as the trusted source of the highest quality protein.

RED MEAT 2030

WHAT SUCCESS LOOKS LIKE IN 2030

**DOUBLE
THE VALUE**

of sales of Australian red meat

**HALVE
THE COST**

of regulatory and industry compliance

REDUCE

trade barriers by \$1 billion

ACHIEVE

carbon neutrality

**TRIPLE
THE VALUE**

of capital accessed

**DOUBLE
THE %**

of project funding for extension for red meat

In developing the priorities and initiatives in Red Meat 2030 we have identified core principles that will guide and ensure our industry's success.

OUR PRIORITIES



OUR PEOPLE

People see being part of the Australian red meat and livestock industry as attractive now and into the future.



OUR CONSUMERS, CUSTOMERS AND COMMUNITY

People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.



OUR LIVESTOCK

We set the standard for world class animal health, welfare, biosecurity and production practices.



OUR ENVIRONMENT

We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.



OUR MARKETS

We improve the economic resilience for our industry by increasing access to, and the performance of existing and new markets.



OUR SYSTEMS

We are a trusted brand because of our integrity systems, built on trust and respect that supports strong partnerships and sharing of information, reducing unnecessary industry and government regulation.

OUR DECISION MAKING PRINCIPLES



COLLABORATION



SUSTAINABILITY



SOCIAL PURPOSE



INVESTMENT IN CAPABILITY



CUSTOMER & CONSUMER CENTRED



TRUST



INNOVATION AND ADOPTION

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Published by Red Meat Advisory Council Limited ABN 44 083 193 891

October 2019

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BUILDING BLOCKS TO 2030

OUR VISION

We have set the ambitious vision of doubling the value of Australian red meat sales by 2030 as the trusted source of the highest quality protein. This bold vision will provide our industry clear guidance against which we can determine our success.

OUR PRIORITIES

To deliver on our vision, we have identified our **6** strategic priorities. These will provide our industry the necessary focus and direction to achieve our vision.

SUCCESS INDICATORS

Our **28** success indicators are the critical signs of progress at an industry-level that we will monitor to ensure we deliver on our priorities.

OUR INITIATIVES

To achieve our vision, we have established a set of **23** initiatives of work across the priorities. These action-oriented initiatives will provide whole-of-industry benefits.

OUR IMPLEMENTATION PLAN

To implement this ambitious plan, we will need to work effectively as a unified industry. To ensure the effective implementation of Red Meat 2030 we will establish cross-sectoral, skills-based Taskforces. These Taskforces will establish clear responsibilities and accountabilities across the industry to ensure the effective roll out and review.



OUR 2030 VISION

TOGETHER, WE WILL
DOUBLE THE VALUE OF
AUSTRALIAN RED MEAT
SALES AS THE TRUSTED
SOURCE OF THE HIGHEST
QUALITY PROTEIN



WHO IS RED MEAT 2030 FOR?

OUR INDUSTRY

Red Meat 2030 outlines a shared vision and direction for the Australian red meat and livestock industries over the next decade.

Together, we will work to translate and apply the strategy to the whole red meat supply chain, to ensure all parts of the industry are working towards shared outcomes.



OUR CUSTOMERS, CONSUMERS AND COMMUNITIES

Red Meat 2030 provides our customers, consumers and communities insight into our industry, and the proactive steps we are taking to address global challenges.

Our customers	Buyers and sellers of Australian red meat and livestock from paddock to plate
Our consumers	Diners and purchasers of Australian red meat
Our communities and government	Societies, regions and cultures that Australian red meat businesses are part of and contribute to



RED MEAT

2030

OUR DECISION MAKING PRINCIPLES

In developing the priorities and initiatives in Red Meat 2030 we have identified principles that will guide and ensure our industry's success.



Improve collaboration and connection across the industry and externally

As businesses that produce food, we are a chain of responsibility and are customers to each other. To deliver our vision we will work with each other and external partners collectively and accountably.



Recognise and promote our social purpose

We will continue to build trust and respect with our customers, consumers and communities, through delivering high quality nutrition, animal health and welfare, and environmental stewardship.



Enhance the sustainability of the Australian red meat supply chain

We will enhance the economic resilience, profitability and long-term sustainability of the Australian red meat supply chain.



Invest in our capability and capacity

We will attract, retain and invest in our people and provide them the support and resources they need to deliver on Red Meat 2030.



Customer and consumer-centric

We will take a customer and consumer-centric approach, putting the needs, wants and expectations of customers and consumers globally at the centre of everything we do.



Build trust and respect through the supply chain and with our customers and consumers

We will continue to build integrity, accountability and transparency to strengthen trust across the supply chain, and between our industry and its customers and consumers.



Support innovation and early adoption

We will enable a future-focused, agile and change-ready Australian red meat industry through innovation and early adoption of technology.

A DECADE OF CHANGE

Australia's red meat and livestock industry is entering a decade of unprecedented change and opportunity.

We have a strong foundation for growth. Our reputation for product quality is renowned around the world, and our 80,000 businesses and those that support them, continue to be a major contributor to Australia's economy and a lifeblood for our rural and regional areas.

Building on our strong foundation, we have set the ambitious vision for 2030 of doubling the value of Australian red meat sales as the trusted source of the highest quality protein. To achieve this, we know we need to work together and listen closely to our customers and consumers. Success will be realised through our passionate people delivering world-class red meat and livestock products across the whole supply chain, here in Australia and throughout the world.

Our relationship with our customers, consumers and communities is paramount to our success. Developing more opportunities to work together, we will adapt our industry and innovate our offering to the ever-changing needs, and values sought from food production

systems. Core to this is our ability to take the highest care of our livestock and environment within a profitable and sustainable industry. This will lead the industry towards long-term sustainability with better outcomes for all.

The coming decade also presents significant challenges. Changing environmental conditions and pressing issues such as climate change, resource scarcity and increasing input costs will need to be addressed. To thrive, we will need to evolve and adapt our practices across the supply chain and continue to drive efficiency. This will accompany our continued focus on issues spanning market access, biosecurity, research and development, extension and adoption.

Red Meat 2030 outlines a broad range of initiatives that together will continue to build our industry's sustainability and profitability in a fiercely competitive world.

Together we will forge new pathways to ensure our industry continues to be world renowned for delivering the highest quality protein and creating amazing food experiences for people everywhere.

THE PURPOSE OF RED MEAT 2030

Red Meat 2030 is the unifying strategy for Australia's red meat and livestock industry over the next decade. The purpose of Red Meat 2030 is to:

Identify whole-of-industry priorities

Red Meat 2030 identifies shared priorities across the red meat and livestock supply chain.

Support our people to deliver

Red Meat 2030 is focused on supporting our people throughout the industry who are charged with delivering on our priorities now and into the future.

Inform our research and development

Red Meat 2030 will guide the research and development priorities for the Australian red meat and livestock industry.

Put our customers and consumers at the centre of everything we do

Red Meat 2030 considers how our priorities and initiatives help meet the needs and demands of our consumers locally and globally.

Coordinate industry investment and advocacy

Red Meat 2030 seeks to coordinate investment and advocacy across the Australian red meat industry to maximise impact.

Adapt to a changing world

Red Meat 2030 acknowledges that 10 years is a significant period and that within this time frame, things will change. Reviews and effective feedback loops will inform the refinement of Red Meat 2030 throughout its life.

OUR INDUSTRY AT A GLANCE

**\$28.5 BILLION
IN RED MEAT SALES**

for domestic and export sales for 2018-2019 in (\$AUD)

**\$17.2 BILLION
IN EXPORT RECEIPTS**

Boxed red meat: 13.5 billion for 2018-2019 (\$AUD)

Live exports: 1.8 billion for 2018-2019 (\$AUD)

Co-products/further processing: 1.95 billion for 2018-2019 (\$AUD)

**\$11.3 BILLION
IN DOMESTIC SALES**

Beef: 8.8 billion for 2018-2019 (\$AUD)

Lamb: 2.5 billion for 2018-2019 (\$AUD)

**80,000
BUSINESSES**

in 2017-2018, across the red meat industry supply chain



2.2 MILLION HEAD LIVE EXPORTED

Cattle: 1.09 million head live exported (2018)

Sheep: 1.1 million head live exported (2018)

Goats: 21,580 head live exported (2018)

3 MILLION TONNES OF RED MEAT

forecast for production by the Australian red meat industry in 2019 –
enough to feed over 73 million people

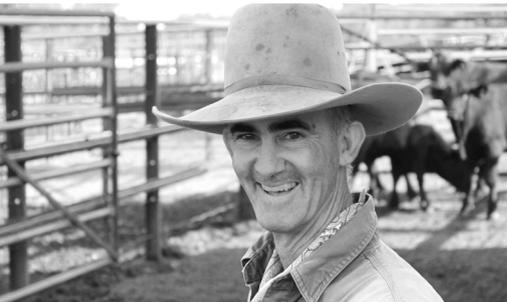
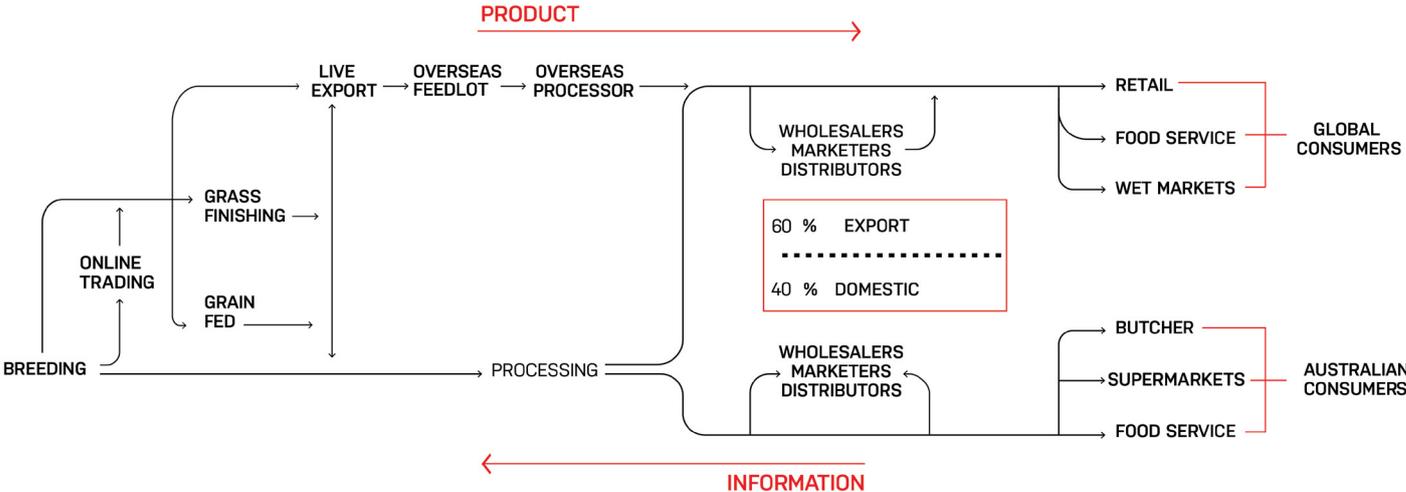
405,000 EMPLOYED IN INDUSTRY

for 2018-2019, across the red meat supply chain

Enabling 172,400 direct jobs

Enabling 232,400 indirect jobs

THE RED MEAT SUPPLY CHAIN



RED MEAT 2030 PRIORITIES

Each of Red Meat 2030's six priorities is connected to an objective and to initiatives which create the necessary direction and action to achieve Red Meat 2030.



OUR PEOPLE

People see being part of the Australian red meat and livestock industry as attractive now and into the future.

Initiatives

- Attracting and retaining good people
- Developing skilled and capable people
- Enabling practice change



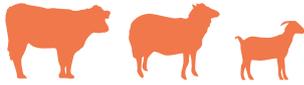
OUR CUSTOMERS, CONSUMERS AND COMMUNITIES

People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.

Initiatives

- Educating and advocating for Australian red meat
- Responding to our audience
- Positioning red meat as a protein of choice
- Identifying high-value opportunities





OUR LIVESTOCK

We set the standard for world class animal health, welfare, biosecurity and production practices.

Initiatives

- Ensuring whole-of-industry animal health and welfare standards and systems
- Adopting animal health, welfare, biosecurity and production best practices
- Optimising animal production for the environment and market



OUR ENVIRONMENT

We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.

Initiatives

- Advancing our sustainability frameworks and supporting their adoption
- Moving to a carbon neutral industry by 2030
- Expanding our role in environmental stewardship
- Building on our proactive approach to climate variability



OUR MARKETS

We improve the economic resilience for our industry by increasing access to, and the performance of existing and new markets.

Initiatives

- Reducing tariff and quota barriers to trade
- Reducing non-tariff barriers to trade
- Building on our approach to biosecurity and food safety
- Promoting investment in our industry
- Ensuring Australia remains competitive with international red meat markets



OUR SYSTEMS

We are a trusted brand because of our integrity systems, built on trust and respect that supports strong partnerships and sharing of information, reducing unnecessary industry and government regulation.

Initiatives

- Ensuring end-to-end integrity, traceability and provenance
- Enabling supply chain data integration and efficiency
- Improving digital connectivity
- Embracing automation and Agtech

SUCCESS INDICATORS

Our success indicators are the critical signs of progress at an industry-level that we will monitor to ensure we are on the right path to achieve our vision over the next decade.

We will monitor our progress and adjust our actions and approach as required, in order to achieve our vision for 2030. To do this we will undertake integrated, project-based monitoring, evaluation and reporting.

PRIORITY



OUR PEOPLE

INDICATORS

1. Substantial increase in adoption rates by doubling the percentage of project funding for extension
2. Workforce turnover rates have decreased resulting in a more stable workforce
3. Application response rates have increased helping us find the people we need to meet workforce demands
4. Training and upskilling rates have increased ensuring we have the skills we need
5. The diversity of our industry has increased making it a more inclusive place to work



CUSTOMERS, CONSUMERS & COMMUNITY

1. Customer and consumer satisfaction rates for our red meat products have increased across all markets
2. Customer, consumer and community approval and trust of the Australian red meat and livestock industry has increased
3. Customer, consumer and community understanding and recognition of our industry's role and value has increased
4. Our products are preferred in the market segments and product categories we wish to trade in
5. Red meat communities are more prosperous as measured through our sustainability frameworks



OUR LIVESTOCK

1. We are recognised as the world-leaders in animal health, welfare and production practices
2. Understanding and use of Estimated Breeding Values (EBVs) have increased, enhancing our productivity and Return on Investment (ROI)
3. Customers, consumers and community approval and trust in our animal health and welfare practices has increased
4. Industry responsiveness to biosecurity risks to our livestock has increased due to effective industry mitigation and management strategies



OUR ENVIRONMENT

1. Our industry's net carbon emissions have been reduced resulting in carbon neutrality by 2030
2. Customers, consumers and community approval and trust in our environmental management and stewardship has increased
3. We are recognised globally as world leaders in agricultural environmental management and stewardship practices
4. Sustainability frameworks are a driving force for practice change



OUR MARKETS

1. We have doubled the value of Australian red meat sales by 2030 compared to a 2020 baseline
2. Australia secures preferential access in over 90% of red meat export markets
3. Non-tariff trade barriers have been reduced by \$1 billion by 2030 compared to a 2020 baseline
4. Australia maintains its disease free status
5. Capital investment in the industry has tripled by 2030 compared to a 2020 baseline



OUR SYSTEMS

1. Participation in coordinated industry integrity systems is 100% by 2030
2. We have halved compliance and regulatory costs by 2030 compared to a 2020 baseline through an innovative approach to compliance
3. Digital connectivity has increased for all industry participants
4. We have achieved end-to-end traceability
5. We are recognised by users as a world class integrity system



OUR INITIATIVES

OUR PEOPLE

Objective for 2030: People see being part of the Australian red meat and livestock industry as attractive now and into the future.

Throughout the supply chain, from farm to market, good people are essential to Australia's red meat industry. We will strive for a safe and healthy workplace for all our people across the supply chain, from those on our farms to those working in our processing plants and in international markets.

It is imperative to attract future workers, retain those currently in the industry, and make being a part of our industry a

source of pride and belonging.

We will invest in our people so that they can grow their skills through a range of education and training opportunities. We will create career pathways to enable them to advance themselves and the industry, including areas where new technologies will change the nature of the work we do. In doing so, we will position the red meat industry as an employer of choice.



ATTRACTING AND RETAINING GOOD PEOPLE

We will attract and retain a diverse range of people that are proud to be part of the Australian red meat and livestock industry. We will support vibrant, thriving rural communities, empowering our people to develop their skills and help design the jobs of the future. We will be sought out by the next generation as an innovative, purpose-driven industry, seen as a place where they can develop a rewarding career.

We will do this by...

1. Delivering employment and growth opportunities that attract entry-level workers
2. Defining and promoting the breadth of career pathways across the supply chain, including in interconnected industries that are essential to our businesses (e.g. manufacturing, animal health and logistics)
3. Developing policies and programs that encourage inclusivity and diversity at all levels within the industry
4. Building on programs that attract people to opportunities in rural and remote Australia
5. Strongly communicating our industry's vision and value to build awareness and attract the next generation of talented people to our industry



DEVELOPING SKILLED AND CAPABLE PEOPLE

We will work across the supply chain to ensure we have appropriately skilled and capable people to harness opportunities. Across the industry we will have the skills and capability needed to support our businesses and industry to deliver on our vision.

We will do this by...

1. Undertaking a national stocktake of the skills needed across Australia to deliver high-quality red meat and related products
2. Creating a coordinated approach with relevant education institutions to ensure the appropriate training systems and qualification frameworks are in place that will deliver the pipeline of skills needed by the red meat supply chain
3. Developing and delivering leadership programs that support increased gender and cultural diversity in the industry
4. Developing a cross-industry approach to migration policy to address worker shortages within the industry especially in regional areas
5. Developing programs that improve workplace health and safety outcomes, and the mental well-being of those working across our industry

ENABLING PRACTICE CHANGE

We will enable a user-led approach to the adoption of best practice and the extension programs that enhance industry practice, productivity and resilience.

We will do this by...

1. Understanding the needs of the supply chain and identifying the drivers for change and their potential impacts on business resilience and sustainability
2. Developing new user-led extension programs with coordinated technical and practice change support from industry bodies, regional agencies, scientists and rural professionals
3. Supporting the development of new, on-farm and post-farm adoption programs that are user-led and coordinated by industry through allocating a percentage of funding for extension and adoption in all levy programs
4. Designing user-led extension/uptake programs into all our research and innovation projects from their commencement
5. Ensuring industry-wide awareness and adoption of industry standards to ensure compliance with industry systems which underpin the integrity of our products

OUR CUSTOMERS, CONSUMERS AND COMMUNITIES

Objective for 2030: People feel good about eating Australian red meat. Our customers, consumers and communities recognise the vital role our industry plays in food production and food security, and trust us to deliver high value, high quality products.

Only through a deep understanding of the supply chain, can we respond to the changing needs and wants of customers and consumers. This understanding will enable us to gain a competitive advantage by ensuring consistent high-value, high-quality products. We will engage with our communities, increasing

transparency along the supply chain in our boxed meat and live export markets. We will build recognition of our ethical and purpose-driven practices, innovative product development and delivery, and a strong connection to Australia as the trusted source of the highest quality protein.

Our customers

Buyers and sellers of Australian red meat and livestock from paddock to plate

Our consumers

Diners and purchasers of Australian red meat

Our communities

Societies, regions and cultures that Australian red meat businesses are part of

EDUCATING AND ADVOCATING FOR AUSTRALIAN RED MEAT

We will be leaders in educating the Australian community and advocating to decision makers on the vital role the Australian red meat and livestock industry plays in the Australian way of life.

We will do this by...

1. Educating Australia's current and future generations on how red meat is produced across our supply chain, and the role our industry plays in developing Australia's red meat regions
2. Advocating to Australia's decision makers on the significant role our industry plays in Australia's economic and social success and our broader geopolitical role in delivering food security
3. Unifying our collective policy, communications, community education and marketing approaches to position Australian red meat as an industry of entertainment, enjoyment and national significance

RESPONDING TO OUR AUDIENCE

We will build a clear picture of the preferences of our customers and consumers across our key markets to ensure we are positioned to respond to opportunities to grow demand and maximise returns for red meat and livestock in Australia and worldwide.

We will do this by...

1. Identifying and understanding consumer segments and characteristics across our markets to enable the development and commercialisation of new products and innovations
2. Aligning and evolving our industry-wide development and promotional programs to meet the needs of customers and consumers in these segments
3. Developing better mechanisms to understand customer and consumer needs, and community sentiment, feeding that back through the supply chain
4. Creating a customer-centric culture throughout the supply chain by increasing the awareness of consumers' preferences and perceptions
5. Meeting increasing demand for Australian livestock export in our region due to sustained income growth and food security drivers where our product is not substitutable for cultural, infrastructure, industry development and animal welfare reasons
6. Leading in competitive markets on quality, integrity and animal welfare for Australian livestock where 100 other countries export live

POSITIONING RED MEAT AS A PROTEIN OF CHOICE

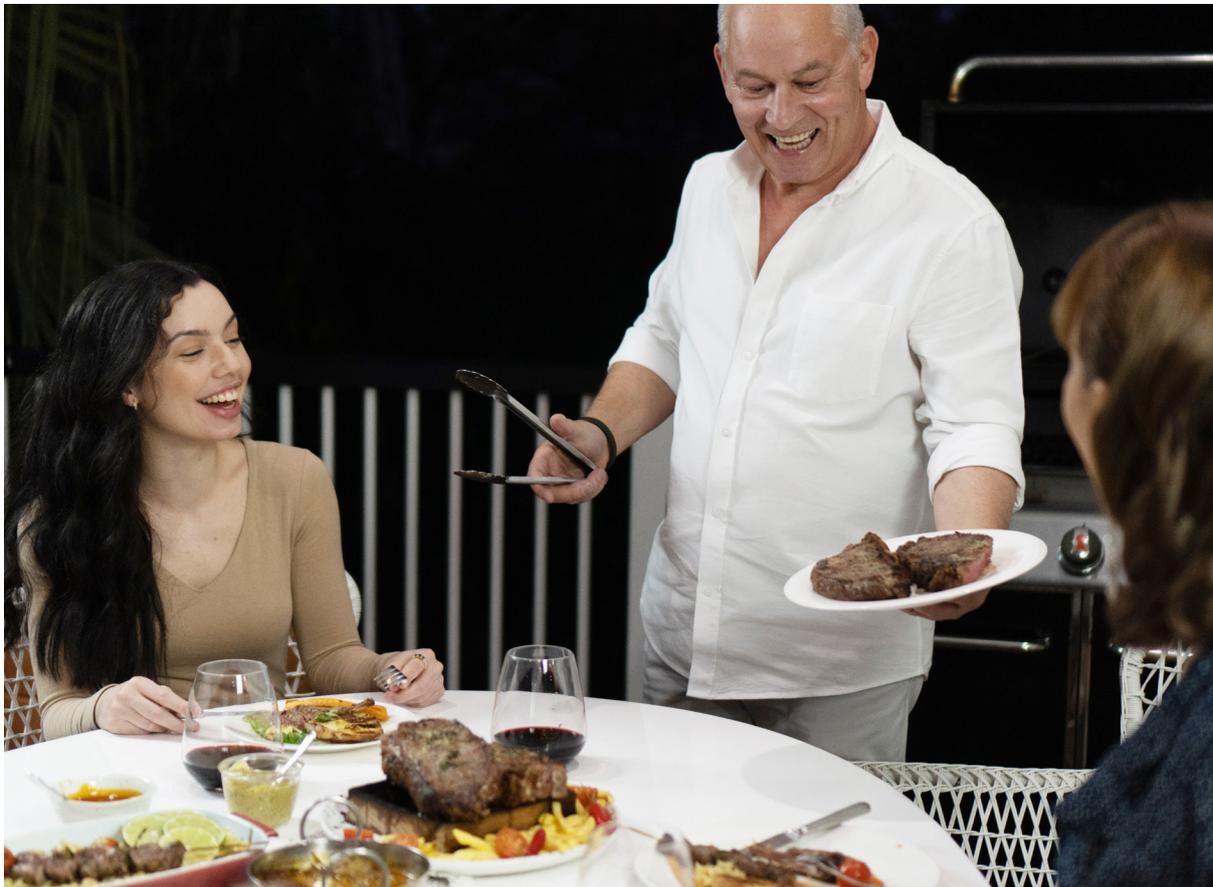
We will use production and consumption data to better inform policy and community discussion around the role of red meat in healthy diets and as part of a sustainable food system. Because we know that health, nutrition and wellbeing remain key drivers of food consumption domestically and internationally.

We will do this by...

1. Proactively communicating an evidence-based narrative around Australian red meat as a *superfood* that is recognised globally for its health and nutritional benefits
2. Partnering with global industry and other stakeholders (including NGOs) to ensure we have a compelling and credible global narrative, supported by local production and consumption data
3. Developing health and nutrition products which maximise the value of Australian red meat by-products

superfood (n) a nutrient-rich food considered to be especially beneficial for health and well-being.

Oxford English Dictionary



IDENTIFYING HIGH-VALUE OPPORTUNITIES

By understanding our customers' and consumers' changing needs we will identify new, high-value opportunities for Australian red meat. We will create new value-added products and new product categories, beyond cuts alone. This includes red meat based snacks and other new and innovative red meat food products.

We will do this by...

1. Understanding global consumers' needs and wants in relation to complete meal solutions, protein-rich snacks and other newly identified product categories for Australian red meat
2. Supporting the development and commercialisation of complete meal solutions, protein-rich snacks and identified other new product categories for Australian red meat
3. Capturing high-value opportunities through new product concepts and innovations
4. Effectively communicating along the supply chain to ensure participants are aware of changing market trends so production systems and supply chains are able to supply fit for purpose products to meet changing consumer needs



OUR LIVESTOCK

Objective for 2030: We set the standard for world class animal health, welfare, biosecurity and production practices.

Care for our animals throughout the whole supply chain is core to what we do. Ensuring the health, welfare and productive performance of our animals is vital to the sustainability of our red meat businesses and the quality of our products. Over generations, Australia has developed world-leading systems

and standards across these areas and we will continue to deliver on this strong track record. Driven by our industry values we will initiate a two-way conversation with consumers and communities, striving to go beyond agreed standards.

ENSURING WHOLE-OF-INDUSTRY ANIMAL HEALTH AND WELFARE STANDARDS AND SYSTEMS

Building on our strong foundation, we will ensure consistent and enforceable standards and systems for animal health and welfare are maintained for the trust of customers, consumers and the community, and to minimise our compliance burden.

We will do this by...

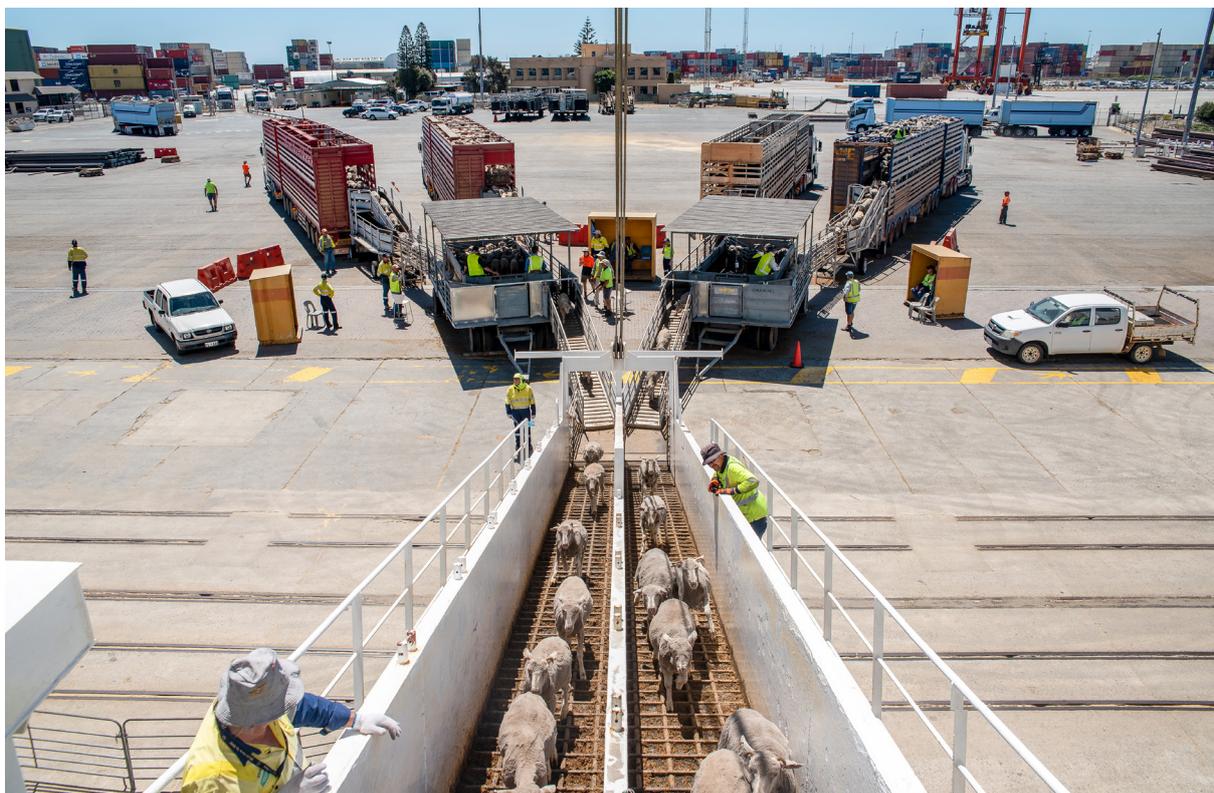
1. Leading the adoption of industry-wide, national and global standards for animal health and welfare, that are achievable for the supply chain, and trusted by the community, customers and consumers
2. Capturing and reporting animal health and welfare data within traceability and assurance systems, ensuring feedback processes are in place along the supply chain
3. Ensuring whole supply chain integrity and compliance to enable high welfare standards
4. Strengthening biosecurity planning and adoption to protect the industry from the spread of disease and the associated animal health and welfare impact

ADOPTING ANIMAL HEALTH, WELFARE, BIOSECURITY AND PRODUCTION BEST PRACTICES

We have a collective responsibility to focus on adoption of best practice (striving to go above and beyond baseline standards) in animal health and welfare throughout the supply chain. This will deliver better business performance and provide greater consistency in both practices and product. It will optimise resources and provide higher quality and real-time data to facilitate improved decision making and business sustainability.

We will do this by...

1. Committing to the adoption of animal health and welfare best practice through the supply chain
2. Providing national coordination of regionally-led and delivered best practice extension systems across species to maximise adoption and ensure consistency
3. Initiating user-led research for all programs to improve participation and deliver better outcomes
4. Increasing industry-wide awareness of industry standards and access to training to implement best management practice
5. Adopting and implement new technology and initiatives to increase efficiencies and reduce the cost of production



OPTIMISING ANIMAL PRODUCTION FOR THE ENVIRONMENT AND MARKET

We will breed our animals to match our environmental conditions and meet market demands by region, through adhering to ethical practices, collaborating, data sharing and taking a whole-of-supply chain approach to decision making.

We will do this by...

1. Promoting Estimated Breeding Values (EBV) for production, regional and market traits, which are relevant under commercial conditions
2. Continuing to build on the effective use of genetics across the supply chain
3. Researching and adopting viable alternatives to improve animal husbandry practices
4. Ensuring new drought resistant feeds and forages are available to maximise feed conversion and minimise greenhouse gas production
5. Ensuring technical resources and capabilities are available at a regional level to support animal production, development and innovation
6. Taking a holistic systems approach to research programs to better understand the complex interactions of animals, soils, plants and climate on production and profitability



OUR ENVIRONMENT

Objective for 2030: We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity.

The Australian red meat production industry operates mostly on landscapes which are unable to support other forms of food production. Ruminant livestock grazing converts pastures which are inedible to humans, into high quality and nutrient dense food products, delivering the dual benefits of food production and ecosystems services. Safeguarding

the health of our environment makes good business sense, and is critical to productivity and profitability. It creates a domestic and international competitive advantage for our industry, building community trust and confidence at a time when customers and consumers increasingly align their purchases with their values.

ADVANCING OUR SUSTAINABILITY FRAMEWORKS AND SUPPORTING THEIR ADOPTION

We will ensure the whole supply chain works within agreed and coordinated sustainability frameworks, using the Australian Beef Sustainability Framework as an exemplar. We will continue to develop transparent standards, systems and verified adoption of recognised best practices across the supply chain, that deliver positive environmental outcomes and resilient businesses. These will consider natural capital like land, soils, water, climate and biodiversity and enhance the productivity, biosecurity and sustainability of our land and businesses into the future.

We will do this by...

1. Leading environmental practices that are viable, recognised and trusted by the community
2. Reducing industry and government compliance and reporting burdens through a coordinated and connected integrity system
3. Connecting environmental systems to assure product integrity, increasing the desirability and differentiation of Australian red meat products in all markets to capture additional value for supply chain participants

MOVING TO A CARBON NEUTRAL INDUSTRY BY 2030

We will play our role in reducing Australia's greenhouse gas emissions by extending our existing commitment to carbon neutrality by 2030 (CN30) across the supply chain. A proactive and accountable approach will help the industry retain the trust of customers, consumers and communities, and stay in front of unnecessary and burdensome regulation.

We will do this by...

1. Identifying required actions and coordinating across the supply chain to achieve our carbon neutral target
2. Researching mechanisms and practices relating to pasture-based carbon sequestration, enteric methane emission reduction, and other mitigation technologies
3. Demonstrably reducing production, processing and consumption waste
4. Increasing research into, and the use of renewables within the industry's energy mix

EXPANDING OUR ROLE IN ENVIRONMENTAL STEWARDSHIP

We will acknowledge our vital role as stewards and managers of 50% of Australia's land mass by enhancing environmental outcomes to the benefit of our businesses and to Australia.

We will do this by...

1. Identifying and developing remuneration mechanisms for the delivery of ecosystem services provided by industry, including biodiversity, carbon sequestration, pest and weed management
2. Quantifying the potential long-term production and profitability benefits of enhancing natural capital and diversification opportunities to enhance economic and environmental resilience
3. Researching optimal land use and diversification opportunities to enhance economic and environmental resilience

BUILDING ON OUR PROACTIVE APPROACH TO CLIMATE VARIABILITY

We will invest in research to identify regionally relevant systems and practices to adapt to climatic changes and develop tools to facilitate practice change and adoption. Because we know that climate variability is predicted to increase over the coming decade, increasing business risk along the red meat supply chain.

We will do this by...

1. Continuing research to improve the resilience of livestock production systems, mitigating the impact of increased climatic variability
2. Progressing research to increase the accuracy of weather and climate forecasting and developing decision support tools
3. Increasing water use-efficiency and identifying mechanisms to increase water security
4. Developing drought resistant production systems through new feeds and forages which maximise feed conversion and minimise greenhouse gas production
5. Researching the implications of climate change on the movement of pests, weeds and disease vectors into new areas



OUR MARKETS

Objective for 2030: We improve the economic resilience for our industry by increasing access to, and the performance of existing and new markets.

Because we export 60% of our production, we rely on open and predictable access to a diverse range of international markets. Our processors and exporters deliver a wide range of products and specifications, seeking the highest returning market for each.

To maximise our returns, we depend heavily on access conditions across our markets. From the highest value animals and cuts to the large range of

co-products, our industry's sustainability depends on finding a profitable home for each. Our industry is also confronted by high levels of regulation in many markets, in the form of non-tariff barriers.

We will take a leadership role through fostering, developing and maintaining positive relationships with our customers and government to identify opportunities to diversify our markets.



REDUCING TARIFF AND QUOTA BARRIERS TO TRADE

To ensure our industry can get the best value for our red meat products we will work towards the most open trade access possible across all markets. We will work across the industry and in partnership with the Australian Government on a targeted trade liberalisation agenda.

We will do this by...

1. Supporting government with the identification of new trade agreements to open new markets and opportunities
2. Strongly pursuing preferential access into both new and existing markets
3. Advocating for ongoing trade access negotiations, and their positive conclusion, for the benefit of our industry

REDUCING NON-TARIFF BARRIERS TO TRADE

Non-tariff barriers represent a significant cost to our industry; we will identify these barriers and partner with the Australian Government in seeing them eliminated or reduced. This ensures we can realise the full potential of existing markets and pursue new markets which show positive commercial opportunity.

We will do this by...

1. Identifying, prioritising, maintaining and sharing a register of non-tariff trade barriers, highlighting their cost to our industry
2. Developing a Regional Market Access and Development Strategy which prioritises our efforts to address those non-tariff barriers representing the highest cost/opportunity for our industry
3. Continuing to invest in ongoing research and technology development to address specific access issues or opportunities
4. Maintaining and building our industry integrity systems, including biosecurity

BUILDING ON OUR APPROACH TO BIOSECURITY AND FOOD SAFETY

We will ensure the provision of robust and real-time systems and technologies to minimise and manage the risk of biosecurity incursions, and enable industry and government to rapidly deploy response capacity. Because we know that trade is a 'two-way street', and our market access and product demand are underpinned by our disease-free biosecurity status and high animal welfare, food safety and quality standards. We will work with government to ensure adequate resourcing of Australia's border, customs and biosecurity capacity, including the inspection, monitoring and testing activities that maintain our disease-free status.

We will do this by...

1. Ensuring emergency disease outbreak preparedness plans and communications strategies are fit for purpose, reviewed and regularly tested
2. Investing in research and development to ensure vaccines are available for relevant strains of emergency diseases
3. Having in place robust biosecurity surveillance and monitoring programs to minimise the risk of disease incursion
4. Continuing to promote the benefits of on-farm biosecurity planning to protect industry against the incursion of diseases, pests and weeds onto their properties and into their regions
5. Having robust traceability systems in place for food recall events

PROMOTING INVESTMENT IN OUR INDUSTRY

We will make our industry more attractive to domestic and global investors to capture our opportunities. Because we know that a broad spectrum of investor capital from around the world is accelerating innovation in food and agriculture and Australia risks falling behind due to a lack of access to capital through agricultural investment products.

We will do this by...

1. Advocating for the establishment of agricultural investment funds that can provide the long-term equity capital to ensure Australian leadership in sustainable food production
2. Improving the confidence of venture capitalists to invest in agriculture as technology and innovation increasingly reduces the risk exposure, which has largely kept non-traditional investors out of the agricultural/biological industries

ENSURING AUSTRALIA REMAINS COMPETITIVE WITH INTERNATIONAL RED MEAT MARKETS

Australia is a specialist producer of red meat with some of the world's highest costs to operate. We will ensure that we improve our competitiveness compared with other global exporters of red meat through increased industry and government efficiency and innovation in key high cost areas including labour, energy and regulatory charges.

We will do this by...

1. Advocating and developing innovative solutions to improve access to labour and affordable energy
2. Ensuring our pre- and post-farm gate industries have a level playing field compared to international competitors for regulation, services and fees and charges
3. Assisting processors to achieve on-plant efficiencies through targeted research and development initiatives, with a focus on extension and adoption

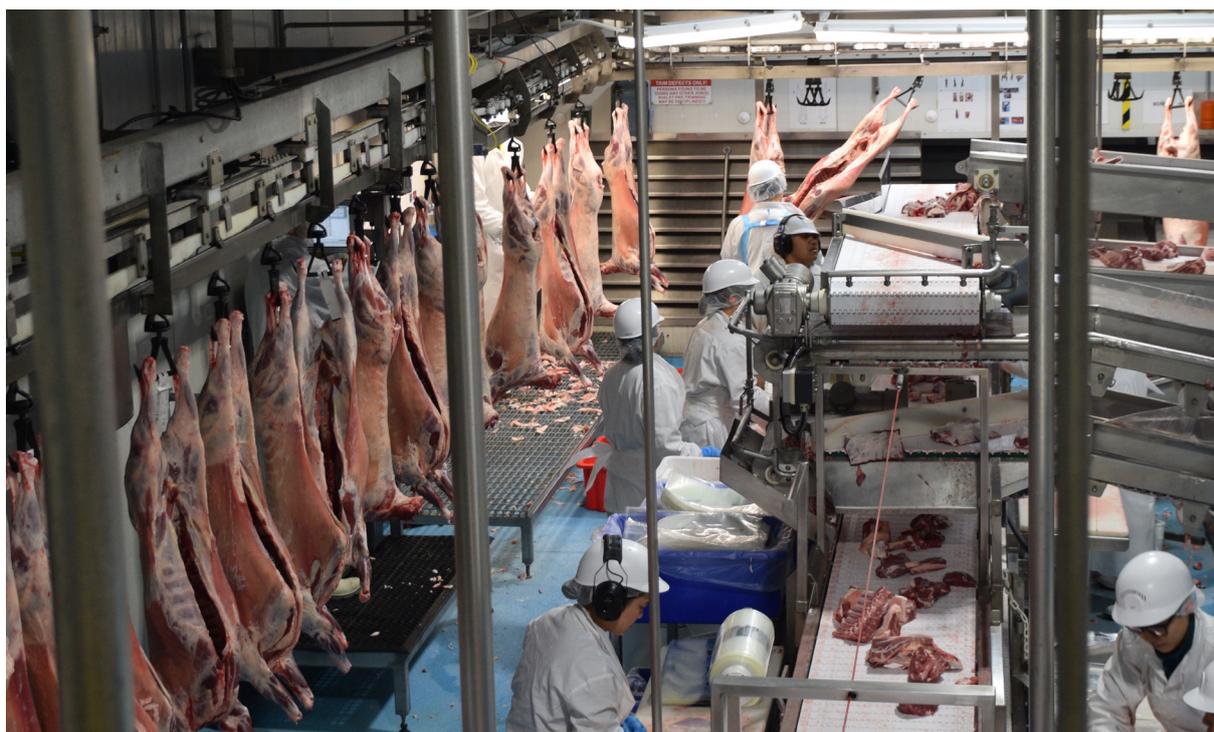


OUR SYSTEMS

Objective for 2030: We are a trusted brand because of our integrity system, built on trust and respect that supports strong partnerships and sharing of information.

Our systems are the anchor for our industry. The integrity of our systems underpins our product provenance and the value derived from our animal welfare, food safety, environmental stewardship and biosecurity credentials. To respond to changing market conditions and stay ahead of our competitors, we need systems that consistently assure our products are produced and processed to meet customer and consumer regulatory requirements, and deliver market signals through the supply chain. We need

the ability to connect, up and down the supply chain, sharing valuable data and insights in a standardised way that improves business-as-usual, as well as our collective response to risks and opportunities as they arise. We seek a collective industry systems approach to managing supply chain integrity and associated standards for maximum efficiency and reduced cost. We will work with governments to ensure adequate resourcing and capacity is available and deployed for monitoring and compliance activities.



ENSURING END-TO-END INTEGRITY, TRACEABILITY AND PROVENANCE

We will improve traceability and verified standards, as they are increasingly important to gaining and maintaining market access and underpinning trust amongst customers and consumers. The ability to verify the provenance of Australian red meat products and associated attributes helps maintain Australia's competitive advantage and meet customers' and consumers' growing demand for information about their food and how it's produced.

We will do this by...

1. Creating a single, user-centric supply chain integrity system for the industry
2. Demonstrating the complete provenance of all our red meat products from pasture to plate through real-time traceability
3. Building standards into existing industry integrity and assurance programs, reducing compliance and reporting burdens
4. Ensuring integrity systems can support and underpin the claims made by our industry
5. Recognising the different needs of producers, processors and livestock exporters to drive technology development, and adoption and resourcing, enabling programs appropriately

ENABLING SUPPLY CHAIN DATA INTEGRATION AND EFFICIENCY

We will develop and implement supply chain data standards and data sharing capability to greatly simplify the transfer of market signals, benchmarking capability, and industry-level (non-competitive) data analytics.

We will do this by...

1. Defining data standards, ownership and capture processes for use across industry integrity and assurance programs, reducing compliance and reporting burdens
2. Developing the automated connection and sharing of data between supply chain and industry participants for industry level (non-competitive) data analytics and increased transparency
3. Identifying innovative approaches to reduce industry and government regulation and regulatory costs

IMPROVING DIGITAL CONNECTIVITY

We will enable transformation through digital innovation so we have reliable connectivity across the whole supply chain. Innovative tools and services that require online connectivity deliver no value if they cannot be accessed by our businesses. Addressing this will open opportunities in supporting change, supply chain data capture and integration, and the development and application of new tools and technologies such as artificial intelligence.

We will do this by...

1. Advocating for full supply chain digital coverage
2. Seeking technology partners to support improved and cost effective connectivity
3. Investing in applications and tools, including artificial intelligence, to capitalise on improved connectivity and build our competitive advantage
4. Enabling real-time digital traceability systems, through technology solutions which ensure connectivity at all times, in all locations

EMBRACING AUTOMATION AND AGTECH

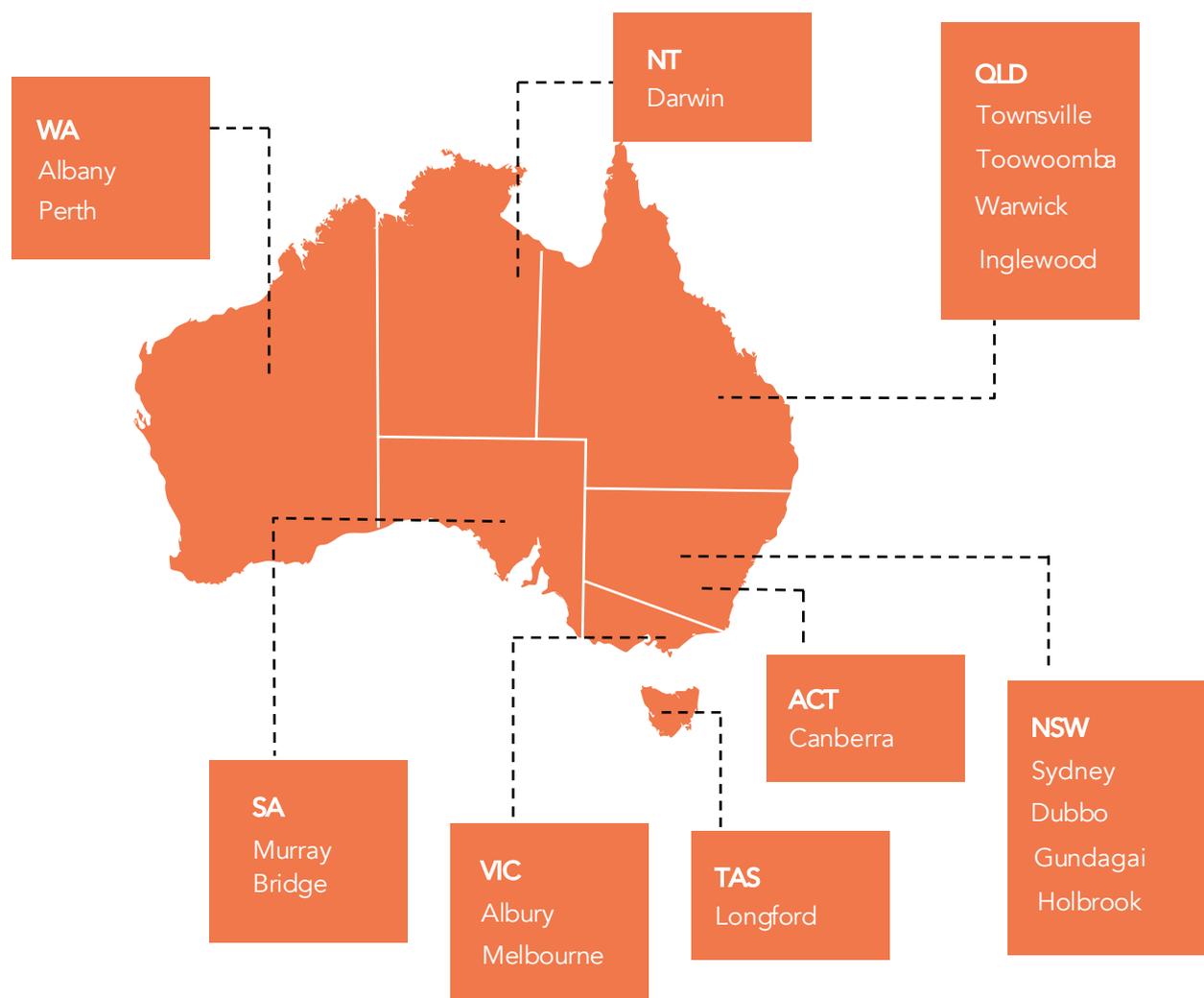
The industry has always been an early adopter of technology, yet now we see an increasing range of options from non-traditional sources in both hardware and software innovation. We will increase access to capital for development and growth, and foster the 'tech' culture of our industry, which will allow us to capitalise on these opportunities.

We will do this by...

1. Advocating for easier access to capital to accelerate Agtech opportunities
2. Encouraging adoption of emerging technologies in Agtech
3. Pursuing adoption of supply chain measurement and decision support tools
4. Linking to industry decision support tools and industry benchmarking opportunities

ENGAGEMENT ACROSS AUSTRALIA

To develop Red Meat 2030 we engaged with people in the industry across its diverse supply chain and geography.



WHAT WE DID

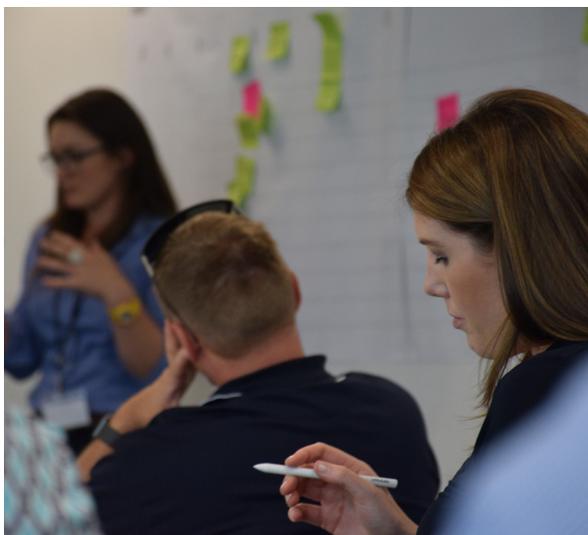
- **12** Workshops
- **6** Focus groups
- **3** Webinars
- **10** Site visits
- **14** In-depth interviews
- **6** Other industry engagements

ACKNOWLEDGEMENT

We thank every person who has assisted to co-create Red Meat 2030. Your active participation in the process has been appreciated and so important to the development of this document. Through the 10-month process there have been people involved from opening up their business for us to walk through, to taking time out of their very hectic schedules to share experience and insights into current issues and future opportunities.

Red Meat 2030 would not have been created without you. We acknowledge and recognise your valuable contribution to the process. Thank you!

Special acknowledgement to the Chairs, Chief Executive Officers and communications leads of all Red Meat 2030 partners and the Department of Agriculture for their input and collaboration.





OUR IMPLEMENTATION PLAN

OUR IMPLEMENTATION PLAN

HOW WE WILL TRANSITION, IMPLEMENT AND REPORT

In line with our guiding principles around collaboration, we will make Red Meat 2030 happen through:

- The industry's Peak Industry Councils' accountability to Red Meat 2030
- A clear program of roll out and review with assigned roles and responsibilities
- A Red Meat 2030 strategy that is well funded by industry levies and attracts investment from other sources
- An accountable and ambitious Red Meat 2030 that measures turning intent into impacts
- Transparent funding determinations
- Ongoing consultative mechanisms to support industry engagement that aren't burdensome
- A Red Meat 2030 strategy that supports, aligns and continues to resource existing successful industry projects

6

PRIORITIES

6

OBJECTIVES

23

INITIATIVES

28

SUCCESS INDICATORS

IMPLEMENTATION TASKFORCES

The Australian red meat and livestock industry has had a long track record of achievement and success by working together.

To ensure the effective implementation of Red Meat 2030 we will establish a cross-sectoral, skills-based Taskforces.

The Taskforces will use the 28 success indicators identified in Red Meat 2030 to monitor their progress, responsibilities and accountabilities across the industry to ensure the effective roll out of the strategy and its review and refinement over its life.

STRATEGY IMPLEMENTATION ROLES AND RESPONSIBILITIES AT A GLANCE

ROLES

RESPONSIBILITY

MONITOR, APPROVE AND COMMUNICATE

- RMAC Board of Directors and RMAC Members identify Taskforce structure
 - Set Terms of References aligned with Red Meat 2030 success indicators
-

DIRECT/GUIDE

- Industry Taskforces comprised of RMAC members, red meat businesses and experts direct and guide implementation
-

DELIVER

- Three red meat Research Development Corporations (RDCs) to deliver research, marketing, development and extension services including funding of Taskforce secretariat
 - RMAC members to provide policy and advocacy support
-

CONNECT

- RMAC members to provide two-way business intelligence and knowledge sharing information network
-

BENEFIT

- Australia's 80,000 red meat businesses
 - Australia's 405,000 red meat employees and 24 million domestic consumers of red meat, and millions of export consumers.
 - Decision makers
-



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