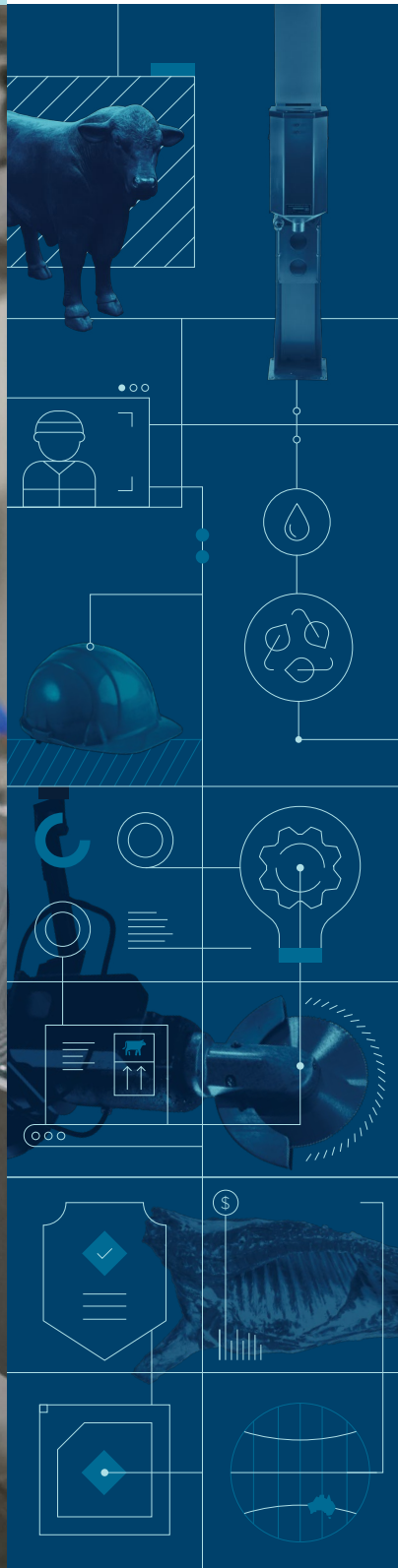
AMPC

AUSTRALIAN
MEAT PROCESSOR
CORPORATION

Annual Operating Plan 2026–2027

Building a stronger red meat processing industry



Acknowledgment of Country

AMPC respectfully acknowledges the Traditional Custodians of the lands, skies and waterways across Australia on which our people live, work, and collaborate. We recognise and honour their enduring connection to Country, and the deep knowledge, culture, and community that has sustained these places for tens of thousands of years.

We pay our respects to Elders past and present and acknowledge the vital contributions of Aboriginal and Torres Strait Islander peoples to the stewardship of lands and environments that support Australia's red meat processing industry.

As a national research and development organisation, and in partnership with processors operating across many Traditional lands, we commit to listening, learning, and acting in ways that support meaningful relationships and shared prosperity with First Nations communities.

The Australian Meat Processor Corporation (AMPC) is the specialist research and development corporation for the red meat processing industry in Australia.

AMPC invests in research, development and marketing activities to benefit red meat processors.

Our vision

The Australian red meat processing industry is globally recognised for its sustainability, innovation and competitiveness, delivering safe and high-quality products that nourish people, while delivering long-term industry and community prosperity.

Our purpose

To enable transformative innovation and sustainable value creation, empowering processors regardless of size, by responding to emerging industry needs and seizing future opportunities.

Our investment

AMPC investments are funded by statutory levies, partner contributions and the Australian Government, and are designed to deliver a range of benefits for the industry and the broader Australian community.

AMPC engages with leading research organisations and marketing providers and funds joint activities with our value-chain partners to address the priorities of the red meat processing industry.

Many of AMPC's investments are multi-year projects in strategic areas in which we have invested in previous years. Our funding decisions are underpinned by active consultation with the red meat processing industry and seek to maximise benefits across the industry broadly.

Our 2026–2027 Annual Operating Plan outlines our activities during the year and aligns with our five-year strategic plan 2025–2030.

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Our strategy

AMPC's 2025–2030 Strategic Plan outlines three key strategic areas that guide AMPC in everything it does. Over the course of the strategic planning period, AMPC will invest in the following areas to advance the Australian red meat processing industry

Industry excellence

A sustainable industry built on integrity, innovation, and skilled people.

FOCUS AREAS

Building community awareness and industry confidence through transparency.

Sustainability leadership by leading the way in reducing environmental impact.

Building a **future-ready workforce** that is skilled and diverse.

Championing **safety and wellbeing**.

Advancing **animal welfare**.

Innovation and technology leadership

Driving the future with bold leadership and transformative technology.

FOCUS AREAS

Technology innovation through forward-thinking research and development.

Leading the **adoption and scalability** of technologies.

Powering the industry with excellence in **digital transformation**.

Process innovation to create value that sets new standards.

Growth and global competitiveness

Expanding markets, increasing value, and leading the world in red meat.

FOCUS AREAS

Improving **market access**, including reducing costs and streamlining compliance.

Supporting continuous improvement to **streamline compliance and industry standards**.

Delivering **value opportunities**, including premium offerings worldwide.

Lead with ethical products that meet future **consumer needs** in food safety, quality, and nutrition.

Red meat processing operating environment

Australia's red meat processing industry continues to grow and develop within a dynamic and often challenging operating and trade environment. AMPC's 2026–27 Annual Operating Plan is designed to address both the short-term and long-term challenges and opportunities within our industry.

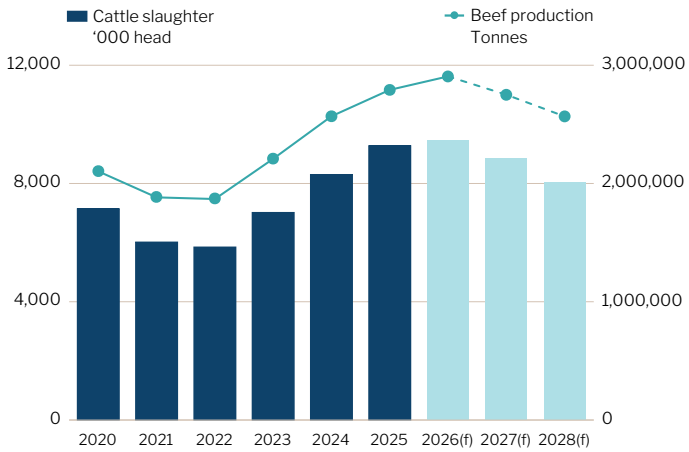
Production outlook

The production outlook for red meat is relatively uncertain with changing global economic conditions, supply chain constraints and market access challenges. Beef production is expected to peak in 2026 before declining slightly as some herd rebuilding takes place.

Sheepmeat processors continue to face challenging market conditions. Production is expected to continue to decline in 2026, falling 24 per cent from 2024 peaks, as southern and western growing regions experience ongoing dry conditions.

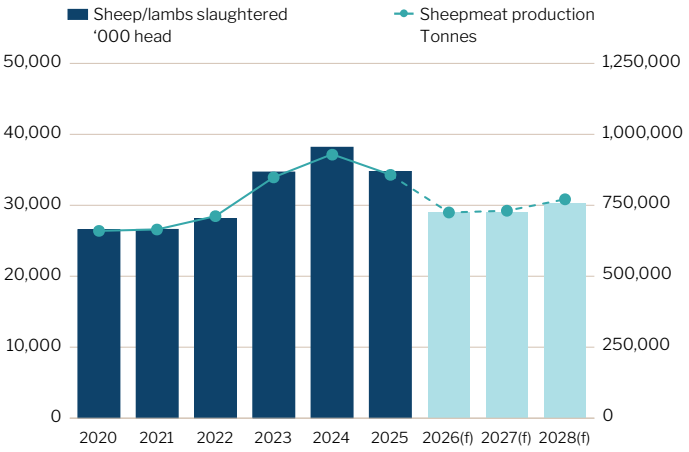
Goat slaughter is projected to increase again in 2026, marking five consecutive years of throughput growth.

Beef throughput and production



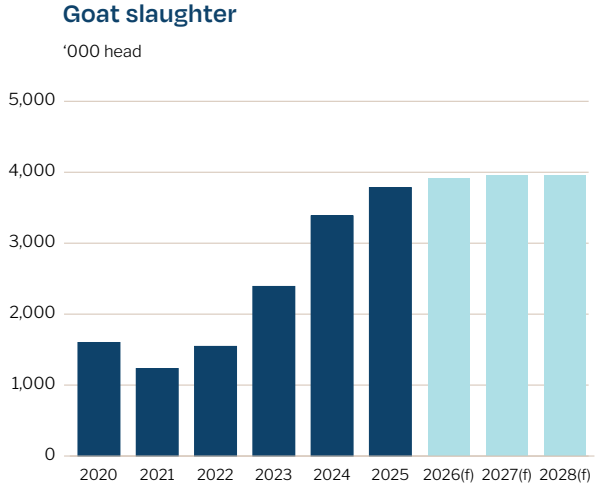
AMPC, MLA, ABARES

Sheepmeat throughput and production



AMPC, MLA, ABARES

Goat slaughter



AMPC, MLA

Trade uncertainty

Australia's red meat processors face increased market volatility in export markets, which will likely also impact domestic markets.

Access to important Chinese and European Union (EU) markets will remain constrained by quotas. At the same time, changes to United States (US) tariffs have created further trade uncertainty, requiring red meat processors to look to diversified markets.

Trade uncertainty has been compounded by conflict in the Middle East, leading to disrupted global supply chains and trading routes.

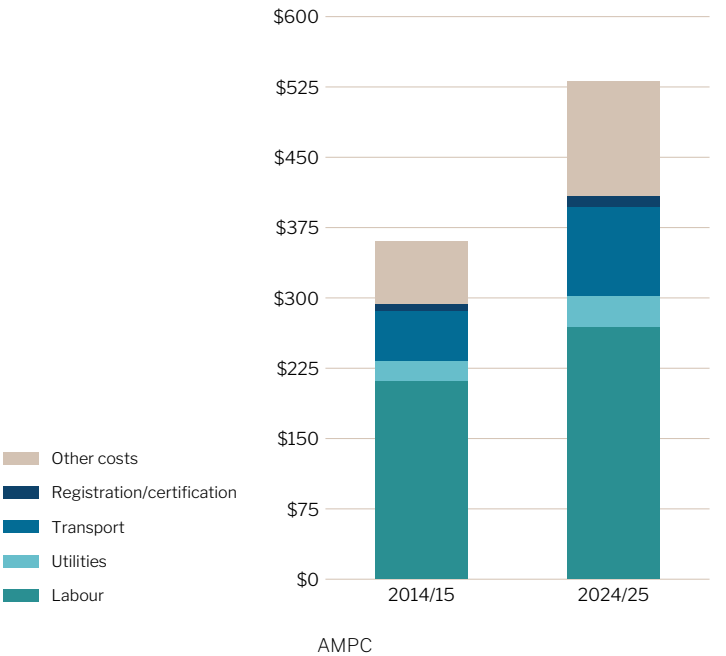
Despite this uncertainty, the trade fundamentals remain strong with robust demand for Australia's high quality red meat products.

Cost pressure and labour shortages

Cost pressure and labour shortages remain key challenges for red meat processors, particularly when competing with lower-cost suppliers in export markets with greater access to labour. AMPC's recent *Cost to Operate* analysis found processing costs continue to rise, with both inflation and interest rates remaining high in the post-COVID Australian economy.

Beef processing operational costs

$ per head



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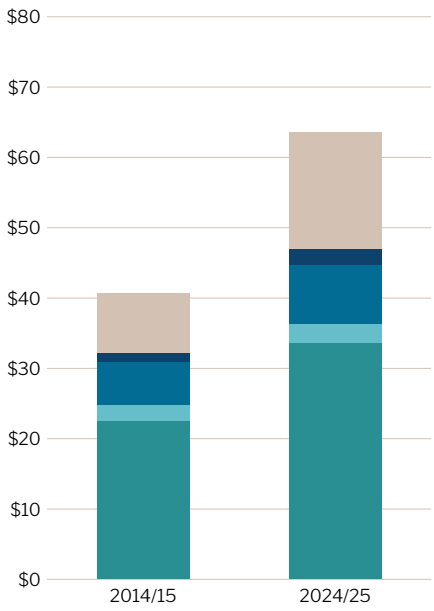
Sheep/lamb processing operational costs

$ per head



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Left: AI automated beef scribing technologies

Changing compliance requirements and maintaining public trust

Red meat processors are operating in an environment of increasing Environmental, Social and Governance (ESG) scrutiny within global financing and trading markets. From a research and development perspective, this reinforces the importance of building robust evidence, measurement capability and practical tools that support processors to understand and respond to evolving compliance requirements, while demonstrating performance over time.

Artificial Intelligence (AI) and data-driven productivity gains

As with most industries, there are significant opportunities to harness the power of AI and data within the red meat processing industry to deliver productivity gains. Over the past few years, AMPC research and development has increasingly explored AI applications in all portfolio areas. In 2026/27, AMPC will explore the use of AI for the following functions:

- Automated bone-in product and packaging sensing to enhance compliance, traceability and load validation
- Monitoring and managing yield and processing performance
- Monitoring processing performance and providing decision support
- Improving safety and hazard identification
- Monitoring animal welfare and food safety outcomes
- Detecting foreign materials

AMPC investment focus for 2026/27

In a constrained and volatile operating environment, AMPC's 2026/27 research and development investment is focused on sustaining processor competitiveness, resilience and market confidence. This is delivered through targeted investment across AMPC's three Strategic Pillars: Industry Excellence, Innovation and Technology Leadership, and Growth and Global Competitiveness.

Together, these investments balance immediate operational priorities with longer-term transformational innovation, delivering measurable on-plant value in 2026/27 while positioning the industry for future growth.

Right: Test driving virtual reality in red meat processing

STRATEGIC PILLAR 1

Industry excellence

FOCUS AREAS

Build community awareness and industry confidence 8 >

Sustainability leadership 8 >

Building a future ready workforce 10 >

Safety and wellbeing 11 >

Advancing animal welfare 12 >

Building community awareness and industry confidence

Right: More to Meat campaign in Toowoomba

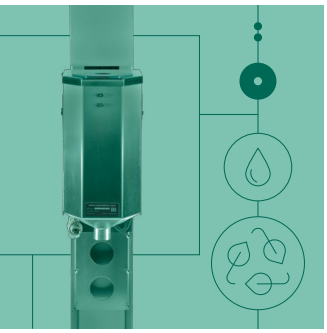
More to Meat campaign

- Deliver Phase 4 of the More to Meat Campaign through targeted communications, media content, and stakeholder engagement, building informed support for the red meat processing industry.

KPIs

- Continued improvement in community attitudes towards the red meat processing industry (net favourability rating), attributable to the More to Meat campaign, based on community survey results.

Sustainability leadership



Top right: Biogas plant

Bottom right: Wind turbines

Energy emission and decarbonisation

- Undertake research and development to deliver clean, affordable and reliable energy for processors.
- Deliver the third updated Decarbonisation Pathway detailing the cost-effective technologies and approaches for meeting emission targets.

Sustainability reporting

- Complete the 2026 Environmental Performance Review measuring sustainability metrics within the Australian red meat processing industry, including water intake, energy use, and greenhouse gas emissions.

Market-imposed and best practice sustainability disclosures

- Assist members with sustainability reporting issues.

Refrigeration energy efficiency

- Demonstrate Refrigeration as a Service (RaaS) using deep learning for automated refrigeration energy efficiency.

Thermal energy

- Deliver the case study for installed multi-step heat recovery system.

Water recycling

- Continue to conduct in-plant wastewater recycling trials. With the objective of achieving a ‘fit for purpose’ approved arrangement for certain equipment wash-down types.

Knife sanitisation adoption

- Support the adoption of the Econoliser knife sanitisation unit delivering 90 per cent reduction in hot water use.

Water stewardship

- Demonstrate the existing proof of concept work for application of Water Stewardship to include community engagement practices.

Bioresource recovery centres

- Continued verification, validation, value uplift, and development of bioresource utilisation pathways from anaerobic co-digestion in integrated wastewater treatment processes.

KPIs

- Industry remains on track to meet the interim Commonwealth decarbonisation target of 63 per cent emissions reduction by 2030, from the 2005 baseline.
- At least 80 per cent of sector throughput is reported in the AMPC Environmental Performance Review.
- Demonstrate Heat Recovery as a System, achieving up to a 70 per cent reduction in gas consumption.
- Double Effect Disc Dryer demonstrates that a 30% saving can be achieved for at least one of the three pilot project participants.
- Wastewater recycling trials deliver a cumulative 20 per cent saving in potable water consumption.
- Anaerobic Co-digestion pilots demonstrate a potential 5% reduction in organic waste to landfill intensity.
- A econoliser case study for adoption at a Brownfield site.

Left: AMPC visits Tessele team at BRAVA centre WA

Building a future-ready workforce

Remote operations and semi-automation

- Further development and deployment of remote-operated shadow robotic technologies enabling staff to operate equipment remotely opening the employment demographic to employees of any age, physical strength, and ability.

Neurodiversity

- Further progress research and development to attract and retain neurodivergent people to the industry, including enabling remote work through technology.

AMPC Careers Portal

- Continued development of the Careers Portal, including additional videos explaining job roles, career development pathways, and development of a 'jobs board'.

Intercollegiate Meat Judging (ICMJ)

- Continue to support the ICMJ program at both the Northern and National levels.

Training

- Develop new industry training resources to be included on the Knowledge Hub.

Innovation Manager Program

- Continuation of the Innovation Manager program, helping red meat processing plants to employ innovation managers to develop and implement innovation strategies tailored to the needs of individual plants, organisations, and the wider industry.

School and university programs

- Conduct five STEM camps engaging up to 30 students at each event. Scope, design and implement the first University Meat Industry Challenge Program (UMICP).

KPIs

- At least 10 per cent increase in unique users visiting the AMPC Careers Portal and Knowledge Hub from 2025/2026 baseline.
- 70 per cent satisfaction rating across the ICMJ Program.
- 70 per cent satisfaction rating across the STEM Camp Program.
- Attract 15 neurodivergent people to industry through AMPC projects, including remote operations roles, with a retention rate of 60 per cent after one year.

Top right: AMPC representatives talking career opportunities in red meat processing

Bottom right: AMPC's Careers Portal is going from strength to strength

Safety and wellbeing

Left: Both mental and physical health is part of the safety and wellbeing agenda

Reducing risk

- Complete Stage 1 Industry Job Task – Benchmarking and Analysis Program, capturing data on manual handling risks for specific tasks in meat processing plants.

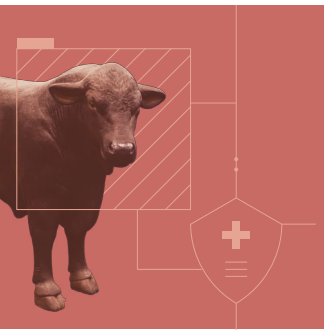
Using AI to improve safety

- Explore a minimum of two technologies to access suitability and use cases for AI to improve safety outcomes or hazard identification.

KPIs

- [ ] Top three manual handling risks are identified with accompanying strategy to reduce the risks.
- [ ] Scope and commence trials for a minimum of two AI technologies to improve safety outcomes.

Advancing animal welfare



Using AI to improve animal welfare

- Continue to investigate the use of AI to support improved animal welfare practices.
- Investigate the use of AI to monitor cattle vocalisation as an indicator of animal welfare outcomes.
- Investigate the use of AI to monitor eye temperature and detect lameness and other pathologies.

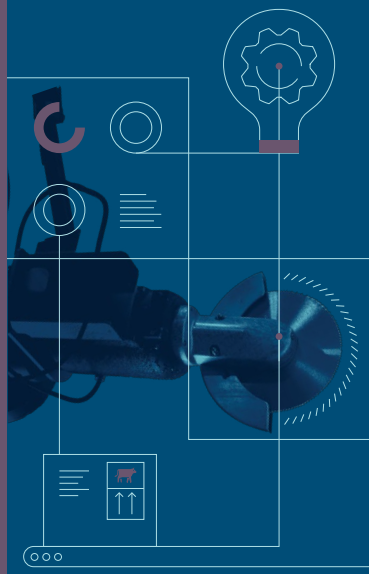
KPIs

- [ ] At least three processors are using AI to improve animal welfare outcomes in production.
- [ ] AI applications shown to be effective in monitoring vocalisations for animal welfare outcomes.

Right: AI in operation pinpointing individual animal outcomes

STRATEGIC PILLAR 2

Innovation and technology leadership



FOCUS AREAS

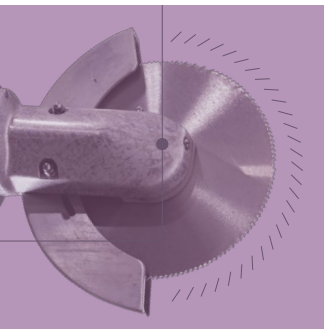
Technology innovation 14 >

Adoption and scalability of technologies 15 >

Digital transformation 16 >

Process innovation 16 >

Technology innovation



Right: StarVac systems used for vacuum sealing in meat packaging

Automated boning room – bovine

- Work with global technology providers to develop and evaluate new automated prototype beef deboning and cutting solutions in production environments.
- Further develop and install non-X-ray, AI-enhanced automated bone in cutting solutions, including chining, separation and scribing.
- Conduct Australian production trials and demonstrations of automated chine bone cutting solutions developed globally.
- Develop an automated leg deboning concept.
- Develop and evaluate automated fat trimming prototypes for production trials.

Automated boning room – ovine

- Working with global technology providers, develop and evaluate new automated prototype de-boning solutions for lamb leg, lamb loin and lamb French racks in production.
- Evaluate conceptual prototype developments for automated goat/mutton cubing.

Materials handling

- Develop new automated loading solutions for primal vacuum bags.
- Develop in production prototype systems for cutweight distribution and sorting.
- Re-evaluate automated container loading prototype developments and available technologies to determine the best investment pathway.
- Further develop and deploy robotic primal packing solutions in production.

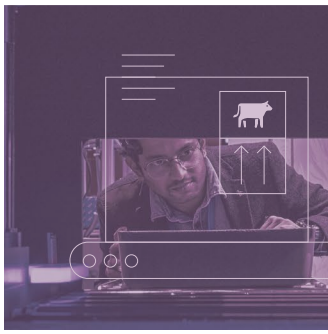
Automated processing

- Work with global technology and industry partners to re-evaluate and roadmap automated harvest floor automation developments.
- Conduct Australian production installation trials and demonstrations of an automated beef splitting solution developed globally.
- Develop new cutting technologies and concepts that support improved manual operations and provide pathways to automated processing.
- Develop new boning assistance technologies and concepts that support improved manual operations and provide pathways to automated processing.

KPIs

- Three new automated beef boning room concepts demonstrated in the production environment, showing improved yield, labour efficiencies, and safety compared to current manual operations.
- Three new automated lamb boning room concepts demonstrated in production, showing improved yield, labour efficiencies and safety compared to current manual operations.
- Remote and semi-automated robotic technologies have been demonstrated in production, performing materials handling tasks on a boning room floor.
- Two new industry materials handling solutions demonstrate reduced labour requirements and retail weight giveaway.
- Automated beef-splitting solution installed and operating in production.

Adoption and scalability of technologies



Left: AMPC has developed tools and systems to assist processors evaluate R&D and adoption

Industry knowledge acquisition and dissemination

- Develop and implement tools and systems to assist processors evaluate R&D and adoption of advanced manufacturing innovations.
- Develop a 3D rendered visualisation depicting a meat processing plant of the future.

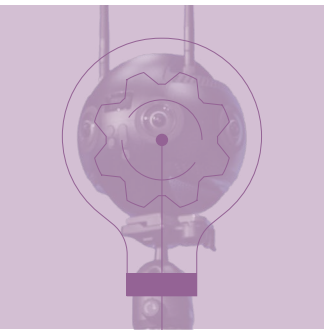
Uptake & Implementation Support

- Support successful industry adoption and integration of new technologies and systems within processing operations, focusing on user readiness, process changes, and ongoing assistance to ensure benefits are realised, moving beyond simple deployment to actual, sustained use and integration within workflows.
- Assess and communicate how proven R&D technologies are performing in production to support greater processor adoption.
- Address barriers for adoption with impact evaluations of technologies and systems that indicate opportunity.

KPIs

- Every AMPC-supported Advance Manufacturing R&D technology, which has been developed and proven in production with validated value propositions, is adopted by at least one processor within 24 months of successful development.
- Industry has access to new tools for evaluating advanced manufacturing technology options, measuring return on investment (ROI) and other considerations.

Digital transformation



Objective assessment and measurement

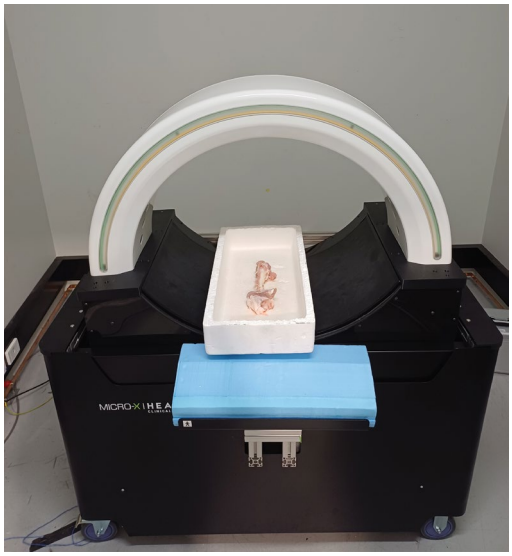
- Further develop new automation-capable objective measurement technologies and tools.
- Develop and enhance DEXA technologies to understand hot/cold correlation, carcase cut weight predictions, and carcase section composition predictions.
- Development of new Computed Tomography (CT) and X-ray imaging tools to monitor and enhance yield through automation opportunities.

Productivity improvement

- Develop and test new automated sensing and AI technologies to monitor and manage yield and processing performance.
- Evaluate the on-plant implementation of processing performance-improvement and decision-support tools, accessing real-time data to enable data-analytic production management, incorporating AI, machine learning, and sensing technologies

KPIs

- ☐ New CT imaging prototype developed and trialled to monitor white bone and yield.



Left: CT scanning of red meat in action

Process innovation

Process and yield improvement tools

- Development and production trials of new chilled/hot trim management systems.
- Production demonstrations and trials of high-speed rinse and chill to improve throughput and scalability across industry.
- Investigate further development of energy-efficient full carcase rapid chill systems.
- Development of a dynamic lamb carcase weight monitoring system.

KPIs

- ☐ Lamb and beef chiller sortation solutions operating in production and suitable for broader industry adoption.
- ☐ High-speed Lamb and Beef Rinse and Chill solution demonstrated in production demonstrating improved speed compared to current manual process.

STRATEGIC PILLAR 3

Growth and global competitiveness

FOCUS AREAS

Market access 18 >

Streamline compliance and industry standards 18 >

Value opportunities 19 >

Food safety, quality and nutrition 19 >

Market access

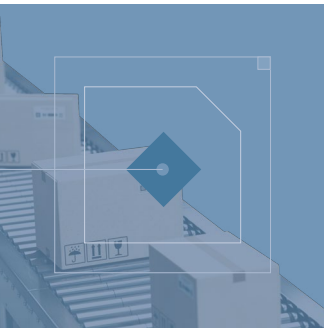
Market access

- Assess viral and bacterial decay of surrogate microorganisms in wastewater to support continued operation in the event of an exotic disease incursion.
- Ongoing management of the Handbook of Australian Meat (HAM) App.

KPIs

- Delivery of validated viral and bacterial decay rate data for surrogate microorganisms in processing wastewater suitable for use in emergency disease planning.

Streamline compliance and industry standards



Traceability

- Assess the effectiveness of ultra-high frequency RFID of carcases.

Hook/gambrel traceability and sortation

- Evaluate and further develop new automated carcase sortation technologies and systems to enhance efficiency and traceability.

Audit costs

- Identify duplication in commercial compliance programs and develop solutions to harmonise where possible.

Cost to operate

- Updated Cost to Operate analysis completed for Australia, New Zealand, USA, and Brazil, allowing comparison of regulated and non-regulated cost competitiveness.

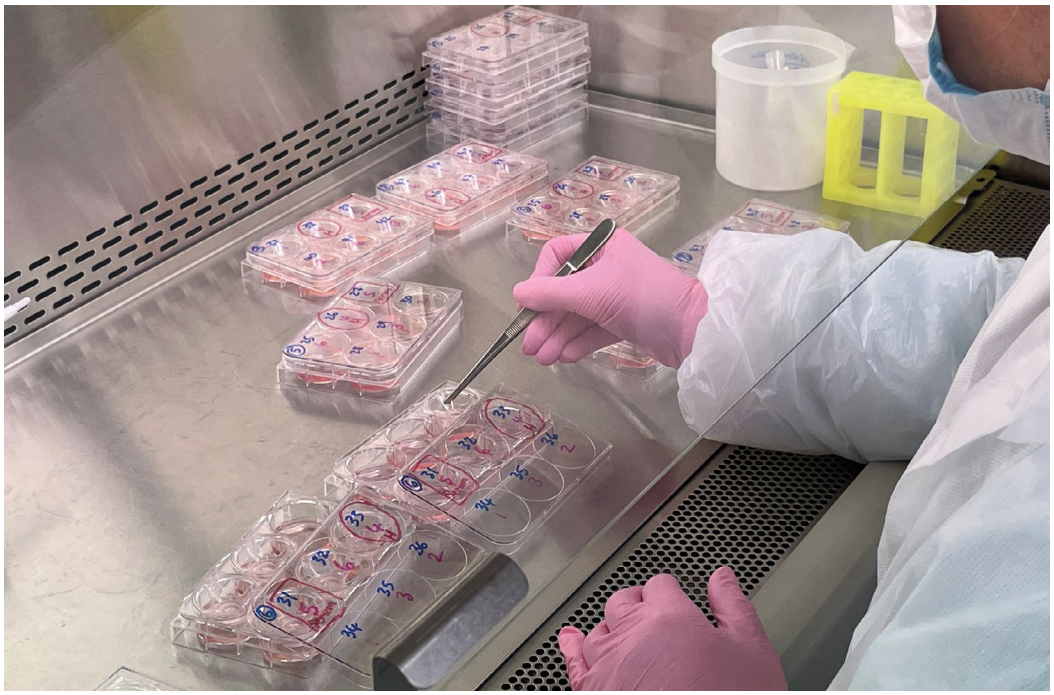
Productivity modelling

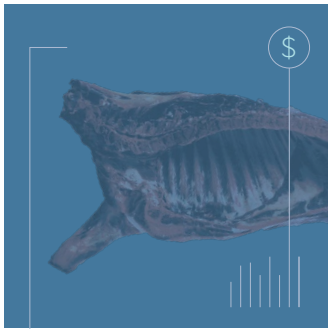
- Develop a suitable method to accurately measure productivity within the Australian red meat processing sector.

KPIs

- Ultra-high frequency RFID tech shown to be at least 99 per cent effective in carcase traceability.
- Evidence of audit harmonisation within the industry, achieving a net reduction in compliance costs.
- Evidence of improved cost competitiveness for Australian red meat processors compared to international competitors (reduced cost differential since previous *Cost to Operate* analysis).

Value opportunities





Left: Assessment of value-adding potential of sheep collagen–based wound healing dressings

Product value

- Identify opportunities to increase the value of products using Objective Measurement technology.
- Translate food-grade Extracellular Vesicles into evidence-supported bioactives.
- Investigate alternative uses for skins and hides.

KPIs

- [ ] Accreditation and adoption of at least one new Objective Measurement technology.

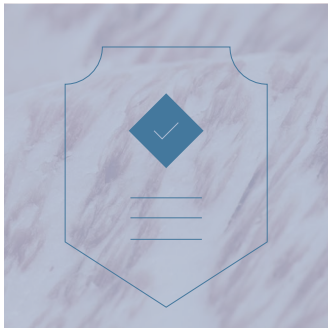
Food safety, quality and nutrition

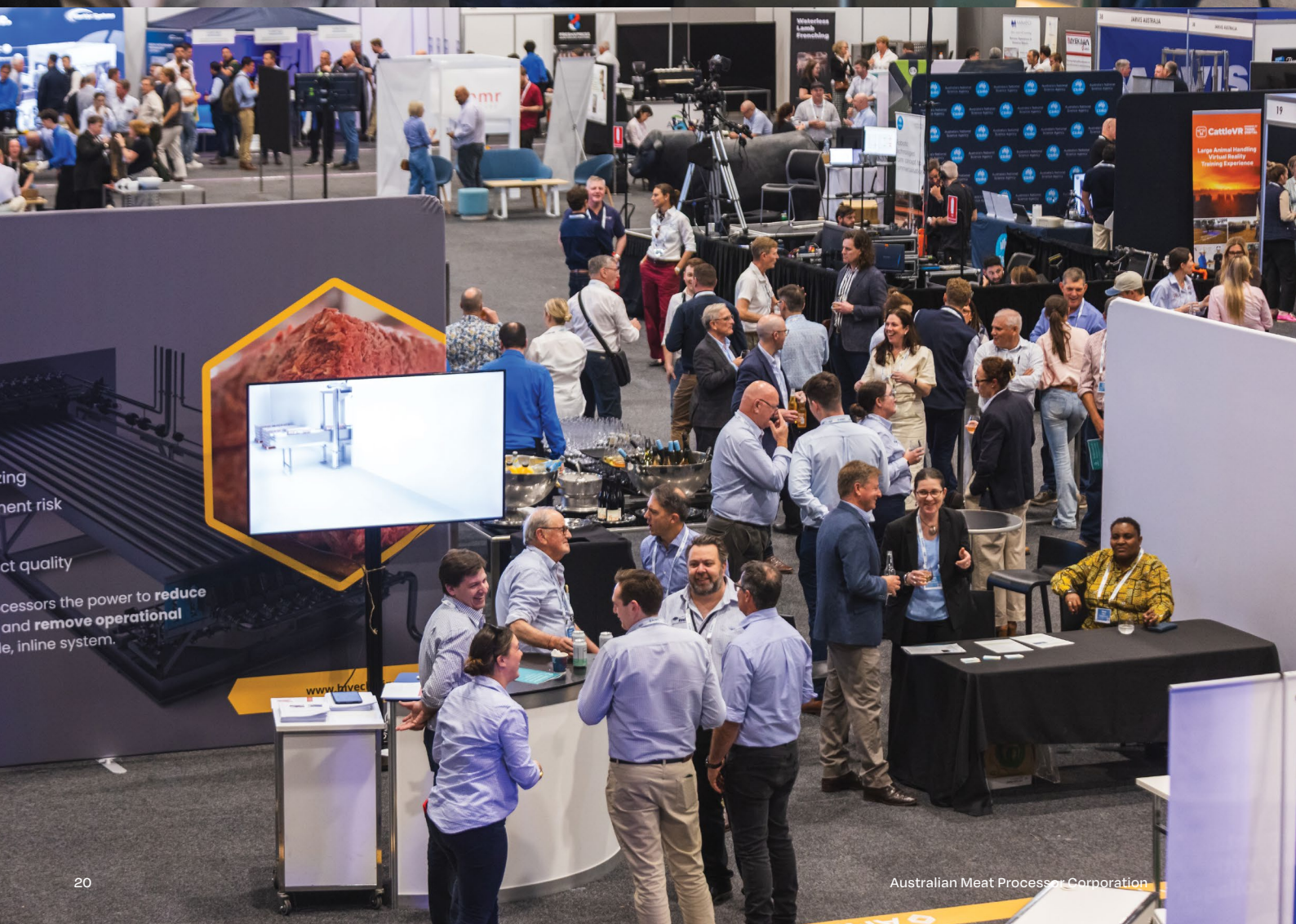
Food safety

- Review potential applications for the use of AI in improving food safety outcomes.
- Assess the STEC and salmonella risk in our beef herd through baseline studies.

KPIs

- [ ] At least three processors using AI to improve food safety.




CattleVR
Large Animal Handling
Virtual Reality
Training Experience
cessors the power to reduce
and remove operational
e, inline system.

Engagement and extension activities

AMPC has an overarching stakeholder engagement framework that sets out principles guiding AMPC's engagement processes. It has executed stakeholder engagement agreements with Meat and Livestock Australia (MLA) and the Australian Meat Industry Council (AMIC) which set out shared behaviours, principals of engagement and principals for matched funding and joint activities.

AMPC works closely with industry, other research and development corporations, and stakeholders on its research and development activities.

AMPC engages with government through regular meetings with the Department of Agriculture, Fisheries and Forestry (DAFF), and CEO meetings with the minister.

The stakeholder engagement framework is available on the AMPC website.

AMPC plans to attend industry events in the 2026-27 year including participating in a joint stand with RDCs at EvokeAg, attending the Meat Business Women annual conference and ABARES. AMPC are also major supporters of LambEx and Beef Week 2027, sponsoring the carcase competitions at both events.

Regional *AMPC Innovation Spotlight* events will continue in 2026-27. The local events highlight research and development outcomes and encourage adoption.

AMPC's extension and adoption manager will continue visiting plants throughout Australia during 2026-27 showcasing research, development and marketing activities.

Engagement and extension

- In-person engagement with processors, promoting innovation and adoption of R&D.

Project participation and adoption

- Accurately track processor adoption of AMPC innovations and the outcomes achieved.
- Develop trust in stakeholders and interest to join more AMPC activities.

Spotlight Events

- Deliver 3 regional Spotlight events showcasing industry research, development and innovation.

KPIs

- 95 per cent of all registered plants visited within 2025-2027.

Left: AMPC Innovation Showcase 2025

Performance monitoring and evaluation

Impact evaluation

- Undertake independent evaluations of 5 program areas per annum to determine return on investment.

KPI progress reporting

- AMPC will report progress against all Annual Operating Plan KPIs within our Annual Report.

Enablers

AMPC's enablers provide the foundation that supports the delivery of our strategic priorities across the red meat processing industry. These functions strengthen industry capability, improve access to data and evidence, accelerate adoption of new innovations, attract investment, and ensure collaborative partnerships remain central to delivering outcomes for processors.

Industry capacity and capability building

AMPC will continue to strengthen the industry's capability to adopt and benefit from innovation. This includes building skills, developing practical tools, and supporting processors to implement improvements that enhance productivity, sustainability, and competitiveness. By investing in the people and structures that enable innovation to flourish, AMPC helps processors adapt to emerging challenges and opportunities.

Science, data and insights

Throughout 2026-27, AMPC will continue delivering insights that support decision making across the industry, helping processors understand performance, assess risks and identify new opportunities. These foundational insights also inform AMPC's investment decisions and ensure the industry is equipped with credible, timely information to remain globally competitive.

Knowledge transfer and adoption

Ensuring that research and development translates into practical industry outcomes is central to AMPC's purpose. AMPC will continue to support the adoption of new technologies and practices by providing accessible resources, on plant demonstrations, and targeted extension activities. By focusing on real world application, AMPC helps processors integrate innovations into their operations and realise performance improvements.

Growing investment in innovation

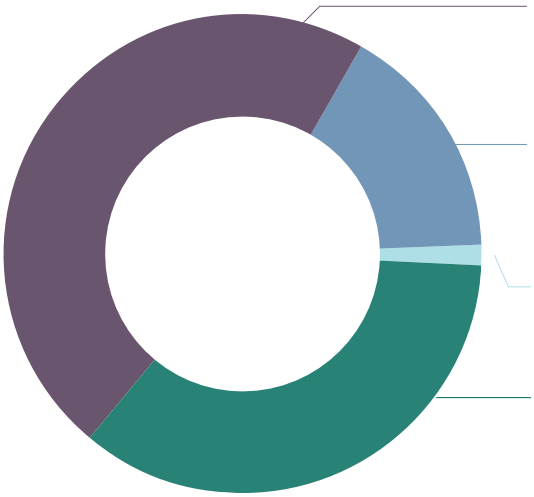
A strong innovation ecosystem relies on attracting and sustaining investment. AMPC will work to grow co-investment and strengthen funding pathways that accelerate the development and commercialisation of innovative technologies. By partnering with research organisations, industry and government, AMPC helps broaden the investment base supporting the industry's long-term productivity and sustainability.

Strategic partnerships and collaboration

Collaboration remains essential to achieving meaningful, industry-wide impact. AMPC will continue deepening relationships with processors, RDCs, government, research partners and international collaborators to share knowledge, align priorities and scale innovation. These partnerships reinforce AMPC's commitment to delivering shared value and ensuring the industry collectively benefits from advances in research, technology and capability.

Balanced portfolio

Expenditure ($m)



Budget

Income	RD&E	Marketing	Total
Levies	$13,158,407	$8,772,272	$21,930,679
Interest	$497,141	$331,427	$828,568
Government matching	$21,969,661	—	$21,969,661
Partner contributions	$15,336,742	—	$15,336,742
Total	**$50,961,951**	**$9,103,699**	**$60,065,650**

Expenditure	RD&E	Marketing	Total
Industry excellence	$14,130,233	$1,445,649	$15,575,882
Innovation technology leadership	$20,898,958	—	$20,898,958
Growth and global competitiveness	$6,916,710	$130,000	$7,046,710
Other program expenses	$48,105	$528,888	$576,992
Total	**$41,994,005**	**$2,104,537**	**$44,098,542**

Corporate costs	RD&E	Marketing	Total
Corporate member services	—	$550,000	$550,000
Direct corporate costs	$4,417,006	—	$4,417,006
Indirect corporate costs	$1,514,316	$3,404,215	$4,918,531
Total	**$5,931,322**	**$3,954,215**	**$9,885,537**

Reserves movements	RD&E	Marketing	Total
Opening reserves	$15,514,024	$12,927,425	$28,441,448
Budget net income	$836,624	$331,427	$1,168,051
Closing reserves	**$16,350,647**	**$13,258,852**	**$29,609,499**

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