

# 2025–26

## Annual Operational Plan

# Contents

<b>Section 01</b>	<b>Overview</b>	
	Opportunities and challenges for 2025–26 . . . . .	5
	Budget Summary . . . . .	9
<b>Section 02</b>	<b>Strategic Imperatives</b>	
	Animal welfare . . . . .	12
	Livestock export supply chain efficiency improvement . . . . .	13
	Livestock export market access . . . . .	14
	Livestock export industry advancement. . . . .	15
<b>Section 03</b>	<b>Our Approach</b>	
	Our Programs . . . . .	17
	Operating Environment . . . . .	18
<b>Section 04</b>	<b>Delivery</b>	
	Exporter Program . . . . .	23
	Industry Capability Program . . . . .	25
	Services and Innovation Program . . . . .	27
	LEP RD&E Program . . . . .	28
	Communications Program . . . . .	30
	Corporate Operations . . . . .	31
	Key Performance Indicators . . . . .	32
	LiveCorp Investment . . . . .	34
<b>Section 05</b>	<b>Livestock Export In-Market Program</b>	
	LEP In-Market Program . . . . .	37
<b>Section 06</b>	<b>Alignment of Objectives</b>	
	Red Meat 2030. . . . .	41
	Australian Government Priorities . . . . .	42
<b>Section 07</b>	<b>Appendix</b>	
	Industry Consultation . . . . .	44
	List of Abbreviations. . . . .	45

# LiveCorp Vision

**Leading the world in the health and welfare of livestock exports**

## LiveCorp Mission

- **Generate positive animal health and welfare outcomes along the length of the livestock export supply chain**
- **Introduce innovative solutions and technical improvements to the performance of the livestock export supply chain**
- **Contribute to the opening and development of livestock export market access**

## Annual Operational Plan

The Australian Livestock Export Corporation (LiveCorp) is the rural Research and Development Corporation (RDC) for the Australian livestock export industry.

LiveCorp provides research, development and extension (RD&E) and marketing services (promoting best practice animal welfare standards, and the benefits of Australian livestock). These aim to continuously improve animal welfare outcomes, increase the profitability, productivity and competitiveness of livestock exports, and enhance its preparedness for future opportunities and challenges.

The Annual Operational Plan (AOP) provides an overview of the investment LiveCorp will make in the relevant financial year, on a program basis. It aims to inform Australian livestock exporters, peak industry bodies, the Department of Agriculture, Fisheries and Forestry (the department), and the wider livestock export industry about LiveCorp's planned activities.

AOPs are prepared each financial year through extensive consultation and engagement with members and the Australian Livestock Exporters' Council (ALEC). They outline the core, strategic and responsive activities to deliver on LiveCorp's investment priorities.

Strategic direction is taken from the LiveCorp *Strategic Plan 2025*, the Australian red meat and livestock industry's *Red Meat 2030*, the Australian Government's Science and Research Priorities, and its National Agricultural Innovation Policy Statement.





## Overview

LiveCorp is the service provider and research body for Australia's livestock export industry. LiveCorp works closely with exporters and other stakeholders to continuously improve performance in animal health and welfare, supply chain efficiency and market access.



## Opportunities and challenges for 2025–26

Australia's livestock export industry provides nutrition and food security to its key markets. It increases the ability of other countries to expand their livestock and meat production capacity, as well as fostering business development and employment opportunities, and providing education and training across the whole supply chain.

In Australia, the industry provides jobs both on and off farm, especially in rural and remote regions. It also supports livestock prices through increased competition, and provides a key marketing option for livestock in times of high turn-off.

The welfare of livestock during transport remains a concern for the Australian community, and a focus for LiveCorp. Our activities support the industry's commitment to high animal welfare standards and continual improvement.

Several key opportunities and challenges have been identified for the 2025–26 operating period.

### Supply and demand for livestock

Australia's cattle herd and sheep flock are both expected to ease further in 2025–26, from high levels in 2024. This is largely due to increased turn-off as a result of dry conditions in southern Australia.

A good wet season in the north has provided some stability to the national herd. Consequently, cattle prices are projected to remain steady, and cattle supply for live export is expected to remain strong.

Demand from Australia's largest cattle market, Indonesia, surged in early 2025 and is expected to remain strong in 2025–26. The local herd is still being affected by foot and mouth disease (FMD) and lumpy skin disease (LSD), and the Indonesian Government has reduced quotas for Indian buffalo meat in recognition of the increased economic activity generated by live cattle imports. The implementation of President Prabowo Subianto's free nutritious meals program also has the potential to create demand for both beef breeders and dairy cattle.

There's also increased interest in breeder and dairy cattle from new markets, including North African countries and the Americas, which may offset continued weaker demand from China.

Demand for Australian sheep remains strong, driven by Australia's reputation for quality, consistency and animal health standards. Disruptions to supply from key competitors due to drought and disease, along with drought in importing countries, are also generating increased interest from new and existing markets.

Constraints which affected sheep exports in 2024–25 have eased, although the industry continues to monitor tensions in the Middle East.

All sheep exported by sea are currently sourced from Western Australia, and multiple factors are likely to affect the state's ability to meet demand. These include an ongoing shift to cropping and meat breeds, leaving fewer adult sheep available for live export; regulatory pressures, including the ban on live sheep exports by sea from 2028; and an expected increase in transfers to the eastern states for re-stocking once dry conditions ease.

## **Indonesia**

Indonesia is Australia's largest livestock export market, and the trade has supported the development of a vibrant commercial cattle sector essential to its food security.

In 2025, the Indonesian Government launched an initiative to provide free meals to schools and pregnant women as a way of tackling malnutrition and stunting, which affect around one in five young children in Indonesia. Australia's livestock export industry is exploring opportunities to support Indonesian farmers to achieve the desired expansion of the country's beef and dairy cattle herds, including ways to leverage Australian expertise in tropical livestock management.

FMD and LSD continue to have an impact on Indonesian livestock, and there is ongoing support from both the Australian Government and industry for local efforts to improve biosecurity and animal health.

LiveCorp will focus on proactive engagement with industry bodies and government representatives to maintain and further strengthen relationships with Indonesia in 2025–26.

## **Animal welfare measurement and reporting**

The mortality rate for sheep exported by sea in 2024 was a new record low of 0.10%. The average for cattle exported by sea was 0.06%, and more than half of all cattle voyages were completed with zero mortalities. All goats are exported by air, and there were zero mortalities in 2024.

Mortality remains an important measure because it is objective and absolute, while animal welfare measures can be subjective, variable and transient. However, the industry continues to collect and analyse animal welfare data from Registered Establishments and both air and sea journeys to guide day to day management decisions and longer term improvements.

The data is used to inform ongoing professional development modules for shipboard staff, research projects, input into regulatory reviews, and communications outputs. A pioneering initiative is also underway to create a system capable of interpreting shipboard data by determining how best to weigh and combine the various measures.

## **Market access**

The quality and disease-free status of Australian livestock continues to attract interest from existing and new markets, including demand for breeding animals to support herd development and genetic improvement. With its contribution to food security, the industry is an integral part of relationships between Australia and many of its trading partners.

LiveCorp works closely with industry and the department on a range of market access priorities, providing support and technical advice to the livestock export Protocol Committee and acting as secretariat. Protocol negotiations will continue throughout 2025–26 with markets across the globe.

Biosecurity is a priority for Australia as part of maintaining market access as well as protecting our agricultural industries. Through Australian Government grants, the industry continues to support projects aimed at boosting vaccination rates for local livestock in Indonesia, and supporting capacity building for farmers and community representatives.

## **Community sentiment**

A long-running series of national surveys to understand community sentiment toward the livestock export industry has highlighted the complex and evolving nature of the relationship. Carried out by an independent third party, the project will continue in 2025–26.

The findings show the Australian public values the contribution of livestock exports to Australian farmers and the communities in which they live, and the industry's importance to people living in destination markets by providing safe and affordable meat. Participants acknowledge that animal welfare is a complex issue, and it remains one of the key drivers of trust and acceptance of the industry.

LiveCorp will continue to develop communication materials informed by the research, to address public concerns and foster a better understanding of the industry.

## **Political landscape**

Legislation is in place to end the export of live sheep by sea from Australia on 1 May 2028. The policy does not apply to live cattle exports, nor does it apply to live sheep exports by air.

LiveCorp will continue to support industry, ALEC and the department with expert advice and resources regarding the sheep trade, consistent with its role as a research and development corporation.

## **Regulatory reform and reviews**

LiveCorp will continue to work with the department to identify opportunities to streamline and improve livestock export regulation, certification and approval processes.

LiveCorp will also provide technical input and/or support with resources for a range of government reviews and ad hoc consultation. This includes reviews carried out by the Inspector-General of Animal Welfare and Live Animal Exports, and consultation on both version 4.0 of the Australian Standards for the Export of Livestock (ASEL) and the Exporter Supply Chain Assurance System (ESCAS).

## **Sustainability**

There is a growing focus from government and the community on sustainability, including increased requirements for carbon accounting and reporting.

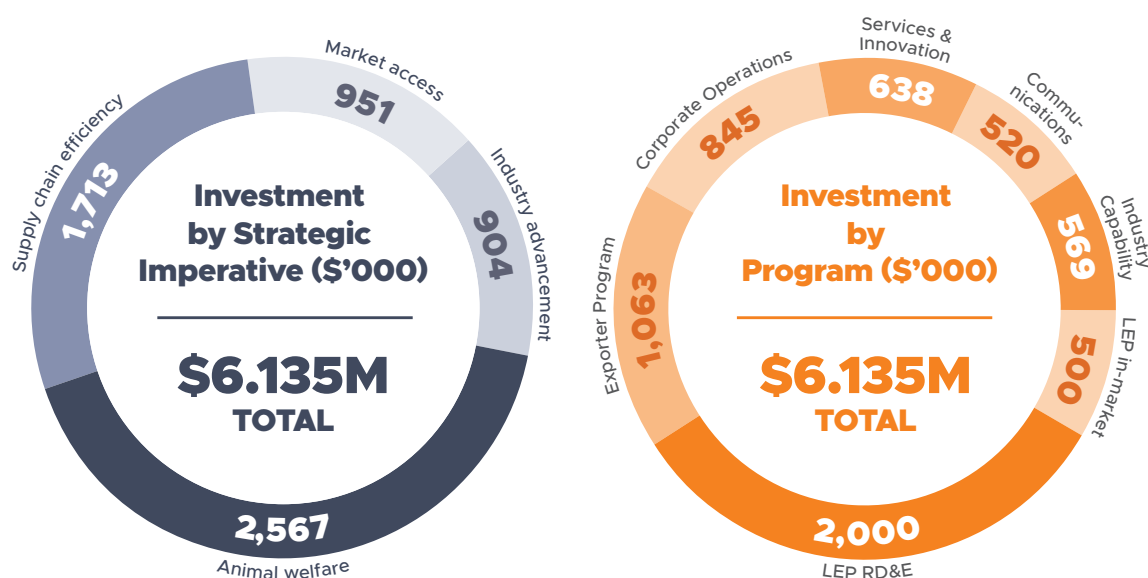
Research has been conducted on the industry's carbon footprint, shipboard effluent management, and the social benefits the industry delivers overseas on food security, poverty alleviation and nutrition, and LiveCorp will continue to build its understanding and communicate the industry's sustainability credentials.





## Budget Summary

In 2025–26 LiveCorp's investment in research, development and marketing activities is forecast to be \$6.135 million.



## Levy rates

LiveCorp is funded by statutory levies on the export of live beef and dairy cattle, sheep and goats under the legislative framework of the *Primary Industries Levies and Charges Disbursement Act 2024*. These levies are collected on either a weight or per head basis.

LEVY RATES (\$)			
	Marketing	Research	Total
Beef cattle (per kg)	0.007936	0.001587	0.009523
Dairy cattle (per head)	5.00	1.00	6.00
Sheep (per head)	0.50	0.10	0.60
Goats (per head)	0.40	0.10	0.50

The levies are divided into two components: marketing (approximately 83%) and research (approximately 17%), as set out in the *Primary Industries (Customs) Charges Act 2024*. In accordance with the Cost Allocation Policy, the ratio of levy income informs LiveCorp's allocation of expenditure across research and marketing activities.



## Strategic Imperatives

LiveCorp exists to deliver for its levy payers and other members and, through them, the livestock export industry. Direction and priorities for the investment of levies are set through consultation and engagement with a range of stakeholders.



# STRATEGIC IMPERATIVES

LiveCorp's mandate is defined in its constitution. It is required to:

- **lead the way in the advancement of animal health and welfare along the export supply chain through its research and development efforts**
- **facilitate the introduction of ongoing improvements to animal health and welfare within the framework provided by Australian Government standards and industry codes and benchmarks**
- **improve the efficiency of the export supply chain, within ASEL and associated regulation**
- **promote the export of Australian livestock to overseas countries through its market access services.**

With these responsibilities in mind, LiveCorp has identified four strategic imperatives that form the core of its *Strategic Plan 2025*. In each of these mission-related areas, LiveCorp has set goals and nominated the initiatives through which these goals are to be realised over the five year period covered by the plan.

The plan was developed in 2020 through an extensive consultation process involving members, the Australian Livestock Exporters' Council (ALEC) as the peak industry body, the Department of Agriculture, Fisheries and Forestry as the regulator, and other stakeholders.

After extending the *Strategic Plan 2025* for 12 months to provide more clarity on the operating environment, work on the new plan is underway ahead of its implementation from 1 July 2026.



## 1 ● Animal welfare

**Lead in materially advancing animal health and welfare along the export supply chain through research, development and extension.**

### GOALS

1. By 2025, LiveCorp will have developed and introduced in the Australian livestock export industry an effective framework for monitoring and reporting on the health and welfare of animals across the various stages of the export supply chain.
2. By 2025, LiveCorp will have generated, through investment in R&D, information to increase the skills, knowledge and capability of people in the livestock export supply chain.
3. By 2025, LiveCorp will have extracted maximum value from its research by investing in extension and adoption pathways from research inception to completion, and effectively communicating the progress and outcomes.
4. By 2025, LiveCorp will have raised knowledge and awareness of the livestock export sector and its commitment to animal health and welfare through engagement and communication activities among the audiences that matter, including exporters, but also in the wider community, its industry partners, and with the department as the industry regulator.



## 2 ● Livestock export supply chain efficiency improvement

**Spearhead efficiency gains in the livestock export supply chain through innovative solutions and technical and technological improvements, within the framework of relevant regulation (e.g. ASEL and ESCAS).**

### GOALS

1. By 2025, LiveCorp will have assisted the industry to introduce the information and communication technology (ICT) capabilities required for the close monitoring, management and reporting of animal health and welfare throughout the supply chain and the operational and environmental conditions that underpin it.
2. By 2025, LiveCorp will have put in place (a) those mechanisms that enable it to access the industry-wide, reliable and quality live export data essential to its evidence-based research and advice; as well as (b) the data gathering, quality control, management and storage infrastructure that offers the robustness, resilience and functionality required to serve the organisation's purpose.
3. By 2025, LiveCorp will have produced effective research that translates to real, measurable performance enhancements along the livestock export supply chain.

## 3 • Livestock export market access

**Advance the export of Australian livestock to overseas countries through services in market access, development and growth.**

### GOALS

1. By 2025, LiveCorp will have maintained and enhanced its reputation as a particularly valuable expert in, and contributor to, the development and maintenance of market access for Australian livestock.
2. By 2025, LiveCorp will have established a solid reputation for innovative approaches and contributions to the promotion of Australian livestock in overseas countries.
3. By 2025, LiveCorp will be able to point to a record of continuous investment in, and technical advice on, priority livestock biosecurity systems, as a material contribution to the development and advancement of market access priorities.

## 4 ● Livestock export industry advancement

**Contribute materially to a growing acceptance of the livestock export industry within the community; to the industry's ability to present its case; and to the ongoing development of a world-leading regulatory framework for the export of livestock.**

### GOALS

1. By 2025, LiveCorp will have made a material contribution to the greater acceptance of the livestock export industry in the community at large.
2. By 2025, LiveCorp will have fostered a significantly better understanding of the industry's nature, of its operations and of its performance among influential stakeholder audiences.
3. By 2025, LiveCorp will have demonstrated its unique expertise and value in the collaborative shaping of well-balanced regulation for the livestock export industry, through research products that speak to the insightful use of high quality data.

## SECTION 03

### **Our Approach**

LiveCorp delivers research and marketing activities and investments through a suite of programs.



## Our Programs

### LiveCorp Programs

LiveCorp's Programs are focused on delivering the *Strategic Plan 2025* and addressing key issues facing members and the livestock export industry.

Activities are developed through an industry-wide consultation process over several months to identify innovative outcomes central to the delivery of continuous improvement in livestock management, health and welfare throughout the supply chain, supply chain efficiency, market access and the sustainability of the industry.

FOR FURTHER DETAILS SEE PAGE 23

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### The Livestock Export Program

LiveCorp and Meat & Livestock Australia (MLA) jointly invest in the Livestock Export Program (LEP) to support the growth, productivity and sustainability of the livestock export industry for the benefit of both producers and livestock exporters.

The LEP leverages exporter and producer levies, as well as government matching of expenditure for eligible research, development and extension (RD&E) projects.

Day-to-day management of the LEP RD&E Program is the responsibility of LiveCorp, while MLA manages and administers three in-market programs.

Jointly, the LEP provides:

- RD&E to improve animal health, welfare and productivity throughout the livestock export supply chain
- In-market activities to support the growth, productivity and sustainability of the livestock export industry through the delivery of risk mitigation strategies and extension of best practice livestock management in destination countries.

FOR FURTHER DETAILS SEE PAGES 28 & 37

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## Operating Environment

### Research, development and extension

The LEP RD&E Program manages a balanced portfolio of research projects which aim to create knowledge, evidence, technology and other practical outputs to inform and support decision making and activities within and related to the industry. Communication, extension and adoption are also a strong focus to ensure the impacts of the investment are realised.

LiveCorp directs its investment through the LEP via a donor arrangement with MLA, which allows every dollar invested in eligible RD&E to be matched by the Australian Government, maximising the return on exporter levies.

The Program has a strong focus on delivery and accountability, with clear processes, structures and reporting in place.

A Management Committee (representing LiveCorp and MLA) provides oversight of the Program as the decision-making group.

It is advised by the Livestock Export Research and Development Advisory Committee (LERDAC), which is comprised of multiple producer and exporter representatives, a staff member from both LiveCorp and MLA, and an independent Chair. An observer from the Department of Agriculture, Fisheries and Forestry (the department) attends each meeting, and technical advisors are brought in as required.

Together, Management Committee and LERDAC ensure there is a balanced portfolio of RD&E activity by identifying short, medium, and long-term projects; identifying opportunities to increase industry benefits from research investments; and evaluating the risk profile of projects. Investments made by the Program will be guided by the LiveCorp strategic plan, industry needs and, where appropriate, will align with Australian Government priorities.

### Collaboration

LiveCorp recognises the importance of cross-industry and cross-sectoral collaboration with industry, research partners, the department and other organisations to leverage expertise and to enhance capacity and capability.

# OUR APPROACH

In addition to its significant collaboration with MLA through the LEP, LiveCorp seeks to identify opportunities for collaboration where the outcomes and value-for-money justify such engagement. Key examples of LiveCorp's cross-sectoral engagements include its participation in the Council of Rural Research and Development Corporations; collaboration with other rural RDCs, such as through the grow<sup>AG</sup> platform and Emerging National Rural Issues forum; and involvement in Animal Health Australia's Industry Forum and National Arbovirus Monitoring Program.

LiveCorp is also a founding and current member of Agricultural Innovation Australia (AIA). Established in 2020, AIA seeks to facilitate investment from public, private and not-for-profit entities to help address the opportunities and challenges confronting the agriculture sector where individual industry investment is unlikely to be effective. LiveCorp was an in-kind contributor to AIA's flagship Environmental Accounting Platform.

## **Evaluation and monitoring**

LiveCorp applies an annual cycle of planning and accountability. The cycle includes interlocking processes of strategic and operational planning, budgeting, implementation, evaluation, performance review and accountability to members, levy payers and stakeholders.

The LEP RD&E Program conducts an annual snapshot survey to collect feedback on the industry's priority areas for research investment and to identify knowledge gaps, areas of need and communication preferences. The survey also evaluates stakeholder satisfaction and the adoption of outputs. The results are used to inform research activities for the following year.

In 2025–26, an independent performance review will also be carried out, as required by the Funding Agreement with the department.

## **Monitoring and reporting of LiveCorp activities**

Monitoring and reporting mechanisms include oversight of LiveCorp's performance, conduct and compliance by a skills-based Board. It reviews, on an ongoing basis, a suite of reports that cover LiveCorp's operational and strategic performance:

- Operational reports, such as finance, workplace health and safety, and risk management
- Annual external audits
- Program and project activities and outcomes against priorities.

Additional monitoring and consultation are conducted through regular meetings (eg the Annual General Meeting) with levy payer members, the Australian Livestock Exporters' Council (ALEC), state and territory Livestock Exporter Associations (LEAs) and other stakeholders. This consultation includes consideration of both strategic and operational performance, and LiveCorp uses the feedback to continually improve the quality of research and investment processes, programs and activities.

The strategic evaluation of LiveCorp activities is conducted in alignment with key governance and planning cycles – particularly in relation to the five-year strategic plan and LiveCorp's Funding Agreement with the Australian Government.

The Funding Agreement for 2025–34 outlines five principles against which LiveCorp is required to monitor and evaluate its performance.

- To engage stakeholders to identify research and development activities and associated priorities that provide benefits to the industry
- To ensure research and development activities, marketing activities and associated priorities are strategic, collaborative and targeted to improve industry profitability, productivity, competitiveness and preparedness for future opportunities and challenges through a balanced portfolio
- To undertake strategic and sustained cross-industry and cross-sectoral collaboration that addresses shared challenges and draws on experience from other sectors
- For governance arrangements and practices to fulfil legislative requirements and align with contemporary Australian best practice for open, transparent and proper use and management of funds
- To demonstrate positive outcomes and delivery of research and development activities, marketing activities and associated benefits to levy payers, charge payers and the Australian community in general, and show continuous improvement in governance and administrative efficiency.



# OUR APPROACH





# SECTION 04

## Delivery

LiveCorp Programs are focused on addressing key issues facing members and the livestock export industry, and delivering against the *Strategic Plan 2025*.



## Exporter Program

### PURPOSE

The Exporter Program facilitates and coordinates issues management, stakeholder engagement and specific animal welfare related initiatives. It is also the main source for regular consultation with the Department of Agriculture, Fisheries and Forestry (the department) regarding regulatory reform and reviews, and with the Australian Livestock Exporters' Council (ALEC) on new and emerging industry issues, policy support and reform implementation.

### PROPOSED ACTIVITIES

- Engage with international businesses, industry bodies and governments (as appropriate) to support relationship building and trade development opportunities for livestock exports.
- Explore opportunities to build relationships with Australian and international government and non-government agencies with an interest in areas such as food security, where livestock exports may play a part.
- Support and increase engagement with Indonesia, including on market access and its nutritious meals program.
- Coordinate and participate in meetings of the Strategic Response Group, including crisis simulation exercises.
- Support the growth of live cattle exports, including broader collaboration with cattle industry stakeholders and increased communications about the trade.
- Consult with ALEC as the peak industry body on industry priorities, issues, planning, and policy direction and implementation.
- Explore opportunities for industry-led activities to bring about improvements and efficiencies in regulatory processes.
- Identify and respond to key emerging sensitivities and issues for market access and the supply chain, including through the provision of technical advice.
- Engage with the Livestock Export Program (LEP) on priority in-market projects, including biosecurity support, animal welfare and other training, and opportunities for market diversification and value adding.
- Explore opportunities to better communicate livestock export-specific positioning on ESG-style topics, including in red meat sustainability frameworks.

## SECTION 04

- Complete the delivery of an Australian Government grant to understand the emissions reduction tools available to the industry, and any gaps.
- Support joint investment and collaboration on cross-industry agricultural issues of national importance.
- Provide funding and strategic input into the National Arbovirus Monitoring Program (NAMP) to support access to livestock export markets, including through participation in the steering committee and input into a review of funding arrangements.





## Industry Capability Program

### PURPOSE

The Industry Capability Program provides technical advice to support improvements and efficiencies in the livestock export regulatory framework, and services, support and advice to assist in implementing regulatory reforms.

It also works to ensure diversity and increased opportunities for exporters and producers by maintaining or improving existing markets and gaining access to new markets.

### PROPOSED ACTIVITIES

#### Regulatory reform and implementation

- Engage with industry and the department regarding the review of the Australian Standards for the Export of Livestock (ASEL), and support efforts to identify topics and knowledge gaps requiring further research.
- Engage with industry and the department regarding the review of the Exporter Supply Chain Assurance System (ESCAS), and support efforts to identify services required to fulfil the ongoing need for ESCAS compliance and welfare assurance.
- Prepare submissions to industry and government reviews, using analysis of industry data where relevant.
- Conduct analysis and provide technical advice to industry bodies and the department to support regulatory reform and effective and scientifically informed regulation.
- Consider outcomes and support the implementation of changes to regulatory and legislative frameworks.
- Review ad hoc regulatory updates from the department and provide technical advice.
- Explore opportunities to support engagement between shipping companies and the Australian Maritime Safety Authority (AMSA) to increase access to vessels and adoption of new technology.

## **Market access**

- Provide secretariat support and technical advice to the Protocol Committee to set market access priorities and develop technical strategies to guide discussions for priority markets, including associated ad hoc exporter consultation.
- Provide expert advice to support the department in its protocol and market access negotiations, protocol issues management and engagement with trading partners.
- Assist with the coordination of, and engagement with, international delegations.
- Explore opportunities to promote Australian livestock in existing markets and to develop new ones.
- Engage with industry and government to increase preparedness for, and management of, potential threats such as exotic animal diseases.
- Participate in NAMP technical committee meetings and provide advice on the program's ongoing management.
- Provide exporters with technical support and advice on export certification, market access and the department's negotiation and policy activities.
- Complete the delivery of an Australian Government grant to support the delivery of foot and mouth disease (FMD) and lumpy skin disease (LSD) vaccines in Indonesia.
- Complete the delivery of an Australian Government grant to support capacity building and biosecurity in Indonesia, with a focus on FMD and LSD.

## Services and Innovation Program

### PURPOSE

The Services and Innovation Program manages the development and delivery of LiveCorp's training programs to support ongoing skills development in areas that support the delivery of its strategic imperatives, especially animal welfare. The program also develops and manages innovative systems and tools to enable the industry's continued adoption and use of digitisation, technology and data to support efficiencies, regulatory improvements and evidence-based decision making.

### PROPOSED ACTIVITIES

#### People, skills and capability development

- Manage the Shipboard Stockperson Accreditation Program to ensure the availability of competent stockpersons and support ongoing professional development opportunities to achieve animal welfare and regulatory outcomes.
- Continue to refine and administer the online LiveCorp Learning Hub.
- Develop and deliver a livestock export awareness tour to provide department staff with first-hand knowledge of industry practices and processes.

#### Digital transformation

- Maintain and continue to enhance the LIVEXCollect digital platform, based on industry feedback and to align with regulatory amendments.
- Use LIVEXCollect and other industry data to inform and support research concepts, submissions, decision-making and communication activities.
- Maintain and refine LIVEXCollect reporting dashboards to maximise opportunities for exporters to derive insights and value from the data.
- Continue the delivery of webinars and other communication activities for exporters, stockpersons and others contributing to, or using, the LIVEXCollect platform, to share insights and identify opportunities.
- Support continuous improvement in the quality and standardisation of data managed by LiveCorp, and the efficiency of its collection, to increase the industry's access to insights and analytics.
- Maintain the online heat stress risk assessment platform.

## LEP RD&E Program

### PURPOSE

The Livestock Export RD&E Program invests in projects which help to improve animal health and welfare, supply chain efficiency and market access. Outputs range from highly practical solutions for immediate implementation, to those which build knowledge and inform industry thinking.

### PROPOSED ACTIVITIES

- Develop a model for the aggregated interpretation of animal welfare indicators to support continuous improvement and reporting.
- Identify, trial and, where successful, encourage the commercial adoption of innovative mature or semi-mature technologies from other industries that may support animal welfare, efficiency or market access improvements in the livestock export industry.
- Manage the ongoing community sentiment project to understand the expectations of the Australian public regarding the livestock export industry.
- Analyse and collate technical information and evidence to support the ASEL 4.0 review.
- Create practical guidelines centred on the prevention and proactive management of bedding, lameness and thermal comfort for cattle.
- Develop practical recommendations regarding the feasibility and competitiveness of supplying Australian dairy cattle to Indonesia, along with extension materials to facilitate knowledge transfer.
- Explore in-market sentiment toward, and performance of, composite cattle breeds.
- Analyse and collate technical information and evidence to support the ESCAS review and identify and design any ongoing services the industry may need to provide.
- Benchmark the cost competitiveness of Australia's live cattle export supply chain.
- Identify ways to optimise Australia's live cattle supply chain for global competitiveness.

- Conduct a literature review to identify gaps in knowledge of the livestock export industry and opportunities for extension.
- Implement the findings of a review into the Program's structure and processes.
- Conduct a survey of producers and livestock exporters to identify knowledge gaps and priority areas for RD&E investment and evaluate program performance.

## **Extension and adoption**

- Support the adoption of findings from research into shipboard stocking density, bedding and ammonia management to support improved animal welfare and achieve efficiencies.
- Communicate the outcomes of sustainability research, including the benefits of livestock exports against domestic and international sustainability frameworks, best practice management of effluent, and livestock export industry carbon emissions.
- Support further adoption of the virtual reality (VR) stunning training tool in South East Asian markets.
- Incorporate adoption pathways and goals into the planning phase of projects.
- Develop communication and extension materials to encourage the adoption of best practice systems, tools and techniques to achieve continuous improvements in animal welfare and productivity.
- Provide targeted communications to ensure stakeholders understand LiveCorp's RD&E investments, priorities and achievements.
- Engage with a range of stakeholders to gain feedback and provide updates on active projects and recent outputs, including through regular webinars for exporters.
- Engage with the grow<sup>AG</sup> platform to list appropriate research projects and commercialisation opportunities.
- Engage with other research and development corporations (RDCs) on best practice extension and adoption program design.



## Communications Program

### PURPOSE

The Communications Program supports the effective transfer of information to exporters, industry stakeholders and the government on research, marketing and other activities undertaken by LiveCorp. The program also supports the industry response to community sentiment. This includes developing communication materials that provide information and visibility about the industry, especially in areas where there are community concerns.

### PROPOSED ACTIVITIES

- Manage the logistics, sponsorship opportunities and publicity for LIVEXchange 2025 and successfully deliver the event.
- Secure speakers for LIVEXchange 2025 to deliver positive, insightful and thought-provoking content and provide a greater understanding of the industry.
- Support the community sentiment research project, including development of the annual survey and communication of outcomes to industry and government.
- Coordinate and participate in meetings of the Community Sentiment Steering Group, to support the implementation of community sentiment research findings and insights.
- Develop informative, fit-for-purpose materials and publications to support increased awareness and understanding of industry practices, performance and regulations, and to counter mis-information.
- Maintain the LiveCorp website to facilitate access to, and sharing of, information and LiveCorp outputs.
- Review and develop a new LiveCorp website.
- Support and communicate the industry's preparedness for a potential exotic disease outbreak.
- Develop resources and participate in select events to communicate LiveCorp's marketing and research activities to exporters and stakeholders.
- Communicate the contribution of livestock exports to destination countries to audiences including the Australian public, the wider red meat industry and Australian government agencies.

## Corporate Operations

### PURPOSE

Corporate Operations provides a framework of rules, relationships and processes through which LiveCorp's strategies can be set, delivered and monitored. The governance systems are designed to deliver the best interests of members, support the values of the company, and meet the obligations of the Funding Agreement.

### PROPOSED ACTIVITIES

- Manage the independent review of LiveCorp's performance.
- Manage the development of LiveCorp's *Strategic Plan 2026–31*, taking into consideration the ban on live sheep exports by sea from 2028 and efforts to support the growth of live cattle exports.
- Manage the implementation of recommendations from the external review of LiveCorp's board governance.
- Support LiveCorp's relationships with a range of stakeholders, including the department, ALEC, Meat & Livestock Australia (MLA) and other industry bodies.
- Monitor the alignment of projects and activities to LiveCorp's *Strategic Plan 2025*, including through consultation with ALEC and members.
- Manage LiveCorp's reporting requirements, including delivery of the AOP, annual report and annual general meeting.
- Support the LiveCorp Board, including through secretariat functions and managing the director selection and induction process.
- Manage legal compliance, contractual obligations and the principles of good governance, including through the regular review of policies and procedures.
- Manage the governance and administration of MLA and Commonwealth funds relating to the LEP RD&E and in-market programs.
- Manage finance and administration activities, including budgets, audits, human resources and IT systems.

## Key Performance Indicators

### General

- LiveCorp's *Strategic Plan 2026–31* is developed with input from members and key stakeholders.
- 75% of members contributing 80% of export levies are consulted at least twice during 2025–26.
- LiveCorp and ALEC are aligned and coordinated on industry priorities.
- LiveCorp's technical advice to industry and government reviews is well informed and supports best practice animal welfare, with relevant regulatory review submissions making use of appropriate data sources.
- RD&E projects and commercialisation opportunities are listed on the grow<sup>AG</sup> website, where relevant, and updated at least annually.
- RD&E investments are aligned with the LiveCorp *Strategic Plan 2025*, and satisfaction with research outcomes increases.
- Satisfaction with communication about current RD&E activities and their impact is maintained.
- LiveCorp maintains governance arrangements and practices which fulfil legislative requirements and align with best practice, including obligations set out in the Funding Agreement and *Corporations Act 2001* (Cth).

### Animal welfare

- Exporters have access to LiveCorp Accredited Stockpersons trained in best practice animal handling, husbandry and ASEL requirements.
- Recommendations from a review of the Shipboard Stockperson Accreditation Program are implemented.
- At least one shipboard stockperson training course is held, and relevant professional development opportunities are offered to existing stockpersons.
- A scientifically valid methodology for interpreting and reporting on animal welfare outcomes is developed, informed by previous research outcomes on animal welfare indicators and analysis of industry data.
- Outcomes from animal welfare-related research are communicated to, and adopted by, relevant members of the livestock export industry, including in areas such as bedding, lameness and thermal comfort.
- Technical input and submissions are provided to support reviews of livestock export standards and regulations.

## **Supply chain efficiency**

- LiveCorp's input and technical advice contribute to the identification and implementation of efficiencies in the livestock export supply chain and in the regulatory framework.
- Exporters are provided with insights from LIVEXCollect to support decision-making and greater efficiencies.

## **Market access**

- There is continued member support and demand for LiveCorp's input and technical advice in the development of market access opportunities, and 80% of priority one market negotiations identified by Protocol Committee are advanced.
- LiveCorp is represented at, and contributes to, all relevant NAMP meetings.
- Activities to increase industry preparedness for an exotic disease outbreak in Australia are progressed.
- Australian Government grants are successfully delivered to support biosecurity capacity and disease management programs in Indonesia.
- Strong relationships and on-going engagement exist between the livestock export industry and overseas and Australian governments, to establish market priorities and monitor in-market conditions.

## **Industry advancement**

- The LIVEXchange conference in Perth is successfully delivered in November 2025.
- New publications are produced, drawing on insights from the community sentiment research, to improve community understanding of the industry, its performance, and its activities.
- The 2025 community sentiment survey demonstrates an improvement in trust and acceptance of the livestock export industry.
- An Australian Government grant is successfully delivered to better understand emissions reduction tools available to the industry.
- Livestock exporters and stakeholders are informed of LiveCorp's activities and research and development projects.
- LiveCorp's website provides a valued and well-utilised source of information and resources on the industry, RD&E activities and training resources.



## LiveCorp Investment 2025–26 (\$'000)

INCOME			
Source	Marketing	Research	Total
Export levies	2,830	566	3,396
Other sources	633	1,500	2,133
<b>Total income</b>	<b>3,463</b>	<b>2,066</b>	<b>5,529</b>
EXPENDITURE			
Expense	Marketing	Research	Total
Exporter Program	1,051	12	1,063
Industry Capability Program	569	–	569
Services and Innovation Program	638	–	638
Communications Program	520	–	520
Corporate Operations	845	–	845
LEP RD&E Program	–	2,000	2,000
LEP In-Market Program	500	–	500
<b>Total expenditure</b>	<b>4,123</b>	<b>2,012</b>	<b>6,135</b>
<b>Total</b>	<b>(660)</b>	<b>54</b>	<b>(606)</b>

## LEP Investment by Funding Source 2025–26 (\$'000)

	LiveCorp \$	MLA \$	Govt. \$	Total M\$	Total R\$	Total \$
<b>Livestock export research and development</b>	500	500	1,000	–	2,000	<b>2,000</b>
<b>Livestock export in-market activities</b>	500	2,307	–	2,807	–	<b>2,807</b>
<b>Total</b>	<b>1,000</b>	<b>2,807</b>	<b>1,000</b>	<b>2,807</b>	<b>2,000</b>	<b>4,807</b>





## Livestock Export In-market Program

Jointly funded livestock export in-market activities are managed and delivered by MLA to support the growth, productivity and sustainability of the livestock export industry.



# LIVESTOCK EXPORT IN-MARKET PROGRAM

## LEP In-Market Program

The livestock export in-market program is delivered by Meat & Livestock Australia (MLA) through its livestock export welfare, market access and productivity group.

The LEP in-market team operates across three key livestock export regions – Indonesia; the Asia Pacific; and Europe, the Middle East and North Africa (EMENA) – to support the growth, productivity and sustainability of the livestock export trade for the benefit of both producers and exporters. Its focus is to support the adoption of best practice livestock management and the delivery of efficiency, business development, animal welfare and biosecurity projects.

### Operating environment

#### Indonesia

Demand from Indonesia surged in 2024–25 and growth is expected to continue into 2025–26, supported by competitive prices for Australian cattle, increased prices for Indian buffalo meat, and the desire for more breeder cattle.

The Indonesian Government has set a target of importing one million beef breeders by 2027 and one million dairy cattle by 2028 to help rebuild local herds following outbreaks of foot and mouth disease (FMD) and lumpy skin disease (LSD), and to reduce the country's reliance on imported meat and dairy products. This provides opportunities for Australia's live cattle export industry, considering its competitive advantage compared to other countries.

Focus areas for the LEP in Indonesia will include continued capacity development for industry personnel in breeding, animal welfare, and biosecurity, as well as working with Indonesian Government departments.

#### Asia Pacific

Australia's disease free status and consistency of supply continue to position our cattle exports as the preferred option for major livestock importers and traders. While cheaper prices for local cattle out-compete Australian in some instances, there is also volatility in cross-border trading in the region. Using Thailand as an example, anthrax outbreaks in early 2025 restricted the supply of cattle, sheep and goats to neighbouring markets, creating short term supply challenges.



Leveraging off the positive reputation of Australian livestock, the LEP will continue looking to broaden market opportunities. Laos, for instance, with its favourable China trade conditions and cheaper feed options, has been identified as a potential processing or re-export partner.

The focus of the LEP continues to be driving the sustainability of the trade in the region by modernising importer business processes, exploring opportunities to improve product offerings (grading, branding, feeding), and supporting businesses to sell meat produced from Australian cattle, sheep and goats into both premium and mass markets.

The LEP Asia Pacific in-market program also incorporates Brunei, Cambodia, Japan, Malaysia, the Philippines and Vietnam.

### **Europe, Middle East and North Africa (EMENA)**

Competitive pricing and a reputation for high-quality, consistent supply continue to position Australian livestock strongly in the EMENA region for the 2025–26 financial year. Demand remains robust in established markets, with increased interest from new buyers across the region.

Saudi Arabia represents a key growth market, building on the successful resumption of live sheep exports in early 2024 after more than a decade. This momentum is expected to continue, supported by improved trade protocols and positive feedback from recent shipments.

There is also growing interest in Australian livestock from North African countries – including Morocco, Algeria and Egypt – as well as from Turkey, driven by local supply constraints and rising consumer demand for high-quality meat products. In addition, demand for Australian dairy cattle is increasing, particularly in markets seeking to strengthen domestic milk production through the import of high-performing genetics.

Commercial operators across the region are continuing to invest in infrastructure upgrades and targeted marketing initiatives, stimulating increased consumer preference for Australian lamb and beef products in retail and foodservice channels.

The LEP will continue working closely with industry to identify new and emerging opportunities, and to support trade development through co-funded projects with exporters and importers to build sustainable market access across the region.

# LIVESTOCK EXPORT IN-MARKET PROGRAM

## CORE ACTIVITIES

The 'livestock export welfare, market access and productivity' product group supports industry with initiatives that identify and mitigate animal welfare risks; implement adoption of best practice welfare systems; maintain access to key overseas markets; and improve supply chain efficiency.

Key investments include:

- engaging with participants along the livestock export supply chain to support Indonesia's nutritious meals program.
- providing technical advice and training to increase biosecurity awareness and capacity in Indonesia.
- promoting Australian livestock and investigating new markets, supply chains and opportunities for market growth.
- providing technical advice and support aimed at increasing the profitability of supply chains.
- developing and strengthening connections with government and industry to promote market access and support the resolution of issues.
- supporting mitigation and contingency preparations and responses in key risk areas of focus.
- supporting exporters, including via the co-funding program, to develop and implement animal welfare, supply chain and marketing improvements.
- increasing awareness of LEP in-market activities through communication activities and engagement with exporters.

## KEY PERFORMANCE INDICATORS IN 2025-26

- Industry and government engagement with Indonesia's nutritious meals program is supported.
- Training and professional development programs are delivered to support the advancement of animal welfare standards and biosecurity measures.
- Opportunities for new markets or market growth are investigated.
- One 'program of work' case study per region showcases live export activities that have mitigated industry trade risk, improved industry's ability to maintain market access or contributed to industry's trade competitiveness, resulting in demonstrated supply chain change and positive economic benefit to industry.
- One 'program of work' case study per region provides insights and informs government/industry policy, resulting in demonstrated capacity for decisions that reduce trade risk and allow trade to operate.

## Alignment of Objectives







Strategic direction is taken from the LiveCorp *Strategic Plan 2025, Red Meat 2030*, the Australian Government's Science and Research Priorities and the National Agricultural Innovation Policy Statement.

# ALIGNMENT OF OBJECTIVES

## Red Meat 2030

*Red Meat 2030* is the overarching framework that sets the collective strategic direction for Australia's red meat and livestock industry. All industry signatories to the Red Meat Memorandum of Understanding have formal obligations for the implementation of *Red Meat 2030*.

The Red Meat Advisory Council coordinates the development of the plan. The industry's service companies – LiveCorp, Meat & Livestock Australia and the Australian Meat Processor Corporation – work with their respective peak industry bodies to implement it.

LIVECORP'S ALIGNMENT TO RED MEAT 2030 OBJECTIVES		Programs in 2025–26	Exporter program	Industry capability program	Services and innovation program	Communications	Livestock export RD&E program	2025–26 Investment (\$'000) LiveCorp exporter levies
Our people					✓	✓	✓	494
	People see being part of the Australian red meat and livestock industry as attractive now and into the future.							
Our customers, consumers and communities			✓	✓		✓	✓	615
	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			✓	✓	✓	✓	✓	1,124
	We set the standard for world class animal health, welfare, biosecurity and production practices.							
Our environment			✓			✓	✓	405
	We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity							
Our markets			✓	✓		✓	✓	905
	We improve the economic resilience for our industry by increasing access to, and the performance of existing and new markets.							
Our systems			✓	✓	✓	✓	✓	1,092
	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.							

## Australian Government National Science Priorities and Agricultural Innovation Policy Statement

The Australian Government revitalised its National Science and Research Priorities in 2024, setting a long-term direction for Australia's science system and for research and development. The priorities provide clarity on the areas in which Australia should focus its science and research efforts, and the 15 Rural Research and Development Corporations play a major role in that ecosystem. The priorities are:

- transitioning to a net zero future
- supporting healthy and thriving communities
- elevating Aboriginal and Torres Strait Islander knowledge systems
- protecting and restoring Australia's environment
- building a secure and resilient nation.

The National Agricultural Innovation Policy Statement released in 2021 also has four long-term priorities:

- Australia is a trusted exporter of premium food and agricultural products by 2030.
- Australia will champion climate resilience to increase the productivity, profitability and sustainability of the agricultural sector by 2030.
- Australia is a world leader in preventing and rapidly responding to significant pests and diseases through futureproofing our biosecurity system by 2030.
- Australia is a mature adopter, developer, and exporter of digital agriculture by 2030.

The primary objective of LiveCorp and LEP RD&E Program investment is to improve and implement best practice animal health and welfare outcomes as directed by LiveCorp's Constitution and Funding Agreement. Australian Government priorities will be considered in the development of the LiveCorp *Strategic Plan 2026–31* to ensure investments align where possible.



# ALIGNMENT OF OBJECTIVES

LIVECORP'S ALIGNMENT TO AUSTRALIAN GOVERNMENT PRIORITIES	Animal health and welfare	Supply chain efficiency	Market access	Industry advancement
	National Science and Research Priorities			
	A net zero future			✓
	Healthy and thriving communities	✓	✓	✓
	Indigenous knowledge systems			
Australia's environment			✓	✓
A secure and resilient nation			✓	
National Agricultural Innovation Policy Statement				
Premium food	✓		✓	
Climate resilience		✓		✓
Biosecurity	✓		✓	
Digital agriculture	✓	✓		

## Industry Consultation

LiveCorp has an extensive engagement and planning process regarding its Annual Operational Plan (AOP). The development of this document started in January 2025 with a round of exporter meetings and culminated in a gathering of levy payers and industry representatives in April.

### MEET

11 one-on-one meetings with exporter companies (combination of face to face and virtual)

### STRATEGISE

1 strategy session  
with LiveCorp board

### PLAN

1 planning day with LiveCorp staff  
2 planning meetings with LEP in-market staff

### CONSULT

Detailed table of proposed activities circulated for feedback.

1 formal consultation meeting with 47 participants representing exporter companies, industry representative bodies, and LiveCorp directors (combination of face to face and virtual).

## List of Abbreviations

<b>AIA</b>	Agricultural Innovation Australia
<b>ALEC</b>	Australian Livestock Exporters' Council
<b>AMPC</b>	Australian Meat Processor Corporation
<b>AMSA</b>	Australian Maritime Safety Authority
<b>AOP</b>	Annual Operational Plan
<b>ASEL</b>	Australian Standards for the Export of Livestock
<b>DAFF</b>	Department of Agriculture, Fisheries and Forestry
<b>EAD</b>	Exotic animal disease
<b>EMENA</b>	Europe, Middle East and North Africa
<b>ENRI</b>	Emerging national rural issues
<b>ESCAS</b>	Exporter Supply Chain Assurance System
<b>ESG</b>	Environmental, social and governance
<b>FA</b>	Funding Agreement
<b>FMD</b>	Foot and Mouth Disease
<b>HSRA</b>	Heat stress risk assessment model
<b>IGAWLAE</b>	Inspector-General of Animal Welfare and Live Animal Exports
<b>LEA</b>	Livestock Exporter Association
<b>LEP</b>	Livestock Export Program
<b>LERDAC</b>	Livestock Export Research and Development Advisory Committee
<b>LiveCorp</b>	Australian Livestock Export Corporation Limited
<b>LSD</b>	Lumpy Skin Disease
<b>MLA</b>	Meat & Livestock Australia
<b>MoU</b>	Memorandum of Understanding
<b>NAMP</b>	National Arbovirus Monitoring Program
<b>NGO</b>	Non-governmental organisation
<b>PIB</b>	Peak industry body
<b>R&amp;D</b>	Research and Development
<b>RD&amp;E</b>	Research, Development and Extension
<b>RDC</b>	Research and Development Corporation
<b>RMAC</b>	Red Meat Advisory Council





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