

2024-25

Annual Operational Plan

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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 the industry, 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 councils, 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.

SECTION 01

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 2024–25

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 sea 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 2024–25 operating period.

Supply and demand for livestock

After three years of growth, Australia's cattle herd and sheep flock are both expected to decrease slightly in 2024–25, but remain above long-term averages.

While the northern herd is expected to remain in a growth phase, there will be elevated turn-off of cattle nationally, driven by strong supply and the potential for drier than average conditions in parts of Australia. This is expected to support more competitive pricing and therefore greater confidence from overseas importers, despite some uncertainties in live cattle markets.

Stronger demand is expected in Indonesia, Australia's largest cattle market. The economy is gradually improving following the COVID-19 pandemic and the domestic herd has been reduced by foot and mouth disease (FMD) and lumpy skin disease (LSD). However, inflation is eroding consumers' buying power and there is increased competition from Indian buffalo meat.

While elevated turn-off is expected to see a contraction of the national sheep flock in 2024-25, supplies are forecast to remain strong. In recent years, all sheep exported by sea have been sourced from Western Australia, which was facing one of the worst dry seasons on record in early 2024.

Increased availability and attractive prices for Australian sheep are expected to see continued growth in demand from the Middle East. However, the industry is likely to face volatility due to conflict and tensions in the region.

Australia's single largest market for live sheep, Kuwait, is looking to increase imports to support a more constant sheepmeat supply during the year. The trade to Saudi Arabia was reactivated in late 2023 with the first live sheep shipment since 2012, which lays the groundwork for more exports to this important market.

SECTION 01

Indonesia

Indonesia is Australia's biggest market for live cattle, and there are strong and long-standing relationships between the livestock export and cattle industries in the two countries.

Significant challenges have impacted the trade in recent years. These include record high cattle prices in Australia; the detection of LSD and then FMD in Indonesia in 2022; the suspension of several pre-export yards in 2023; and a delay in Indonesia releasing import permits in 2024 ahead of its Presidential election.

The Australian Government provided vaccines and other support for Indonesia's efforts to control the spread of FMD and LSD, including several grants delivered through industry bodies. Proactive diplomatic efforts and collaboration between industry and government in both countries will continue, supporting Australia's engagement with the new Indonesian Government as it looks to implement nutritional and food security initiatives for its people.

LiveCorp will continue working with industry and the department to maintain and further strengthen relationships with Indonesia in 2024–25.

Animal welfare measurement and reporting

Mortality rates on livestock export ships in 2023 were close to the lowest on record. The average for cattle was 0.05%, with nearly half of all cattle voyages being completed with zero mortalities. The average for sheep was 0.17%, which was 81% lower than a decade ago.

While mortality remains an important measure because it is objective and absolute, the industry is investigating how to use new measures of animal welfare in conjunction with mortality to demonstrate performance. One of the key challenges is that animal welfare measures can be subjective, variable and transient, and a project is underway to develop a model capable of accurately aggregating and interpreting animal welfare data.

LiveCorp will also continue to collect and analyse animal welfare data from Registered Establishments and both air and sea journeys, to provide input into discussions on research, regulation and communications, and allow exporters to make evidence based management improvements.

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 activities.

LiveCorp continues to work 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 2024–25 with markets across the globe.

Biosecurity is a priority for Australia as part of maintaining market access as well as protecting our agricultural industries, especially with major exotic animal diseases continuing to spread throughout the world, including to our near neighbours.

LiveCorp remains involved in various taskforces and committees set up by the department, red meat industry and wider agricultural bodies to help ensure the industry is as prepared as possible for a potential incursion.

Community sentiment

The multi-year project to understand community sentiment toward livestock exports has already provided insights on the complexity of the relationship between Australians and the industry, and will continue in 2024–25.

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. The surveys also show that attitudes toward animal welfare standards have improved over time, and that animal welfare remains the key issue on which the industry is judged by the community.

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

The Australian Government has announced that the export of live sheep by sea from Australia will end on 1 May 2028 and legislation has been introduced to Parliament.

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

Regulatory reform is a priority for both industry and the department.

LiveCorp will continue to provide expertise and resources to joint industry and government regulatory reform taskforces, which have identified a range of initiatives 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, including with the new Inspector General of Animal Welfare and Live Animal Exports.

This also includes preparation for consultation on version 4.0 of the Australian Standards for the Export of Livestock (ASEL), and the continuing reviews of the Exporter Supply Chain Assurance System (ESCAS) and Australian Animal Welfare Strategy.

Sustainability

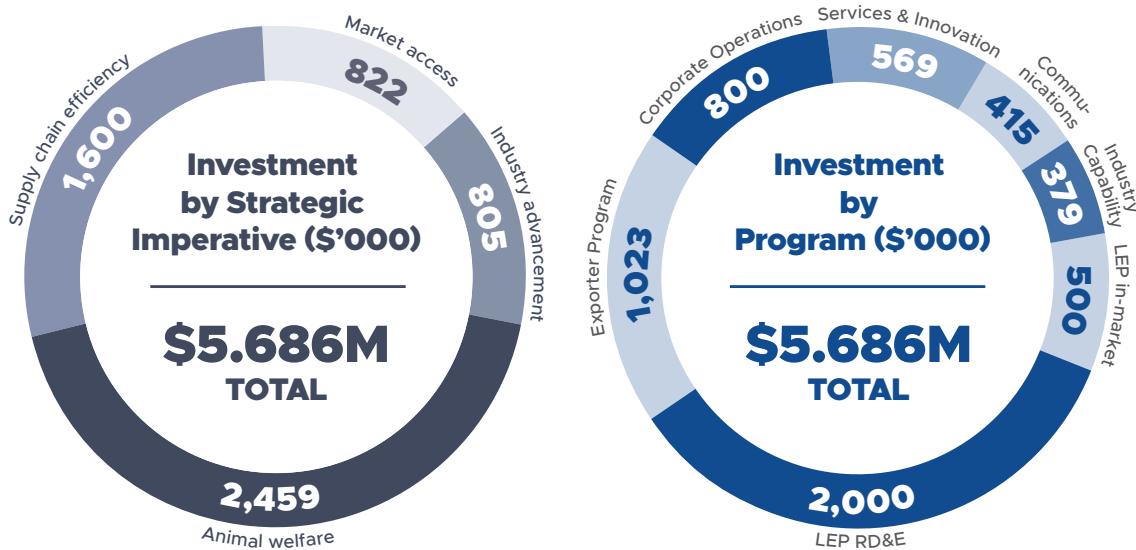
There is a growing focus from government and the community on sustainability, including new requirements for carbon accounting and reporting.

LiveCorp will continue to explore opportunities to identify and report on the livestock export industry's performance on sustainability matters, including the social benefits the industry delivers overseas on food security, poverty alleviation and nutrition.



Budget Summary

In 2024–25 LiveCorp’s investment in research, development and marketing activities is forecast to be \$5,686 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 Collection Act 1991*. 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 1999*. 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 members and levy payers 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 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 (the department) as the regulator, and other stakeholders.

While the plan was due to expire in 2025, LiveCorp has decided to extend it for 12 months until 30 June 2026. This will allow further delivery against the imperatives and goals, while also providing more time for clarity on the operating environment ahead of the next five-year cycle.



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.

STRATEGIC IMPERATIVES

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.

STRATEGIC IMPERATIVES

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.

A man wearing a blue long-sleeved shirt, blue jeans, a tan cowboy hat, and sunglasses stands in a dirt corral. He is looking towards a young child who is wearing a plaid shirt, dark pants, and a red hat. The child is standing near a group of cows. The corral is enclosed by a metal fence. In the background, there are several large, leafy trees under a clear blue sky.

Our Approach

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

Image © The Livestock Collective

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 focused on continuous improvement in livestock management, health and welfare, supply chain efficiency, market access and industry sustainability.

Since the introduction of a statutory levy on the export of dairy cattle in 2021, LiveCorp has increased its consultation and collaboration with Australia's dairy industry. Services to support the export of high value breeding animals continue to be delivered as part of normal operations, as well as through dairy-specific activities and projects.

[FOR FURTHER DETAILS SEE PAGE 22](#)

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 and welfare, supply chain efficiency, market access and industry advancement.
- In-market activities to support the growth, productivity and sustainability of the livestock export industry through a focus on market access, animal health and welfare, and supply chain efficiency in destination countries.

[FOR FURTHER DETAILS SEE PAGES 28 & 36](#)

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 skills-based Livestock Export Research and Development Advisory Committee (LERDAC), which is comprised of producer and exporter representatives, an independent scientist, an observer from the Department of Agriculture, Fisheries and Forestry (the department) and an independent Chair.

Together, Management Committee and LERDAC ensure there is a balanced portfolio of RD&E activity, by identifying short, medium, and long-term projects; aligning the funding with industry and government priorities; identifying opportunities to increase industry benefits from research investments; and evaluating the risk profile of projects.

RD&E Blueprint

Investments made by the LEP RD&E Program are guided by the *RD&E Blueprint*, which was developed after extensive consultation with producers, livestock exporters, the department and others. It provides visibility and clarity on the industry's priorities for funding, helps to ensure they are addressed in a structured and consistent way, and also takes into account the strategic goals of the broader red meat industry.

The Blueprint identifies five RD&E goals with 14 priorities to be targeted across a five year timeframe:

- 1. Greater transparency of animal health and welfare in the supply chain**
- 2. Understanding and addressing animal health and welfare risks in the supply chain**

OUR APPROACH

- 3. Improving the uptake, adoption and commercialisation of better animal health and welfare practices and tools**
- 4. Improving supply chain efficiency and regulatory performance**
- 5. Supporting better market access conditions for Australian producers and exporters**

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.

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^{AG} platform and Emerging National Rural Issues forum; and involvement in Animal Health Australia's 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.

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 has also introduced 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. It also evaluates stakeholder satisfaction and the adoption of outputs. The results are used to inform research activities for the following year.

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, 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 2021-31 outlines five principles against which LiveCorp is required to monitor and evaluate its performance.

- To engage stakeholders to identify RD&E priorities and activities that provide benefits to the industry
- To ensure RD&E priorities and activities (and marketing activities) are strategic, collaborative and targeted to improve 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 RD&E and marketing benefits to levy payers and the Australian community in general, and show continuous improvement in governance and administrative efficiency.

OUR APPROACH

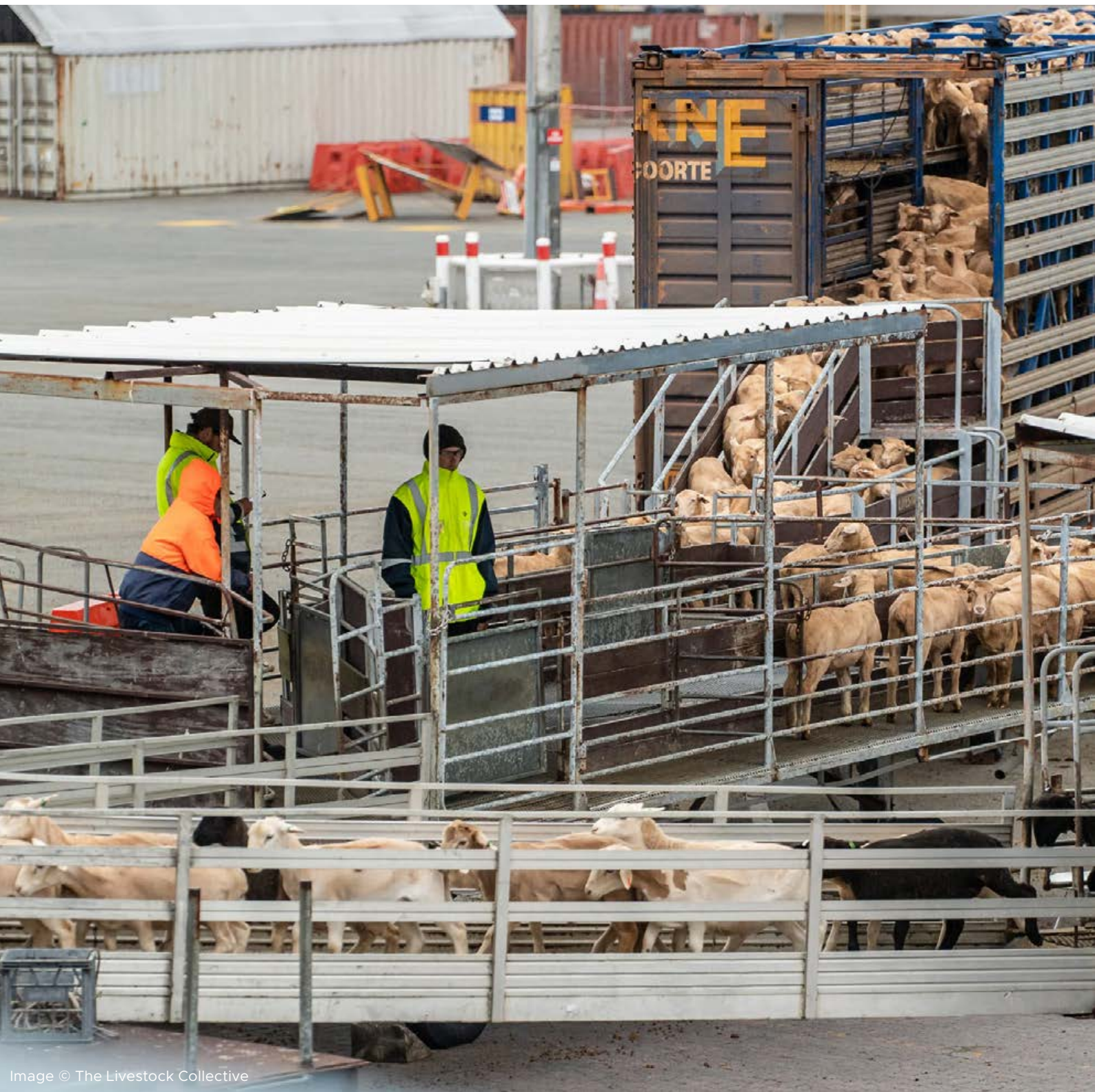
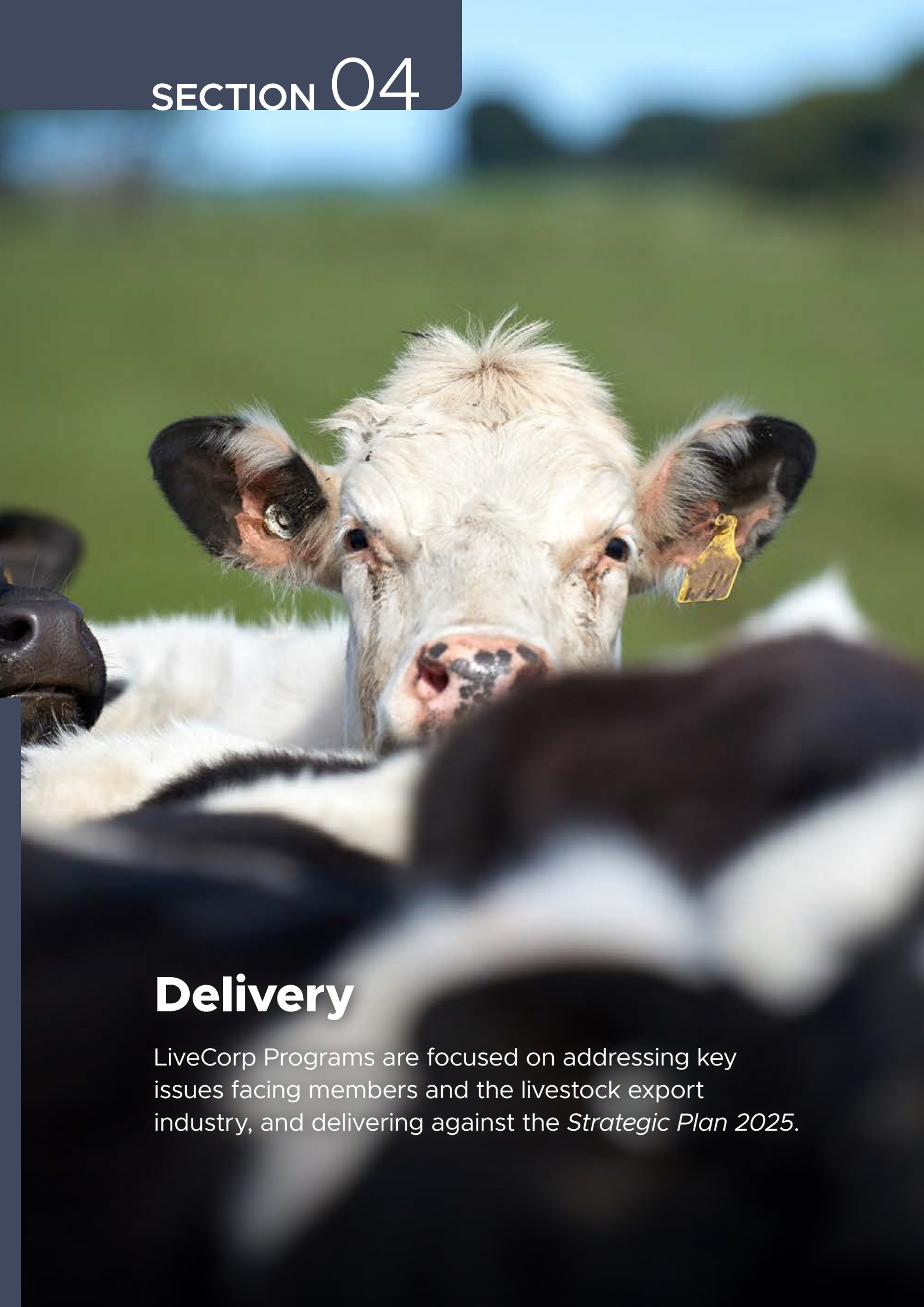


Image © The Livestock Collective



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 initiatives that cross program areas. It is also the main source for regular consultation with the department regarding regulatory reform and reviews, and with 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.
- Coordinate and participate in meetings of the Strategic Response Group, including crisis simulation exercises.
- Support industry, ALEC and the department with expert advice and valuable resources regarding the live sheep export trade, within LiveCorp's role as a research and development corporation and service body.
- Consult with ALEC as the peak industry council on industry priorities, issues, planning, and policy direction and implementation.
- Participate in and contribute to industry/government roundtables and working groups to bring about improvements and efficiencies in the industry's 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 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 develop new livestock export indicators for inclusion in red meat sustainability frameworks, and to better communicate livestock export-specific positioning on ESG-style topics.
- 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.

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 ASEL 4.0 review, and support efforts to identify topics and knowledge gaps requiring research and other preparation ahead of formal consultation.
- 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.
- Support the implementation of changes to regulatory and legislative frameworks.
- Review ad hoc regulatory updates from the department and provide technical advice.

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, and assist with the coordination of international delegations.

- Explore opportunities to promote Australian livestock in existing markets and to develop new ones.
- Contribute to industry and government taskforces and committees set up to develop plans and identify preparation, response and support activities for potential threats such as exotic animal diseases.
- Represent the livestock export industry on the NAMP technical committee and provide advice on its 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 FMD and LSD vaccine delivery in Indonesia, and communicate the outcomes.

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 review of the shipboard stockpersons course and training materials to ensure they reflect current regulatory standards and on-board practices, and increase the standardisation of animal welfare monitoring and reporting.
- Support the pilot and subsequent roll-out of the updated stockpersons course, including coordinating course presenters, logistics and attendance.
- 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.
- Maintain the animal welfare assessment training for on-board data collection and ensure its ongoing relevance and accuracy.
- Continue to refine and administer LiveCorp's online Learning Management System.

Digital transformation

- Complete the roll-out of the LIVEXCollect digital platform to Registered Establishments and sea exporters.
- Finalise development of the complimentary LIVEXCollect mobile application to support user experience improvements for stockpersons and veterinarians.

- Use LIVEXCollect and other industry data to inform and support research concepts, submissions, decision-making and communication activities.
- Maintain and continue to refine LIVEXCollect reporting dashboards to maximise opportunities for exporters to derive insights and value from the data.
- Undertake webinars and other communication activities for exporters, stockpersons and others contributing to, or using, the LIVEXCollect platform, to share insights and identify opportunities for improvement.
- 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.
- Administer and maintain the LIVEXCollect data system in line with the digital transformation strategy, including adapting to regulatory amendments and other routine updates as appropriate.
- 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.
- Review findings from research into shipboard bedding and ammonia management, and stocking densities, and encourage adoption to support improved animal welfare and achieve efficiencies.
- Identify, trial and, where successful, encourage the commercial adoption of innovative mature or semi-mature technologies from other industries that could 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.
- Review the LiveCorp Shipboard Stockperson Accreditation Program and training course.
- Analyse and identify best practice management of effluent produced during live export voyages.
- Undertake a carbon lifecycle assessment of the live export supply chain.
- Analyse and collate research, knowledge and data on key topics within the Australian Standards for the Export of Livestock (ASEL) to support industry and government discussions as part of a planned review.
- Explore opportunities to quantify the benefits of livestock exports against domestic and international sustainability frameworks, including the United Nations Sustainable Development Goals.

- Investigate opportunities to adopt new technologies and practices to continue to enhance animal welfare outcomes during long haul cattle voyages.
- Update the online ASEL Handbook application to reflect any changes to the standards.
- Review the LEP RD&E Program structure and processes.
- Explore opportunities to standardise export documentation to achieve greater efficiencies.
- 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 in-market adoption of the virtual reality (VR) stunning training tool and commercialisation by the technology provider.
- Support the industry's exotic animal disease preparedness through the roll out of resources for use by livestock export ships in the event of an incursion.
- 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^{AG} platform to list appropriate research projects and commercialisation opportunities.
- Engage with other 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

- 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.
- Maintain the LiveCorp website to facilitate access to, and sharing of, information and LiveCorp outputs.
- Support and communicate the industry's preparedness for a potential exotic disease outbreak.
- Develop resources and participate in select events, such as LambEx, to communicate LiveCorp's marketing and research activities to exporters and stakeholders.
- Communicate the contribution of livestock exports to sustainability goals for the wider red meat industry and international consumers.
- Continue to develop the program, manage sponsorships and conduct other activities for LIVEXchange 2025, including a student program and photo competition.

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

- Support LiveCorp's relationships with a range of stakeholders, including the department, ALEC, 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 AGM.
- 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

- 75% of members contributing 80% of export levies are consulted at least twice during 2024–25.
- 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^{AG} website, where relevant, and updated at least annually.
- RD&E investments are aligned with the LEP RD&E Blueprint, and satisfaction with research outcomes increases.
- Satisfaction with communication about current RD&E activities and their impact increases.
- 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.
- The review of LiveCorp’s shipboard stockperson training course is completed and at least one course held in 2024-25.
- Progress is demonstrated on the development of a scientifically valid methodology for interpreting and reporting on animal welfare outcomes, informed by previous research outcomes on animal welfare indicators and analysis of industry data.
- New technologies and practices are identified to further enhance animal welfare outcomes during cattle voyages.

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 National Arbovirus Monitoring Program meetings.
- Activities to increase industry preparedness for an exotic disease outbreak in Australia are progressed.
- 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

- 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.
- Initiatives are progressed to help the livestock export industry understand and communicate baseline data in different areas of sustainability.
- 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 2024–25 (\$'000)

INCOME			
Source	Marketing	Research	Total
Export levies	2,715	543	3,258
Other sources	570	1,500	2,070
Total income	3,285	2,043	5,328
EXPENDITURE			
Expense	Marketing	Research	Total
Exporter Program	1,011	12	1,023
Industry Capability Program	379	-	379
Services and Innovation Program	569	-	569
Communications Program	415	-	415
Corporate Operations	800	-	800
LEP RD&E Program	-	2,000	2,000
LEP In-Market Program	500	-	500
Total expenditure	3,674	2,012	5,686
Total	(389)	31	(358)

LEP Investment by Funding Source 2024–25 (\$'000)

	LiveCorp \$	MLA \$	Govt. \$	Total M\$	Total R\$	Total \$
Livestock export research and development	500	500	1,000	-	2,000	2,000
Livestock export in-market activities	500	2,276	-	2,776	-	2,776
Total	1,000	2,776	1,000	2,776	2,000	4,776

DELIVERY



SECTION 05



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 market access and trade development, 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 is expected to grow in 2024–25 due to increased supply of cattle from northern Australia and more competitive prices, along with efforts to re-build Indonesia's herd after the significant impact of foot and mouth disease (FMD) and lumpy skin disease (LSD) in recent years. This is despite inflation impacting consumer spending and continued growth in permits for Indian buffalo meat.

The election of new President Prabowo Subianto in early 2024 may see some policy changes by early 2025. There is also growing interest from Indonesian consumers in lamb and mutton, which may provide opportunities while sheep prices in Australia are competitive.

Areas of focus for the LEP in Indonesia include continued capability development in animal welfare and biosecurity, and supporting marketing channels by providing insights to support abattoirs meet Indonesia's new halal certification requirements.

Asia Pacific

Across the markets in the region, increased supply of Australian cattle and more competitive prices are expected to support demand, and the volume of live cattle exports to Vietnam is expected to remain fairly steady.

The LEP is actively pursuing programs to support the industry in the face of ongoing competition from Indian buffalo meat and growing acceptance of frozen product. This includes working with key customers across the region to increase their capability to process higher quality product which is able to compete in new channels.

Another area of focus is exploring new market opportunities, including options for accessing the China market with Australian live cattle through formal trade routes such as Laos.

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

Europe, Middle East and North Africa (EMENA)

Competitive prices for Australia livestock, combined with high quality and consistency, are expected to underpin a continued resurgence of trade into the Middle East.

There is strong demand from existing markets as well as interest in Australian livestock from several potential new markets in the region. Saudi Arabia presents a significant ongoing opportunity following a number of successful live sheep shipments in early 2024 after a hiatus of more than a decade.

Commercial operators continue to invest in upgrades to infrastructure, and in marketing campaigns which are creating increased consumer demand for locally processed Australian lamb and beef products.

The LEP is collaborating with industry to identify new and emerging market opportunities, and to support importers through co-funding projects with exporters.

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:

- 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 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 2024–25

- Training and professional development programs are delivered to support the advancement of animal welfare standards in-market.
- Opportunities for new markets or market growth are identified and investigated.
- One 'program of work' case study is produced per region showcasing 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 is produced per region that has provided insights and informed government/industry policy, resulting in demonstrated capacity for decisions that reduce trade risk and allow trade to operate.

SECTION 06



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, MLA and the Australian Meat Processor Corporation – work with their respective peak industry councils to implement it.



FOR FURTHER DETAILS SEE PAGE 42.

Australian Government National Science Priorities and Agricultural Innovation Policy Statement

The Australian Government has a set of nine National Science and Research Priorities, and corresponding Practical Research Challenges, designed to ensure that appropriate levels of public funding are allocated to research that addresses the most immediate and critical areas of importance to Australia.






Its National Agricultural Innovation Policy Statement, released as the latest step in the modernisation of Australia's R&D system, establishes four long-term priorities:

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

The primary objective of LiveCorp and LEP RD&E investment is to improve and implement best practice animal health and welfare outcomes as directed by LiveCorp's Constitution and Funding Agreement. Investment will be made, where possible, into areas that align with the Government's priorities.

FOR FURTHER DETAILS SEE PAGE 43.

SECTION 06

LIVECORP'S ALIGNMENT TO RED MEAT 2030 OBJECTIVES	Programs in 2024-25					2024-25 Investment (\$'000) LiveCorp exporter levies
	Exporter program	Industry capability program	Services and innovation program	Communications	Livestock export RD&E program	
Our people			✓	✓	✓	453
 People see being part of the Australian red meat and livestock industry as attractive now and into the future.						
Our customers, consumers and communities	✓	✓		✓	✓	550
 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	✓	✓	✓	✓	✓	1,025
 We set the standard for world class animal health, welfare, biosecurity and production practices.						
Our environment	✓			✓	✓	375
 We demonstrate leadership in sustainability, delivering on community expectations in the areas of land, water, biodiversity, climate variability and biosecurity						
Our markets	✓	✓		✓	✓	799
 We improve the economic resilience for our industry by increasing access to, and the performance of existing and new markets.						
Our systems	✓	✓	✓	✓	✓	984
 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.						

ALIGNMENT OF OBJECTIVES

LIVECORP'S ALIGNMENT TO AUSTRALIAN GOVERNMENT PRIORITIES	Animal health and welfare	Supply chain efficiency	Market access
National Science and Research Priorities			
Food	✓		✓
Soil and Water			
Transport	✓	✓	
Cybersecurity			
Energy			
Resources			
Advanced Manufacturing			
Environmental Change			
Health			
National Agricultural Innovation Policy Statement			
Premium food	✓		✓
Climate resilience		✓	
Biosecurity	✓		✓
Digital agriculture	✓	✓	

Industry consultation

LiveCorp has an extensive engagement and planning process regarding its AOP. The development of this year's AOP started in January 2024 with a round of exporter meetings and culminated in a gathering of levy payers and industry representatives in April.

MEET

13 one-on-one meetings with exporter companies (virtual)

STRATEGISE

1 strategy session
with LiveCorp board

PLAN

1 planning day with LiveCorp staff
1 planning meeting with LEP in-market staff

CONSULT

Detailed table of proposed activities and performance measures circulated for feedback.

1 formal consultation meeting with 42 participants representing exporter companies, industry representative bodies, and LiveCorp directors (combination of face to face and virtual)

List of Abbreviations

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



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