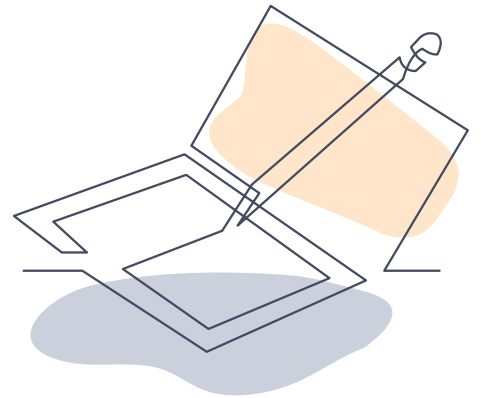


STRATEGIC PLAN 2025



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About LiveCorp

The Australian Livestock Export Corporation (LiveCorp) is a rural research and development corporation, and the declared livestock export marketing body and livestock export research body for the purposes of sections 60(3) and 60(3A) of the Australian Meat and Live-stock Industry Act 1997 (Cth).

LiveCorp's mandate is to provide research, development and extension (RD&E) and marketing services designed to foster best practice and continuous improvement in animal health and welfare outcomes for Australia's livestock export industry.

Funding

LiveCorp is funded by statutory levies on the export of beef cattle, sheep and goats, as well as a voluntary contribution on the export of dairy cattle. A statutory levy on the export of dairy cattle has been introduced to Parliament by the Minister. This is expected to come into effect in 2021 and will allow LiveCorp to increase its investment in that segment of the industry.

As set out under the Primary Industries (Customs) Charges Act 1999, the levy rates have two components: a marketing portion (representing approximately 83% of the total) and a research component (reflecting the remainder, i.e. approximately 17% of the total). The ratio informs LiveCorp's own allocation of expenditure across its marketing and research activities.

The Australian Government also contributes one dollar for every levy dollar LiveCorp invests in RD&E activities. This occurs through the donor arrangement entered into by the Commonwealth of Australia with LiveCorp. The arrangement enables Meat & Livestock Australia (MLA) to receive matching payments from the Commonwealth for amounts contributed by LiveCorp for research and development purposes.

Collaboration

LiveCorp works with providers from the public and private sectors to leverage and engage their expertise so that levies are directed to projects and activities that create value for the industry. Collaborative partnerships are established where an investment is expected to operate to the mutual benefit of the partners.

LiveCorp's principal collaboration occurs through a joint program with MLA, in the form of the Livestock Export Program (LEP).

LiveCorp also contributes to the delivery of cross-sectoral strategies for biosecurity and animal health and welfare under the National Primary Industries RD&E Framework.

Members

LiveCorp administers the statutory levies on behalf of the levy payers who are Australian-licensed livestock exporters. At the time of publication 74% of levy payers are LiveCorp members.

Consultation

Directions and priorities for the investment of levies are set through consultation and engagement with members, the peak industry body, the Department of Agriculture, Water and the Environment, and other stakeholders. The consultation process ensures that the priorities of the livestock export industry are considered and appropriate strategies developed.

LiveCorp works closely with the peak industry body, the Australian Livestock Exporters' Council (ALEC). ALEC is responsible for shaping industry policy direction, enabling the effective alignment of delivery priorities for the livestock export industry.

Developing the Strategic Plan 2025

In formulating this five-year plan, LiveCorp has considered the views of its members and stakeholders, expressed through an extensive consultation process: the outcomes of consultation for the LiveCorp Performance Review; the nature and complexity of the present and future operating environments; the prescribed purpose of LiveCorp; the relevant priorities set out in the Red Meat 2030 plan; and the Australian Government's Science and Rural Research Priorities.

Our Members' Voice

Service to the live export industry

LiveCorp exists in order to serve its members and levy payers and, through them, the livestock export industry. The organisation's mandate requires it to consult with its stakeholders — nowhere more importantly than in the development of a five-year strategy.

In constructing this plan, LiveCorp has spoken with no fewer than 53 persons, gathering the views and comments that have provided the foundations upon which the plan is built. The names of contributors are listed at Appendix 2. These contributors have delivered two sets of messages: the first about what the industry should prioritise over the next five years; and the second, about what stakeholders want LiveCorp to achieve in that same timeframe.

The desired future of the industry

The coming five years will be ones of consequence for the Australian livestock export industry. A past marked by controversy and reactive excesses must be left behind and a viable, longer-term future constructed.

By 2025, livestock exporters want to see an Australian industry that:

- **has made substantial progress towards confirming its legitimacy** and is viewed as an integral part of the national portfolio of exporting industries, defined by its performance rather than crises.
- **is recognised as a material contributor to the national economy** and as having a positive impact among the key audiences with which the industry interacts.
- **is acknowledged as an active contributor to the development of a regulatory framework** that successfully reconciles animal welfare and biosecurity considerations on the one hand with operational and commercial imperatives on the other.
- **sees livestock exporters act as responsible corporate citizens** who hold themselves to mutual account, in an industry that has taken significant steps toward self-management in order to safeguard and enhance community trust and acceptance.
- **is recognised for its consistent, animal welfare and efficiency-driven performance.** It is now an industry in which accidental high-mortality events are a rarity that do not trigger an existential crisis for the entire industry.
- **is valued for the societal and economic benefits it brings to the international**

communities with whom it trades. It shares knowledge, advice and insights into methods, approaches and practices with trading partners, enabling overseas communities to secure optimal outcomes.

Expectations surrounding LiveCorp's activities

As a major participant in the livestock export industry, LiveCorp understands that what it plans for the coming five years must not only support the intended future of the livestock export industry but also meet the expectations of its members and levy payers.

That said, it must be borne in mind that LiveCorp's ability to achieve its aims depends equally on two factors: the active support and engagement of industry members and levy payers; and the availability of the resources required for it to deliver the expected outcomes.

LiveCorp's investment over the next five years must translate into outcomes that make a 'material difference' and thus deliver value to its members, levy payers and the wider industry. For stakeholders, this means:

- **LiveCorp's voice must be clearly and widely heard** among the audiences that matter: among exporters of course, but also in the wider community, among its industry partners, and with the department as the industry regulator.
- **LiveCorp's advice must carry greater weight** in regulatory decision-making. There is much praise for the quality and thoroughness of LiveCorp's research, and this research can be translated to well-informed, evidence-based regulation.
- **LiveCorp must prove a source of continuous, innovative, technical and technological improvements** that produce real, measurable performance enhancements along the livestock export supply chain.
- **LiveCorp must ensure that it extracts maximum value from the research it commissions.** In an environment of scarce resources, returns on research dollars need to bear measureable fruit for the industry.
- **LiveCorp must put in place the resources it requires to deliver to its mandate and ensure its continuity.** This requires a team with expertise in the livestock export industry, access to the industry-wide, reliable livestock export data essential to its research and advice, and the management framework and infrastructure required to serve the organisation's purpose.

Value production is central to the industry. Return on the exporters' investment lies at the heart of the relationship between LiveCorp and its levy payers.

LiveCorp's mission

LiveCorp's mandate is defined in its constitution. It requires it 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 the associated regulation, and
- Promote the export of Australian livestock to overseas countries through its market access services.¹

With these responsibilities in mind and for the five years to 2025, LiveCorp commits to the following 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.

¹ Constitution of Australian Livestock Corporation, S2, Ss 2.1, p5

LIVECORP'S MISSION, VISION AND VALUES

LiveCorp's vision

In its previous five-year plan, LiveCorp sought to '[drive] world leading research, development and extension, supported by innovative services, that underpins the sustainability of the livestock export sector as a trusted, valued and connected contributor to animal health and welfare.'²

LiveCorp's research, development and extension activities will continue to be the bedrock of its activities and outputs, and the foundation of its reputation, over the five years ahead.

Bearing these factors in mind, LiveCorp's 2025 vision is as follows:

Leading the world in the health and welfare of livestock exports

² LiveCorp Strategic Plan 2016-2020, p4

LiveCorp's values

At its core, LiveCorp is the organisation it is and achieves what it does because of its people: their honesty, their ethical stance, their thoroughness, their perseverance and their resilience.

LiveCorp staff have created LiveCorp's reputation. They carry the organisation forward. They enable it to deliver its product. And it is staff with whom members, levy payers and stakeholders interact and establish working relationships. Honesty, ethics, thoroughness, perseverance and resilience are the values staff weave into their work. In turn, these personal values provide the base upon which the organisation's particular values rest.

As a body, LiveCorp's actions and work reflect five defining attributes: responsiveness, integrity, objectivity, innovation and reliability.

These five attributes are LiveCorp's hallmark, its 'brand'. To the outside world, they express what the organisation stands for when it attends to its mission and its work:

LIVECORP'S MISSION, VISION AND VALUES

Responsiveness

LiveCorp's purpose is to serve the livestock export industry and its members.

LiveCorp answers questions swiftly and purposefully, conscious that in many instances, its advice is needed as input to industry reviews, to capture market access opportunities, to respond to critical incidents or to protect and advance the health and welfare of animals along the supply chain.

Integrity

LiveCorp acts in accordance with its values and mandate. It does not compromise its position or reputation by ill-judged comments. Its recommendations and advice are research-derived and have animal health and welfare as their first object

Objectivity

LiveCorp is not beholden to one philosophy or school of thought. It steers clear of bias and never loses sight of its mission: only unprejudiced, objective advice can advance animal health and welfare and provide the foundations for the sensible and effective regulation of the industry.

Innovation

LiveCorp never ceases to look for innovation. It calls for it from collaborators and partners. It encourages it among members. Its approach to the crafting of changes capable of improving animal health and welfare, export supply chain performance and in-market benefits is inventive and methodical.

Reliability

LiveCorp understands the importance of delivering on its undertakings.

It understands that reliability is key to stakeholder trust. Failure to deliver where animal health and welfare is concerned is not an option. Conscious of its responsibilities, LiveCorp solves problems and crafts outcomes in imaginative yet science-backed ways.

The Operating Environment

Mission, vision, values and strategies do not unfold in a vacuum. They do so in the 'real world'. In the five years to 2025, it is likely that LiveCorp will be tending to its mission, striving to realise its vision and seeking to apply its values in a more unpredictable and risk-fraught environment than we have seen in decades.

Execution of the strategies that express LiveCorp's five-year ambition will require particular skill on LiveCorp's part, given an environment populated by consequential threats that are marked by unusual unpredictability and material disruption.

Two considerations weigh on the analysis presented in this section: that the threats identified present as active (rather than potential) risks; and in two instances, as real and present dangers.

Of the risks discussed, one of them, the COVID-19 pandemic, has been wreaking havoc globally since March 2020. Another of the risks identified, in the form of a COVID-triggered economic recession, is unfolding before our eyes; the only question being the depth and duration of the damage it will cause. In neither of these instances is there room for evasive action. The fact that they have not affected the livestock export industry so far does not mean that they will not do so in a five-year timeframe, given the uncertainties involved.

The second consideration worth flagging arises from the risk that, powerful as some of these threats are as individual events, two or three of them may actually converge in time with extensive and disruptive consequences for the health of Australia's livestock export activities between now and 2025.

Over the coming five years, the livestock export industry, and LiveCorp, in collaboration with ALEC and other stakeholders, should be alert to these threats and prepared to mitigate the impact as best they can.

The opportunities and risks have been divided into two categories:

- Trends or risks that are essentially global in nature (the 'wider order'): COVID-19 and its disruptive ramifications; COVID-19 and the global economic recession; trade tensions and geopolitical instability; and climate change.
- Trends or risks that represent factors or influences national in nature (the 'nearer order'): a positive longer-term outlook for Australian livestock exports; the maintenance of our biosecurity status; incidents of poor animal care and mistreatment and their consequences; activism; and the misalignment of the regulatory regime with commercial export imperatives.

The wider order

Risk

The COVID-19 pandemic and its disruptive ramifications

On 23 April 2020, in a special bulletin titled 'Mitigating the impacts of COVID-19 on the livestock sector', the United Nations Food and Agriculture Organization (FAO) recognised the pandemic as presenting '...an unprecedented emergency and a grave social threat'. It described its impacts as affecting access to inputs, services and markets; processing capacity, storage and conservation; national and international transport; and modified retailing and product demand, reduced consumer purchasing power; and, more generally, reduced demand and public procurement.³

There is no doubting the reality of the social and economic distress caused by COVID-19. While acknowledging this terrible impact, mention of COVID-19 as a strategic risk arises from the pandemic's ability to upend supply chains in unexpected ways.

COVID-19 will cause ongoing instability in the form of operational/supply chain disruptions and the establishment of a 'new normal' over the period covered by this strategic plan.

The disruptions will create instability along the supply chain in Australia and in importing countries.

Risk

COVID-19 and the global economic recession

In its May 2020 update on the economic outlook, the Department of Agriculture, Water and the Environment forecast COVID-19 triggering a global recession in 2020, adding that the decline (a) will be felt globally, (b) will affect advanced as well as emerging and developing economies and (c) will continue to hold a deal of uncertainty as to when the economic damage might be contained and repaired.

On a more positive note, it pointed out that '...overall demand for Australia's agricultural products is expected to remain relatively strong because food is an essential product.' The department's view was similar to that of institutions like the World Bank and the International Monetary Fund.

The department's report noted that '...economies such as Australia, China, Japan, the Republic of Korea and some South-East Asian economies are heavily reliant on trade. This means that their economic recovery will depend on the recovery of their major

³ *Mitigating the impacts of COVID-19 on the Livestock Sector*, Food and Agriculture Organization, United Nations, 23 April 2020

trading partners.⁴ It is with this dependency on the economic health of our livestock export trading partners that our greater concern lies.

Of particular importance to the Australian livestock export industry is the fact that countries classified as emerging markets and developing economies, many of which are buyers of Australian livestock (like Indonesia, Israel, Kuwait, Malaysia, Qatar, the United Arab Emirates and Vietnam), would be harder hit than many. These countries are expected to experience (or are already experiencing) material decreases in income per capita and purchasing power, as well as enduring rising poverty levels.

It is anticipated that the livestock export industry will see harder economic times than usual in the first half of this plan as a result of COVID-19. This will put pressure on the financial viability of some exporters and turn a spotlight on the efficiency and effectiveness of export processes as significant cost contributors.

Risk

Trade tensions and geopolitical instability

Given the rise in international tensions over recent times, a higher-risk environment is envisaged over the duration of the plan, than has been the case during the past five to ten years.

Three matters are of particular concern: the increased recourse to tariffs and trade sanctions in the furtherance of national interests; interventionist practices by governments, including retaliatory bans or the threat thereof; and rising political instability.

In the five-year time frame of the plan, there is a reasonable probability that the industry will experience disruptions arising from geopolitical instability and nationalist agendas. The best mitigation will lie in the industry's preparedness to deal with the implications and consequences of such events.

Risk

Climate change

Worldwide, climate change is already affecting numerous countries by altering weather and climate, affecting production capacities and, in some instances, re-orienting agribusinesses in those countries. Extreme weather and drought may yet alter this country's cattle-raising capacity for good. Globally, public opinion could, furthermore, weigh in against the red meat and livestock industry if it should turn against cattle production on the basis of environmental concerns (CO2 emission levels of ruminants, for instance).

⁴ Economic Overview, Howden H & Mobsby D, Department of Agriculture, 7 May 2020

Adaptation to climate change remains embedded in the preoccupations of international bodies like the United Nations. Climate change features as one of Australia's nine science and research priorities. Recognition of its importance is reflected in various Australian agriculture forums. It is explicit in RMAC's Red Meat 2030 (2019), where sustainability features as one of the industry's priorities, including a stated objective surrounding carbon neutrality by 2030.

Of great concern are the potential effects of climate warming for Australia, in the form of both extreme weather events and altered weather patterns resulting in floods, droughts and bushfires. Recent rains have brought a measure of relief after a decade of drought in many areas, but the longer-term outlook sees droughts becoming more frequent and more pronounced, temperatures continuing their steady rise and extreme events remaining an unwelcome feature of our environment. Ultimately, the progressive degradation of conditions is bound to affect not only key livestock export production areas like the Northern Territory but conditions elsewhere in Australia, as well as in destination markets.

Established weather patterns will be disrupted further as global warming increases in the years ahead, and the livestock export industry will be coping with the challenges posed by more extreme weather events and conditions (storms, floods, droughts and bushfires). These events will affect Australian producers as they will livestock importing countries.

The nearer order

Opportunity

A positive longer-term outlook for Australian livestock exports

There is a cautious, demand-based optimism about the longer-term future of Australian livestock exports. The argument is endorsed by organisations such as Food Innovation Australia (2019) and the WHO: as standards of living rise, so does the demand for protein – meat-derived protein among the most favoured (at least in the near- to medium-term covered by this plan). RMAC's Red Meat 2030 and MLA's Strategic Plan 2025 take it as a foundation to their strategic thinking.

While some exporters see the COVID-19 pandemic as strengthening the argument for increased self-sufficiency among importing nations, for others, the key driver of livestock imports will remain the provision of protein to supplement insufficient national production capacity. In either case, Australian livestock benefits from a dual

advantage: that of quality (the ‘clean and green’ halo) and that of relative proximity to the importing markets (which confers a cost and ‘freshness’ advantage over far-flung competitors).

But there are natural constraints to the livestock export industry taking full advantage of these growth horizons. They arise from a likely supply tightness brought about by two causes: the decade long drought that parched much of Australia and forced many producers to destock; and with the return to wetter conditions experienced since the end of 2019 and the beginning of 2020, the decision by producers to begin restocking, an initiative that will unfold over the coming two years, i.e. 2021 and 2022.

The ten-year trend is likely to show a rise in demand for livestock exports overseas. However, given (a) the uncertainty arising from the COVID-19 pandemic and (b) the intention voiced by many producers to restock rather than raise turn-off levels over the next two years after a decade of drought, lower livestock export numbers are anticipated in the early years of the plan, prior to any material pick-up in export numbers.

Risk

Incidents of poor animal care and mistreatment

The management of live and at times unpredictable animals, more often than not in large numbers, is the business of the livestock export industry. Ensuring the health and wellbeing of animals along the various stages of the export supply chain is everyday business. In this complex process, it is statistically inevitable that breaches of animal health and wellbeing do, and will, occur from time to time. However, the true risk to the exporter and, by extension, to the industry lies in a blatant breach of animal health and wellbeing – one that involves unnecessary distress or suffering and speaks to negligence.

While the livestock export industry is deserving of criticism for past poor practices, on the whole it is more responsible and professional than incidents involving one or two its members would suggest. Indeed, the industry has heeded calls for improvements in the ways in which it tends to the welfare of the animals in its care, just as it continues to take steps to improve it and so achieve a continuing reduction in the loss of animal life and/or their ill treatment.

When it comes to the reduction of animal fatalities beyond statistical probability norms, much of the focus has been on shipboard conditions. But risks to animal welfare reach beyond shipboard conditions. The industry is exposed to reputational damage wherever poor animal treatment manifests anywhere along the export supply chain, including in importing countries.

It is probable, that, over the coming five years, exporters will experience situations (a) where incidents occur along the export supply chain that fall below their own expectations and/or the regulatory threshold and (b) where animals are mistreated in the importing country, best intentions and efforts notwithstanding. Such cases must not be allowed to threaten the viability of the entire industry.

Risk

Activism

Social media platforms have dramatically amplified the reach of activists and, importantly, the speed with which a particular cause can garner supporters and have them organised into an effective force within hours and days. Social media has, in that regard, put activism on steroids.

The Australian livestock export industry is only too well aware of the power of activism, having felt the brunt of it on a number of occasions, each one traumatic and each bringing with it harsh scrutiny, an inquiry of some description and, unsurprisingly, further regulation. The Keniry Review of 2003, the Farmer Review of 2011, the McCarthy Review of 2018 and the Moss Review a few months later, all followed that pattern.

Of concern to the livestock export industry is the fact that activist power is exercised in an environment in which misinformation and disinformation are as common as accurate commentary. Poorly informed public opinion can be readily fanned and its force applied to elected representatives, an assault that most are ill-prepared for and one from which they can only retreat by promising increased control over the offending industry.

Activism, aided and abetted by social media, will continue to make its presence felt and pursue its aim of a full industry shutdown. The threat posed is too great to be accepted without a firmer, more articulate and altogether more compelling response than has been the case in recent years. The industry's ongoing engagement with, and education of, the audiences that determine its future are as urgent as they are important.

Risk

Misalignment of the regulatory regime with commercial imperatives

The Commonwealth Department of Agriculture, Water and the Environment regulates the Australian livestock export trade. It frames the conditions under which the export of live animals can occur and monitors adherence to those conditions in individual livestock consignments.

SECTION 04

As the repository of standards and rules for livestock export, the regulatory framework has a profound influence on the conduct of livestock export operations. Too loose a system will defeat its own governance purpose; but if it is too constraining, it will cripple the flow of export operations and take its commercial toll along the way. Yet even if the regulatory system strikes the perfect balance between the spirit and intent of its rules and its prescriptive detail, there remains the question of the consistency of interpretation of the rules and that of their application.

The direction and the spirit of regulatory policy and of the application of that policy are inflected by the social and political agendas and sensitivities of the day – all of which respond to the material put before them. Where that material demonstrates industry responsibility and performance, it works to the industry's credit and invites a lighter, trust-inspired regulatory touch. Conversely, where the evidence points to industry failures, the regulatory impost grows as greater control is sought over performance.

That being so, it should come as no surprise that a shift has occurred in the management philosophy applied to the livestock export industry.

The transition from one to the other has had a profound effect on exporters and the export of live animals as a business enterprise, as it has on regulatory operations.

From the industry's perspective, the current regime has gone too far toward control in operational matters, and the time has come for all parties to work toward a sensible, collaboratively developed 'reset'.

A balanced regulatory regime is critical to the longer-term viability of the industry: achieving balance between the intent of regulations and their prescriptive detail; and achieving a much higher consistency of interpretation and application of the regulations in day-to-day settings, jointly underpin the predictability of outcomes upon which successful commercial operations depend.



LiveCorp 2025: Strategic Imperatives

To fulfil its mission, LiveCorp must address four strategic imperatives that form the core of its Strategic Plan 2025. The imperatives are:

- **Animal welfare**
- **Livestock export supply chain efficiency improvement**
- **Livestock export market access**
- **Livestock export industry advancement.**

In each of these mission-related areas, LiveCorp has set five-year strategic goals and nominated the initiatives through which these goals are to be realised.

Realisation of the goals and the delivery of the associated initiatives will require LiveCorp to navigate the wider-order and nearer-order risks described in the previous section of the document.

1 • Animal welfare

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

The promotion of livestock wellbeing throughout the export supply chain is the first object of LiveCorp's constitution.⁵ It is also the first concern of the Australian government when it comes to livestock exports: 'The export of animals obliges all participants in the trade to ensure that the animals' welfare is protected to the greatest extent possible and that the treatment of the animals reflects Australian community expectations.'⁶

Initially centred on the prevention of cruelty, the concept of animal welfare has now evolved into a system in which scientific method operates within a framework of values to which it answers.⁷ We take note, in that respect, of the regulator's reference to 'Australian community expectations' in its attempt to define the concept of welfare. Community expectations speak to societal values and norms; the demonstration of performance relies on controllable and verifiable measurements.

As one of two industry leadership bodies as well as by virtue of a constitution that directs it to the provision of technical, research-based advice, LiveCorp is the entity to which responsibility falls for the development of an animal welfare framework and the associated operating norms. It is, moreover, a task which, properly executed, will also provide an aid by which the industry can consistently measure and demonstrate its performance to the community at large.

STRATEGIC 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.

⁵ Constitution of Australian Livestock Export Corporation, S2, Ss 2.1(a)(1)(A), p5

⁶ Australian Position Statement on the Export of Livestock, S3, Ss3.1, p7

⁷ A Review of Animal Welfare Policy and Assessments Frameworks, Millar H, July 2018

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, industry partners, and with the department as the industry regulator.

STRATEGIC OUTCOMES

Development and delivery of an animal health and welfare framework in consultation with members and levy payers and in collaboration with (a) the experts whose contribution LiveCorp will seek and (b) the regulator, whose requirements the final product must satisfy (e.g. ASEL and ESCAS).

Delivery against the framework will occur in annual instalments across the five-year period of the strategic plan.

LiveCorp will measure the value and/or impact created through R&D investment, through the surveys it runs from time to time among members and levy payers.

ASSOCIATED ENDEAVOURS

LiveCorp is already progressing work on matters related to animal health and welfare indicators.

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).

Increasingly, improvements in operational effectiveness and animal health and welfare are coming to depend on the introduction of automation, sensor-driven data analytics and AI applications rather than human oversight as a basis for real-time decision-making.

Yet when it comes to automation and technological capability, the Australian livestock export industry is a diverse mix of different business enterprises, ranging from small, family owned operations to large, multi-national concerns.

This multifaceted landscape will have increasingly serious consequences for the introduction of efficiency-boosting tools and technologies over the years ahead, as it will for the development of information-sharing platforms and technologies as industry standards.

The fundamental point is this: in a situation where regulations governing animal welfare grow more specific and more rigorous, our welfare monitoring tools and instruments must keep pace and prove fit-for-purpose.

Helping the industry to bridge that gap is the overarching goal behind the research and activity that LiveCorp proposes to undertake as part of its obligation to work toward greater efficiency in the export supply chain and, through that work, further improve the management of animal health and welfare.

STRATEGIC 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 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.

STRATEGIC OUTCOMES

Access to data (along with the capacity to analyse it in order to extract useful information from it) is fundamental to LiveCorp's ability to produce the evidence-based research and advice upon which it relies for its advice to industry and the regulator.

LiveCorp will (a) map the five-year Digital Transformation Project plan for delivery of the intended ICT capabilities prior to year-end 2020, in preparation for work to begin in Q1 of 2021; and (b) thereafter deliver the associated outcomes to 2025, in accordance with the project plan.

LiveCorp will also seek the advice of members and levy payers as to those tools or instruments that would be the most immediately useful to the industry, and prioritise their delivery within the plan accordingly. The delivery of project modules will take into account the associated personnel training requirements.

As part of the system development effort and to the extent that it is appropriate for it to do so, LiveCorp will collaborate with the regulator to ensure that the project outcomes provide for optimal connectivity with the department's systems and reporting requirements.

ASSOCIATED ENDEAVOURS

LiveCorp has already undertaken (or is about to undertake) work on matters related to the introduction of ICT applications and platforms.

Where this is the case, the projects involved will take their place in the five-year project plan for the digital transformation of the industry. Likely to form part of the Digital Transformation Project are the following:

1. LIVEXCollect (ASEL 3.0)
2. Heat Stress Risk Assessment model
3. Animal welfare surveillance systems
4. Standards and guidelines for on-board environmental condition monitoring and data collection

3 • Livestock export market access

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

LiveCorp's constitution requires it to promote (a) the export of Australian livestock to overseas countries and (b) trade access in the interest of livestock exporters.⁸

LiveCorp attends to these responsibilities in two principal ways: through the development of protocols or the removal of trade barriers between the Australian government and existing or new trading partners; and through a range of initiatives undertaken in collaboration with Meat & Livestock Australia (MLA), through the Livestock Export Program (LEP). LiveCorp has earned the appreciation and respect of exporters for the expertise it has applied to the development of protocols, and the diligence with which it has provided its assistance.

In the uncertain times ahead, it is imperative that LiveCorp maintain its protocol development expertise and deploy it as nimbly as it can, in any one of three scenarios: (a) to protect an existing market; (b) to develop it further; or (c) to gain access to a new one, to the ultimate benefit of exporters, the industry and Australia's economy. With that in mind, the strategic focus of the years ahead is clearly a dual one: first, to protect the integrity of Australia's established livestock export markets; and second, to seek out growth in both existing and new markets wherever the opportunity arises.

STRATEGIC 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.

⁸ Constitution of the Australian Livestock Export Corporation, S2 Ss2.1(a)(v), p5

STRATEGIC OUTCOMES

LiveCorp has earned the appreciation and respect of exporters for the expertise it has applied to the development of health protocols, and the diligence with which it has provided its assistance. Questioned on this aspect of LiveCorp's performance, exporters continue to express praise and support for the continuation of LiveCorp's involvement in protocol development.

ASSOCIATED ENDEAVOURS

We expect that the Indonesian (and any similar) breeder program would be folded into the wider market access and extension effort.

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.

LiveCorp must devote some of its energy to promoting, protecting and furthering the interests of the Australian livestock industry, alongside ALEC, MLA and individual exporters.⁹

Advancement of the industry's position in technical matters is an integral and substantial part of LiveCorp's agenda: it undertakes research into community sentiment about the industry in order to develop information that addresses the salient aspects of that sentiment; it commissions research in support of the advice it provides to the industry and the regulator on technical matters with a bearing on regulation; and it engages with the regulator on an extensive basis, reviewing proposed legislation, position papers, draft policies, impact statements, and amendments to ASEL and ESCAS, along with a raft of related matters.

Earlier in the plan, it was made clear the critical importance of

- the pressing need for the industry to gain the recognition and acceptance that it has earned for its contribution to the national economy and the benefits it provides to international communities;
- the need for an effective response to the misinformation and disinformation propagated by tendentious activism; and
- the improvement of dealings between the regulator and the regulated, in search of a better balanced livestock export regime.

LiveCorp is but one contributor to this information and education effort. It is also one of the more important, capable and authoritative voices in the industry – an industry whose members look to both ALEC and LiveCorp to speak on their behalf.

⁹ Constitution of the Australian Livestock Export Corporation, S2 Ss2.1(a)(v), p5

STRATEGIC GOALS

- By 2025, LiveCorp will have made a material contribution to the greater acceptance of the livestock export industry in the community at large.
- 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.
- 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.

STRATEGIC OUTCOMES

There is an evident and measurable improvement in the general knowledge and acceptance of the industry, along with a greater appreciation of its significance for local communities and economies.

The quality, reach and proactivity of the industry's communication efforts about its nature, its role, its contribution and its performance have improved significantly in terms of both the strength of its voice and the clarity of its messaging.

The regulator and exporters recognise and acknowledge the contribution of LiveCorp's research-based expertise (and the quality of the data that underpins it) to shaping the livestock export industry regulatory framework into a world-leading model that successfully melds regulatory and commercial objectives into an efficient, fit-for-purpose operating regime, to the benefit of all stakeholders.

ASSOCIATED ENDEAVOURS

We expect that the following current or anticipated projects and initiatives would be folded into the industry advancement effort:

- Research into community sentiment
- Review of Approved Arrangements
- The regulatory reform agenda

Industry priorities: Red Meat 2030

The Red Meat Advisory Council (RMAC) released its 10-year strategic plan for Australia's red meat and livestock industry in October 2019. LiveCorp's strategic plan considers the six priorities contained in Red Meat 2030 in the context of the livestock export sector and LiveCorp's purpose.

The six Red Meat 2030 priorities are:

Our people

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

Our customers, consumers and communities

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

Our livestock

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

Our markets

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

Our environment

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

Our systems

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

Australian Government priorities: National Science and Research Priorities

The Government has established a set of nine National Science and Research Priorities and their corresponding Practical Research Challenges. The priorities and challenges are 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. Wherever possible, LiveCorp RD&E investments will be made in areas aligned to the Government's research priorities. The priorities are:

Food

Develop internationally competitive, sustainable, profitable, high-intensity and high-production capacity in new and existing food products and maintain Australia's reputation for clean, safe and quality-controlled food production.

Soil and water

Focus on Australia's critical soil and water assets, build capacity for improved accuracy and precision in predicting change to enable better decision-making.

Transport

Develop low-cost, reliable, resilient and efficient transport systems that respond to Australia's changing urban, regional and remote communities and meet business needs.

Cybersecurity

Position Australia as a leader in cutting-edge cybersecurity research and innovation to safeguard the country's security, enhance resilience and enable economic growth.

Energy

Enable the Australian energy sector to improve efficiency and reduce emissions, integrate diverse energy sources into the electricity grid and, as a result, create jobs, growth and export opportunities.

Resources

Support the exploration of traditional resources, rare earth elements and groundwater, and develop new technologies and knowledge to allow safe, environmentally sensitive and economically viable resource extraction.

Advanced manufacturing

Develop and support existing industries while enabling the development of a new and advanced manufacturing sector.

Environmental change

Build Australia’s capacity to respond to environmental change and integrate research outcomes from biological, physical, social and economic systems.

Health

Build healthy and resilient communities throughout Australia by developing treatments, solutions and preventative strategies to improve physical and mental well-being and improve the efficiency and effectiveness of Australia’s health care system.

Australian Government priorities: Rural Research, Development and Extension Priorities

The Government’s Rural RD&E Priorities are designed to complement the National Science and Research Priorities. They target rural RD&E funding to deliver tangible and sizeable on-farm benefits that improve farm gate returns. The priorities are:

Adoption of RD&E

Focus on flexible delivery of extension services that meet primary producers’ needs and recognise the growing role of private service delivery.

Advanced technology

Enhance innovation of products, processes and practices across the food and fibre supply chains through technologies such as robotics, digitisation, big data, genetics and precision agriculture.

Biosecurity

Improve understanding and evidence of pest and disease pathways to help direct biosecurity resources, minimising biosecurity threats and improving market access for primary producers.

Soil, water and natural resources

Manage soil health, improve water use efficiency and certainty of supply, sustainably develop new production areas and improve resilience to climate events and impacts.

INDUSTRY AND GOVERNMENT PRIORITIES

Alignment with industry and government priorities			
LiveCorp Strategic Imperatives	Red Meat 2030	National Science & Research Priorities	Rural RD&E Priorities
Animal welfare	Our livestock Our people	Food Transport	Advanced technology Adoption of RD&E
Livestock export supply chain efficiency improvement	Our livestock Our systems	Transport	Advanced technology Adoption of RD&E
Livestock export market access	Our customers, consumers and communities Our markets	Food	Biosecurity Adoption of RD&E
Livestock export industry advancement	Our environment Our customers, consumers and communities Our systems	—	—

Financial forecast for the five years to 2025

(All amounts are \$'000)

Financial forecast	2020-2021			2021-2022		
Projected Income	M\$	R\$	Total\$	M\$	R\$	Total\$
Cattle	2,543	509	3,052	3,020	604	3,624
Sheep	487	97	584	490	98	588
Goats	4	1	5	4	1	5
Total levies	3,033	607	3,640	3,514	703	4,217
Other	1,095	—	1,095	1,030	—	1,030
Total	4,128	607	4,735	4,544	703	5,247
Forecast Expenditure	M\$	R\$	Total\$	M\$	R\$	Total
Exporter Program	1,072	26	1,098	950	30	980
Industry Capability Program	942	—	942	650	—	650
Services and Innovation Program	727	—	727	700	—	700
Communications Program	754	—	754	1,000	—	1,000
Dairy Cattle Program	79	21	100	300	70	370
Livestock Export Program	750	550	1,300	750	600	1,350
Corporate Operations	993	—	993	1,038	—	1,038
Total	5,316	597	5,913	5,388	700	6,088

Notes:

M\$ = funding allocated to marketing activities

R\$ = funding allocated to RD&E activities eligible for Commonwealth matched funding

2022-2023			2023-2024			2024-2025		
M\$	R\$	Total\$	M\$	R\$	Total\$	M\$	R\$	Total\$
3,640	728	4,368	3,806	761	4,567	3,242	648	3,891
655	131	786	750	150	900	750	150	900
5	1	6	5	1	6	5	1	6
4,300	860	5,160	4,561	912	5,473	3,997	800	4,797
780	—	780	1,050	—	1,050	800	—	800
5,080	860	5,940	5,611	912	6,523	4,797	800	5,597
M\$	R\$	Total\$	M\$	R\$	Total	M\$	R\$	Total\$
960	30	990	981	30	1,011	981	30	1,011
685	—	685	700	—	700	715	—	715
700	50	750	800	50	850	750	—	750
800	—	800	1,000	—	1,000	800	—	800
300	70	370	319	80	399	315	70	385
750	700	1,450	750	750	1,500	750	700	1,450
1,013	—	1,013	1,050	—	1,050	1,060	—	1,060
5,208	850	6,058	5,600	910	6,510	5,371	800	6,171

Corporate governance

LiveCorp's corporate governance framework is set by the Board having regard to the best interests of members, the values of the Company, obligations set out under the Funding Agreement with the Commonwealth of Australia, and in accordance with the ASX Corporate Governance Council's Corporate Governance Principles and Recommendations where relevant.

This framework has been implemented to ensure that LiveCorp remains accountable to its members and stakeholders.

LiveCorp Board

LiveCorp is governed by a six-member Board, consisting of three skills based independent Directors nominated by the Selection Committee, two exporter representative Directors nominated by members and an Ex-Officio Director appointed by ALEC. The Ex-Officio Director has no roles, responsibilities or rights on the LiveCorp Board except to attend meetings of the Board and has no vote in any proceedings of the Board. The Chair of the Board is an independent Director.

The Board provides leadership and sets the strategic direction, targets and performance indicators. It oversees implementation of the strategic objectives and monitors the performance of the organisation, ensures company viability through adequate financial resources, and oversees risk management and compliance.

Directors are appointed at LiveCorp's Annual General Meeting (AGM) for a three-year term, after which time a director may reapply. No director can serve for longer than nine consecutive years.

Independence

The Board considers each director's independence annually and provides the opportunity at every board meeting for each director to disclose any new or changed interests. Directors are considered to be independent if they are not a member of management and are free of any interest, position or relationship that materially interferes with, or could reasonably be perceived to materially interfere with, their capacity to bring an independent judgement to bear on issues before the Board and to act in the best interests of LiveCorp and its members generally.

At the last assessment the Board determined that a majority of the Board are independent.

Board committees

The Board operates two committees:

- **The Finance, Audit and Remuneration Committee (the FAR Committee):**
The primary role of the FAR Committee is to ensure that LiveCorp's financial reporting is a true and fair reflection of its financial position and transactions. The committee has oversight responsibility of LiveCorp's financial reporting, internal control structure, remuneration structure and the external audit function.
- **The Selection Committee:** The role of the Selection Committee is to review the Board for appropriate balance of skills, knowledge, experience, independence and diversity to enable it to discharge its duties and responsibilities effectively. The committee nominates independent skills-based director candidates for consideration by the Board and election as a director at annual general meetings.

Conflicts of interest

In accordance with the requirements of the Corporations Act 2001 (Cth) and LiveCorp's Conflict of Interest Policy, a director who considers that he or she may have a direct or indirect pecuniary or non-pecuniary interest in a matter to be discussed by the Board must disclose the existence and nature of the interest before the discussion. The onus of the obligation to disclose material and personal interests rests solely with the director.

All disclosures are recorded in the minutes of the meeting and, depending on the nature and significance of the interest, directors may be required to absent themselves from the Board's deliberations.

Further, at the time of appointment each director is required to provide disclosure about their business and other interests and the Board has a standing notice of director's interests that is tabled and reviewed at each meeting.

Reporting framework

LiveCorp is not a publicly listed company and is not subject to ASX listing rule disclosures. However, as a public company limited by guarantee, it does report to members and the Australian Securities and Investments Commission (ASIC) in the form required by the Corporations Act 2001 (Cth).

LiveCorp also operates under the Funding Agreement with the Commonwealth of Australia. The Funding Agreement sets out the requirements for LiveCorp's expenditure of levy funds and provides a framework under which LiveCorp must report to the department.



Appendix 1: Delivering LiveCorp's Strategic Plan 2025: The Programs

Programs and delivery

LiveCorp invests the levy funds it receives on the export of livestock into RD&E and marketing activities across six programs to deliver on its priorities. The programs are as follows:

- **The Exporter Program** plans, facilitates and coordinates strategic issues management, including specific animal welfare related initiatives and prepares responses to government inquiries or reviews. The program is also the main source for regular engagement with LiveCorp's members and consultation with ALEC on industry priorities, policy support and implementation.
- **The Industry Capability Program** provides technical advice to support improvements and efficiencies in the livestock export regulatory framework and develops and facilitates services, support and advice to assist in the implementation of regulatory reforms. The program also has responsibility for market access opportunities and improving/maintaining existing markets.
- **The Services and Innovation Program** supports industry to increase its capacity and capability through skills development and training, and information technology solutions to meet and exceed standards, compliance and reporting obligations. The program also develops improved and/or innovative systems and tools to support extension and adoption of R&D.
- **The Communications Program** provides the effective transfer of information to exporters, industry stakeholders and government on research and marketing activities undertaken by LiveCorp. The program also supports the industry response to community sentiment by developing communication materials that provide information and visibility in areas where there are community concerns and encouraging the adoption of research by exporters which addresses those concerns.
- **The Dairy Cattle Program** will come into effect when the statutory dairy cattle export charge is implemented and levied on dairy cattle exports, which is anticipated in early 2021. The program will provide funding for RD&E for animal welfare related issues on the export of dairy cattle; support efficiency improvements in the supply chain; provide technical advice and support for market access; and provide funding, representation and advice on the National Arbovirus Monitoring Program (NAMP) to underpin market access opportunities.

- **The Livestock Export Program (LEP)** is a collaboration between LiveCorp and MLA, to invest funds into research and development to improve animal health, welfare and productivity throughout the livestock export supply chain; and livestock export market activities to support the growth, productivity improvements and sustainability of the livestock export industry.

LEP RD&E

In order to obtain matching contributions on research expenditure from the Australian Government and maximise the return on research dollars received from exporter levies, LiveCorp directs its investment through the Donor Arrangement with MLA via the LEP RD&E Program.

The purpose of the RD&E Program is to invest in projects that seek to build knowledge, fill gaps in existing understanding, and develop, trial and implement practical extension outputs in the areas of animal health and welfare, supply chain efficiencies and market access.

Following feedback from members and stakeholders on the performance of the LEP RD&E Program, an independent review was undertaken in 2018 to improve the process, structure and reporting of the RD&E functions to demonstrate value returned on investment.

The review focused on the systems and processes that support the delivery of RD&E, with a particular emphasis on governance and the extension of project outcomes. The result has been a fresh focus on delivery and accountability, including the development of an RD&E Blueprint to guide decision making and provide clarity on the priorities for funding.

The Blueprint identified five RD&E goals that are consistent with industry's priorities across a five-year timeframe:

- Greater transparency of animal health and welfare in the supply chain
- Understanding and addressing animal health and welfare risks in the supply chain
- Improving the uptake, adoption and commercialisation of better animal health and welfare practices and tools
- Improving supply chain efficiency and regulatory performance
- Supporting better market access conditions for Australian producers and exporters

Within this framework the Livestock Export Research and Development Advisory Committee (LERDAC) and the LEP RD&E Management Committee are committed to ensuring that they are continually investing in and managing a balanced portfolio of RD&E projects in alignment with the Blueprint.

The approach applied to research project concept planning and design has improved to ensure consideration, planning and focus on extension, technology transfer, and commercialisation of R&D starts at the project planning phase and continues through the life of the project, thereby ensuring the strategies identified to implement the outcomes are effective.

Appendix 2: LiveCorp's Strategic Plan 2025: The Consultation Process

'In developing or varying the Strategic Plan, LiveCorp must develop a consultation plan, including details of the proposed consultations with (a) levy payers, the Commonwealth, prescribed industry bodies and other RDCs as appropriate.'

Funding Agreement 2017-2021, S30, Ss30.4

The five-year strategic plan set out in this document rests on the contributions of the members, levy payers, Commonwealth officers, peak industry bodies and RDC stakeholders with a direct interest in the future of the livestock export industry and, by extension, that of LiveCorp as the partner of ALEC in shaping and influencing the course of that future.

Initially intended to take place as a suite of workshops in capital cities, the consultation program was altered from the onset as the COVID-19 pandemic took hold and restrictions on travel and large gatherings came into effect nationwide. In its place, LiveCorp and the Consultant designed an approach based on (a) individual interviews and (b) small group events, conducted via teleconference. Allowance was also made for participation via written submissions. Significant effort was made to contact and invite members to participate and contribute to the development of the plan.

As it transpired, the individual and small group contacts at the heart of the new plan made for uniformly deeper, franker and more insightful discussions than would have been the case in the most open of workshop settings. No-one opted for written submissions, preferring instead to make their views known by direct input. Furthermore, there is little doubt that calling on an informed but independent party to conduct the interviews contributed materially to the openness and candour that the discussions displayed.

The names, organisational affiliation of those who were interviewed and the capacity in which they took part in the consultation are set out in the tables opposite. Some persons were interviewed twice but in different capacities (or as spokespersons for a different group) on each occasion.

Exporters and levy payers

Name	Title	Organisation	Capacity
GARDINER, David	Managing Director	Austock Rural	Exporter, levy payer
GORDON, Mike	General Manager	Rural Export & Trading (WA)	Exporter, levy payer
GRIEVE, Angus	Managing Director	Australian Breeding Livestock Exports	Exporter, levy payer
JAMES, Ashley	Managing Director	Southern Australia Cattle Co.	Exporter, levy payer
KEENAN, Paul	Export Manager	Livestock Shipping Services	Exporter, levy payer
McEWIN, William	Managing Director	Frontier Int.	Exporter, levy payer
McFARLANE, Fraser	Managing Director	Flinders Int.	Exporter, levy payer
PURCELL, Patrick	Managing Director	Purcell Bros.	Exporter, levy payer
STANTON, Mike	Managing Director	International Livestock Export	Exporter, levy payer
UNDERWOOD, Patrick	Managing Director	Australian Cattle Enterprises	Exporter, levy payer

LiveCorp staff and Board members¹⁰

Name	Title	Representing
ALEXANDER, Liesel	GM, Corporate Operations & Finance	LiveCorp staff
BROWN, Sam	Chief Executive Officer	LiveCorp staff
COLLIER, Wayne	GM, Programs	LiveCorp staff
COX, Felicity	GM, Special Projects	LiveCorp staff
DWYER, Lisa	Director, Kangertong Farming	LiveCorp director
GALVIN, David	Chairman, Australian Livestock Exporters' Council	LiveCorp director
GOODE, Imogen	Manager, Programs	LiveCorp staff
HALLATT, Katie	Support Officer, Programs	LiveCorp staff
LATHAM, Kaaren	Communications Manager	LiveCorp staff
NELSON, Courtney	Communications and Resource Development Officer	LiveCorp staff
SETTER, Troy	CEO, Consolidated Pastoral Company	LiveCorp Chairman

Department of Agriculture, Water and the Environment

Name	Title	Representing
COOKSON, Beth	Assistant Secretary, Animal Biosecurity	Animal Biosecurity & Compliance
McALISTER, Jodie	Director, Market Access, South-East Asia	Trade & Market Access
McEWEN, Melissa	Principal Regulatory Officer	Export Reform, Live Exports
SHERIDAN, Carol	Assistant Secretary	Animal Welfare, Live Exports

¹⁰ Note: Other LiveCorp Board members were interviewed in their capacity as exporters.

Meat & Livestock Australia

Name	Title	Representing
BEATTY, David	Group Manager, Productivity	MLA
DUNDON, Peter	Program Manager, Livestock Export Program	MLA LEP
FADMA, Helen	Manager, Livestock Services, Indonesia	MLA LEP
LEVONIAN, Rashelle	Project Manager - Trade Market Access and Livestock Exports	MLA LEP
PATCHING, Michael	Manager Livestock Services – Asia Pacific	MLA LEP
STRONG, Jason	Managing Director	MLA
WHITAKER, Spencer	Access and Trade Project Manager, MENA	MLA LEP

Peak industry bodies

Name	Title	Representing
CRISP, Stephen	Chief Executive Officer	Sheep Producers Australia
FALKENHAGAN, John	Chief Executive Officer	Goat Industry Council of Australia
HARVEY-SUTTON, Mark	Chief Executive Officer	Australian Livestock Exporters' Council
McGOVERNE, John	Policy Director	Cattle Council of Australia
MACKAY, Don	Chairman	Red Meat Advisory Council
NEELAGAMA, Anna	Chief Executive Officer	Red Meat Advisory Council
TOBIN, Travis	Chief Executive Officer	Cattle Council of Australia

Young Livestock Exporters' Network (YLEN) and The Livestock Collective

Name	Title	Representing
BOLT, Stephen	Sheep producer	The Livestock Collective
COOLE, Patrick	Manager, ESCAS	YLEN (Halleen Australasian Livestock)
LUDEMAN, Holly	Managing Director	The Livestock Collective
MOFFAT, Kari	Manager, Animal Welfare Assurance	YLEN (Australian Rural Exports)
WEBSTER, Grayson	Project Co-ordinator	The Livestock Collective

Sheep exporters forum

Name	Title	Representing	Capacity
EDWARDS, John	General Manager	Emanuel Exports	Supply chain participant
GORDON, Mike ¹¹	General Manager	Rural Export & Trading (WA)	Exporter, levy payer
INGLE, Andy	Managing Director	Southern Australian International Livestock Services	Exporter, levy payer
KEENAN, Paul	Export Manager	Livestock Shipping Services	Exporter, levy payer

¹¹ Note: Mike Gordon is also a LiveCorp director**Cattle exporters forum**

Name	Title	Representing	Capacity
ADNAM, Angus ¹²	Executive	Queensland Livestock Exporters Assoc.	State chapter representative
CUNNINGTON, John	Business Development Manager	Halleen Australasian Livestock / WA Livestock Exporters Assoc.	Exporter, levy payer
INGLE, Andy	Managing Director	Southern Australian International Livestock Services	Exporter, levy payer
McEWIN, William	Managing Director	Frontier Intl.	Exporter, levy payer
PANKHURST, Greg	Chairman	Queensland Livestock Exporters Assoc.	State chapter representative
SEALY, Harold	Livestock Manager	Livestock Shipping Services	Exporter, levy payer
WATKINS, Peter	Director	Queensland Livestock Exporters Assoc.	State chapter representative
WINTER, Simon	Manager, Compliance	South East Asia Livestock Services	Exporter, levy payer

The timing of the conversations with participants within the overall plan development process was a purposeful decision by LiveCorp and the Consultant. Holding the interviews at the start of the strategic reflection allowed the comments and observations of participants to be taken into consideration from the onset, rather than inviting comments on an already-developed draft, then all too close to representing a fait accompli.

Given this and the number of individuals consulted on the industry, its future and the role of LiveCorp in realising that future (as well as their experience of dealings with LiveCorp), the process stands as a highly open and collaborative one – and as such evidence of LiveCorp's consultative approach, as prescribed under the terms of its Funding Agreement 2017-2021.

¹² Note: Angus Adnam is also a LiveCorp director

Appendix 3: Principal Documentary Sources

In drafting LiveCorp's Strategic Plan 2025, the author consulted numerous sources. The more important reference documents are listed below.

Reference work or document	Author/origin
Constitution of Australian Livestock Export Corporation	LiveCorp
Funding Agreement 2017-2021	DAWE (2017)
Australian Position Statement on the Export of Livestock	DAWE (2006, 2011)
Exporter Supply Chain Assurance System (ESCAS)	DAWE (2015)
Australian Standards for the Export of Livestock (ASEL, v2.3)	DAWE (2011)
Guidelines, Agricultural Competitiveness (White Paper)	DAWE (2015)
Australian Standards for the Export of Livestock (ASEL, v3.0)	DAWE (2020)
Economic Overview 2020	DAWE (2020)
Beef and Veal, June Quarter 2020	DAWE (2020)
Sheep Meat, June Quarter 2020	DAWE (2020)
Livestock Export Review	Keniry (2003)
Independent Review of Australia's Livestock Export Trade	Farmer (2011)
Independent Review of Conditions for the Export of Sheep	McCarthy (2018)
Monitoring and Reporting during Livestock Export Voyages	Insp. Gen. (2020)
National Science and Research Priorities	DISER (2015)
SNAPSHOT Research Priorities in Australia	ARC (2019)
National Primary Industries Research, Development & Extension Framework	NPIRDEF (2017)
Strategic Plan 2016-2020	LiveCorp (2016)
Annual Operating Plan 2018-2019	LiveCorp (2018)
Annual Operating Plan 2019-2020	LiveCorp (2019)
Meat Industry Strategic Plan 2020	RMAC (2016)
A Better Red Meat Future (White Paper)	RMAC (2019)
Together, Towards a Better Red Meat Future (Red Meat 2030)	RMAC (2019)
Strategic Plan 2016-2020	MLA (2016)
Strategic Plan 2020-2025	MLA (2020)
Annual Investment Plan 2018-2019	MLA (2018)
Annual Investment Plan 2019-2020	MLA (2019)
Annual Investment Plan 2020-2021	MLA (2020)

The consultation of documentary sources has extended well beyond these foundation documents, particularly in Section 4, with its focus on the assessment of the anticipated environment in which the industry and LiveCorp are expected to operate over the five year period to 2025 (e.g. Food and Agriculture Organization of the United Nations, the International Monetary Fund and the World Bank). Where this has occurred, sources are identified in footnotes.



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