

LIVECORP ANNUAL OPERATIONAL PLAN 2018/19

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INTRODUCTION

The Australian Livestock Export Corporation (LiveCorp) is the Rural Research and Development Corporation (RDC) for the livestock export industry in Australia. LiveCorp's mandate is to provide research, development, extension (RD&E) and marketing services that maximise the productivity, sustainability and competitiveness of Australia's livestock export industry. LiveCorp administers statutory levies on live exports of beef cattle, sheep and goats and a voluntary contribution on exports of dairy cattle on behalf of the livestock export industry in Australia, as detailed in its Funding Agreement (FA) with the Australian Government Department of Agriculture and Water Resources (the department). Livestock export levies are strategically invested in programs that deliver a range of benefits for the industry and the broader Australian community. As part of the FA, LiveCorp is required to submit an Annual Operational Plan (AOP) that describes its activities for the year ahead.

ANNUAL OPERATIONAL PLAN

The AOP provides an overview of the activities LiveCorp will fund for the financial year 2018–19, on a program basis. It aims to inform Australian livestock exporters, peak industry councils (PICs), the department and the wider livestock export industry about LiveCorp's planned activities. It includes the initiatives, deliverables and budgets in a practical, operational framework for managers to achieve outcomes.

The strategic direction for the AOP is taken from:

- The LiveCorp Strategic Plan 2016-2020;
- The Red Meat Industry Strategic Plan - MISP 2020;
- The Australian Government's Science and Research Priorities and corresponding Practical Research Challenges; and
- The Rural RD&E Priorities set out in the Agricultural Competitiveness White Paper, released in July 2015.

PROGRAMS

LiveCorp focuses its RD&E and marketing activities across two program streams to deliver on its strategies:

- The LiveCorp Programs
- The Livestock Export Program

LiveCorp Programs

There are five LiveCorp Programs (refer to pages 19 to 23) that are focused on addressing key issues facing exporters including profitability, sustainability, competitiveness, capability and performance. In addition to being administered and delivered by LiveCorp, the LiveCorp Programs are supported by an industry-wide consultation process. This process aims to identify and deliver innovative outcomes central to continuous improvement in livestock management, health and welfare throughout the supply chain and the long-term sustainability of the industry.

The Livestock Export Program

The joint Livestock Export Program (LEP) is collaboratively funded between LiveCorp and Meat & Livestock Australia (MLA). It leverages both exporter and producer levies, as well as government matching of expenditure for eligible RD&E projects. There are three LEP in-market programs and the RD&E program (refer to pages 25 to 29). MLA administers the LEP, with LiveCorp jointly providing support services, to deliver the following:

- RD&E;
- Market access and trade support;
- Livestock management and welfare;
- Communications and issues management; and
- Industry capability and technical services.

The principles guiding LEP activities to support the Australian livestock export industry are:

- The Exporter Supply Chain Assurance System (ESCAS) is the Australian Government regulatory framework for the live export of feeder and slaughter livestock. The department is responsible for the administration and enforcement of ESCAS.
- Compliance with ESCAS animal welfare, control, traceability and reporting obligations is the responsibility of Australian licensed exporters in managing their overseas supply chains. LiveCorp and the LEP are service providers to the exporters; and
- Supply chain infrastructure and maintenance is the responsibility of the exporter. The LEP provides animal welfare and infrastructure design advice.

COLLABORATION

LiveCorp recognises the importance of working with industry, research partners, governments and other organisations to leverage synergies and enhance capability. In addition to the LEP, LiveCorp seeks to identify opportunities for collaboration with other research agencies and in cross-sectoral structures where the outcomes and

value-for-money justify such engagement. Current cross-sectoral engagements include LiveCorp's participation in the Council of Rural Research and Development Corporations (CRR&DC) and the National Primary Industries RD&E Framework for Animal Welfare and Animal Biosecurity Strategies.

OPERATING ENVIRONMENT

There will be a number of key priorities for the livestock export industry over the 2018–19 period.

Regulatory Reform

In July 2017 the Australian Government commenced a comprehensive review of the Australian Standards for the Export of Livestock (ASEL) which covers the livestock export supply chain from on-farm preparation through to disembarkation overseas. These standards ensure animals are fit for export and maintain their health and welfare status throughout the export voyage.

LiveCorp will support the ASEL review by providing current, relevant and reliable evidence and research findings to stakeholders, the ASEL Technical Advisory Committee and the department. The ASEL review is anticipated to have three stages and be completed within the 2018–19 financial year.

McCarthy Review

The release of footage in April 2018 covering on-board treatment of sheep, over a series of voyages to the Middle East in 2017 shocked the Australian community, undermining public confidence in the trade.

In response, the Australian government commissioned a short, sharp review of live sheep exports to the Middle East, during the northern summer to advise on conditions and any changes to the administration of ASEL and/or actions that would be required to assure the health and welfare outcomes for sheep being transported to the Middle East during the northern hemisphere summer.

This review considered stocking density on ships, bedding and animal waste management, ventilation and heat stress risk, skills of the crew in managing animal health and welfare, contingency planning and reporting.

The review findings were released in May 2018 and included twenty-three recommendations falling into two categories:

- Those recommendations that should be implemented as soon as practical to address the immediate and specific challenges of exporting sheep from Australia to the Middle East during higher risk 2018 northern hemisphere summer.

These are interim measures to apply until October 2018.

- Those recommendations that may require more time to implement and will be considered by the ASEL review committee within their own time frame.

The department released its response to the McCarthy Review report concurrently. The department response identified recommendations from the Review that it supported, and others – related to changes to the Heat Stress Risk Assessment model – that would be subject to a further three month review process.

Industry Reform

The livestock export industry in Australia is at a defining point in time, its social licence to operate has been damaged with the Australian public. The industry must strive to build a new way forward for animal welfare based on science, trust and performance.

During April and May 2018, the Australian Livestock Exporters' Council (ALEC) and its members agreed to and announced a range of measures and major changes to address failings in transparency and accountability to the Australian community. These included an independent review of governance structures, codes of conduct and ethics standards; conditions for the export of sheep to the Middle East; and the establishment of Livestock Global Assurance Program (LGAP).

LiveCorp will support the cultural and leadership changes and provide the research and development to support systems and processes that improve independence and transparency of the industry.

Livestock Global Assurance Program

In April 2018 the livestock export industry endorsed the establishment of LGAP which will be implemented over a four year period commencing in July 2018.

LGAP represents the result of more than four years of research undertaken by the LEP RD&E Program into more efficient and effective ways for Australian livestock exporters to meet the Australian Government's ESCAS regulations. LGAP is not a replacement for ESCAS, but being certified by LGAP would be accepted by the Australian Government as exporters having met ESCAS requirements.



RESEARCH, DEVELOPMENT & EXTENSION (RD&E)

Unlike most other RDCs, LiveCorp is not eligible to directly receive matching contributions on research expenditure from the Australian Government. In order to attract matching contributions and maximise the return on research dollars received from levies, LiveCorp must direct its investment through MLA's R&D framework via the LEP RD&E Program.

The RD&E Program generates the data, new knowledge and outputs that underpin LiveCorp and the LEP's ability to deliver against the Strategic Objectives. To ensure alignment, the following strategic outcomes have been identified in the LiveCorp 2016-2020 Strategic Plan for the LEP RD&E Program:

- Achieve R&D outcomes that improve animal health and welfare, that are extended and communicated to industry stakeholders effectively.

- Ensure RD&E program outcomes are adopted and deliver new innovations and technical materials improving the performance of livestock throughout the Australian livestock export supply chain.
- RD&E projects are conducted to facilitate continued access to existing markets and the opening of new markets.
- Collaboration is achieved at a national level with RDCs, research providers and the Australian livestock export industry delivering RD&E and marketing services.

The RD&E funding distribution across the Strategic Objectives is determined by LiveCorp, MLA and the livestock export industry during the AOP planning process.

Figure 1 opposite represents the RD&E program aims by allocation.

BALANCED PORTFOLIO

LiveCorp is committed to ensuring it invests, manages and participates in a balanced portfolio of RD&E activities that is appropriate to meeting the industry's needs and providing an attractive return on investment for members and levy payers. The LEP R&D Management Committee manages the research investment process and the associated review and evaluation of funded projects, with input from the Livestock Export R&D Advisory Committee (LERDAC).

The primary objectives of LERDAC and the Management Committee are to ensure transparent, independent and robust review of all RD&E projects funded by LiveCorp, MLA and the government. In this way, all projects are selected for investment based on merit and against industry and government priorities.

In delivering a balanced portfolio of RD&E activity, LERDAC and the Management Committee undertake to:

- Identify short, medium and longer-term projects for funding, on merit, against industry priorities, government priorities and LiveCorp's Strategic Plan;
- Address current gaps in the existing research portfolio;
- Increase industry return on research investment;

- Focus on industry benefit and the adoption of research outputs;
- Evaluate the risk profile of research projects against the risk appetite;
- Foster high-quality, relevant research which delivers benefits across multiple timeframes; and
- Increase industry participation in research, development and adoption activities.

In 2018-19 the LEP RD&E Program will implement the concept of multi-year project partnerships with select, credible research organisations who have key expertise, infrastructure and have been considered or are already engaged in substantial research projects with the LEP RD&E Program. The primary benefit of project partnerships is strong linked relationships that will allow the program to capitalise on cross-over capacity, value-adding to the return on investment.

Figure 2 opposite details the investment of the LEP RD&E Program for 2018-19. Reflective of exporter and government expectations with respect to allocations, and in line with LiveCorp's Strategic Plan, the majority of investment lies within animal health and welfare.

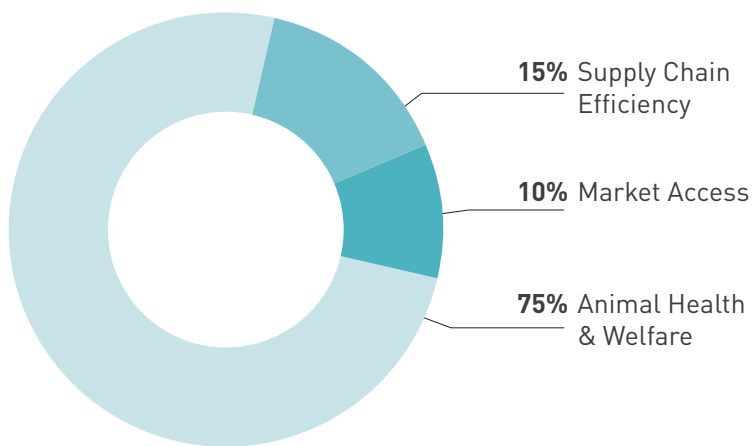


Figure 1: Investment Targets for the RD&E Program

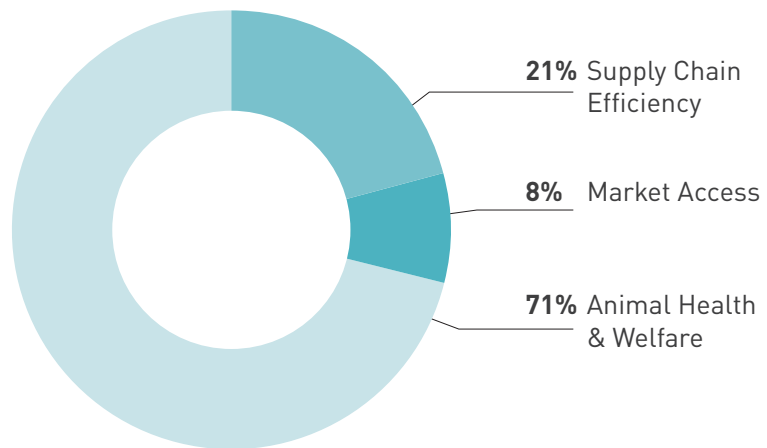


Figure 2: RD&E Program Forecast Investment for 2018-19



ALIGNMENT OF OBJECTIVES

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

AUSTRALIAN GOVERNMENT NATIONAL SCIENCE AND RESEARCH PRIORITIES

The Government has established a set of 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. These Priorities will be reviewed by the Government every two years to allow for new initiatives and ensure the issues being addressed are the most pressing for the nation.

There are nine priority areas devoted to science and research developed by the Australian Government:

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.

Based on the objectives and outcomes of each priority, the food priorities are most relevant to the livestock export industry and with LiveCorp's strategies.

AUSTRALIAN GOVERNMENT RURAL RESEARCH DEVELOPMENT AND EXTENSION PRIORITIES

The Government has developed clear, farmer-oriented priorities to target rural RD&E funding to deliver tangible and sizeable on-farm benefits that improve farm gate returns. The Government's Rural RD&E Priorities are designed to complement the National Science and Research Priorities. While these agriculture priorities do not cover all of the important issues facing primary industries, they are the highest priority research areas:

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.

LEP RD&E PROJECT AREAS	Animal Health and Welfare	Supply Chain Efficiency	Market Access
RURAL RD&E PRIORITIES			
1. Adoption of RD&E	✓	✓	✓
2. Advanced Technology	✓	✓	
3. Biosecurity	✓		✓
4. Soil, water and natural resources	✓		
NATIONAL SCIENCE AND RESEARCH PRIORITIES			
1. Food	✓		✓
2. Soil and water			
3. Transport			
4. Cybersecurity			
5. Energy			
6. Resources			
7. Advanced manufacturing			
8. Environmental change			
9. Health			

Table 1 - Alignment of the LEP RD&E Projects with the Australian Government Research Priorities

MISP 2020

MISP is the overarching framework that sets the collective strategic direction for the Australian red meat and livestock industry. All industry signatories to the Red Meat Memorandum of Understanding (MoU) have formal obligations for the implementation of MISP. The Red Meat Advisory Council (RMAC) co-ordinates the development of the plan while the industry's service companies, LiveCorp, MLA and Australian Meat Processor Corporation (AMPC), work with their respective peak industry councils to implement it.

MISP 2020	Livecorp's 2016-20 Strategic Objectives				
	1. Achieve continuous improvement in animal health and welfare across the supply chain.	2. Improve supply chain efficiencies and regulatory performance.	3. Enhance market access and conditions for both existing and new markets.	4. Develop and deliver targeted exporter, government and other stakeholder communications that serve to secure, promote and inform the activities of the livestock export sector.	5. Maximise collaboration with key Australian and international stakeholders involved in the livestock export industry.
1.0 Consumer and community support	✓	✓		✓	✓
1.1 Welfare of the animals within our care					
2.0 Market growth and diversification					
2.1. Efficiency and value in trade and market access			✓	✓	
2.2. Marketing and promoting Australian red meat and livestock					
3.0 Supply chain efficiency and integrity					
3.1. Optimising product quality and cost efficiency		✓			
3.2. Guaranteeing product and systems integrity					
4.0 Productivity and profitability	✓	✓			
4.1. Live export productivity					
5.0 Leadership and collaborative culture					
5.1. Building industry capability			✓	✓	✓

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 our members, levy payers and stakeholders.

MONITORING AND REPORTING OF LIVECORP ACTIVITIES

The primary monitoring and reporting mechanisms include review by the LiveCorp Board, on an ongoing basis, of a suite of reports that cover LiveCorp's operational and strategic performance. The performance reports considered include:

- Operational reports, such as Finance, Workplace Health and Safety and Risk Management;
- Annual external audit; and
- Program and project activities and outcomes against priorities.

Additional monitoring and consultation is conducted through regular meetings with levy payers, ALEC, state and territory Livestock Export Associations (LEA) 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 the four-year FA.

As prescribed in the FA 2017-21, LiveCorp is required to engage an independent organisation to undertake a comprehensive review of performance. This independent performance review will be due to take place in 2020-21 and must take into account LiveCorp's performance in meeting its obligations under the FA; implementing governance arrangements and practices to ensure proper use and management of levy funds; meeting the planned outcomes and targets of the Strategic Plan; delivering benefits to members, industry and stakeholders; and consulting with levy payers and industry.

In 2018-19 an independent LiveCorp Board performance evaluation will be carried out. This external review is undertaken every three years.

LEP RD&E PROGRAM REVIEW

Over 2017-18, the LEP RD&E Program commissioned an independent review of LERDAC to consider improvements to its governance, decision-making processes, frameworks and reporting. The review made a range of recommendations that fall within four broad themes, covering: clarity, reach, structure and knowledge.

In 2018-19, the LEP RD&E program will focus on the implementation of the review recommendations in consultation with stakeholders.

STRATEGIC OBJECTIVES



STRATEGIC OBJECTIVE 1

Achieve continuous improvement in animal health and welfare across the supply chain

Continuous improvement in animal health and welfare across the livestock export supply chain is the key strategic objective for LiveCorp's operations and investment. This prioritisation is in accordance with the FA, LiveCorp's Constitution and the livestock export industry priorities. It should also be noted that animal welfare benefits accrue through programs delivered against different strategic objectives – in particular, supply chain efficiencies and regulatory performance.

Strategies

- Improving the skills, knowledge and capability of people and increasing the understanding and adoption of evidence based standards, systems and processes in livestock export supply chains to deliver good animal health and welfare outcomes.
- Encouraging increased adoption/improvement of infrastructure in livestock export supply chains to support good animal health and welfare outcomes.
- Supporting improvements in the understanding and performance of participants throughout the export supply chain in delivering against Australian animal welfare regulatory requirements.
- Supporting livestock export supply chain stakeholders in implementing the ALEC Livestock Export Industry Reform Strategy.
- Commissioning RD&E to support improved animal health and welfare consistent with the above strategies.

Strategic Deliverables

This key objective aims to deliver over the next five years the following strategic outcomes:

- The provision of animal health and welfare technical support is identified through market research as adding significant value to exporters' businesses and the Australian livestock export industry.
- Training programs are undertaken domestically and in-market with demonstrable improvements in animal health and welfare and implementation of regulatory requirements.
- Increased adoption of training and support programs is evidenced through

reduced animal health and welfare issues reported.

- R&D outcomes that improve animal health and welfare are extended and communicated to industry stakeholders effectively.

2018-19 Outcomes*

- People in livestock export supply chains have the skills, knowledge, capacity and access to resources to deliver good animal health and welfare outcomes.
- Livestock export supply chains have knowledge in the infrastructure that supports good animal health and welfare outcomes.
- Livestock export supply chains understand Australian animal welfare regulatory requirements.
- Reporting framework adopted and refined to support the RD&E animal welfare indicators pilot project and broader ongoing research data collection.
- RD&E projects that support improved animal health and welfare are commissioned.

Budget

The LiveCorp indicative budget for 2018-19 against this strategic objective is \$1,652,000 (M\$1,211,000 and R\$441,000).

Relevant Programs

- Exporter Program.
- Services & Innovation Program.
- Dairy Cattle Export Program.
- Communications Program.
- LEP In-Market – Indonesia Program.
- LEP In-Market – Asia Pacific Program.
- LEP In-Market – EMENA Program.
- LEP RD&E Program.

*Note: Pages 18 to 29 list details of activities for 2018-19 and corresponding key performance indicators and deliverables for each Program.

STRATEGIC OBJECTIVE 2

Improve supply chain efficiencies and regulatory performance

Improving supply chain efficiencies and regulatory performance remains a high priority for both the export industry and Australian Government. Both stakeholders collectively seek to improve compliance whilst improving the regulatory environment and export business practise.

Strategies

- Developing the effectiveness and efficiency of the Australian livestock export industry regulatory structures by reducing red tape, regulatory burden and better aligning it with business structures.
- Providing support for the adoption and enhancement of livestock control and traceability systems and innovative means to improve productivity in the industry, within the constraints of the regulatory environment.
- Supporting and encouraging the efficiency, sustainability and productivity of Australian livestock export supply chains with the necessary knowledge, skills, systems, technologies and tools to comply effectively and efficiently with regulatory requirements.
- Providing technical advice, where appropriate, to improve facilities, skills development and infrastructure that increases the efficiency of, and access to, primary and secondary ports and removes bottlenecks in supply chains.
- Providing R&D support for ongoing improvements and refinements to existing regulation, including ESCAS and supporting industry led quality assurance systems.

Strategic Deliverables

This key objective aims to deliver over the next five years the following strategic outcomes:

- Improved regulatory processes are adopted by industry and the level of red tape is reduced.
- Peak Councils and the Australian Government regard LiveCorp's advice on livestock export industry issues as significantly valuable.
- Improvements to skills development, infrastructure, port facilities, registered premises and other supply chain elements are identified to support supply chain efficiencies.

- R&D input and support for the development and improvement of key regulatory or industry standards and systems (e.g. ASEL, ESCAS) leads to a more co-regulatory process.
- The RD&E program outcomes are adopted and deliver new innovations and technical materials improving the performance of livestock throughout the Australian livestock export supply chain.

2018-19 Outcomes*

- New and/or improved livestock export regulatory processes are implemented to increase regulatory performance by livestock exporters.
- People in export supply chains have the knowledge, skills and tools to improve control, traceability, sustainability and productivity.
- RD&E projects that support ongoing improvements to existing regulation and industry quality assurance are commissioned.

Budget

The LiveCorp indicative budget for 2018-19 against this strategic objective is \$896,000 (M\$770,000 and R\$126,000).

Relevant Programs

- Exporter Program.
- Services & Innovation Program.
- Industry Capability Program.
- Dairy Cattle Export Program.
- LEP In-Market – Indonesia Program.
- LEP In-Market – Asia Pacific Program.
- LEP In-Market – EMENA Program.
- LEP RD&E Program.

*Note: Pages 18 to 29 list details of activities for 2018-19 and corresponding key performance indicators and deliverables for each Program.

STRATEGIC OBJECTIVE 3

Enhance market access and conditions for both existing and new markets

Market access remains a key strategic objective in order to capture both new market opportunities and ensure access to existing markets is practical, certifiable and scientifically based. A key consideration is to ensure sufficient detail is contained within government-to-government agreements to provide all stakeholders/agencies with necessary assurances to support continuous trade in livestock.

Strategies

- Increased understanding and knowledge of new and existing market access issues and in-market conditions through the provision of technical support to government and industry.
- Collaborating with the Australian Government to provide advice, input and support for trade and market access including delegations.
- Investing in, and providing technical advice for, priority livestock biosecurity systems to enhance market access priorities (i.e. the National Arbovirus Monitoring Program (NAMP)).
- Establishing priorities through the Protocol Committee to coordinate/facilitate industry input into protocol negotiations between governments.
- Monitoring overseas governments' policies and market data to determine potential changes in demand which could materially affect Australian livestock exports; and initiating action to manage the effects of the changes.

Strategic Deliverables

This key objective aims to deliver over the next five years the following strategic outcomes:

- Industry and government confirm their support of LiveCorp market access activities.
- Maintain and improve access activities to existing markets and assist with the opening of new markets.
- Facilitation of trade delegations to and from Australia in support of market access objectives is increased.
- RD&E projects are conducted to facilitate continued access to existing markets and the opening of new markets.

2018-19 Outcomes*

- The livestock export industry is coordinated and united in its priorities and advice on market access issues and support for delegations.
- Strong relationships and on-going engagement exist between the livestock export industry and overseas and Australian governments that establish market priorities and monitor in-market conditions.
- Australia's animal health systems and structures are efficient and effective in supporting market access and improving Australia's animal health reputation.
- RD&E projects that facilitate continued and new access to markets are conducted.

Budget

The LiveCorp indicative budget for 2018-19 against this strategic objective is \$929,000 (M\$881,000 and R\$48,000).

Relevant Programs

- Exporter Program
- Industry Capability Program.
- Dairy Cattle Export Program.
- LEP In-Market – Indonesia Program.
- LEP In-Market – Asia Pacific Program.
- LEP In-Market – EMENA Program.
- LEP RD&E Program.

*Note: Pages 18 to 29 list details of activities for 2018-19 and corresponding key performance indicators and deliverables for each Program.

STRATEGIC OBJECTIVE 4

Develop and deliver targeted exporter, government and other stakeholder communications that serve to secure, promote and inform the activities of the livestock export sector

Stakeholder communication and engagement seeks to improve community and industry stakeholders' awareness of LiveCorp and the LEP's programs and inmarket activities to further support the industry reform strategy.

Strategies

- Enhancing communication to the Australian Government and industry to ensure they are informed of the changing requirements of the livestock export industry.
- Increasing the communication on the extension of R&D, and the positive benefits for the industry, exporters and the Australian community.
- Supporting ALEC to ensure that all industry participants, the Australian community and stakeholders in overseas markets are aware of the Australian livestock export industry's commitment and progress towards achieving the industry reform strategy.
- Ensuring that communications are appropriate, effective and inform government and industry stakeholders of the livestock export sector.
- Improve the awareness and understanding of the livestock export industry by the Australian community.

Strategic Deliverables

This key objective aims to deliver over the next 5 years the following strategic outcomes:

- LiveCorp communications are delivered to target audiences in a timely, accessible and professional manner.
- Annual reviews of the effectiveness of LiveCorp communications are held with key stakeholder groups.
- R&D programs and the benefits that they provide are reported to exporters and the Australian community via managed LiveCorp, ALEC and MLA channels.
- Briefings are provided to producers, exporters and governments on key issues.

2018-19 Outcomes*

- The livestock export industry, livestock producers and government are appropriately and effectively informed of LiveCorp activities and LEP projects.
- Extension of R&D that improves animal health and welfare is communicated to the industry, exporters and the community.
- The Australian community is aware of the livestock export industry's actions and commitment to achieving the industry reform strategy.
- The Australian community is aware of the contribution made by the livestock export industry to improving animal welfare practices and outcomes.

Budget

The LiveCorp indicative budget for 2018-19 against this strategic objective is \$639,000 (M\$639,000 and R\$nil).

Relevant Programs

- Exporter Program.
- Services & Innovation Program.
- Communications Program.
- Dairy Cattle Export Program.

*Note: Pages 18 to 29 list details of activities for 2018-19 and corresponding key performance indicators and deliverables for each Program.

STRATEGIC OBJECTIVE 5

Maximise collaboration with key Australian and international stakeholders involved in the livestock export industry

Stakeholder collaboration seeks to increase the scope of LiveCorp and the LEP's investment in animal welfare and leverage relationships on projects that have a common purpose.

Strategies

- Developing collaborative programs, potential joint industry projects, communications linkages, and long-term relationships with key livestock export industry stakeholders in order to increase the impact of LiveCorp and LEP investment.
- Identifying R&D projects where Australian Government overseas aid can be leveraged to develop collaboration programs with trading partners and livestock importing industries.
- Developing multi-level collaboration with international agencies, foreign governments and industries to improve livestock export programs and their acceptance in-market (including animal health and welfare programs).
- Collaboration at a national level with other RDCs, research providers and the Australian livestock export industry to deliver RD&E and marketing services.

Strategic Deliverables

This key objective aims to deliver over the next five years the following strategic outcomes:

- Key projects involving collaboration with Australian and international livestock and livestock export related, health or welfare organisations including aid programs are investigated and developed.
- Linkages with major international organisations with an interest in collaborating on animal health and welfare projects are investigated and developed.
- Collaboration is achieved at a national level with RDCs, research providers and the Australian livestock export industry delivering RD&E and marketing services.

2018-19 Outcomes*

- RD&E collaboration is developed with other RDCs, research providers and industry participants.

Budget

The LiveCorp indicative budget for 2018-19 against this strategic objective is \$217,000 (M\$217,000 and R\$nil).

Relevant Programs

- Exporter Program.
- Industry Capability Program.

*Note: Pages 18 to 29 list details of activities for 2018-19 and corresponding key performance indicators and deliverables for each Program.

LIVECORP PROGRAMS

EXPORTER PROGRAM

PURPOSE

To facilitate and coordinate activities that directly benefit LiveCorp members and the Australian livestock export industry, including issues management, time critical projects, consultation, driving specific animal welfare related initiatives, and preparing and responding to government inquiries or reviews. The Program is also the main source for regular consultation with ALEC on industry issues, planning, policy support and implementation.

ACTIVITIES FOR 2018-19

- Support the implementation of LGAP and other initiatives that enhance animal welfare and sustainability of the trade.
- Support ALEC as the peak industry council on industry issues, planning and policy direction and implementation, such as in relation to the McCarthy Review, ASEL Review, industry reform and control and traceability frameworks.
- Support and provide technical advice for market access risks and opportunities, including breeding cattle to Indonesia and trade with China.
- Engage with Australian diplomats to build capability and enable improved understanding of Australian livestock systems.
- Provide funding, representation and advice on the ongoing management of NAMP to support market access.
- Provide funding and representation on SAFEMEAT which oversees and promotes sound management systems to deliver safe and hygienically produced meat products.

OUTCOMES IN 2018-19

- New and/or improved livestock export regulatory processes are implemented to increase regulatory performance by livestock exporters.
- The Australian community is aware of the livestock export industry's actions and commitment to achieving the industry reform strategy.
- Strong relationships and on-going engagement exist between the livestock export industry and overseas and Australian governments that establish market priorities and monitor in-market conditions.
- Australia's animal health systems and structures are efficient and effective in supporting market access and improving Australia's animal health reputation.

KEY PERFORMANCE INDICATORS IN 2018-19

Biennial survey of members and industry stakeholders indicates a high level of satisfaction (75% plus) with the services delivered by LiveCorp.

BUDGET

\$1,283,700

INDUSTRY CAPABILITY PROGRAM

PURPOSE

To gain access to new markets, maintain markets and improve existing market protocols to ensure diversity and increase opportunities for Australian exporters and producers. The Program also supports regulatory reform and improvements in supply chain activities by identifying and implementing efficiencies that reduce regulatory burdens that are government and exporter priorities.

ACTIVITIES FOR 2018-19

- Facilitate industry and government meetings to set market access priorities and gather expert advice to support the department in its protocol or market access negotiations with trade partners.
- Develop strategies and high quality, scientifically rigorous briefs to support market access and protocol issues management and the removal of trade barriers.
- Support exporters with export certification, market access and the department's policy development.
- Support exporters with industry reform activities, including the implementation of LGAP and recommendations from the McCarthy Review.
- Engage in regular consultation with exporters, stakeholders and the department and, where appropriate provide technical support, on regulatory reform priorities (e.g. review of ASEL) and identify and progress opportunities to improve regulatory efficiency.
- Provide technical input in coordination with industry on ongoing regulatory activities and operational issues (e.g. export advisory notices, Approved Arrangements and ESCAS control and traceability).
- Assist with logistics, coordination and technical input into delegations to and from Australia.

BUDGET

\$538,000

OUTCOMES IN 2018-19

- The livestock export industry is coordinated and united in its priorities and advice on market access issues and support for delegations.
- New and/or improved livestock export regulatory processes are implemented to increase regulatory performance by livestock exporters.

KEY PERFORMANCE INDICATORS IN 2018-19

Current market access is maintained and market access priorities are advanced. High level of satisfaction (75% plus) from members and government stakeholders with LiveCorp's contribution to market access priorities and regulatory reform.

COMMUNICATIONS PROGRAM

PURPOSE

To provide for the effective transfer of information to key industry stakeholders, on research and marketing activities undertaken by LiveCorp and the LEP to enhance the transparency and accountability of industry's commitment to improving animal welfare outcomes.

ACTIVITIES FOR 2018-19

- Support industry with information, technical advice and research for the implementation of the industry reform strategy, including risk communications and public R&D communication.
- Deliver biannual LEP RD&E updates and outcome summaries to stakeholders and develop informative materials that are accessible to exporters and stakeholders to encourage extension and adoption of R&D.
- Develop a framework to communicate outcomes of R&D that exporters and industry have adopted to address or solve problems.
- Develop and provide technical briefs on diseases, issues analysis and management and talking points to PICs.
- Continue to use opportunities to host or collaborate with MLA and producer groups in delivering producer focused Live Export Briefing Forums across key livestock production regions of Australia.

OUTCOMES IN 2018-19

- The livestock export industry, livestock producers and government are appropriately and effectively informed of LiveCorp activities and LEP RD&E projects.
- Extension of R&D that improves animal health and welfare is communicated to the industry, exporters and the community.
- The Australian community is aware of the contribution made by the livestock export industry to improving animal welfare practices and outcomes.

KEY PERFORMANCE INDICATORS IN 2018-19

Biennial survey of members and industry stakeholders indicates a high level of satisfaction (75% plus) with the communication content and methods delivered by LiveCorp.

BUDGET

\$571,000

SERVICES AND INNOVATION PROGRAM

PURPOSE

To support industry to increase its capacity and capability through the delivery of training services to meet and exceed standards, compliance and reporting obligations for the Australian livestock export industry. The Program also develops improved and/or innovative information systems and tools to enhance communication and create regulatory efficiencies.

ACTIVITIES FOR 2018-19

- Deliver training programs that educate participants on best practice animal handling and husbandry along with enhanced knowledge of animal welfare and regulatory requirements to deliver continuous improvement in animal welfare.
- Develop innovative resources and factsheets that support the extension and adoption of R&D and its effective communication to stakeholders.

OUTCOMES IN 2018-19

- People in livestock export supply chains have the skills, knowledge, capacity and access to resources to deliver good animal health and welfare outcomes.

KEY PERFORMANCE INDICATORS IN 2018-19

Biennial survey of members and industry stakeholders indicates a high level of satisfaction (75% plus) with the training services delivered by LiveCorp.

BUDGET

\$183,000

DAIRY CATTLE EXPORT PROGRAM

PURPOSE

LiveCorp receives a voluntary contribution on exports of live dairy cattle and receipts can therefore vary significantly. Consequently, LiveCorp monitors program expenditure against receipts and refines export dairy cattle activities and deliverables accordingly. For this reason, the activities outlined in this AOP are indicative only.

ACTIVITIES FOR 2018-19

- Support the establishment of the statutory dairy cattle export charge.
- Coordinate breeding cattle committee meetings to maintain regular dialogue with dairy exporters and stakeholders to discuss market access priorities, protocol requirements, technical advice and issues management.
- Provide funding, representation and advice on the ongoing management of NAMP to support market access.

OUTCOMES IN 2018-19

- Australia's animal health systems and structures are efficient and effective in supporting market access and improving Australia's animal health reputation.

KEY PERFORMANCE INDICATORS IN 2018-19

The dairy cattle export charge is passed into legislation.

Current market access is maintained and market access priorities are advanced.

BUDGET

\$158,000

LIVESTOCK EXPORT PROGRAM (LEP)

LEP IN-MARKET PROGRAM – INDONESIA

MARKET OVERVIEW

As the largest export destination and trading partner for Australian cattle exports, Indonesia remains a major focus for the LEP. The Indonesian government's agricultural policy goal to achieve self-sufficiency for staple foods including beef, along with policy interventions to address beef price affordability, has changed the market profile and demand for Australian live cattle.

In 2018-19 the LEP Indonesia program will continue its focus on animal health and welfare and the extension and adoption of best practice livestock management, particularly the in the area of support for breeding cattle welfare.

ACTIVITIES FOR 2018-19

- Deliver programs, engage with stakeholders and provide technical advice for in-market animal health and welfare activities – including religious festival programs, breeding programs, nutrition and production systems and adoption of welfare indicators.
- Organise or participate in regional animal welfare events to liaise and engage with local industry and organisations to support market access, trade promotion, supply chain efficiency and highlight Australian animal welfare.
- Support the implementation of LGAP.
- Review stunning rates and efficacy and health and hygiene standards particularly in relation to the halal status of stunning.
- Undertake market intelligence activities to provide information to stakeholders and the Australian industry on market access and market insights and assist in developing the competitiveness and differentiation of Australian beef products to support the demand for Australian live cattle.

BUDGET

\$782,000

OUTCOMES IN 2018-19

- People in livestock export supply chains have the skills, knowledge, capacity and access to resources to deliver good animal welfare outcomes.
- People in export supply chains have the knowledge, skills and tools to improve traceability, sustainability and productivity.
- Livestock export supply chains understand Australian animal welfare regulatory requirements.
- Strong relationships and on-going engagement exist between the livestock export industry overseas and Australian government that establish market priorities and monitor in-market conditions.

KEY PERFORMANCE INDICATORS IN 2018-19

Minimum of 70% of government and industry stakeholders satisfied with the LEP's activities.

LEP IN-MARKET PROGRAM – ASIA PACIFIC

In 2018-19, the LEP In-Market Programs of Vietnam and Other Asia will be merged to form the Asia Pacific Program covering China, Vietnam, Malaysia, Brunei, Sabah and Sarawak, Cambodia, Thailand, Japan and the Philippines.

MARKET OVERVIEW

The Asia Pacific region is very sensitive to livestock prices and despite the softening in Australia's cattle, sheep and goat prices off the highs of 2016-17, importers continue to source from cheaper markets like Thailand, Myanmar, Brazil and India. There has been some expansion to the slaughter and feeder cattle trade to China as supply chains and relationships are developed and the outlook is for this growth to continue at a steady pace.

In 2018-19 the LEP Asia Pacific program will continue to invest in projects to work through the risks identified by industry, in addition to supporting market access, capacity building, and industry communications and insights.

ACTIVITIES FOR 2018-19

- Provide support to ensure understanding and compliance with the principles of ESCAS including control and traceability, appropriate preparation for religious festivals and ensuring good animal welfare outcomes.
- Provide support in adoption and extension of best practice animal health and welfare management, including animal handling; restraint; stunning; slaughter practices and techniques; and slaughter equipment maintenance.
- Continue to provide support and technical advice for captive bolt legalisation in Vietnam.
- Engage with local stakeholders to provide support to improve supply chain productivity with emphasis on efficiency and productivity improvements;

standardising and modernising processes to increase capacity and throughput (including logistics, distribution, and product traceability) and value adding carcass cutting.

- Undertake market intelligence activities to provide information to stakeholders and the Australian industry on market access and market insights (e.g. regional competition, demand and supply; market access and trade status/issues; potential regional restrictions, pricing data).
- Support the implementation of LGAP.

OUTCOMES IN 2018-19

- People in livestock export supply chains have the skills, knowledge, capacity and access to resources to deliver good animal welfare outcomes.
- Livestock export supply chains have knowledge in the infrastructure that supports good animal health and welfare outcomes.
- People in export supply chains have the knowledge, skills and tools to improve traceability, sustainability and productivity.
- Livestock export supply chains understand Australian animal welfare regulatory requirements.

KEY PERFORMANCE INDICATORS IN 2018-19

Minimum of 70% of government and industry stakeholders satisfied with the LEP's activities.

BUDGET

\$1,349,000

LEP IN-MARKET PROGRAM – EUROPE, MIDDLE EAST AND NORTH AFRICA (EMENA)

MARKET OVERVIEW

Key markets within the EMENA region include the United Arab Emirates (UAE), Qatar, Kuwait, Israel, Jordan, Oman, Iran, Egypt, Turkey, Russia and Lebanon.

Sheep exports to the region remain at historically low levels due to a range of factors including demand, regional supply and competition from chilled/frozen meat. Further, live sheep exports to the region will be severely impacted from 2018-19 as recommendations from the McCarthy Review are applied.

In 2018-19 the LEP EMENA program will support projects to work through the risks identified by industry, in addition to supporting market access and capacity building.

ACTIVITIES FOR 2018-19

- Provide support in adoption and extension of best practice animal health and welfare management, including animal handling; stunning; slaughter practices and techniques; heat stress management; feedlot infrastructure and management; and control and traceability.
- Provide support to improve efficiency and regulatory performance for supply chain participants.
- Support market access, trade promotion, highlight good animal welfare practices and the Australian animal welfare and regulatory system.
- Provide technical advice and input to support the development and delivery of Australian livestock exporters risk mitigation plans for the religious festival of Eid al-Adha.

- Undertake market intelligence activities to provide information to stakeholders and the Australian industry on trade, market access and market insights.
- Provide technical briefings to PICs, stakeholders and Australian government officials in the EMENA markets regarding Australia's supply situation, competition and trade outlook in the region.
- Support the implementation of LGAP.

OUTCOMES IN 2018-19

- People in livestock export supply chains have the skills, knowledge, capacity and access to resources to deliver good animal welfare outcomes.
- Livestock export supply chains have knowledge in the infrastructure that supports good animal health and welfare outcomes.
- Livestock export supply chains understand Australian animal welfare regulatory requirements.
- People in export supply chains have the knowledge, skills and tools to improve traceability, sustainability and productivity.
- Strong relationships and on-going engagement exist between the livestock export industry and overseas and Australian governments that establish market priorities and monitor in-market conditions.

KEY PERFORMANCE INDICATORS IN 2018-19

Minimum of 70% of government and industry stakeholders satisfied with the LEP's activities.

BUDGET

\$917,000

LEP RD&E PROGRAM

PURPOSE

The LEP RD&E Program provides the data, knowledge, publications and outputs that underpin LiveCorp and the LEP's ability to deliver against the strategic objectives of animal health and welfare, supply chain efficiencies and market access.

The research conducted by the LEP RD&E Program is targeted at progressively identifying, understanding and seeking to resolve key animal welfare risks, market access issues or supply chain inefficiencies through projects to gather and analyse data, build knowledge, increase productivity and fill gaps in understanding, and develop, trial and implement practical extension outputs.

RESEARCH INITIATIVES IN 2018-19

Animal Health and Welfare

Budget \$1,700,000

RD&E initiatives within animal health and welfare include:

- supporting the ASEL review by providing current, relevant and reliable evidence and research findings.
- supporting on-going research and data collection, scoping studies and adoption to improve heat load management in the Middle East.
- supporting updates to the Heat Stress Risk Assessment model as recommended in the McCarthy Review.
- analyzing the impact of allometric stocking densities for sheep exports to the Middle East.
- conducting research into stocking densities to understand animal needs and behaviours.
- identifying practical, economic and non-invasive indicators of animal welfare.
- developing a monitoring and reporting framework to identify problems, enable corrective actions and capture improvements in animal welfare

- trialing and developing alternative power loads to operate captive bolt devices.
- validating acceptable stunning outcomes to comply with ESCAS and halal standards.
- conducting research on ammonia management.
- developing project partnerships in bedding management and stocking densities on board livestock vessels and identification of on board environmental monitoring technologies that support animal welfare indicators.
- supporting extension and adoption of best practice systems and procedures to achieve continuous improvements in animal welfare

Supply Chain Efficiency

Budget \$500,000

RD&E initiatives within supply chain efficiency include:

- supporting the implementation of LGAP and other initiatives that enhance a control and traceability framework and sustainability of the trade.
- reviewing and identifying opportunities within livestock export supply chains to improve efficiencies and reduce capacity/access infrastructure bottlenecks improving cost of delivery performance through the livestock export supply chain.
- improving cost of delivery performance through the supply chain.
- supporting extension and adoption activities to improve efficiency and productivity throughout the livestock export supply chain.

Market Access

Budget \$200,000

RD&E initiatives within market access include:

- monitoring market access barriers and delivering plans to support industry to reduce technical and economic barriers to trade and improve market access.
- supporting extension and adoption of best practice systems and procedures to secure and maintain market access and mitigate risk of trade closure.

OUTCOMES IN 2018-19

- RD&E projects that support improved animal health and welfare are commissioned.
- RD&E projects that support ongoing improvements to existing regulation and industry quality assurance are commissioned.
- RD&E projects that facilitate continued and new access to markets are conducted.
- Reporting framework adopted and refined to support the RD&E animal welfare indicators pilot project and broader ongoing research data collection.
- RD&E collaboration is developed with other RDCs, research providers and industry participants.

KEY PERFORMANCE INDICATORS 2018-19

- Annual survey of industry stakeholders indicates a high level of satisfaction (above 70%) with the conduct of the LEP RD&E Program.
- Improved communication of RD&E projects, activities and outcomes is delivered to industry and stakeholders.
- R&D outcomes implemented to improve and manage heat stress and mortality during the summer Middle East environment.
- R&D outcomes implemented to support and refine stocking densities and best practice bedding management on board livestock vessels.
- Tools and methods for monitoring levels of R&D adoption are implemented.

TOTAL BUDGET

2,400,000*

*Includes Commonwealth matching R&D contributions.

BUDGETS 2018-19

LIVESTOCK EXPORT VOLUME

The 2018-19 export forecast for cattle, sheep and goats below has been developed in consultation with exporters and ALEC.

The 2018-19 forecasts are:

- Cattle — 806,000 head
- Sheep — 1,325,250 head
- Goats — 26,000 head
- Dairy — 87,100 head

LEVY RATES

LiveCorp is funded by statutory levies on livestock exports of beef 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. Voluntary contributions are also provided for dairy cattle exports on a per head basis.

The current rates are:

- Beef cattle — \$0.009523 per kg
- Sheep — 60 cents/head
- Goats — 50 cents/head
- Dairy cattle — \$6/head (voluntary)

The rates are divided into a marketing (approximately 83%) and a research component (approximately 17%) as set out in the regulations to the Primary Industries (Customs) Charges Act 1999. The majority of the levy funding received by LiveCorp is marketing dollars and in accordance with the Cost Allocation Policy, the ratio of levy income informs LiveCorp's allocation of expenditure across research and marketing activities.

LIVECORP BUDGET FOR 2018-19

		Marketing Funds	Research Funds	Total
Income		\$	\$	\$
	Industry levies	2,955,321	591,528	3,546,848
	Other sources	449,660	–	449,660
	Total income	3,404,981	591,528	3,996,508¹
Expenditure		\$	\$	\$
PROGRAMS	Exporter	1,268,406	15,270	1,283,676
	Services & Innovation	183,014	–	183,014
	Industry Capability	537,501	–	537,501
	Communications	571,210	–	571,210
	Dairy Cattle Export	157,605	–	157,605
	Live Export Program (LEP)	1,000,000	600,000	1,600,000
	Total program costs	3,717,737	615,270	4,333,007
	Corporate	854,864	–	854,864
	Total costs	4,572,601	615,270	5,187,871
	Budget (Deficit) / Surplus	(1,167,620)	(23,742)	(1,191,362)

1: Total income forecast for 2018-19 is \$1 million less than forecast in the 2016-20 Strategic Plan as a result of the decline in export activity and implementation of stocking density adjustments.

BUDGETS 2018-19

LEP BUDGET 2018-19

Summary of LiveCorp, MLA and Australian Government contributions to the LEP.

		LiveCorp funds	MLA Funds	Govt. Funds	Total
IN-MARKET PROGRAMS	Indonesia	155,000	627,000	–	782,000
	Asia Pacific	280,000	1,069,000	–	1,349,000
	EMENA	165,000	752,600	–	917,600
	Industry Capability ²	–	134,000	–	134,000
	Co-Funding ³	400,000	400,000	–	800,000
	MLA Global Administration	–	576,000	–	576,000
	Total in-market budget (M\$)	1,000,000	3,558,600	–	4,558,600
	RD&E	600,000	600,000	1,200,000	2,400,000
	Total RD&E budget (R\$)	600,000	600,000	1,200,000	2,400,000
	Total LEP budget	1,600,000	4,158,600	1,200,000	6,958,600

2: MLA's contribution to the LiveCorp Industry Capability Program.

3: The Co-funding program maintains a separate budget to the in-market programs.

LIST OF ABBREVIATIONS

ALEC	Australian Livestock Exporters' Council
AMPC	Australian Meat Processor Corporation
AOP	Annual Operating Plan
ASEL	Australian Standards for the Export of Livestock
CRR&DC	Council of Rural Research & Development Corporations
EMENA	Europe, the Middle East and North Africa
ESCAS	Exporter Supply Chain Assurance System
FA	Funding Agreement
KPI	Key Performance Indicator(s)
LiveCorp	Australian Livestock Export Corporation Limited
LEA	Livestock Export Association(s)
LEP	Livestock Export Program
LERDAC	Livestock Export R&D Advisory Committee
LGAP	Livestock Global Assurance Program
MISP	Meat Industry Strategic Plan
MLA	Meat and Livestock Australia
NAMP	National Arbovirus Monitoring Program
PIC	Peak Industry Council(s)
R&D	Research and Development
RD&E	Research, Development and Extension
RDC	Research and Development Corporation
RMAC	Red Meat Advisory Council
UAE	United Arab Emirates



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