



## AUSTRALIAN RED MEAT

# Produced sustainably to serve the EU



Australian farmers are proud suppliers of red meat to the EU market. We produce our beef, lamb and goat meat sustainably, to serve European consumers with quality products that respect the highest environmental and animal welfare standards.

## WHAT IS SUSTAINABILITY?

We define it as producing

**high-quality beef, sheep and goat meat**

in ways that are



Environmentally Sustainable



Socially Sustainable



Financially Sustainable

with respect for and to benefit



Our People



Our Animals



Our Natural Resources

## THIS FACTSHEET CONTAINS INFORMATION ON:

- ✓ Our roadmap to carbon neutrality by 2030



- ✓ Our beef and sheep sustainability frameworks



- ✓ How we measure our impact on vegetation across Australia: the Balance of Tree and Grass Cover



- ✓ Animal welfare in Australia



- ✓ EU-Australia red meat trade & expectations for the future Free Trade Agreement



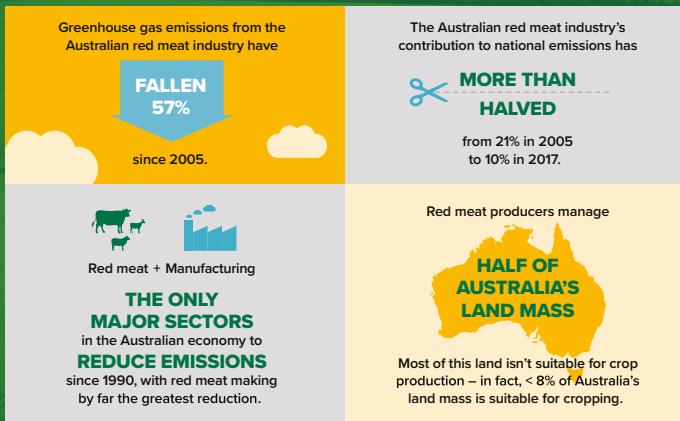
# OUR JOURNEY TOWARDS CARBON NEUTRALITY BY 2030



## WHAT IS CN30?

Australian beef, lamb and goat meat producers have set an ambitious target to be Carbon Neutral by 2030 (CN30). This target means that by 2030, the Australian industry, including lot feeding and meat processing, will make no net release of greenhouse gas (GHG) emissions into the atmosphere.

## WHAT HAS BEEN ACHIEVED SO FAR



## THE PATHWAY TO CN30

Research by Australia's national science research agency CSIRO, commissioned by MLA, has confirmed that **the Australian red meat industry can be carbon-neutral by 2030**, and identified five science-led pathways to reach this target.

It is estimated that the industry will need to reduce and/or offset **55.7 Mt CO<sub>2</sub>-eq** annually to achieve net zero GHG emissions on an annual basis.

## HOW DO WE GET THERE?

MLA has published its CN30 Roadmap, outlining the **four key areas of work** where the industry needs to focus to reach the CN30 target: industry leadership, GHG emissions avoidance, carbon storage, and integrated management systems.

	TECHNOLOGIES	KEY STRETCH TARGETS
GHG emissions avoidance	<ul style="list-style-type: none"> <li>Natural feed additives that improve livestock productivity and lower enteric methane emissions</li> <li>Animal genetics and husbandry practices</li> <li>Pastures, shrubs and legumes that improve livestock productivity and lower enteric methane emissions</li> <li>Equipment to capture and reuse methane from processing waste treatment</li> </ul>	<ul style="list-style-type: none"> <li>Livestock productivity in feedlots increased by 10% and enteric methane decreased by up to 90%</li> <li>Livestock productivity in grazing management increased 5–10% and enteric methane decreased by 35–75% in 40% of the national herd and flock</li> <li>25 million hectares of new legume plantings established, increasing livestock productivity by 25% and reducing emissions intensity by 10–20%</li> <li>More than 40 million hectares of grazing land adopting savanna burning management methodologies</li> </ul>
Carbon storage	<ul style="list-style-type: none"> <li>Legumes, pastures and shrubs that build feedbase and carbon stocks above and within soils</li> <li>Trees and shrubs that improve carbon storage, animal health and biodiversity</li> <li>Methods to optimise carbon storage in dead woody biomass in grazing lands</li> <li>Methods to improve accounting of woody thickening in grazing lands</li> </ul>	<ul style="list-style-type: none"> <li>25 million hectares of new legume plantings established, storing soil carbon, boosting pasture productivity and livestock productivity</li> <li>Soil carbon storage levels in 10 million hectares of grazing lands increased by 50–100kg CO<sub>2</sub> e/ha/year</li> <li>Integration of shade clumps/lines and shelterbelts on 10 million hectares increasing livestock productivity by 10% and storing more than 25 Mt CO<sub>2</sub> e emissions p.a.</li> </ul>
Industry Leadership	<ul style="list-style-type: none"> <li>Working with peak industry councils and government to set clear and stable policy mechanisms, underpinned by science based evidence, that support research, development and adoption activities.</li> </ul>	<ul style="list-style-type: none"> <li>Development of internationally recognised educational packages for industry and community.</li> <li>International educational initiatives established to enable knowledge and technology transfer.</li> </ul>
Integrated Management System	<ul style="list-style-type: none"> <li>Technical and economic analysis of farming systems to determine appropriate combinations of emissions avoidance and carbon storage technologies and practices.</li> </ul>	<ul style="list-style-type: none"> <li>An established network of advisors working with 50% of producers, 100% of accredited feedlots and processors, using a carbon accounting tool to manage GHG emissions and business productivity.</li> </ul>

# MEASURING PROGRESS ON SUSTAINABILITY GOALS



## AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK (ABSF)

The Framework, launched in 2017, defines sustainable beef production in the Australian context and tracks the industry’s performance in addressing key priorities against a series of sustainability focussed indicators on an annual basis. The key indicators are aligned to four themes: Animal Welfare, Economic Resilience, Environmental Stewardship and People and the Community.

Within those themes the Framework has identified 23 priority issues of which 6 are considered key and 50 indicators which track progress against recognised standards and metrics.

The Australian sheep industry has launched its own sustainability framework in 2021, the Australian Sheep Sustainability Framework (ASSF).

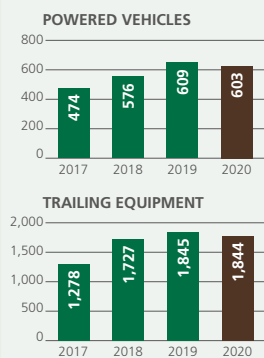
## IN PRACTICE: HOW THE ABSF TRACKS SUSTAINABILITY PERFORMANCE AGAINST KEY INDICATORS – SOME EXAMPLES



### Animal Welfare

#### PRIORITY 1.2: SAFE LIVESTOCK TRANSPORT

**1.2a** Number of powered vehicles and trailing equipment which operate under TruckSafe Animal Welfare.

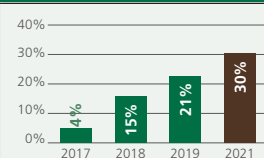


Upward, Improvement



#### PRIORITY 1.3: ANIMAL HUSBANDRY TECHNIQUES

**1.3b** Percentage of industry regularly using pain relief when undertaking aversive husbandry practices.

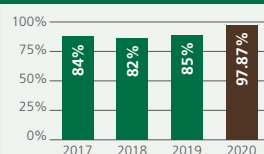


Upward, Improvement



#### PRIORITY 1.4: HUMANE PROCESSING

**1.4a** The percentage of cattle slaughtered through an establishment accredited under the Australian Livestock Processing Industry Animal Welfare Certification System (AAWCS)



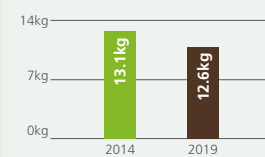
Upward, Improvement



### Environmental stewardship

#### PRIORITY 6.1: MANAGE CLIMATE CHANGE RISK

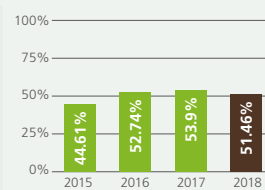
**6.1a** kg CO<sub>2</sub>e emitted per kg liveweight when raising beef.



Downward, Improvement



**6.1e** Percentage total CO<sub>2</sub>e reduced by beef industry from a 2005 baseline.

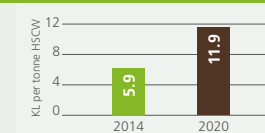


Flat, No Change



#### PRIORITY 7.1: SOLID WASTE TO LANDFILL FROM PROCESSING

**7.1a** Kilograms of solid waste per tonne Hot Standard Carcase Weight (HSCW) when processing beef.



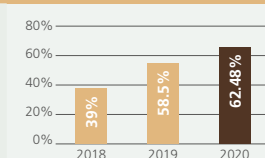
Upward, Setback



### People & the community

#### PRIORITY 8.3: ANTIMICROBIAL STEWARDSHIP

**8.3a** The percentage of feedlots covered by an antibiotic stewardship plan.



Upward, Improvement



Note: The TruckSafe Animal Welfare system will be presented on page 4 of this factsheet.

# MONITORING OUR IMPACT ON VEGETATION: THE BALANCE OF TREE AND GRASS COVER

In order to scientifically assess its impact on natural resources and biodiversity, the Australian red meat industry has developed a state-of-the-art accurate measuring system for: (1) the area of land directly managed by farmers for environmental outcomes and (2) changes in vegetation across beef farms in Australia. This measuring system is called Balance of Tree and Grass Cover and it is one of the six key priorities identified in the ABSF.

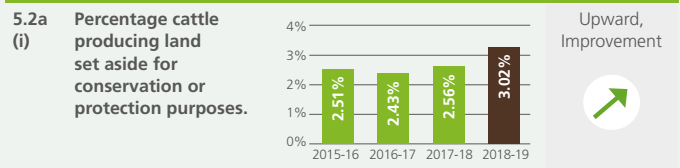
## HOW IS THE DATA COLLECTED AND MEASURED?

The Balance of Tree and Grass Cover system involves the integration of an **exhaustive 30 years of satellite data identifying annual trends in woody vegetation and seasonal trends in ground cover**, collected by NASA and the European Space Agency (ESA) around the globe.

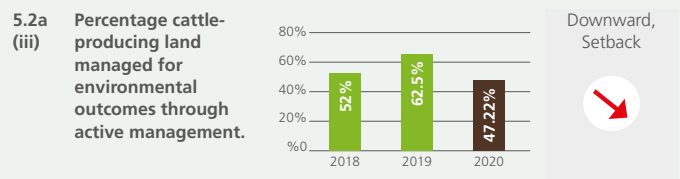


## FOCUS ON KEY INDICATORS

### PRIORITY 5.2: BALANCE OF TREE AND GRASS COVER



This represents **12,049,214 hectares of cattle-producing land set aside for conservation or protection purposes.** This includes reserves, parks, heritage sites and indigenous protected areas.



This figure represents the **area of land where on-farm management activities contribute to positive environmental outcomes.**

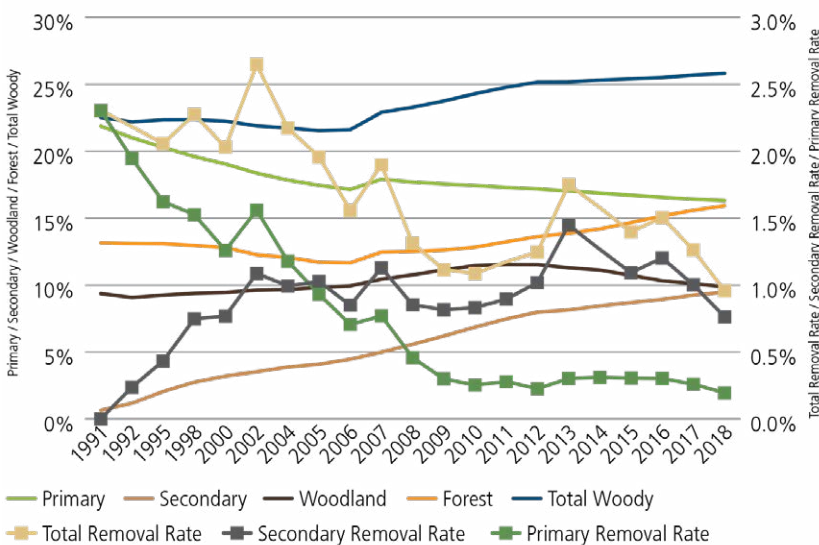


Figure 1: Annual changes in woody vegetation including removal rates from 1991 to 2018.

Data shows that **Australia’s grazed agricultural lands are increasing in woody vegetation.** Over the last decade there has also been a **general increase in the density of woodland areas** through a transition from woodland to forest.

Trends in the primary woody vegetation removal have declined by more than 90% from 1990 levels, and since 2009 the national annual removal rate has been less than 0.3%.

Note: A forest is defined as woody vegetation with a minimum 20% canopy cover (CC), potentially reaching 2 meters high and a minimum area of 0.2 hectares. Sparse woody is defined as woody vegetation with a canopy cover between 5-19%. Primary forest (≥20%CC) or woodland (5-19%CC) is defined as woody vegetation present in 1988. Secondary forest or woodland has been disturbed at anytime post-1988. “Woody” is inclusive of both forest and woodland.

## ANIMAL WELFARE IN AUSTRALIA

The welfare of livestock is fundamental to the success and sustainability of every farmer, transporter and processor in Australia. Animal protection is enshrined in Australian law and the national **Animal Welfare Standards and Guidelines (AAWSG)** ensure best practice animal welfare at every stage of the production process. The AAWSG are being translated into law at State level across Australia and are audited on a regular basis.

In 2015, the World Organisation for Animal Health (OIE) performed a comprehensive evaluation of Australia's animal health and biosecurity system, benchmarking it against 130 countries worldwide. **Australia was awarded the highest level of competence (level 5) in the field of animal welfare.**

## FOCUS ON: ANIMAL WELFARE DURING TRANSPORT

Australia does not export live animals to the European Union, but it has strict Livestock Transport Standards in place to ensure that livestock are well treated when being moved, as part of the AAWSG. Australia is also **one of the few countries worldwide** having existing protocols/guidelines in place for unweaned animals and pregnant females during transport, as underlined by a recent European Parliament Research Service study on "Particular welfare needs in animal transport: unweaned animals and pregnant females".

## TRUCKSAFE ANIMAL WELFARE

TruckSafe is a not-for-profit risk management system to improve the safety and professionalism of trucking operators nation-wide in Australia. It has a voluntary Animal Welfare module.

Through its accreditation and training processes, TruckSafe Animal Welfare provides a best practice standard for trucking operators when transporting livestock including how to prevent disease, stress and contamination when moving livestock and making sure the 'paddock to plate' traceability is supported during the journey, which ultimately protects the eating quality of the final product.



**TruckSafe® ANIMAL WELFARE**

## LIVESTOCK PRODUCTION ASSURANCE (LPA)



- ✓ The Livestock Production Assurance (LPA) program is the Australian livestock industry's on-farm assurance program covering food safety, animal welfare and biosecurity.
- ✓ The LPA is managed by Australia's Integrity Systems Company, a wholly-owned subsidiary of MLA. It is independently audited, and over 215,000 farms voluntarily take part.
- ✓ Producers who participate in LPA must ensure that the handling of livestock is consistent with the requirements of the Australian Animal Welfare Standards and Guidelines.



Food safety

+



Animal welfare

+



Biosecurity

- ✓ Producers must keep a current copy of the Australian Animal Welfare Standards and Guidelines and be familiar with its content.
- ✓ The person responsible for the management of livestock on every farm must successfully complete training in these Standards and Guidelines through the LPA Learning tool or an equivalent training program.
- ✓ Staff involved in animal husbandry must be familiar with the content of the current version of the Standards and Guidelines for cattle, sheep and/or goats.

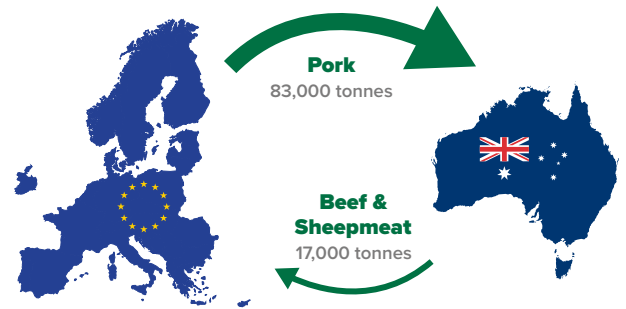
## EU-Australia agricultural trade – state of play and expectations for the future FTA

The EU enjoys a €1.4bn surplus in agricultural trade with Australia.

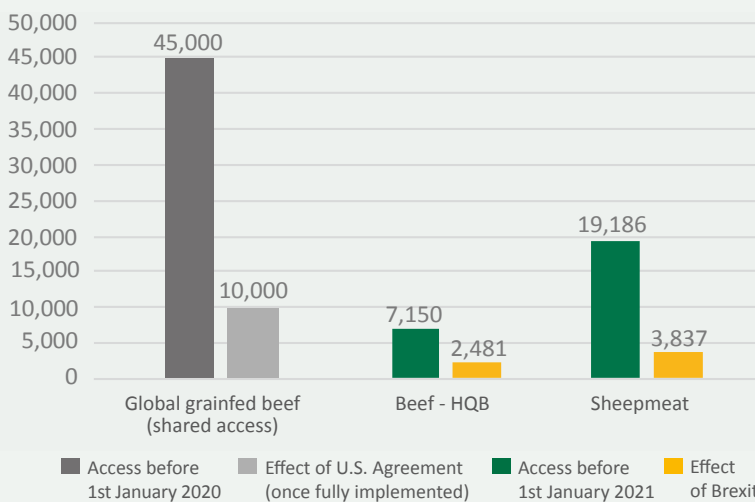
In red meat, EU pork exports to Australia alone are almost 5 times Australian beef & sheepmeat exports to the EU.

In 2019 Australia exported 12,750 tonnes of beef and 4,430 tonnes of sheepmeat to the EU27, approximately 0.2% of the EU27 total beef consumption and 0.6% of the EU27 total sheepmeat consumption.

Red meat trade (EU27-Australia – 2019)



Australia's beef & sheepmeat market access to the EU27 (tonnes)



Australia's access to the EU market for beef and sheepmeat is strictly limited by a system of tariff-rate quotas. Prohibitive out-of-quota tariffs severely constrain trade above quota volumes. Recent developments have further reduced Australia's access:

- 1 | Brexit and the resulting apportionment of previous EU28 import TRQs for beef and sheepmeat between the EU27 and the UK (effective as of 1 January 2021).
- 2 | 2019 EU agreement with the U.S. on the ringfencing of a share of the global grainfed beef import quota for the U.S. alone (entered into force on 1 January 2020).

Since 2018, the EU and Australia have been negotiating a Free Trade Agreement (FTA), with 11 completed rounds as of June 2021.

The EU-Australia FTA is expected to have a positive overall impact on both economies, while maintaining and potentially improving the EU's current agricultural trade surplus with Australia. Within this context, the FTA represents an unprecedented opportunity to modernise Australia's access to the EU market for beef and sheepmeat, allowing Australian producers to serve the EU with quality and sustainable red meat that fully meets the requirements of EU consumers.

## Ensuring the highest quality standards to meet the expectations of EU consumers

We export 70% of our beef and 76% of our sheepmeat production to customers in over 100 countries worldwide who value and trust our products.

As high-cost producers, we have to compete on quality to service third country markets. In the EU, our main customer is the high-end foodservice sector.

Australia's Integrity Systems Company (ISC) is responsible for Australia's world leading red meat integrity system which guarantees the food safety, quality assurance and traceability of Australian products as clean, safe and natural.

Australia has a dedicated production system to meet the EU market requirements for beef, the European Union Cattle Accreditation Scheme (EUCAS).

EUCAS allows Australian producers to segregate cattle that have never been treated with hormones throughout all stages of production, providing an assurance that Australian beef exported to the EU is 100% hormone-free.



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