Markets in motion: supply, demand and competition

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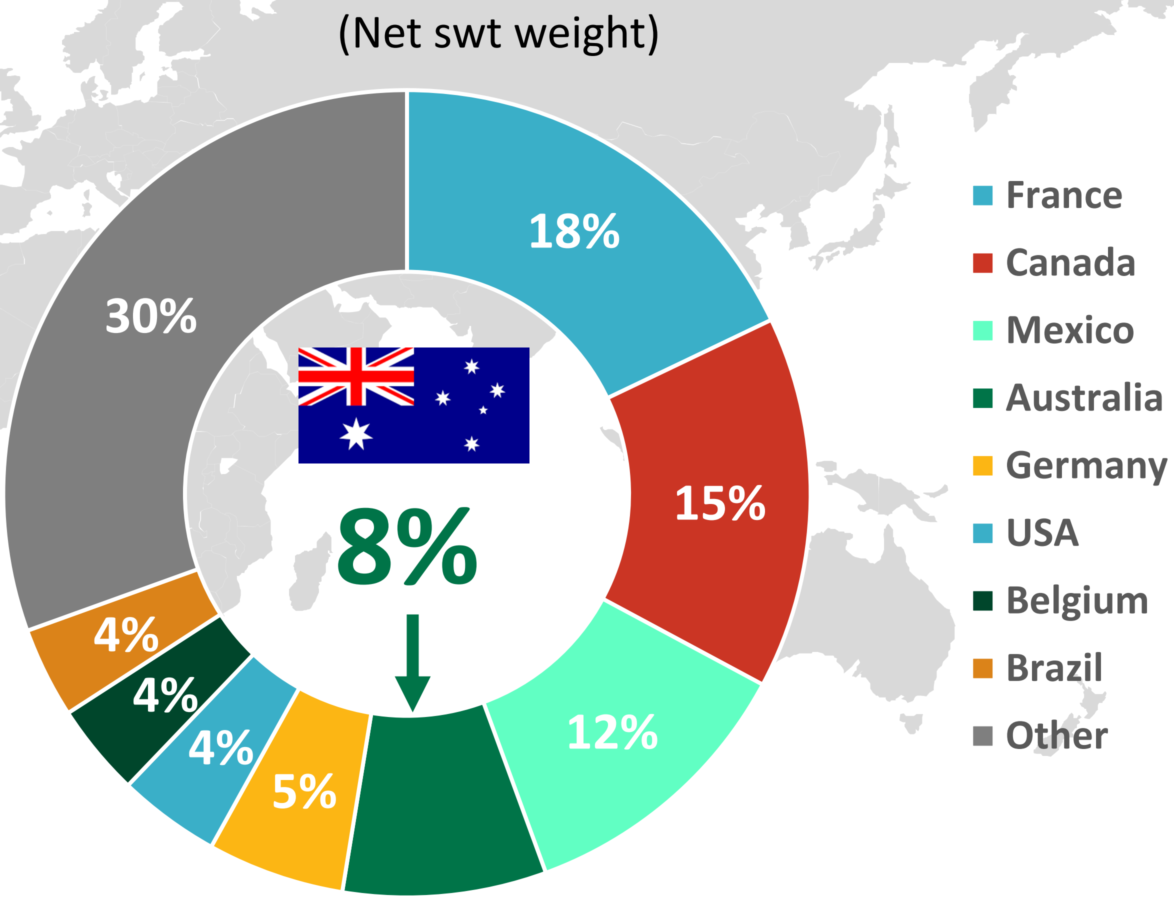
Australia is the 4th largest Live cattle exporter.

Top global live cattle suppliers in 2024



8% of the global trade

- France and Canada share land border with key market(s)
- Brazil supply MENA countries
- Australia has a strategic position and a long-lasting partnership with Asia

Source: Comtrade. Based on imported countries

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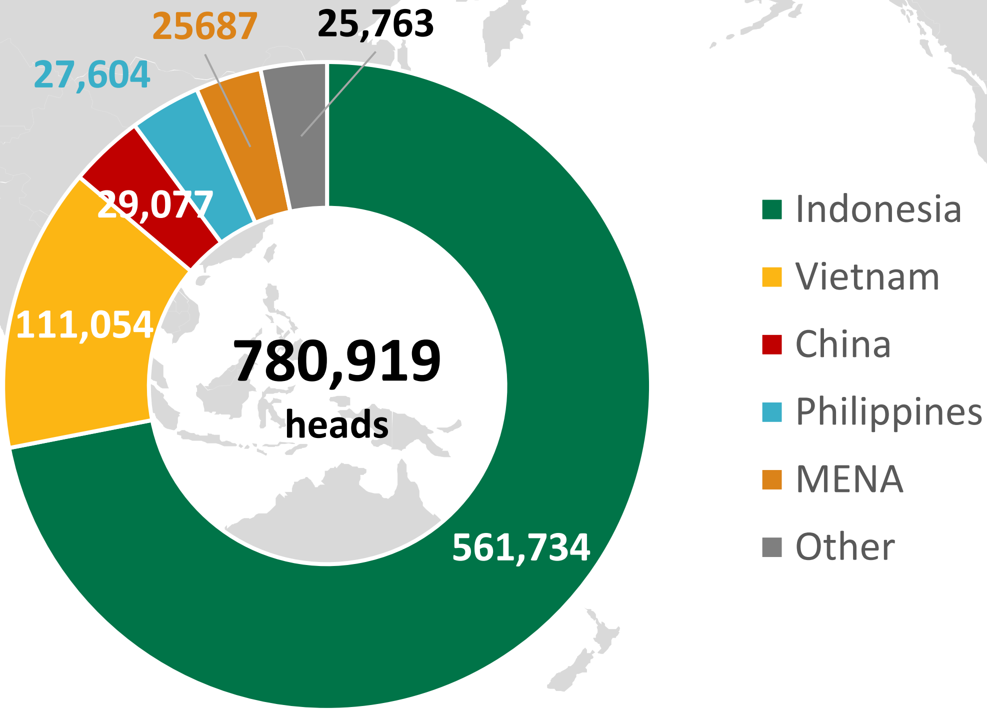
Strong Indonesia demand for Australian cattle

Australian live cattle exports in FY25



Australia exported to 16 countries in FY25

Live exports

$944 million

Source: DAFF. Live export cattle includes feeder, slaughter and breeder cattle. Figures for 2024-25.

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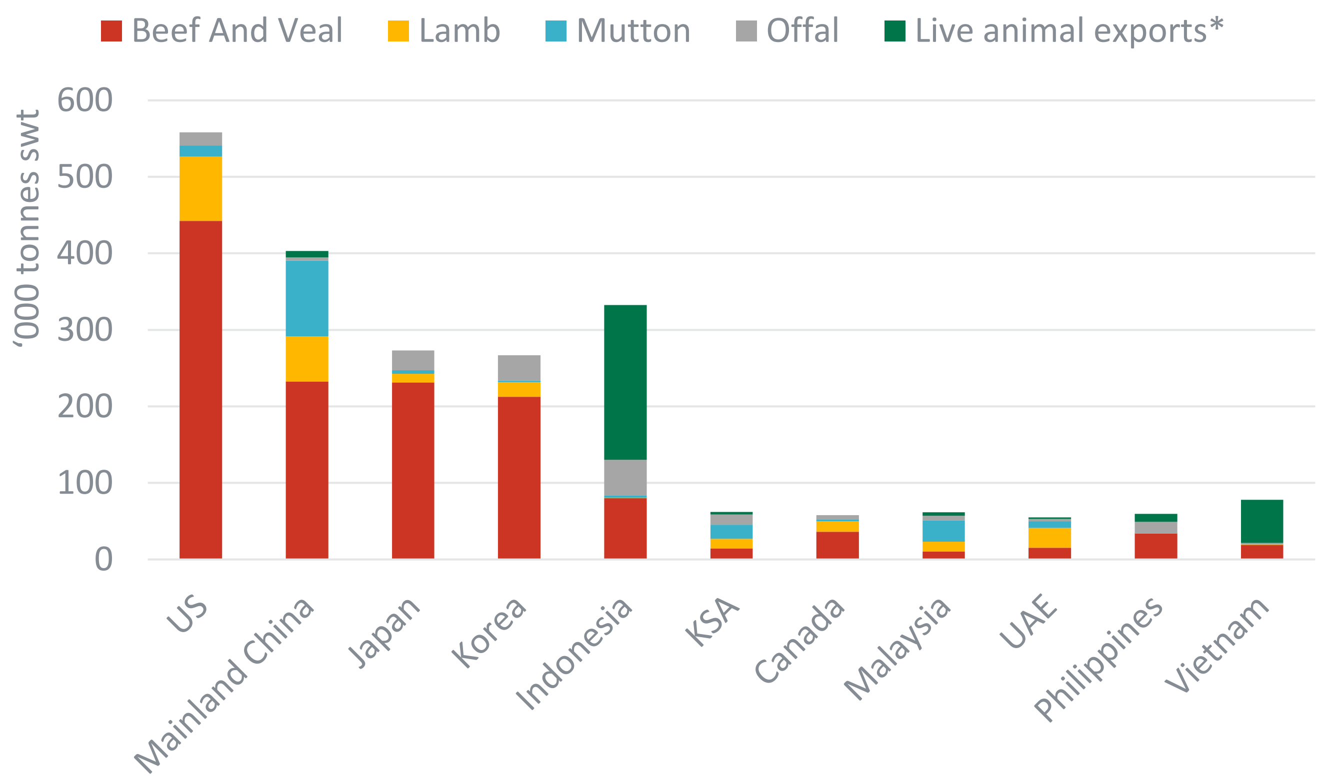
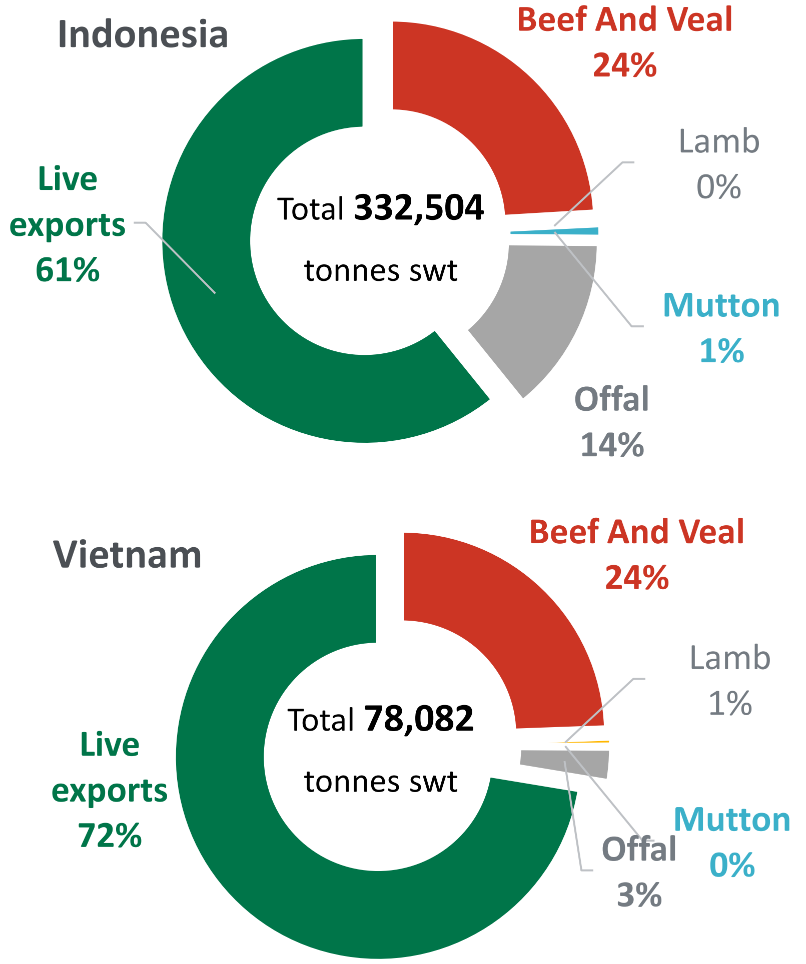
Live export is a key component of protein intake in Indonesia and Vietnam



Proportion of Australian exports in 2024-25



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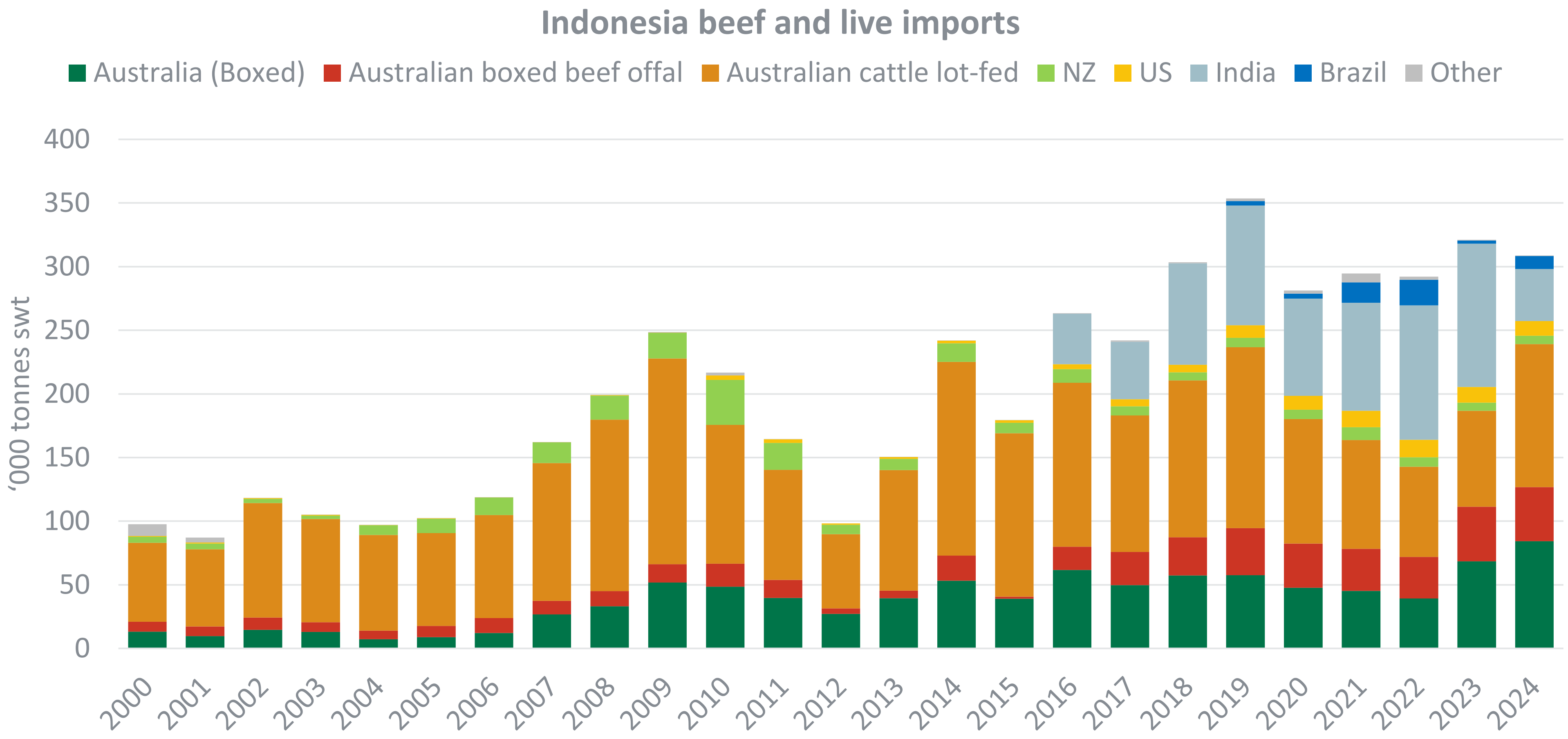
*Source: DAFF. Trade Data Monitor (TDM). *Live includes cattle, sheep and goats*

Australian cattle is important for Indonesia's food security



~20%

Indonesia beef consumption

Source: Trade Data Monitor (TDM) (Indonesia beef import data), DAFF, MLA Calculations

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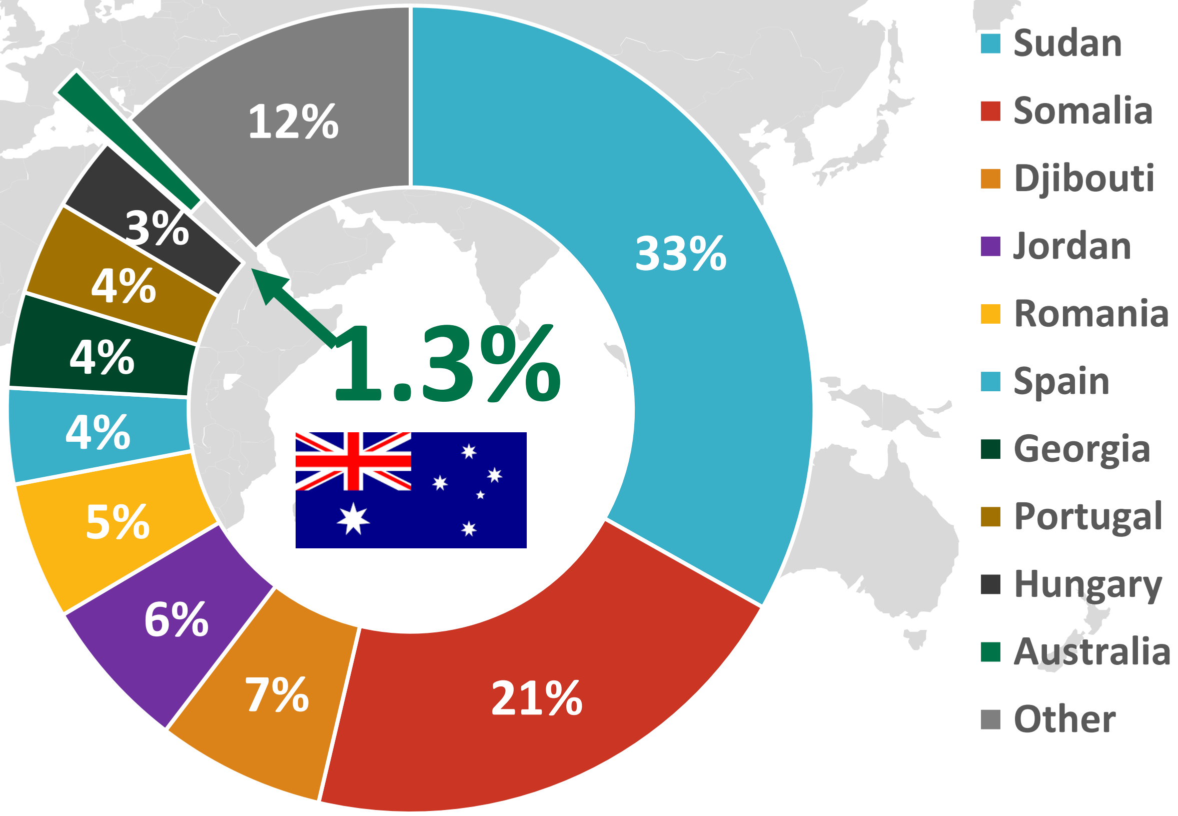
LIVE SHEEP: Australia represents 1.3% of the global trade volume

Top global live sheep exporters in 2024

(volume, based on importing countries)



- Sudan, Somalia and Djibouti supply Saudi Arabia
- Romania and Spain supply MENA markets such Jordan and Morocco
- Australia sanitary status and quality credentials make it a preferred supplier

Source: Comtrade

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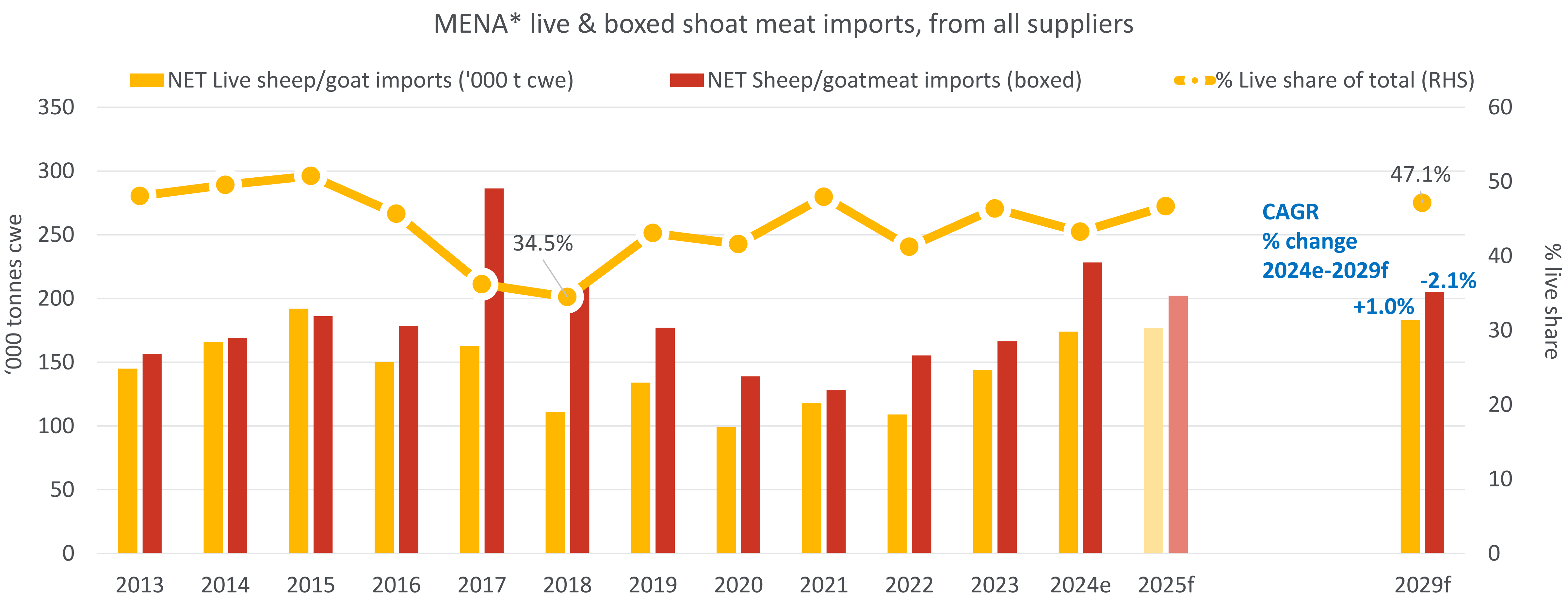
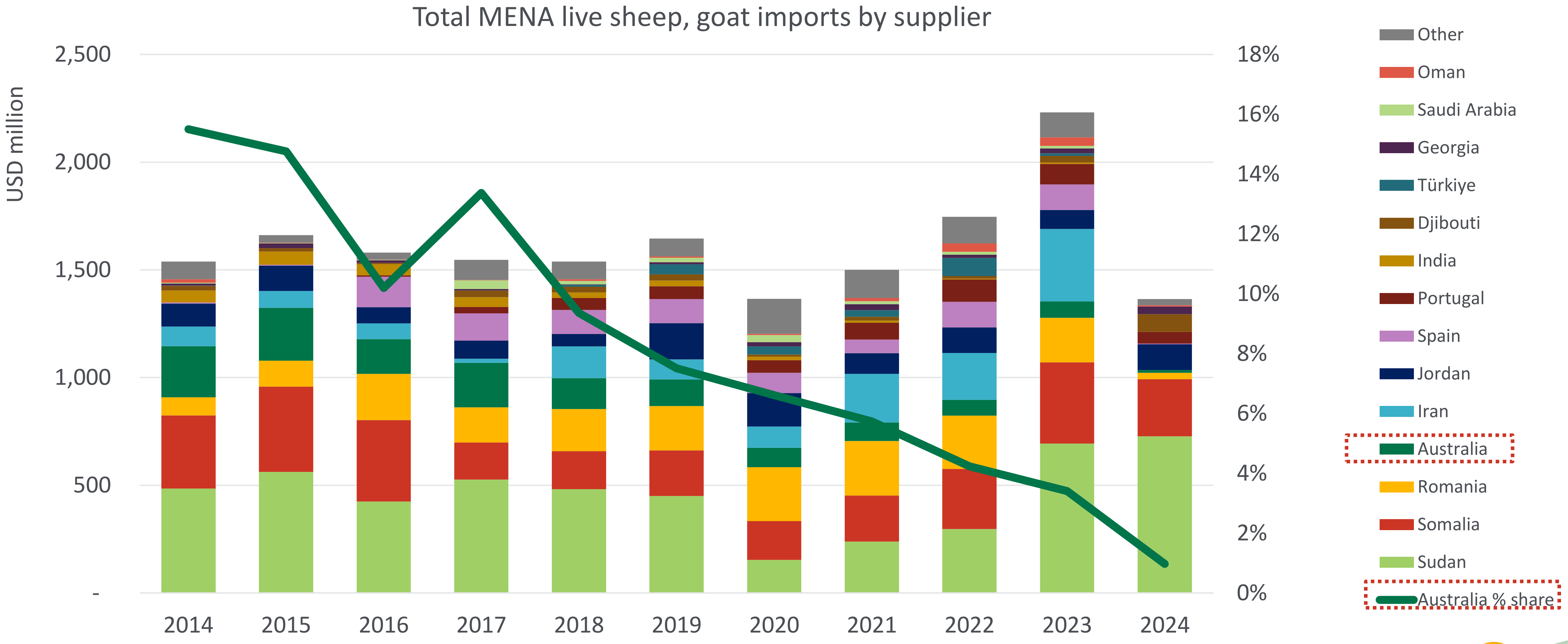
MENA: share of live amongst total imports is RISING



*Source: GIRA. *MENA here is Greater MENA = MENA-21 countries. This combines sheep and goat. These figures have taken into consideration intra-regional/re-exports.*
CAGR = compound annual growth rate.

Sudan, Somalia, Romania are key suppliers, with Australia's share in decline.



Source: Comtrade. Importer countries: Saudi Arabia, Oman, Morocco, UAE, Jordan, Qatar, Libya, Palestine, Bahrain, Israel, Lebanon, Egypt, Algeria, Türkiye, Kuwait, Iran and Iraq

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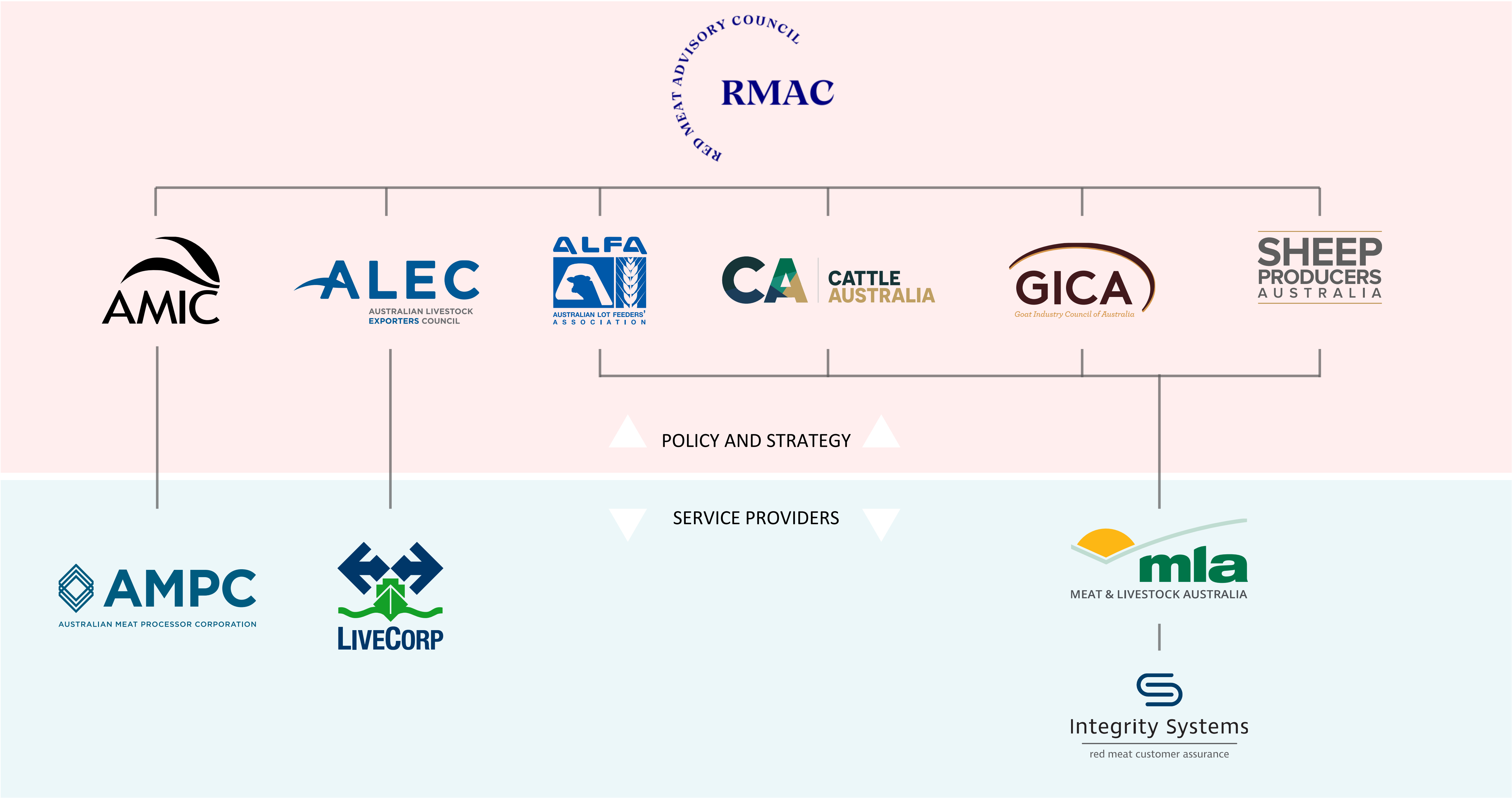
RED MEAT ADVISORY COUNCIL
RMAC
AMIC
ALEC
AUSTRALIAN LIVESTOCK EXPORTERS COUNCIL
ALFA
AUSTRALIAN LOT FEEDERS' ASSOCIATION
CA
CATTLE AUSTRALIA
GICA
Goat Industry Council of Australia
SHEEP PRODUCERS AUSTRALIA
POLICY AND STRATEGY
SERVICE PROVIDERS
AMPC
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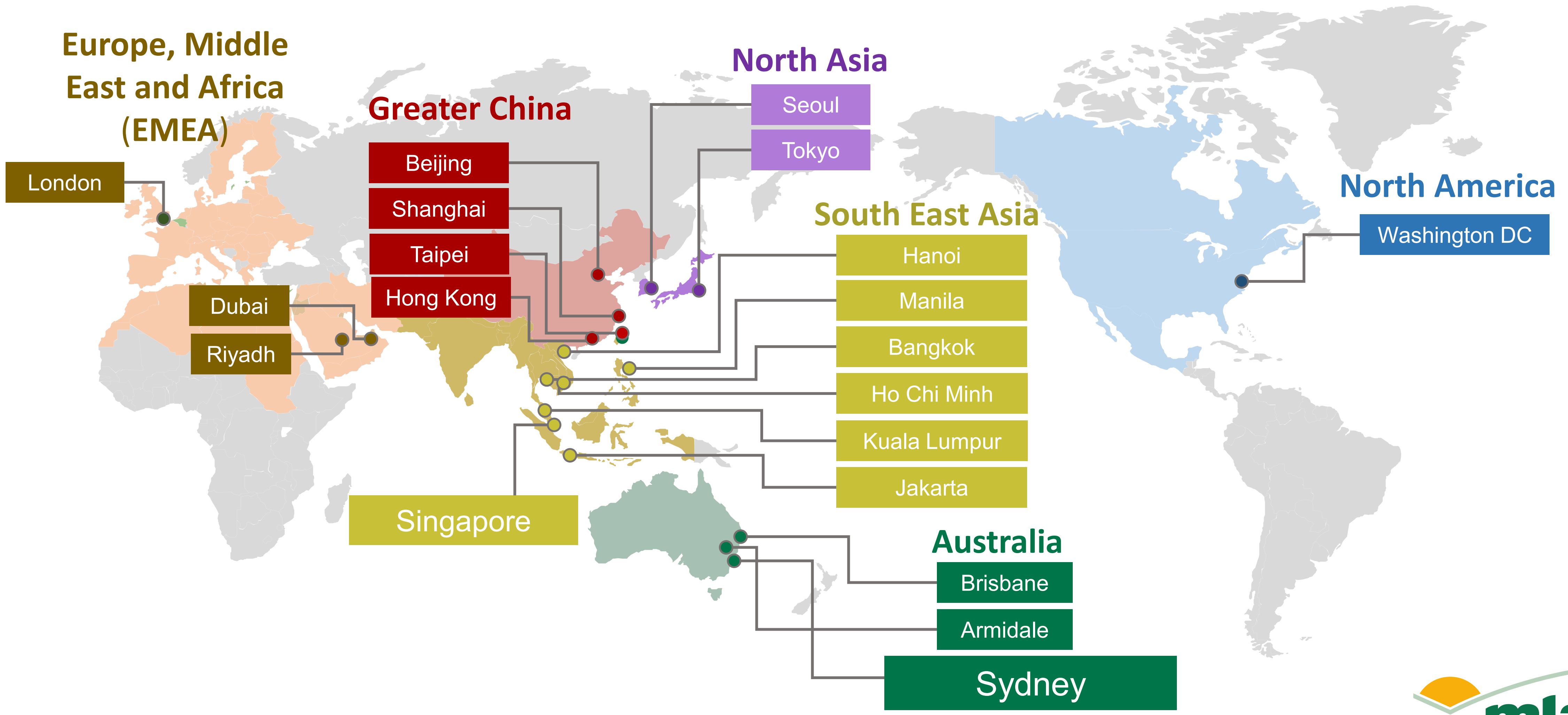
Integrity Systems
red meat customer assurance

MLA's International network



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FY25 and FY26 Key Focus Areas

1. Animal welfare

- Ensuring the trade meets government requirements and community expectations

2. Supply chain efficiency

- Competition threatens the trade – all markets are under growing pressure

3. Market access & insights

- LEP's in-market strength – overseas staff provide real time, highly valued insights and support

4. Co-funding Program

- Partnering with exporters – e.g. Eid/Korban

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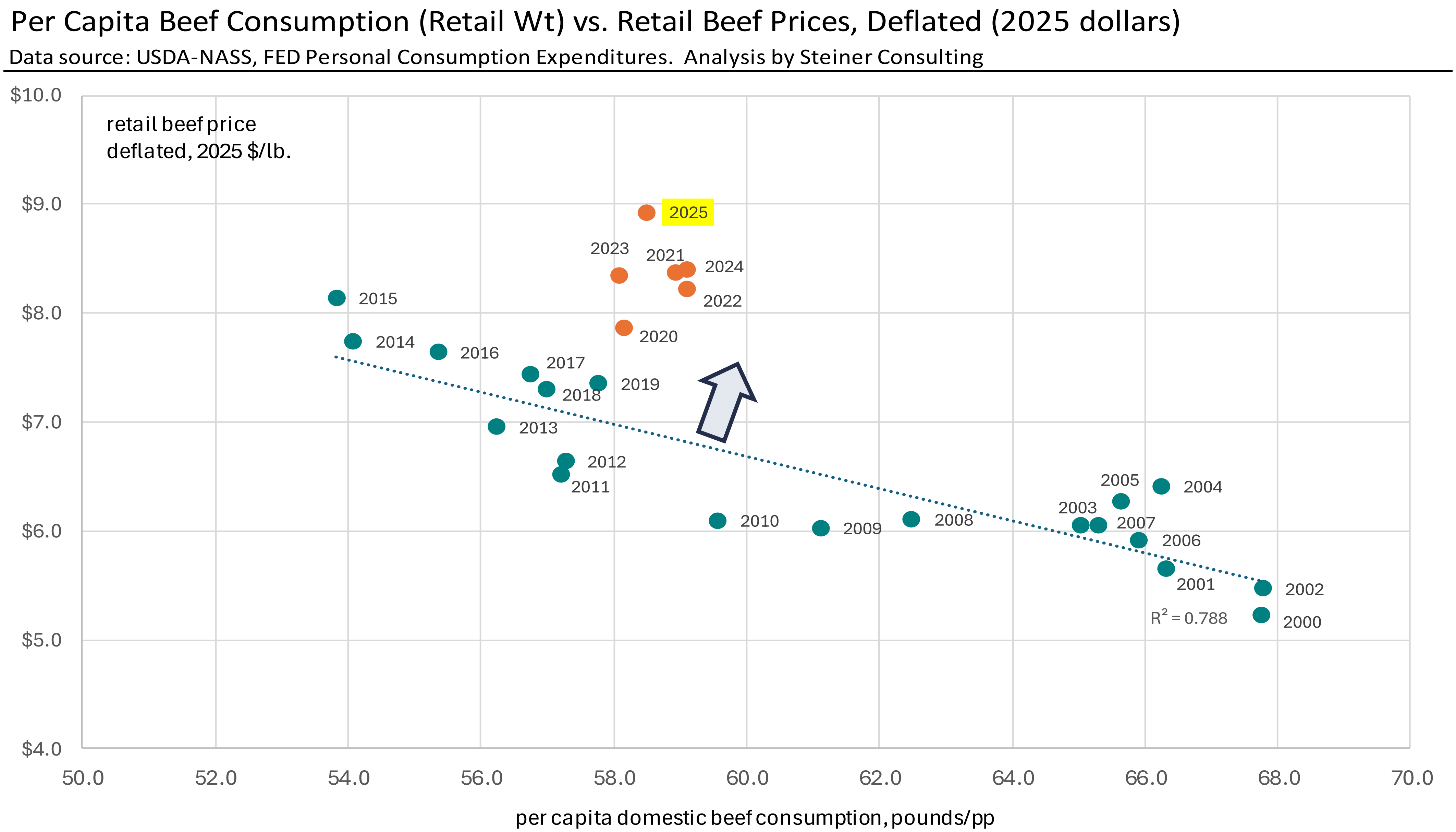
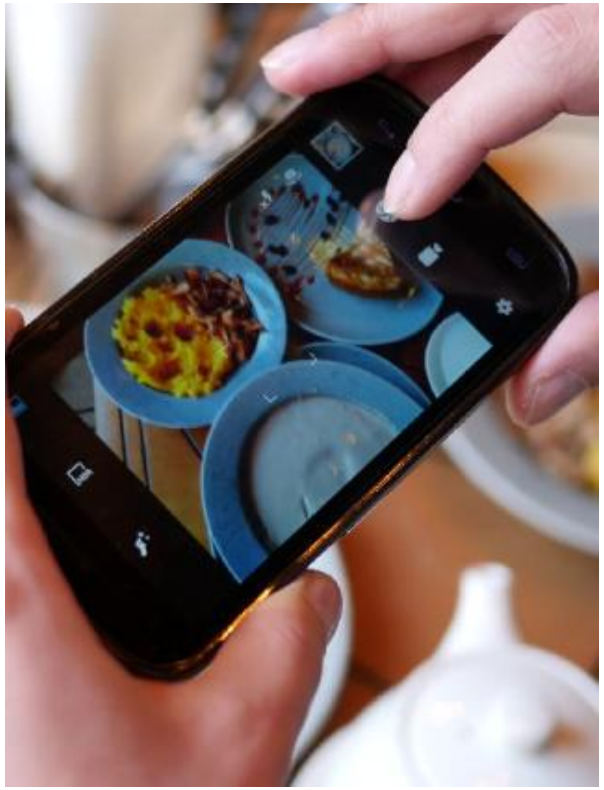
Meat: from villain to vital

210analytics

Demand Curve Shift in US



Growing affluence in Asia Pacific



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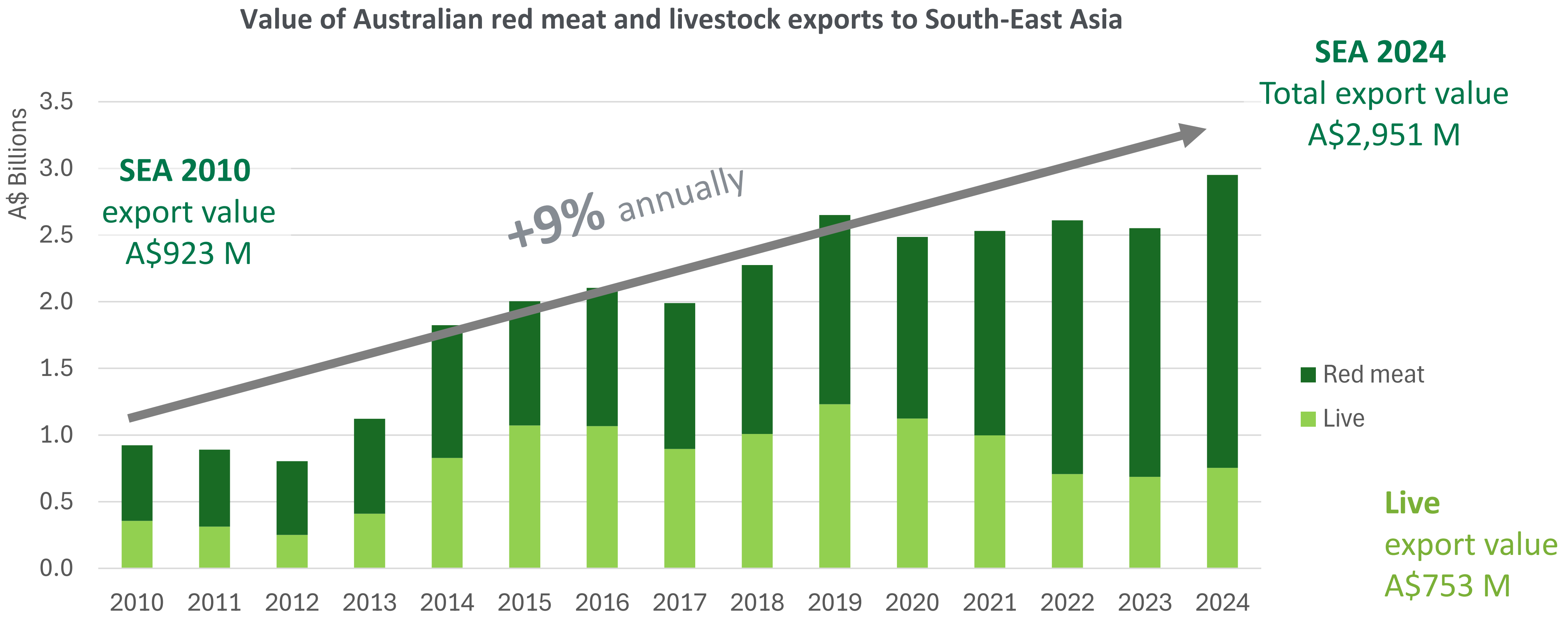
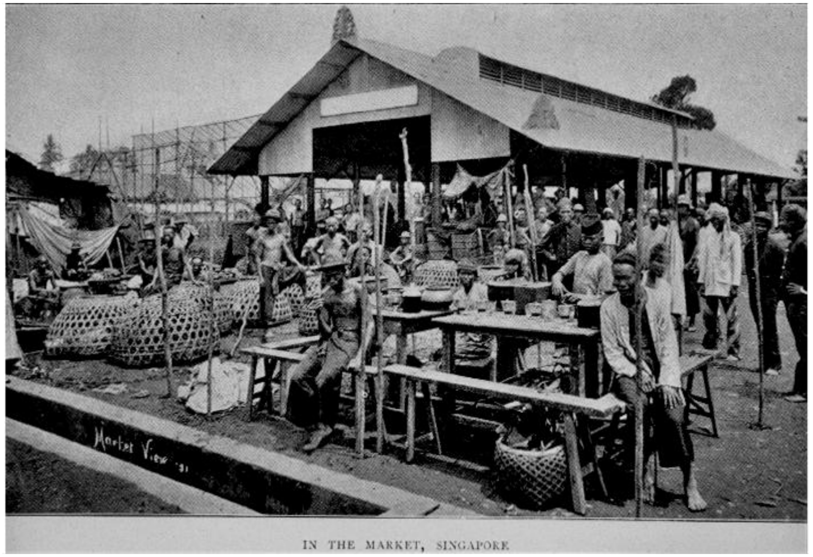
Economic growth and competitive prices have been driving SEA demand for Australian live cattle and boxed beef in recent years.



Source: Trade Data Monitor (TDM)

Evolution of the wet market



1896, original (unsanitary) wet markets established

1950s and 60s, wet markets proliferate with housing boom, higher sanitary standards, better cold chain management

1980s, modern wet markets established, with national standards and sanitary monitoring

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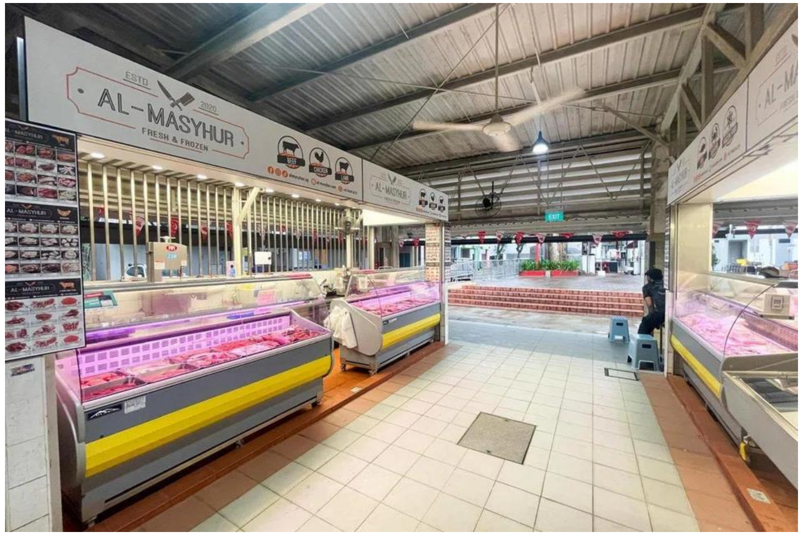
Today's wet market



Online sales leads to double the sales

Live streaming and tik tok

New generations

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Challenges & Opportunities

Challenges

- Consumer's changing habits
- Cheap competition
- Wet markets have generally provided less opportunity for product differentiation and marketing

Opportunities

- New export pathways
- Food security and nutrition requirements
- Economic growth in Asia
- Protein popularity
- Consumers always value 'freshness' – businesses can develop their product to access modern retail trade and HORECA