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BEEF & LAMB** <sup>TM</sup>

**THE BEST OF AUSTRALIA**



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# Aussie Beef & Lamb's Role in the UK

**Emma Boughen**

**MLA Business Development Manager – UK**

# Today's agenda

Time	Item
7.00-7.20pm	<b>Presentation 1: UK State of Play + Aussie Beef &amp; Lamb's place in the world</b> <ul style="list-style-type: none"><li>• Who is MLA &amp; Aussie Beef &amp; Lamb</li><li>• State of play here in the UK and around the world</li><li>• The role of Aussie Beef &amp; Lamb here in the UK &amp; around the world</li></ul>
7.20-7.35pm	Butchery demo & steak tasting flight
7.35-7.45pm	<b>Presentation 2: Farming in an Aussie context</b> <ul style="list-style-type: none"><li>• On-farm sustainability and animal welfare</li><li>• Integrity &amp; quality systems</li><li>• Traceability &amp; trust</li></ul>
7.45-8.45pm	Chef Mike Reid cooking demonstration
8.45-10pm	Dinner

# Who is Meat & Livestock Australia?



### Resources

- Livestock supply projections
- Export data
- Market insights



### Services

- Category brand marketing support
- Aussie Meat Academy workshops and/or events
- Targeted business development support
- Market access support



### Funding

- Market Development Partnerships
- MLA Donor Company



### What we don't do

Import products

Sell products

Provide product pricing (excl live animal pricing in Australia)

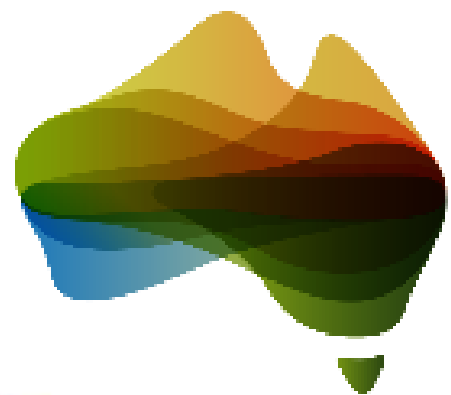


# The Aussie Beef & Lamb Brand

The Aussie Beef & Lamb brand promotes Australian red meat across export markets, representing beef, lamb, goat and veal.

It is a Meat & Livestock Australia (MLA) owned brand, and we use the brand to:

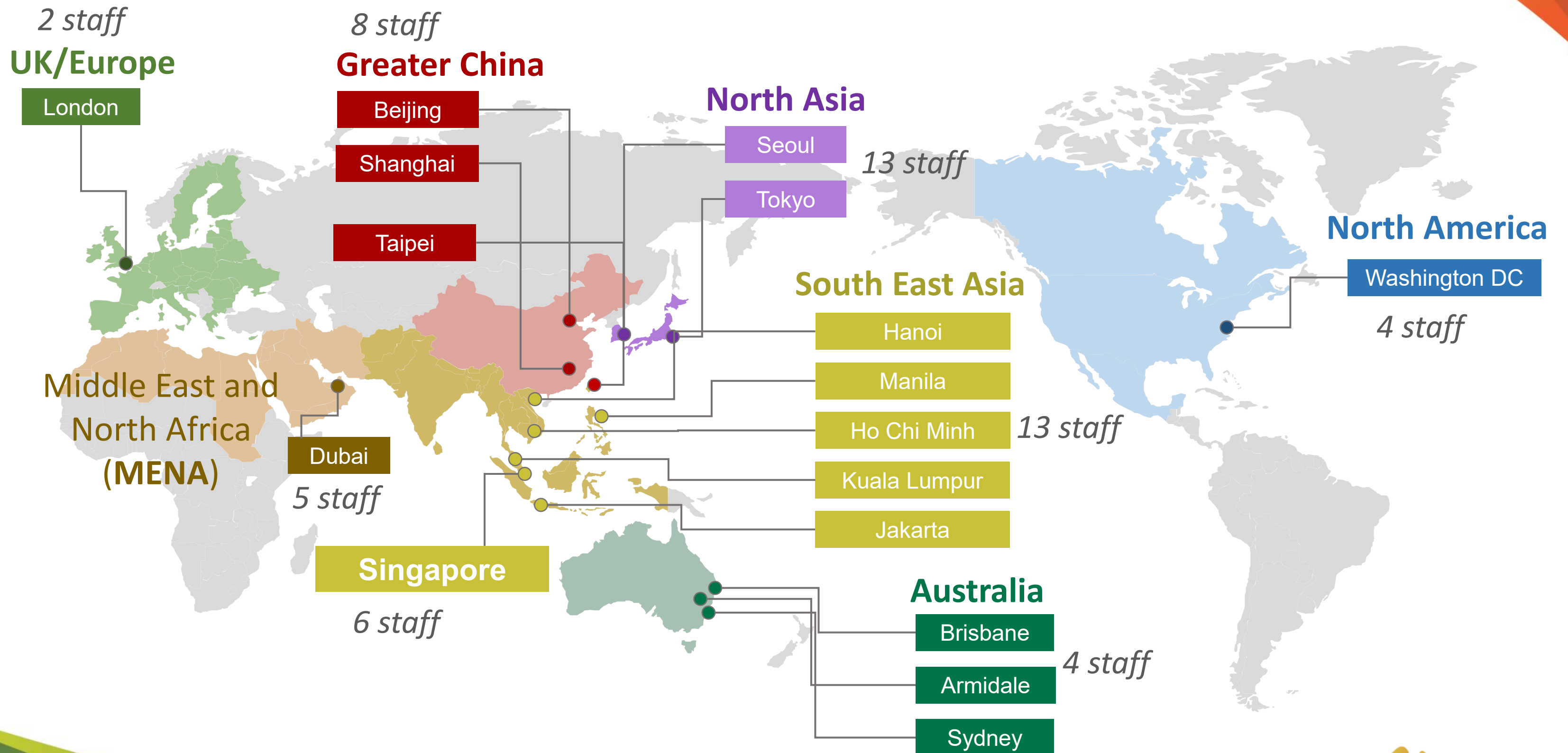
1. Build awareness of Australian red meat.
2. Build preference for Australian red meat by promoting the attributes that make Australian meat superior and/ or different to other importing country of origin (COO) competitors.



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# MLA's International network



55 staff across 17 locations

# Putting Australia in context



70M people



31M sheep



9M cattle  
(19% dairy)



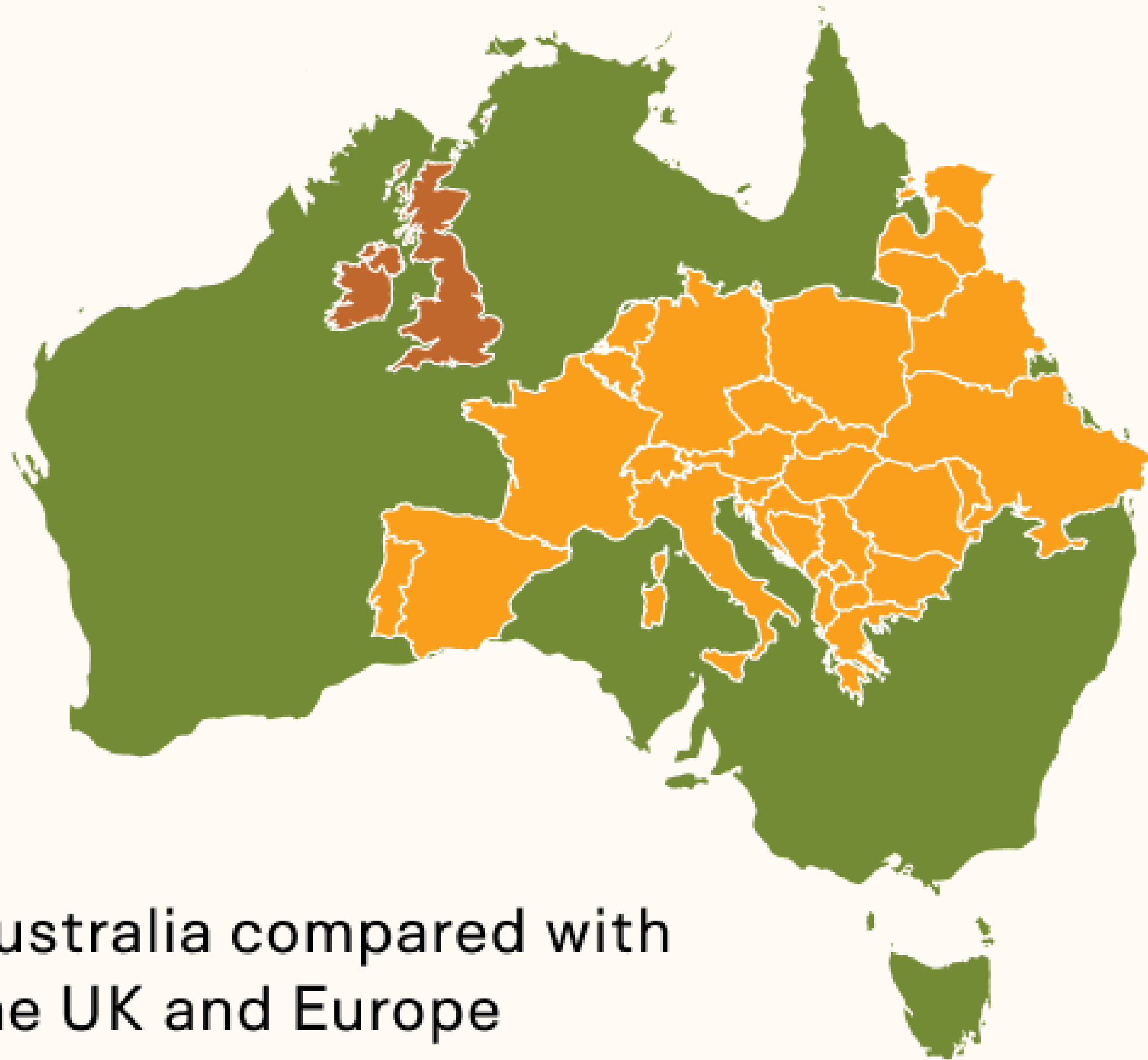
28M  
people



79M sheep



31M cattle  
(5% dairy)



Australia compared with  
the UK and Europe

# Extensive & diverse product range



GRASSFED BEEF



GRAINFED BEEF



ORGANIC BEEF



ANGUS BEEF



WAGYU BEEF



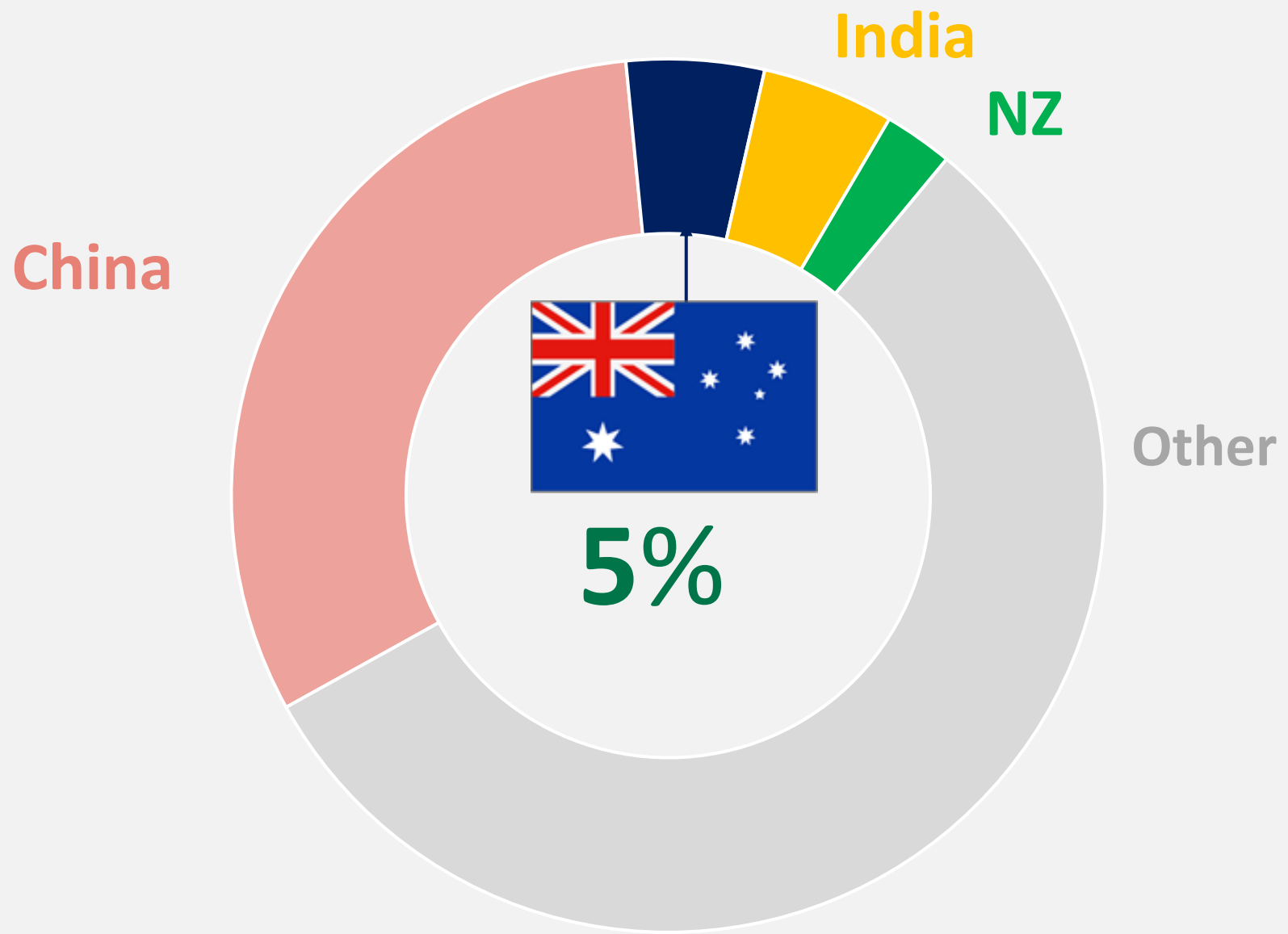
HALAL CERTIFIED BEEF  
& LAMB



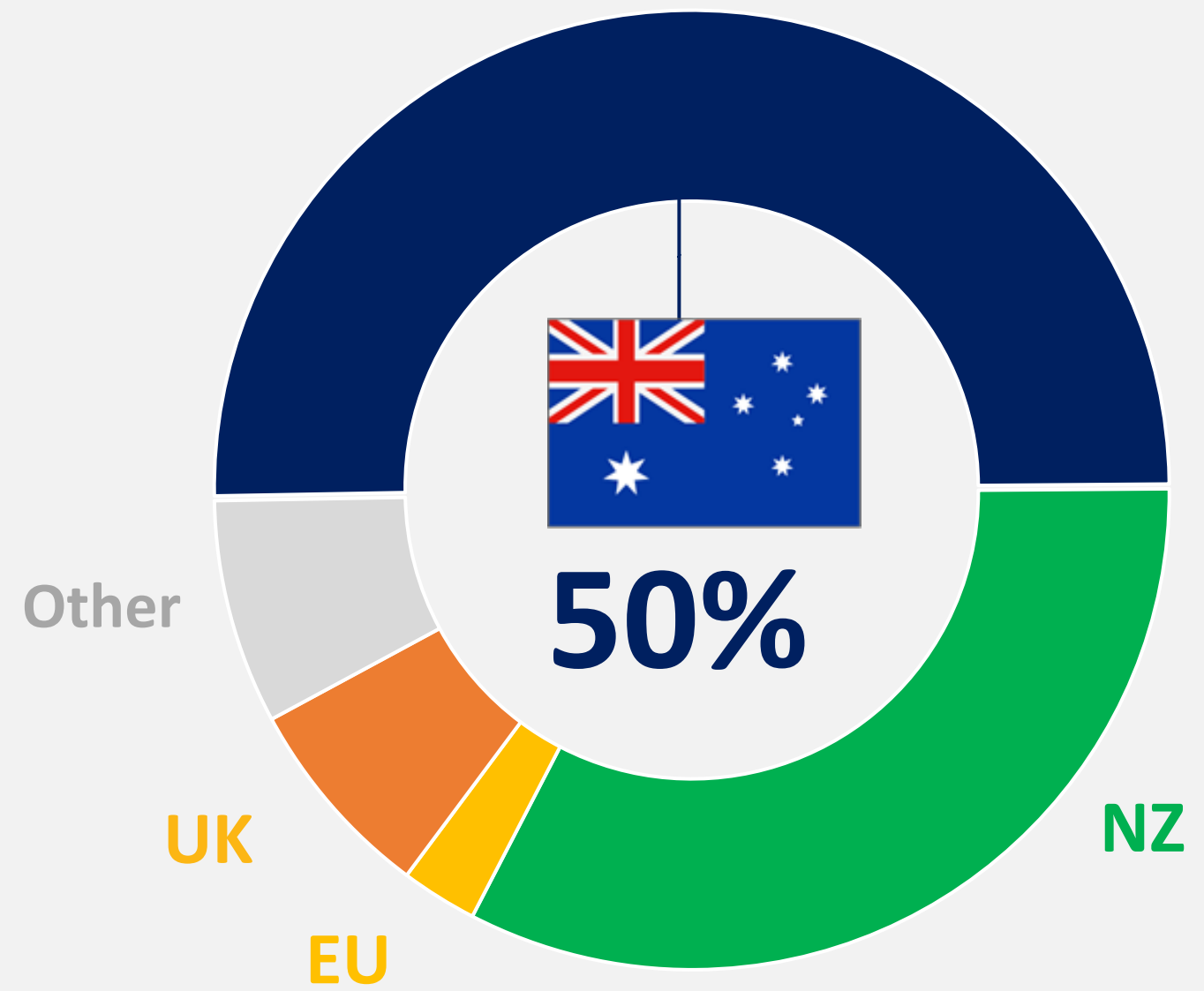
GRASSFED LAMB

# Australia represents 50% of global sheepmeat exports

## Global production



## Exports



Source: OECD-FAO 2023

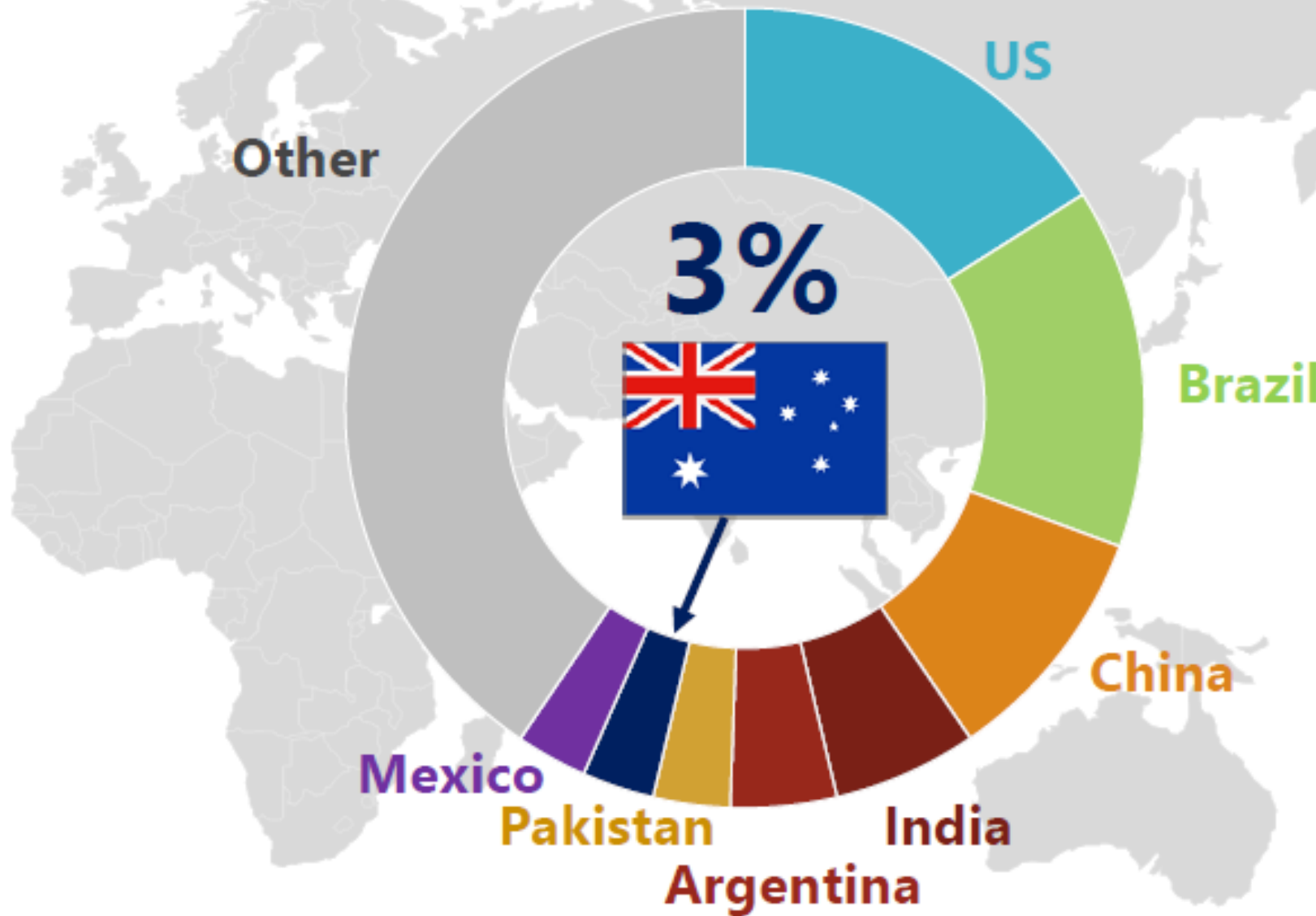
Source: Trade Data Monitor

Australia is a small producer but represents 50% of all exports



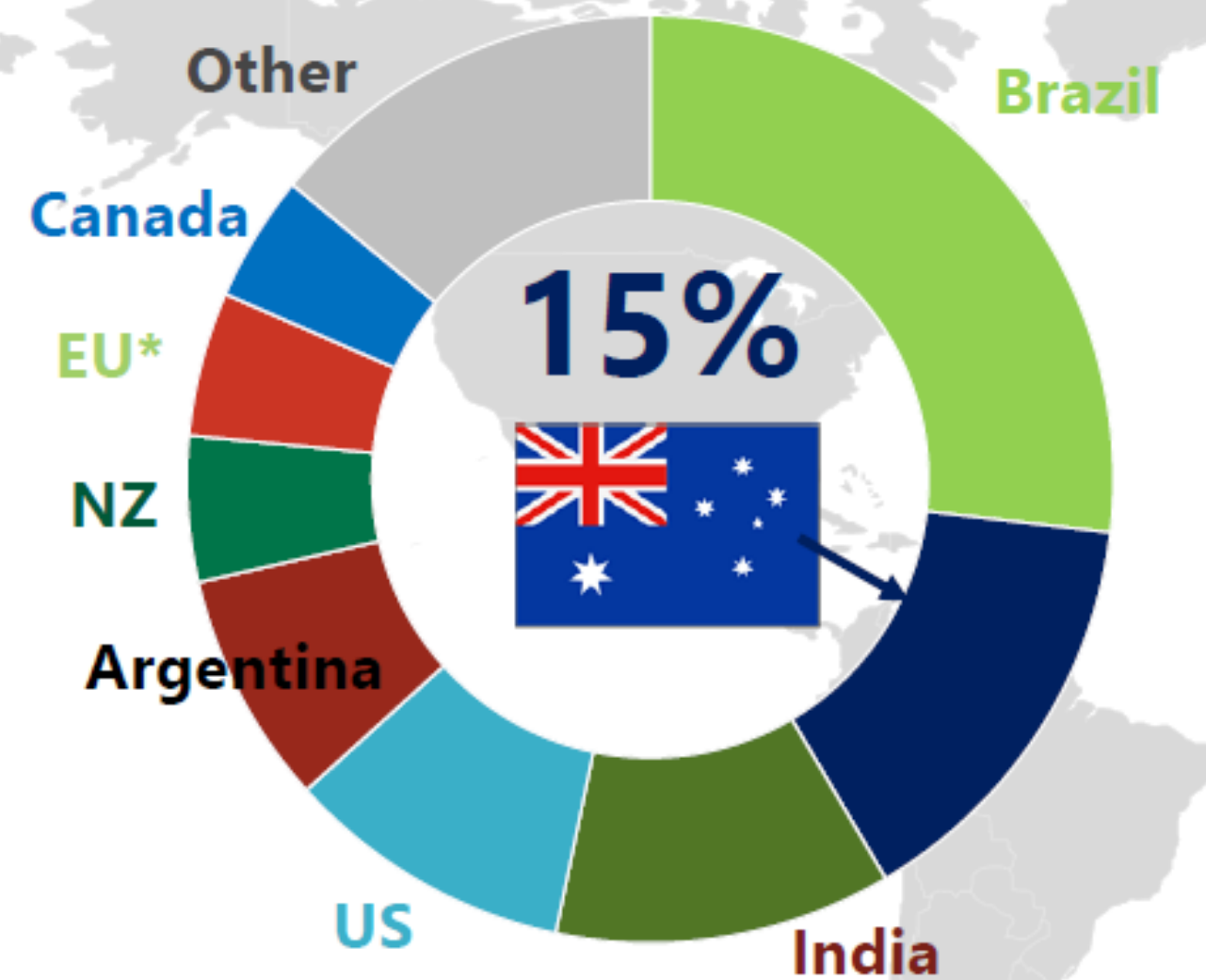
# Australia represents 15% of global beef exports

Global production



Source: FAOSTAT, 2023 – latest data, India's statistics include buffalo meat

Exports

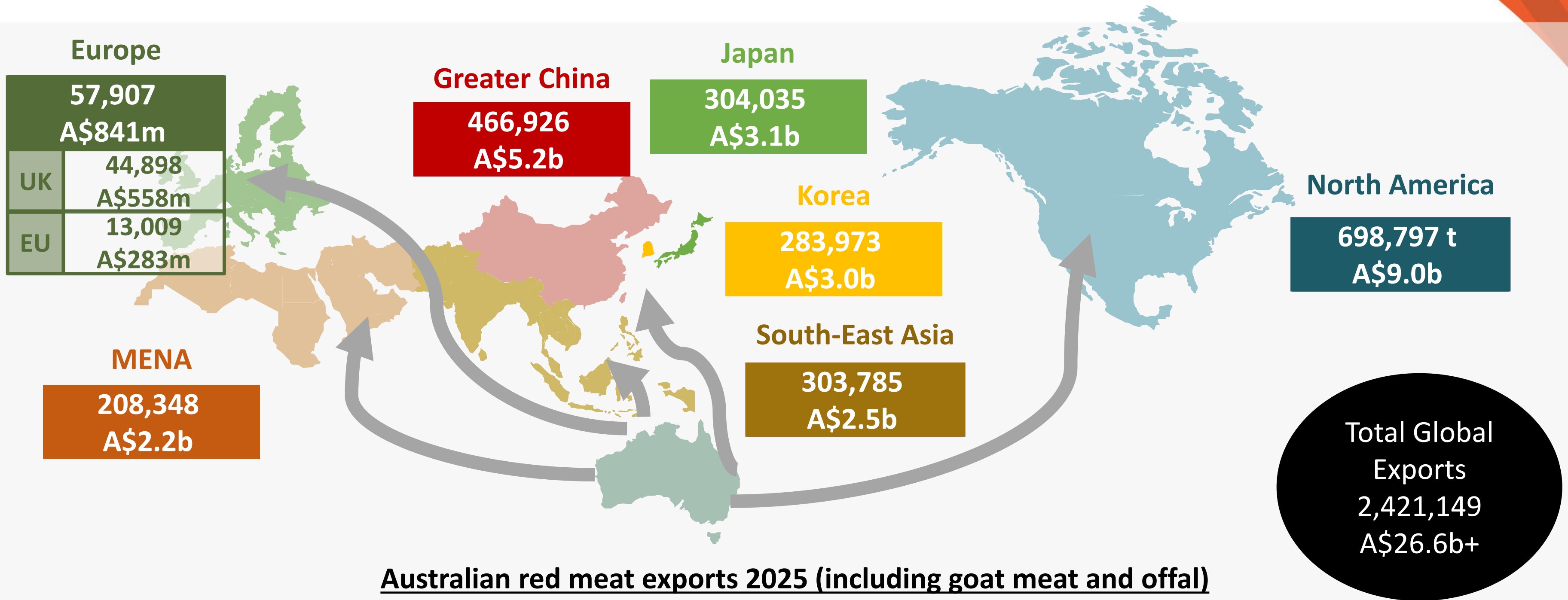


Source: Trade Data Monitor (TDM, MAT November 2024, India's statistics include buffalo meat)

Australia is a small producer that plays a big role in global exports



# Australia supplies over 100 countries under diverse import requirements

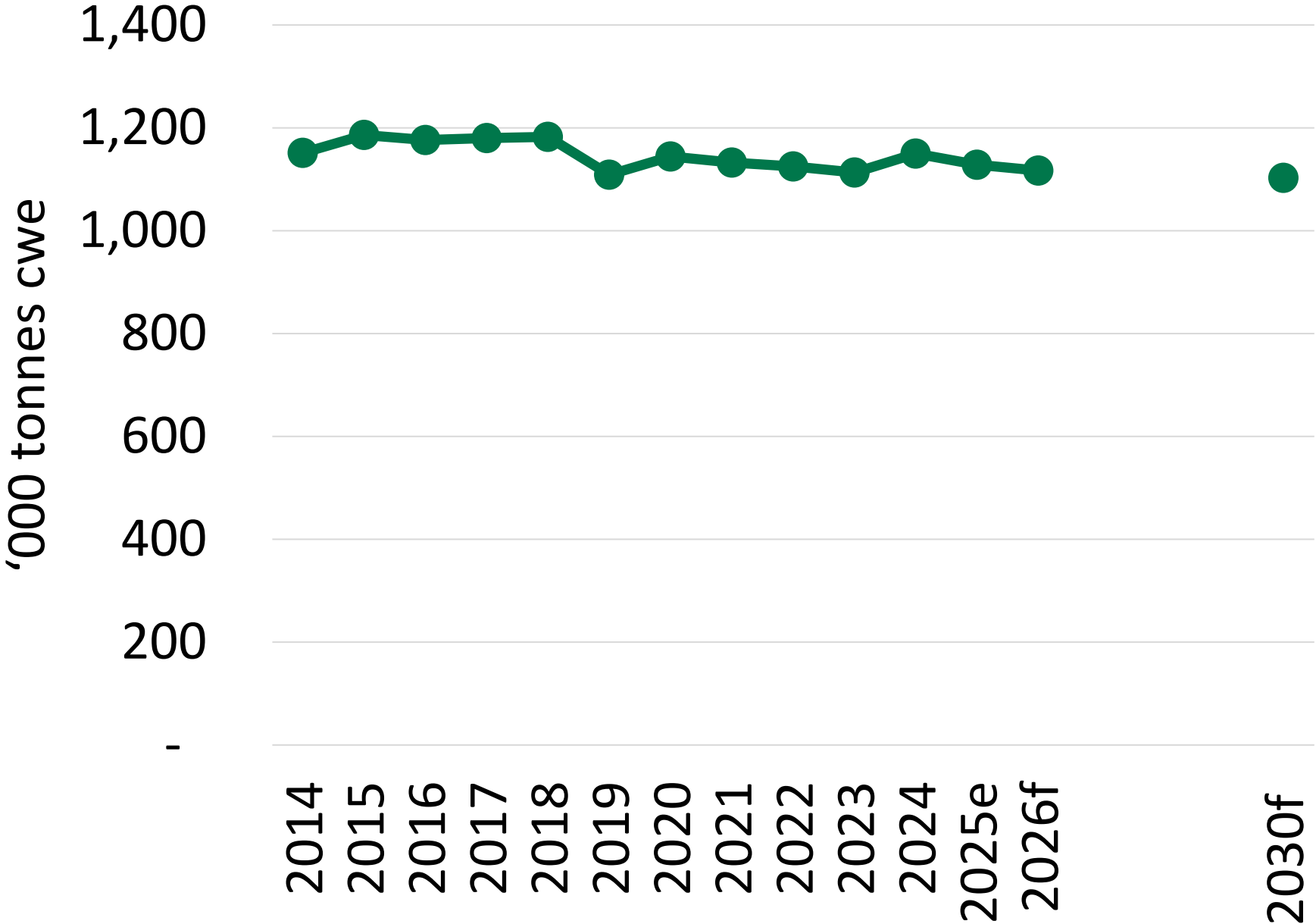


•Source: volume – DAFF 2025, Value –TDM, export volume in tonnes shipped weight (swt)

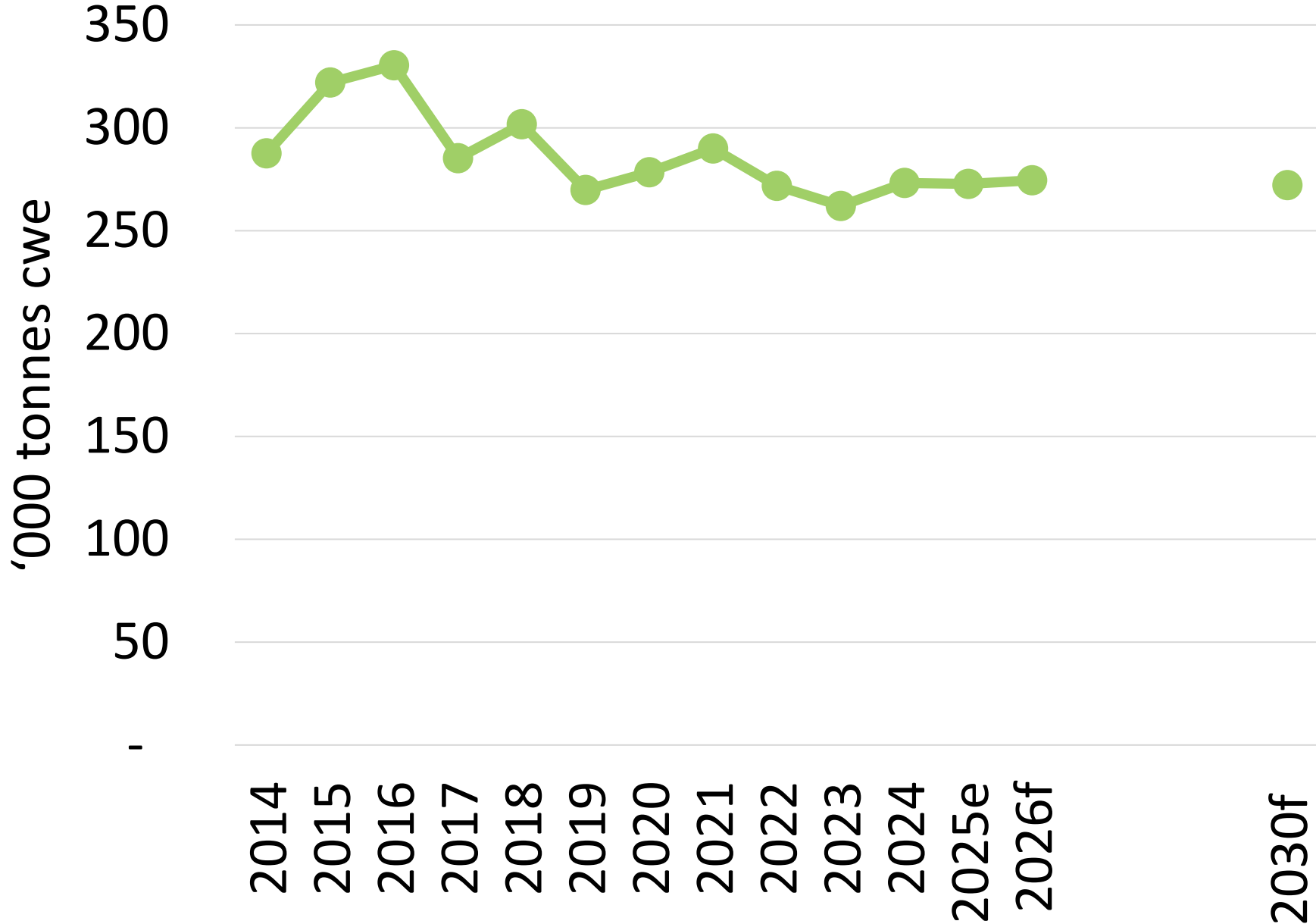
# STATE OF PLAY IN THE UK AND AROUND THE WORLD

# UK beef and lamb consumption remains steady, supported by ongoing population growth

### UK beef and veal consumption

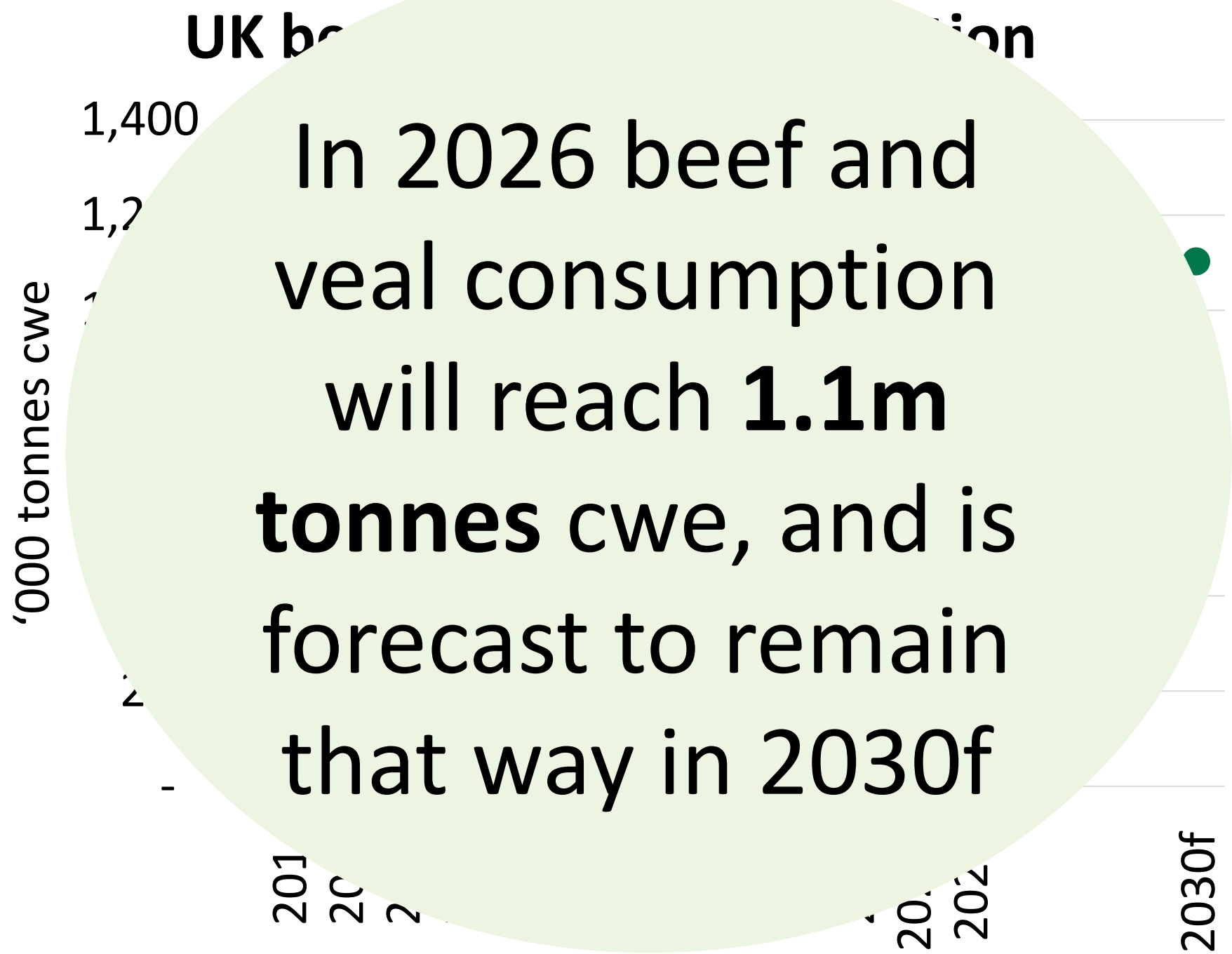


### UK sheep meat\* consumption

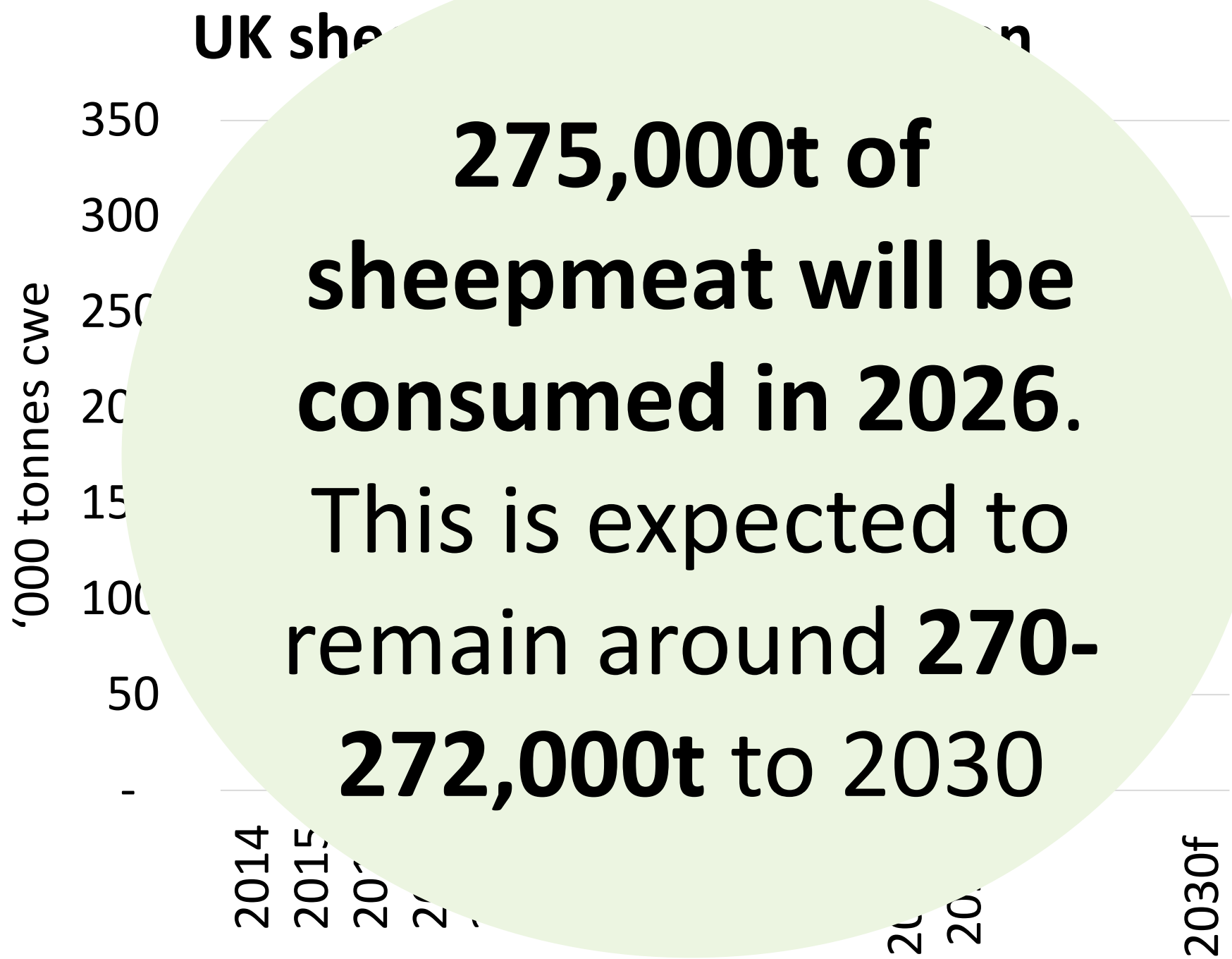


Source: GIRA GMC25 Dataset Dashboard, cwe = carcass weight, \*sheep meat includes goat meat

# UK beef and lamb consumption remains steady, supported by ongoing population growth



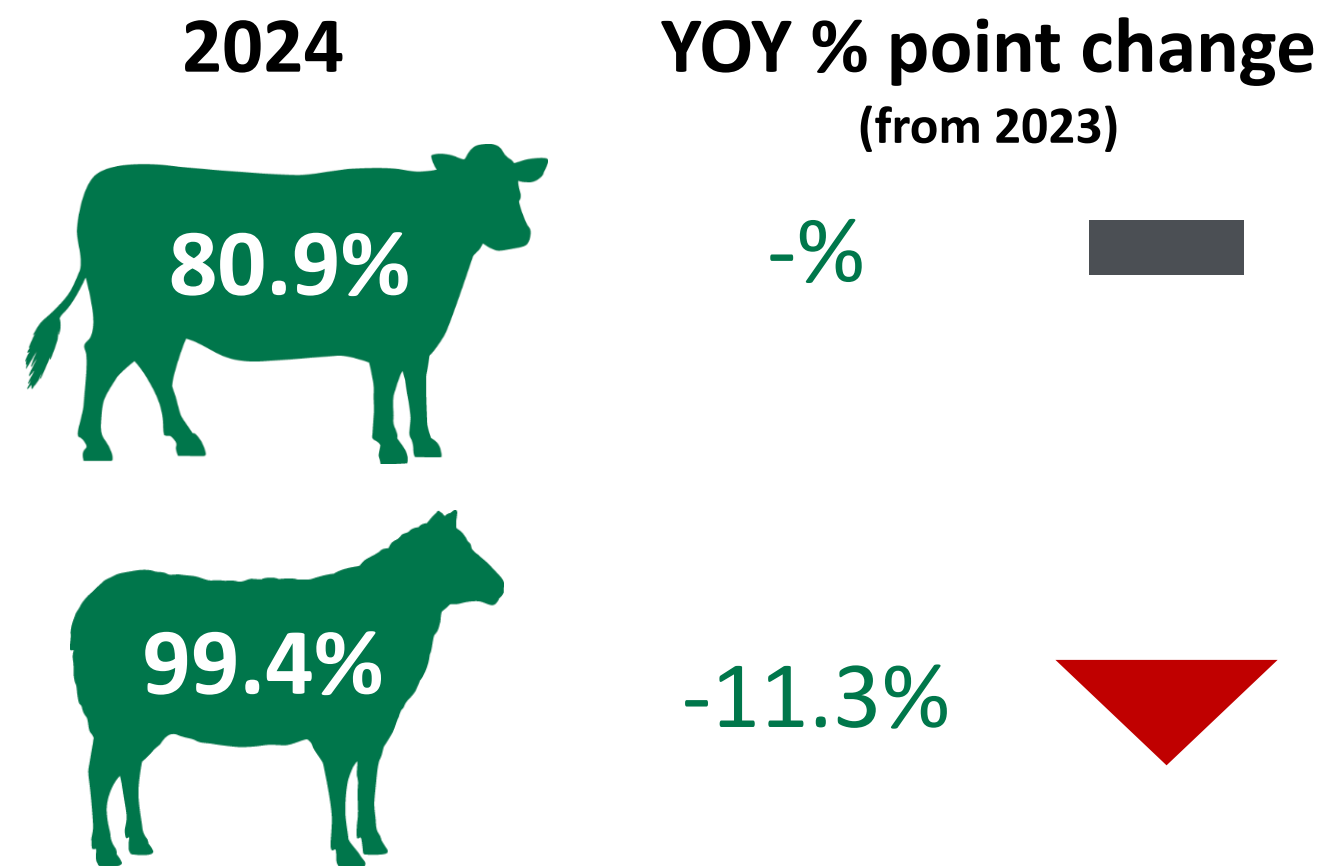
In 2026 beef and veal consumption will reach **1.1m tonnes cwe**, and is forecast to remain that way in 2030f



**275,000t of sheepmeat will be consumed in 2026.** This is expected to remain around **270-272,000t** to 2030

Source: GIRA GMC25 Dataset Dashboard, cwe = carcase weight, \*sheep meat includes goat meat

# The UK sources red meat through a mix of domestic production and imports

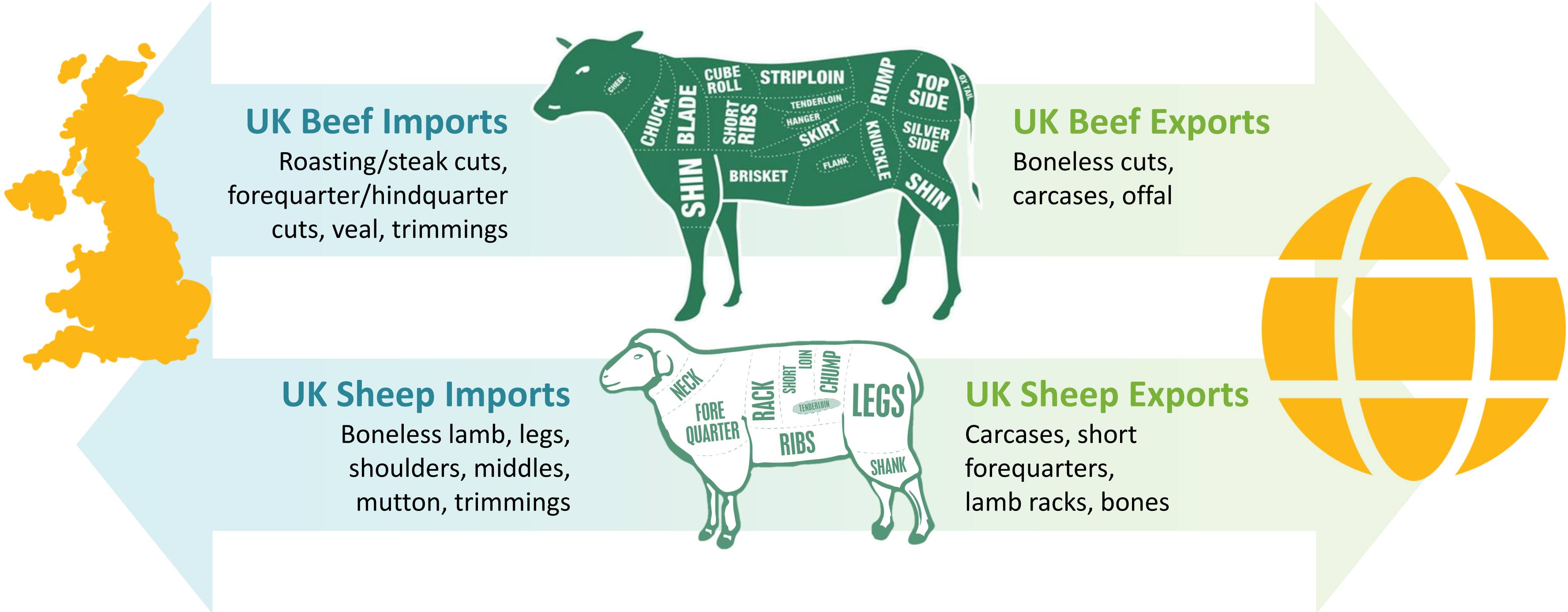


*“UK beef sector faces growing supply and demand gap by 2030, needing additional 278,000 tonnes of beef to reach self-sufficiency”*

*- Quality Meat Scotland*

Source: AHDB, [Quality Meat Scotland](#), May 2025, Self sufficiency is calculated as a percentage of production over consumption (where consumption is the sum of production and imports, minus exports)

# Supply and demand for specific cuts is balanced across the whole carcass through trade



**UK Beef Imports**  
Roasting/steak cuts, forequarter/hindquarter cuts, veal, trimmings

**UK Beef Exports**  
Boneless cuts, carcasses, offal

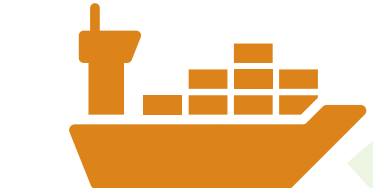
**UK Sheep Imports**  
Boneless lamb, legs, shoulders, middles, mutton, trimmings

**UK Sheep Exports**  
Carcasses, short forequarters, lamb racks, bones

Source: IMTA Carcase Balance

# Supply and demand for specific cuts is balanced across the whole carcase through trade

% of UK beef and sheepmeat production exported



~16%

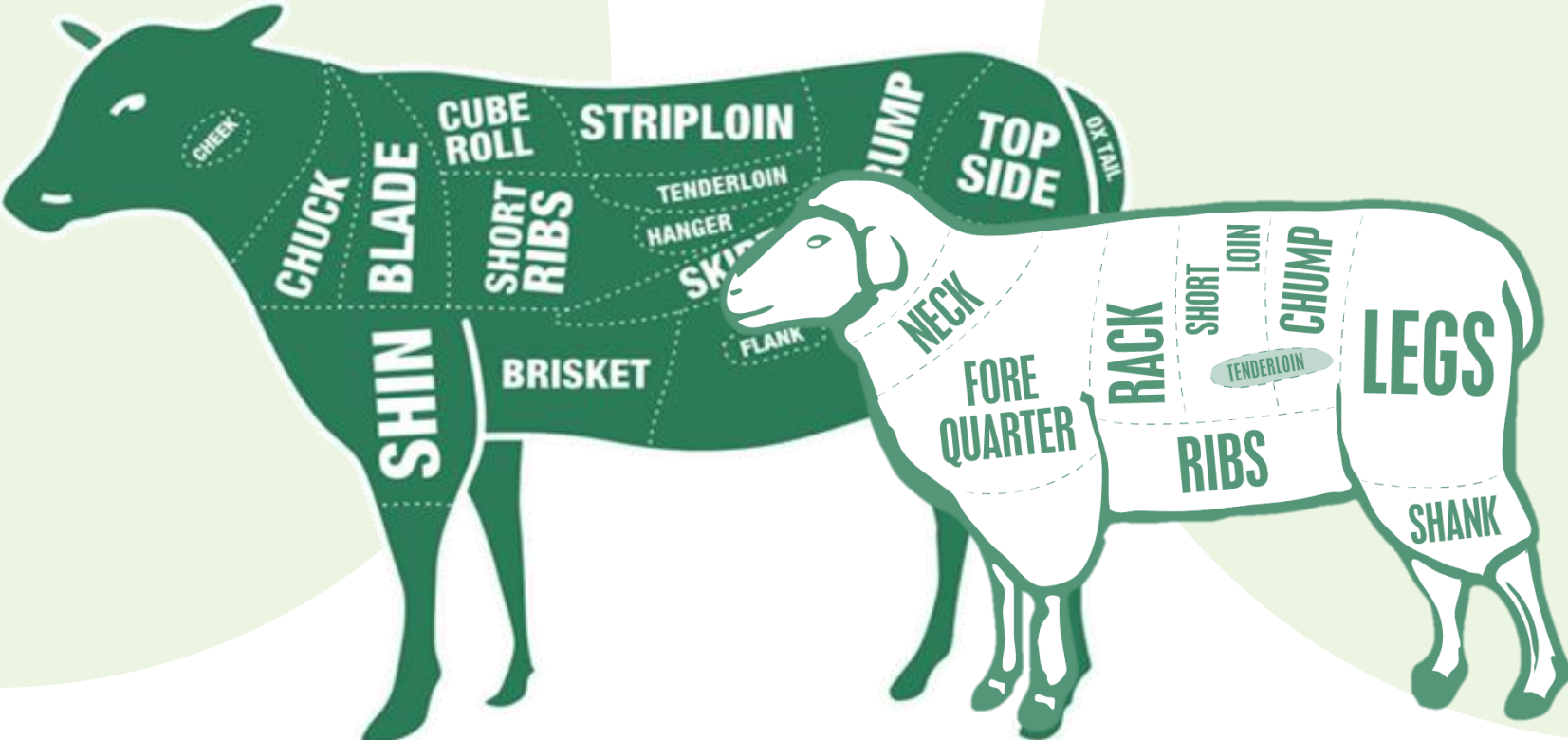
of domestic beef and veal is exported\*



~31%

of domestic sheepmeat is exported\*

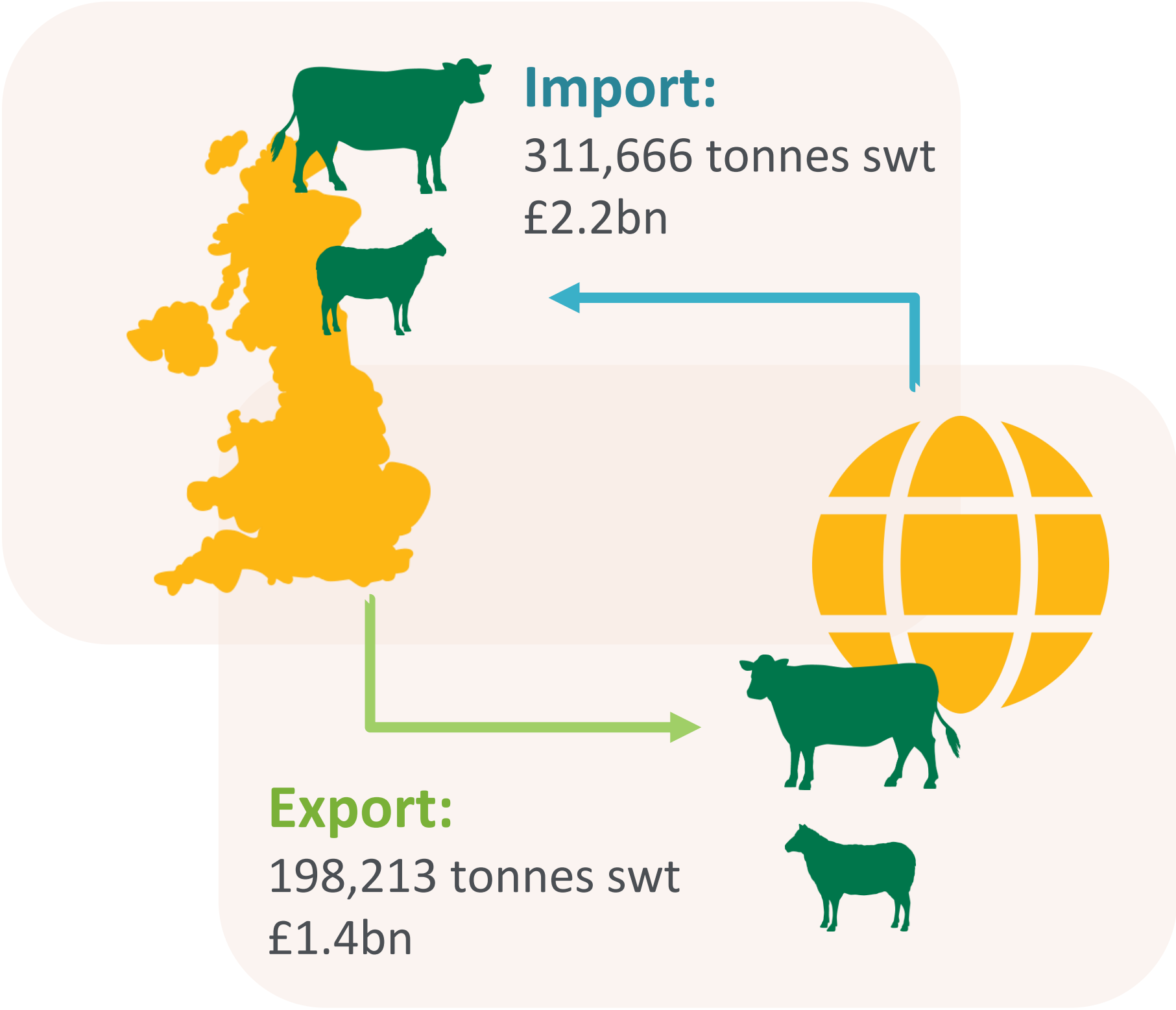
- Boneless cuts
- Carcasses
- Offal



- Carcasses
- Short forequarters
- Lamb racks
- Bones

Source: GIRA GMC 2025, cwe = carcass weight equivalent, \* exports divided by net production, 2014-2024 - 10 year average, IMTA for export cuts breakdown

# Imports are a part of UK's carcass balance and longstanding food supply



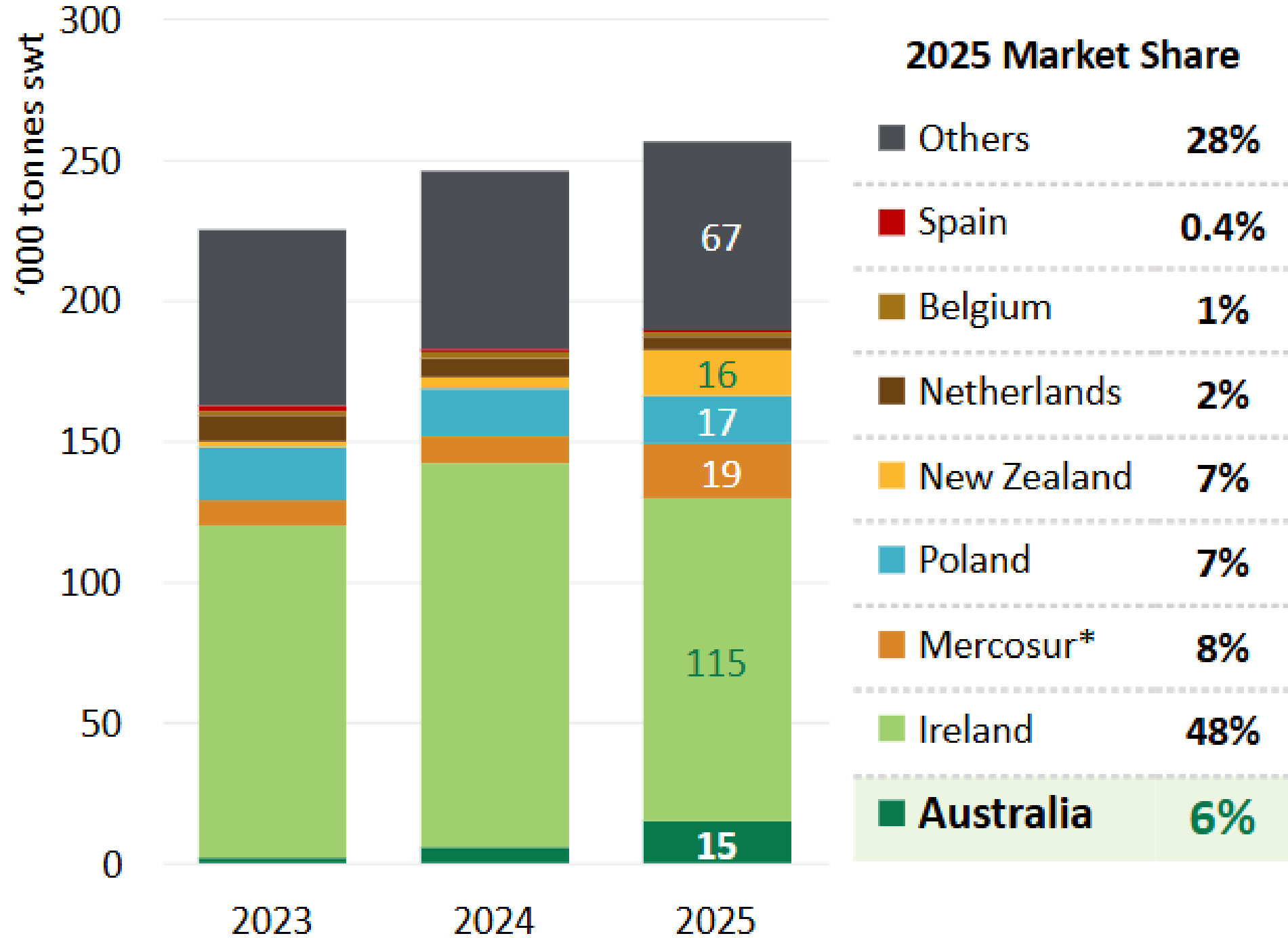
## Benefits of two-way trade

-  **CONSUMER CHOICE**  
More variety of products for shifting consumer preferences
-  **FOOD SUPPLY SECURITY**  
Assures a stable source of food to meet UK consumer demand

Source: Trade Data Monitor, LLC (TDM), 2025, International Meat Trade Association (IMTA), The Crucial Role of Imports: An Overview of Current UK Import Access, June 2025

# The UK sources beef from a diverse supplier mix

## UK total beef imports by supplier

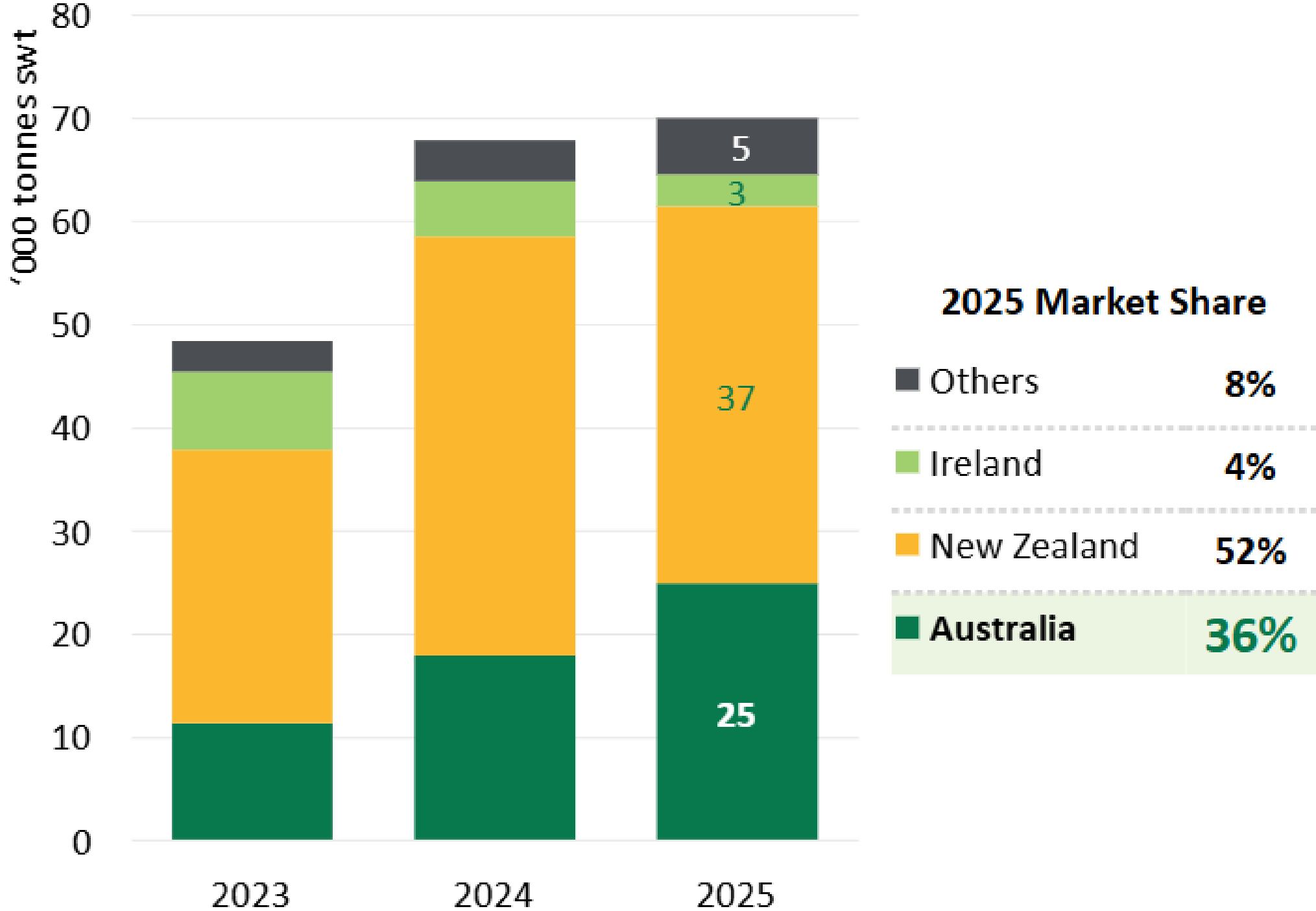


Source: Trade Data Monitor, LLC (TDM), 2025, \*Mercosur includes Argentina, Brazil, Uruguay and Paraguay



# The UK sources sheepmeat from a diverse supplier mix

## UK total sheepmeat imports by supplier



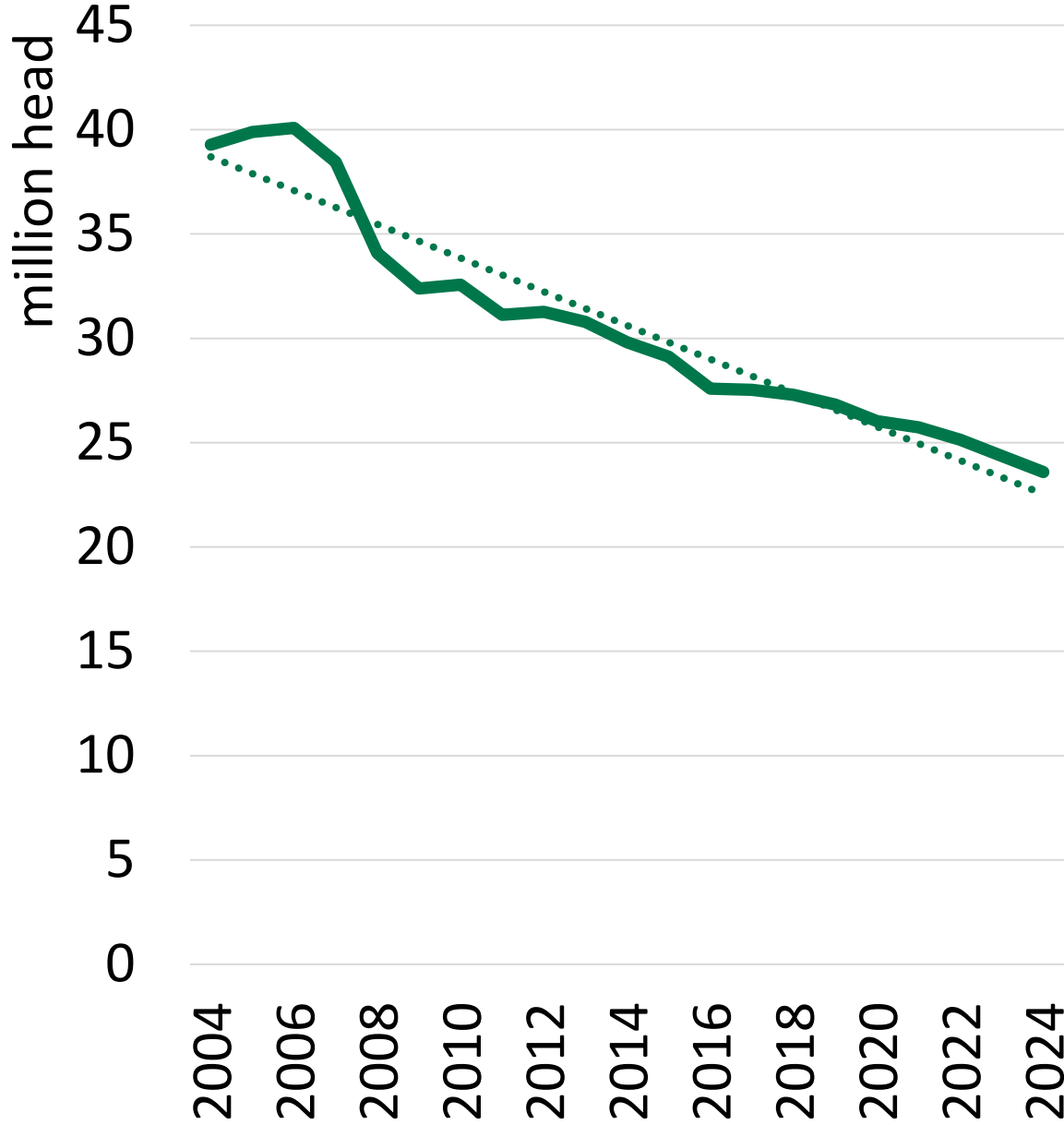
Source: Trade Data Monitor, LLC (TDM), 2025, \*Mercosur includes Argentina, Brazil, Uruguay and Paraguay



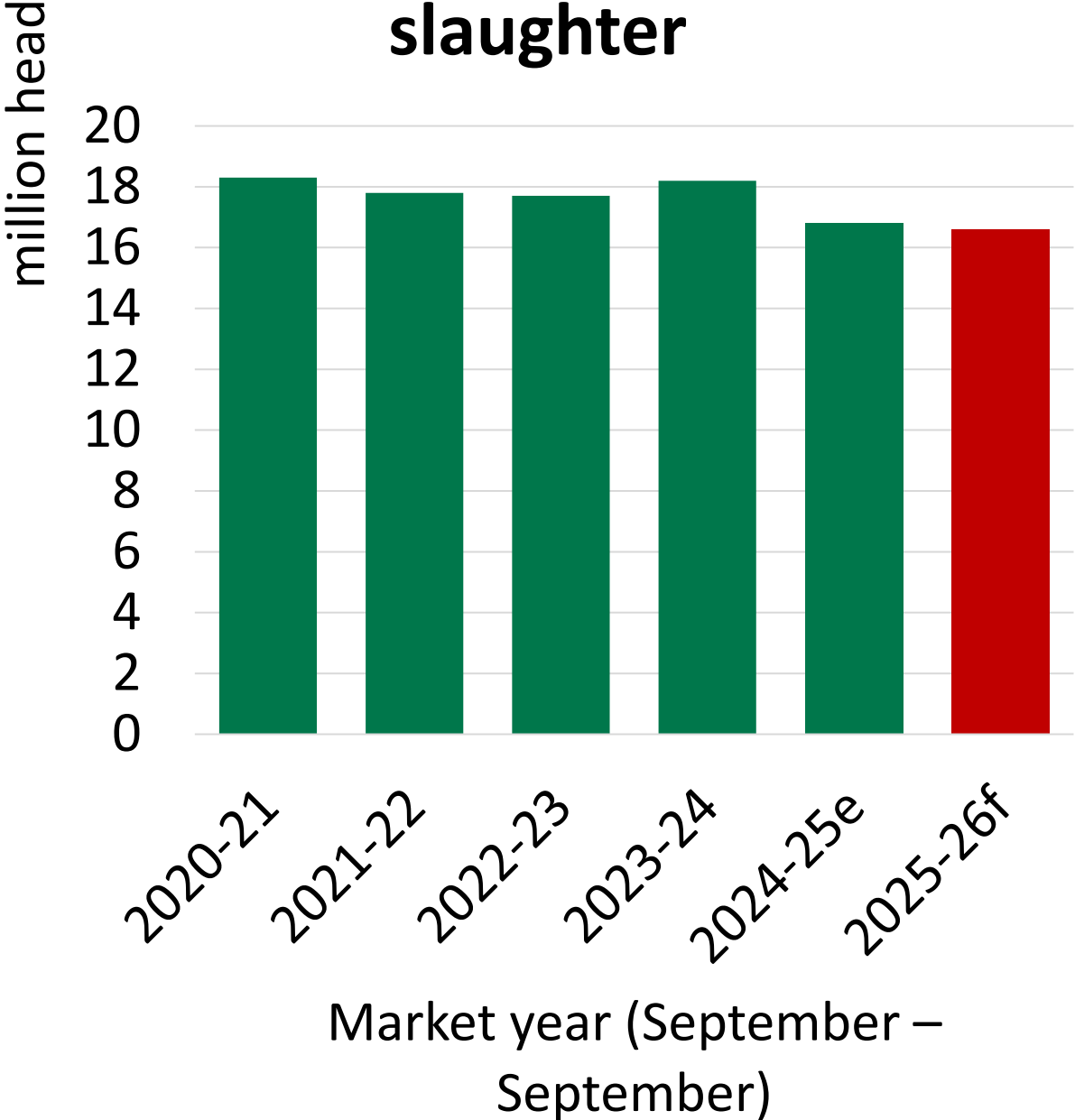


# New Zealand's sheep production has been reducing over time

### New Zealand sheep flock



### New Zealand forecast lamb slaughter

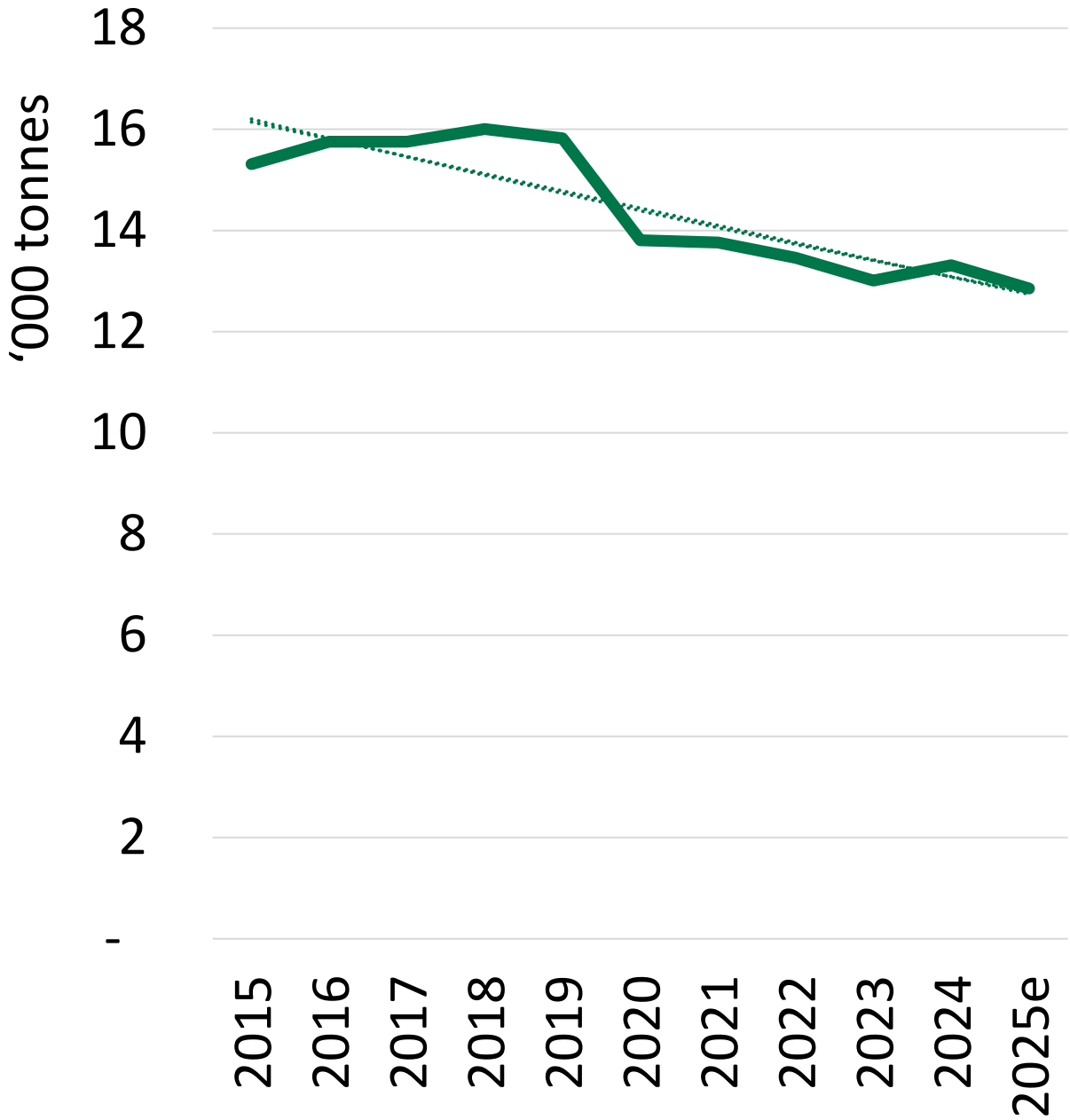


Source: Beef + Lamb NZ, Rural News Group NZ

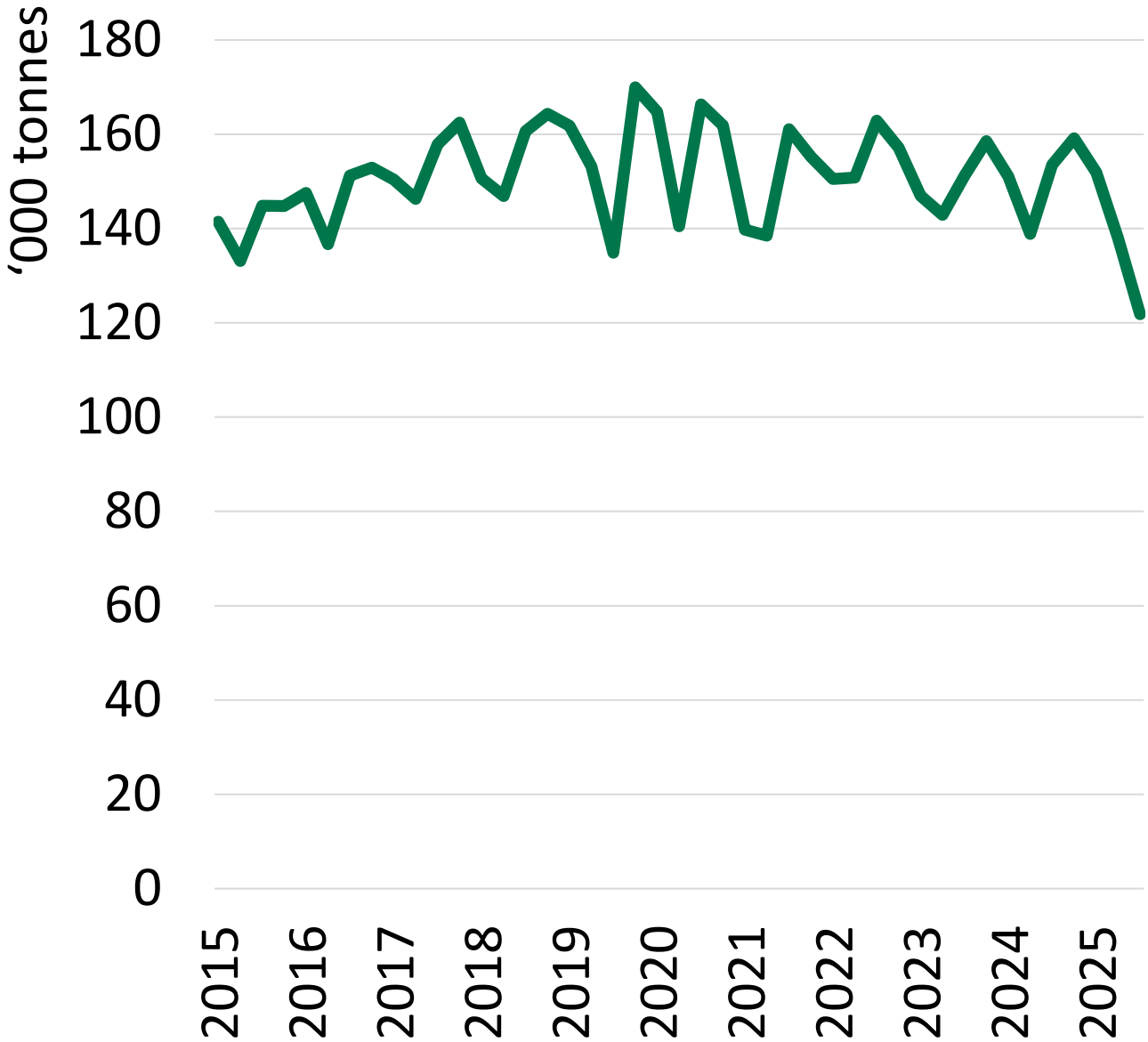


# EU and Irish beef production has moderated in recent years

### EU net beef production



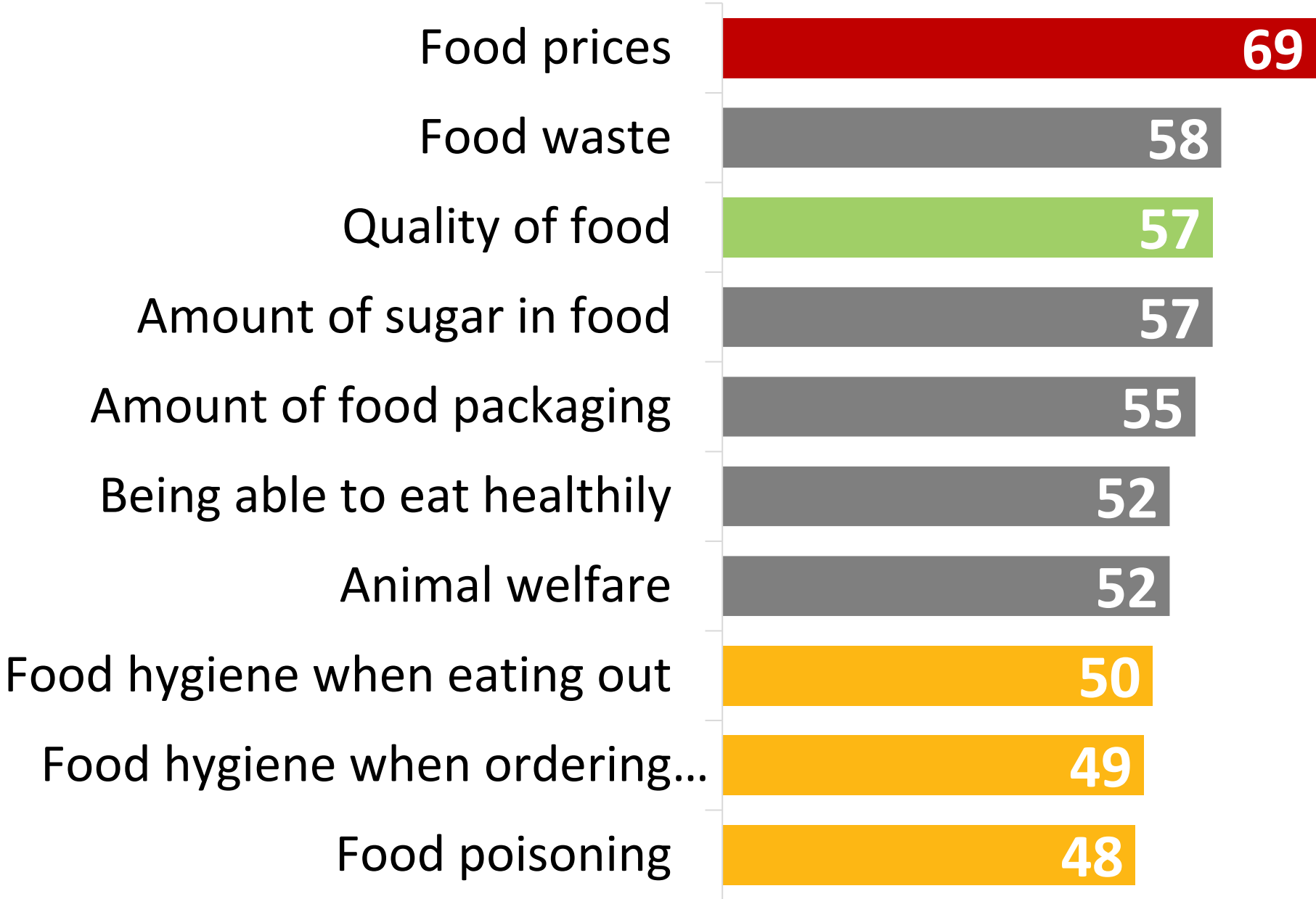
### Irish quarterly beef production



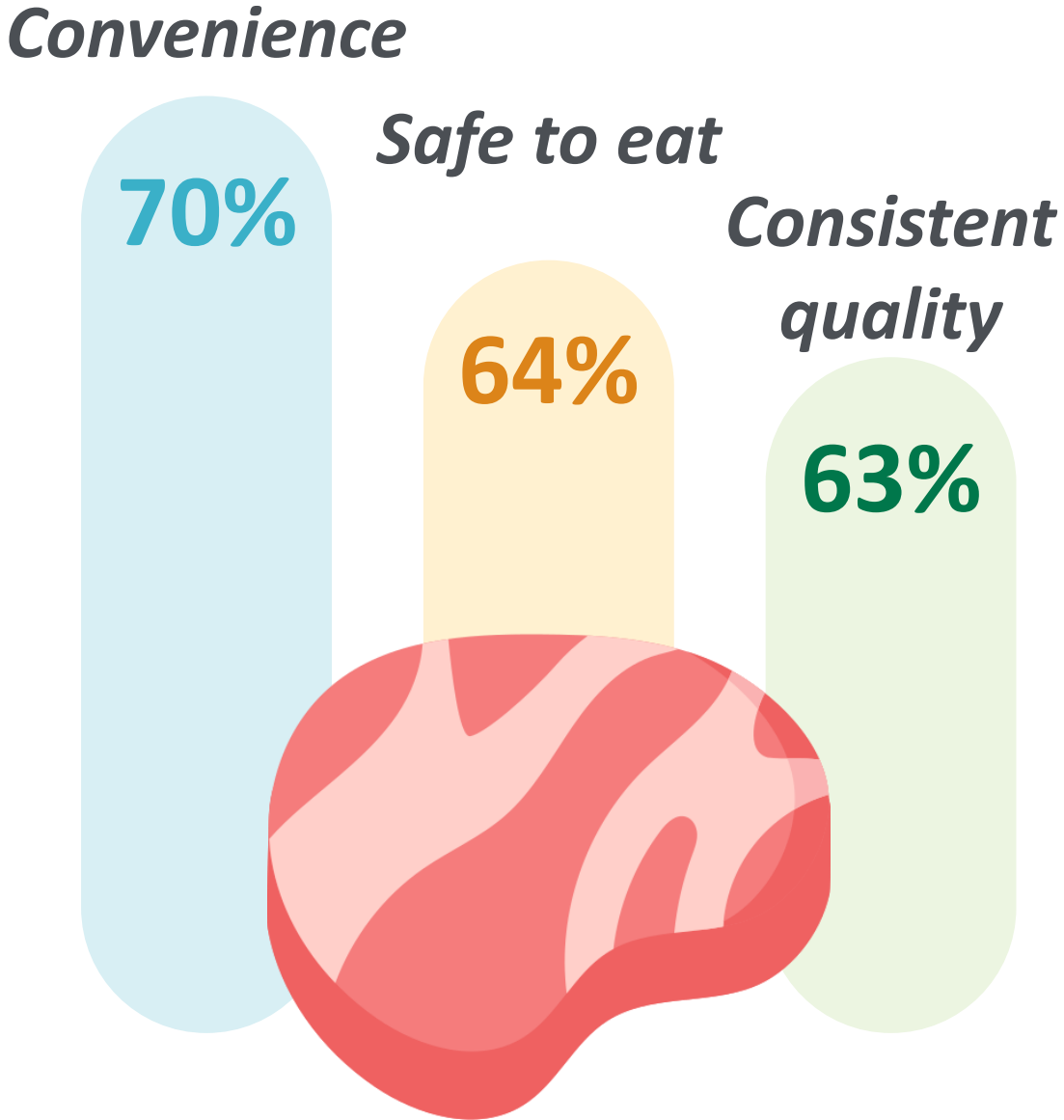
Source: GIRA GMC 25, Eurostat

# British consumers expect convenience, safety and consistent quality

Most common food-related concerns %



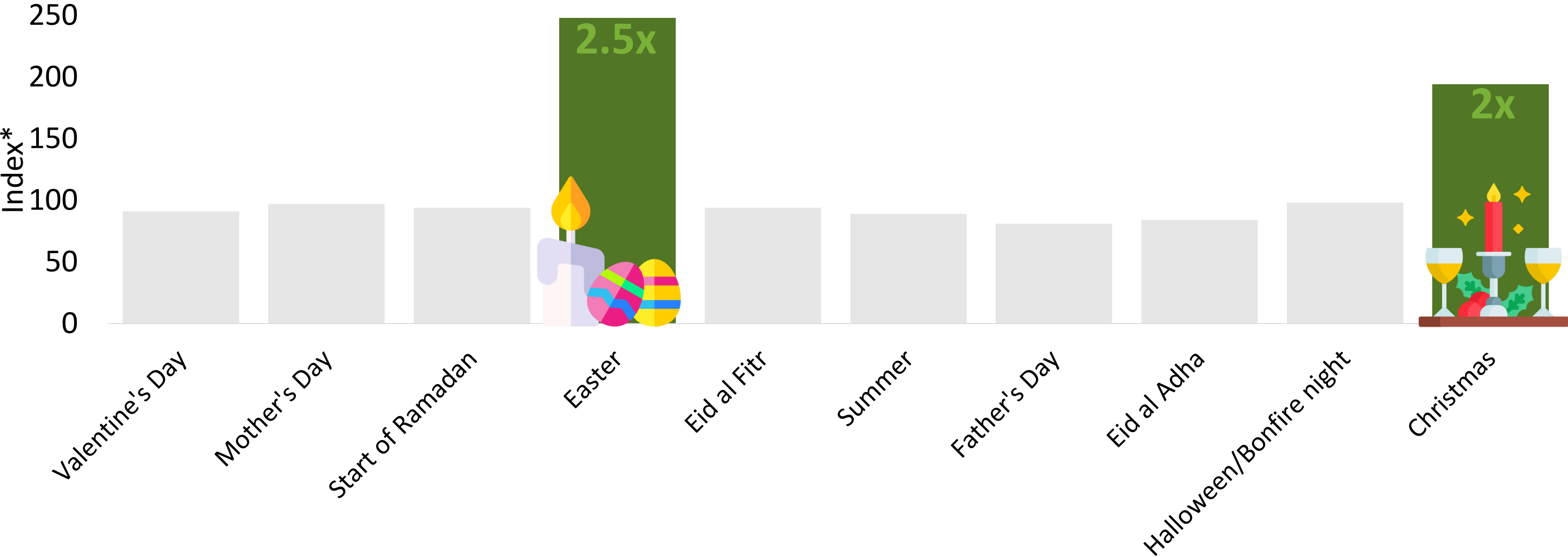
Top call outs that UK consumers value in beef



Source: MLA Global Consumer Tracker UK 2025, UK Food Standards Agency (FSA) [Food and You 2 Wave 9](#), March 2025

# Seasonality creates predictable demand during peak demand

## Lamb retail performance at key seasonal events compared with average 2 week period



Source: [AHDB analysis of Kantar data, Volume, Total Lamb, index versus average 2 weeks 2023](#),

\*Index versus the average two weeks excluding Christmas (over 100 means more likely to be purchased and under 100 means less likely to be purchased)



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# AUSTRALIA'S COMMITMENT TO SUSTAINABILITY & WELFARE



# Australian production aligns with British values across animal welfare, traceability and sustainability



**Australian Beef**  
Sustainability  
Framework



**SHEEP**  
**SUSTAINABILITY**  
FRAMEWORK



**On-farm  
assurance**



**Identification &  
Traceability**



# How food is produced is more important than the distance it travels

**5%**

Less than 5% of greenhouse gas emissions, water and energy use come from transport



Shipping is the most efficient form of transport

Australia is one of the only countries in the world to conduct a full-scale Life Cycle Analysis of the environmental impact of beef & lamb production.

In doing so, we learned that:

**Food miles (or "locally produced") is not a suitable indicator of environmental impact.**

(\*Source: Recent research published in The Journal of Cleaner Production and The Journal of Agricultural Systems)

**The Australian red meat industry has reduced net carbon emissions by**

**78.56%**

**over the period from 2005 to 2021**



**DID YOU KNOW:**

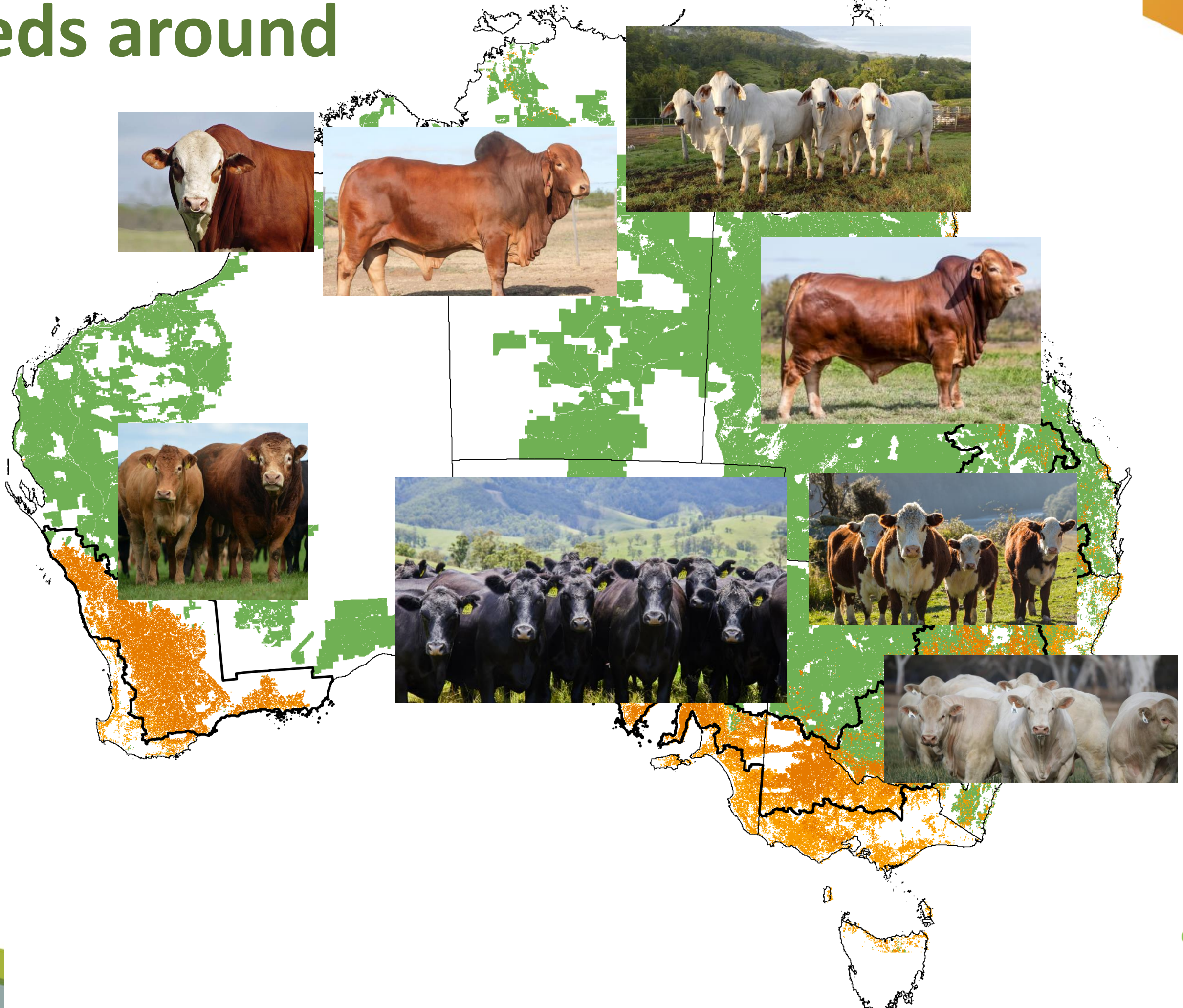
The red meat industry also aims to be carbon neutral by 2030.

\* Source: 2021 MLA Red Meat Emissions Update

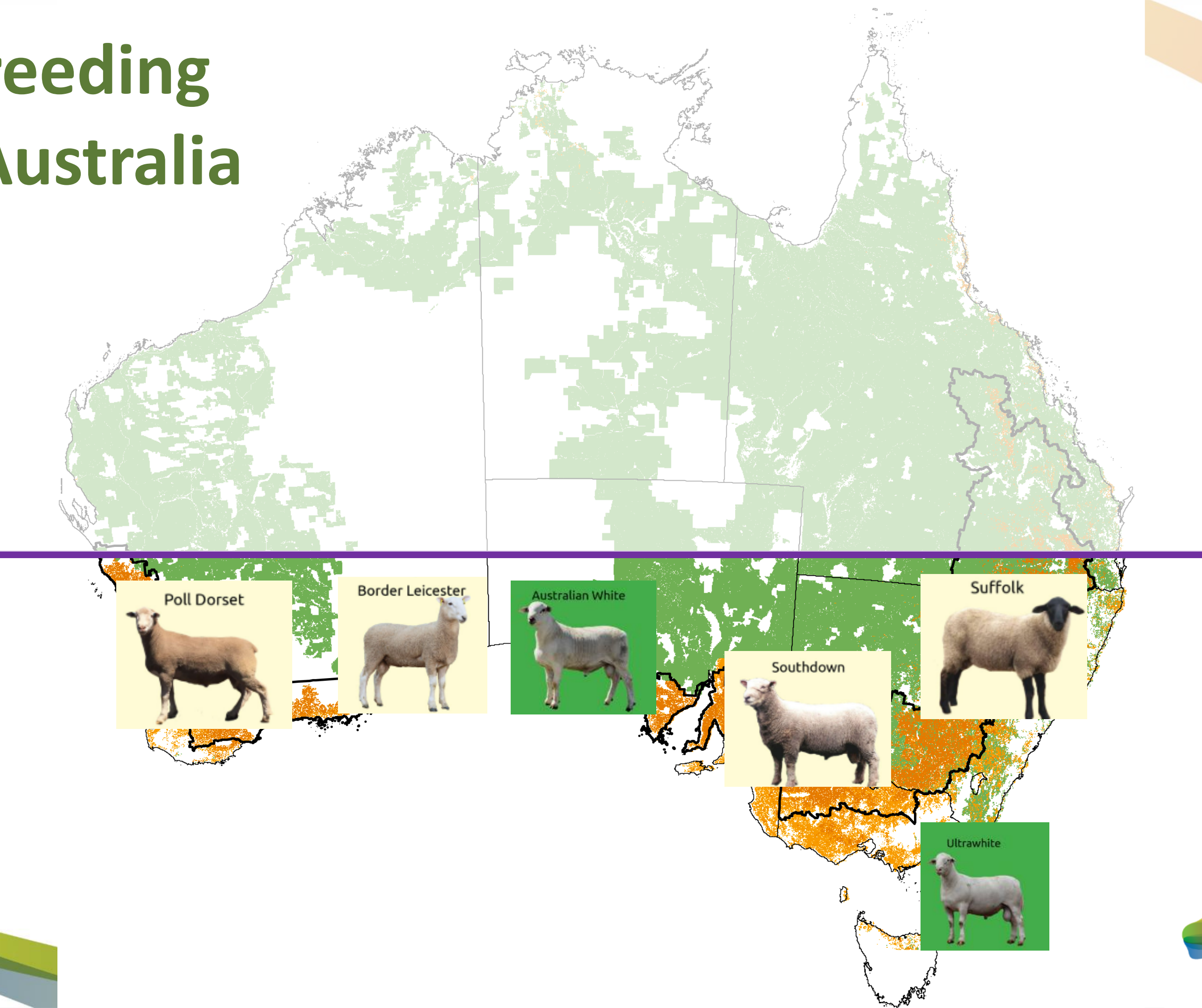
[WWW.GOODMEAT.COM.AU](http://WWW.GOODMEAT.COM.AU)



# Cattle breeds around Australia



# Sheep breeding around Australia



# Leading food safety standards = longer shelf life



Vacuum-packaged Aussie beef has a **shelf life of up to 20 weeks** under optimal storage conditions.

*Shelf life of up to 20 weeks*



Vacuum-packaged Aussie lamb has a **shelf life of up to 12 weeks** under optimal storage conditions.

*Shelf life of up to 12 weeks*

## AUSTRALIAN FOOD SAFETY PROGRAMS

Australian beef & lamb achieves such long shelf life due to:



The cleanliness of the livestock prior to slaughter



Decreased processing speeds optimises hygiene



Audited HACCP procedures



World class food safety and hygiene standards during processing



Australian Government audits



# THERE ARE MANY DIFFERENT FACTORS THAT IMPACT EATING QUALITY (IT'S NOT JUST MARBLING)...

*Tropical*  
**BREED**  
*Content*

*Carcass*  
**WEIGHT**  
\*\*\*

**SEX**

*Hormonal*  
**GROWTH**  
PROMOTANTS

**HANGING**  
**METHOD**

**CUT**  
*Ageing*

**MARBLING**

**OSSIFICATION**  
(MATURITY)

....  
**INDIVIDUAL**  
**CUT**

*Cooking*  
**METHOD**

*Via*  
**SALEYARD**  
\*\*\*

\*\*\*  
**pH**

\*  
**RIB-FAT**  
*Measurement*

MILK-FED  
**VEAL**

# Two programs work together to underpin **food safety** on-farm and **traceability** through the value chain



LPA: On-farm management of food safety, animal welfare and biosecurity risks.

**On-farm assurance**



NLIS: Tracks the location of every animal throughout its life.

**Identification & Traceability**



**Property Identification Code (PIC)**  
— required for all livestock-producing properties

**LPA and NLIS records** — underpin food safety and traceability

**LPA NVDS** — link on-farm assurance and traceability for livestock moving through the value chain



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# MENU

Wagyu Picanha Tartare served with 15-hour Beef  
Dripping Potatoes & Oscietra Caviar

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Pressed Lamb Shoulder & Sweetbreads, served  
with Broad Beans, Whipped Feta, Pickles  
Cucumber & Bronze Fennel

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Meat & Three Veg – Wagyu Sirloin & Grainfed Beef  
Fillet served with Carrot, Cavolo Nero & Turnip

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Roasted Lamb Rump, English Peas, Smoked Lamb  
Shoulder, Hung Sheep's Yoghurt, Saltbush, Pea  
Pod Jus

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Scan the QR  
code to let us  
know how  
today went!

