The Aussie Wagyu Advantage

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What we'll cover today...

Who is MLA?

Aussie beef's place in the world

What makes Aussie Wagyu unique

Aussie beef: sustainability, consistency & trust

Who is Meat & Livestock Australia?

mla
MEAT & LIVESTOCK AUSTRALIA

AUSSIE BEEF&LAMB™

PRODUCT OF AUSTRALIA

AUSSIE BEEF&LAMB

What do we offer?

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)

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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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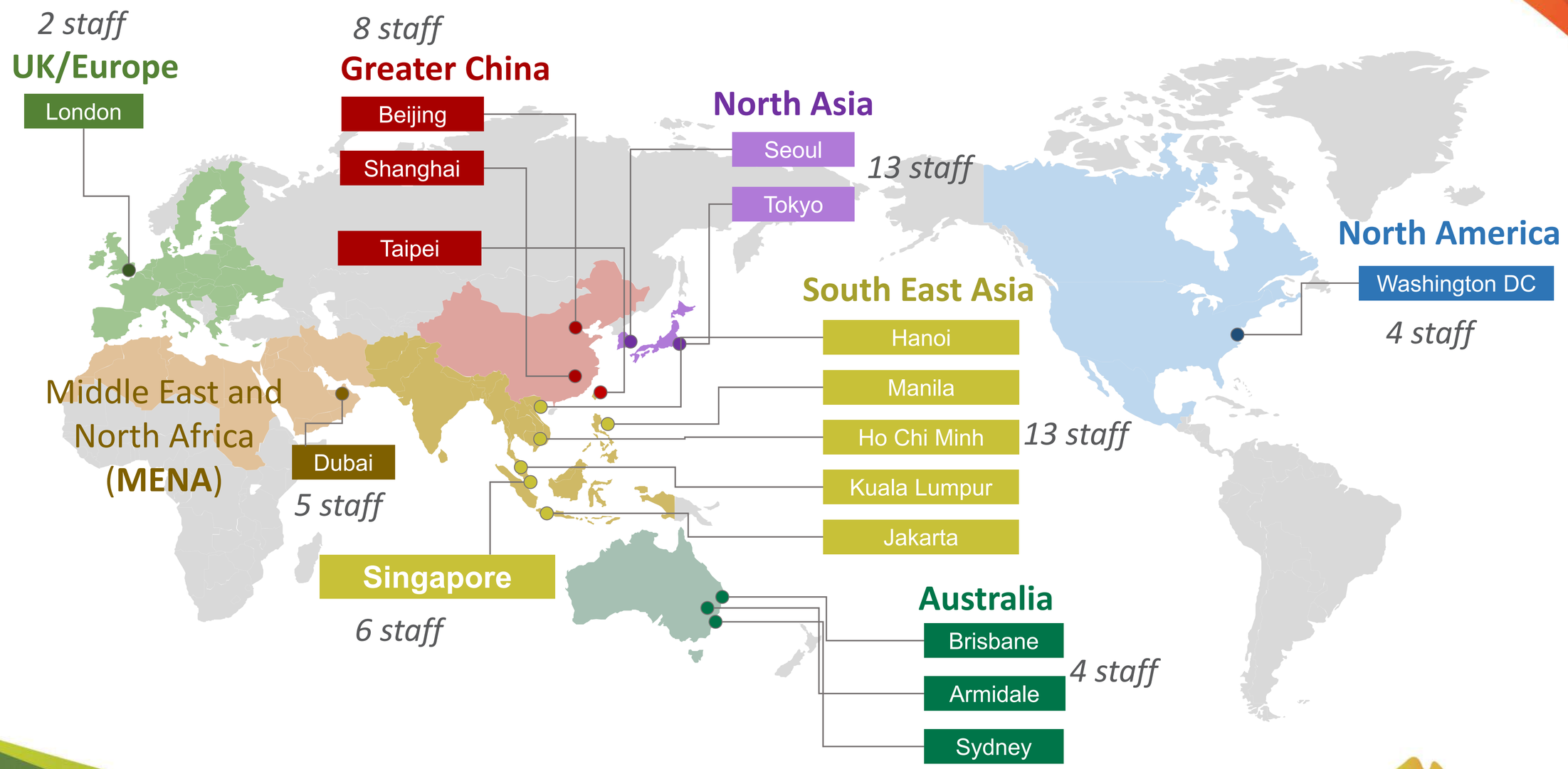
MLA's International network



55 staff across 17 locations

Unlock the full potential of Aussie Beef & Lamb in your business

AUSSIE MEAT ACADEMY

- **Culinary development:** cut utilisation, menu ideation and flavour trends
- **Culinary operations training:** excellent execution with red meat from QSR to fine dining
- **Market trends & consumer insights:** shape and guide your menu or shelf configuration
- **Supply forecasting**
- **Meat grading systems:** understand Australia's world-leading meat grading systems for product consistency
- **Butchery training & insights:** from cut breakdowns to portioning for the modern plate
- **Australia's farming systems:** sustainability targets, progress, and commitment to animal wellbeing
- **Educational resources** and front-of-house **staff training**

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Aussie Beef Mates & Lambassador programs

- Identify influential food professionals that are passionate about Aussie beef and lamb
- Join a global network
- Menu & recipe development
- Work with us to promote and share the Aussie story through partnering with us on:
  - Events & training
  - Social & traditional media
  - Potential Aus industry tour
  - Trade shows
  - Demo kitchens

LAMBASSADOR of Australian Lamb

AUSSIE BEEF MATES

Extensive & diverse product range

GRASSFED BEEF

GRAINFED BEEF

ORGANIC BEEF

ANGUS BEEF

WAGYU BEEF

HALAL CERTIFIED BEEF

GRASSFED LAMB

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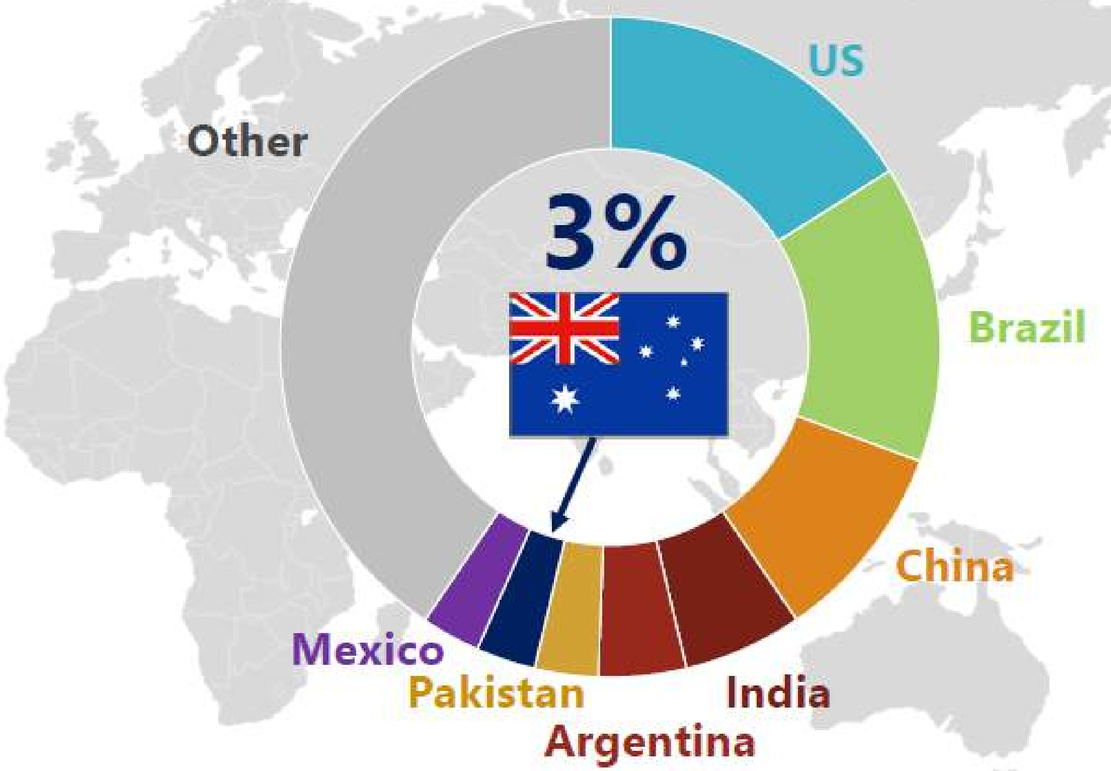
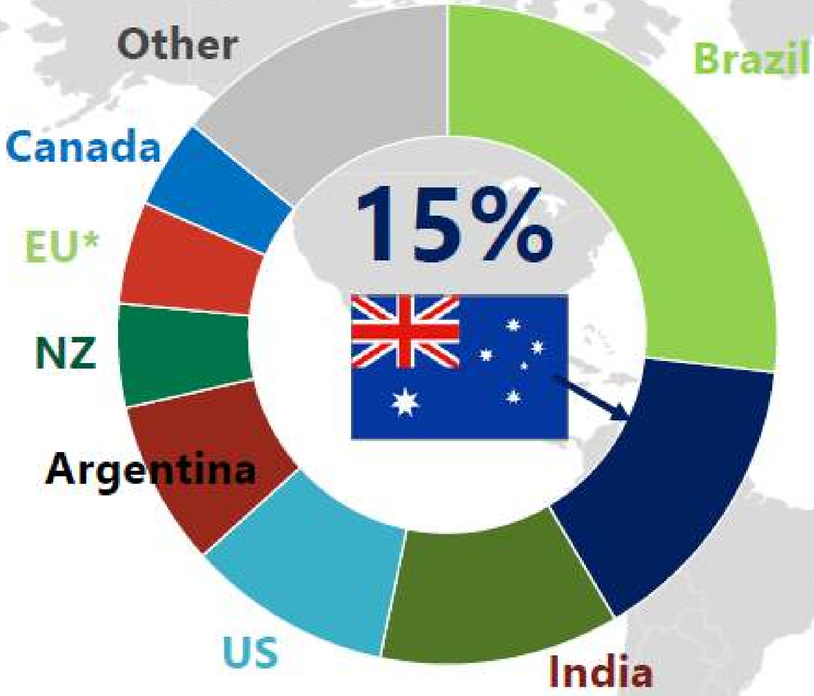
Australia's place in the world: Beef

Global production



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

Exports

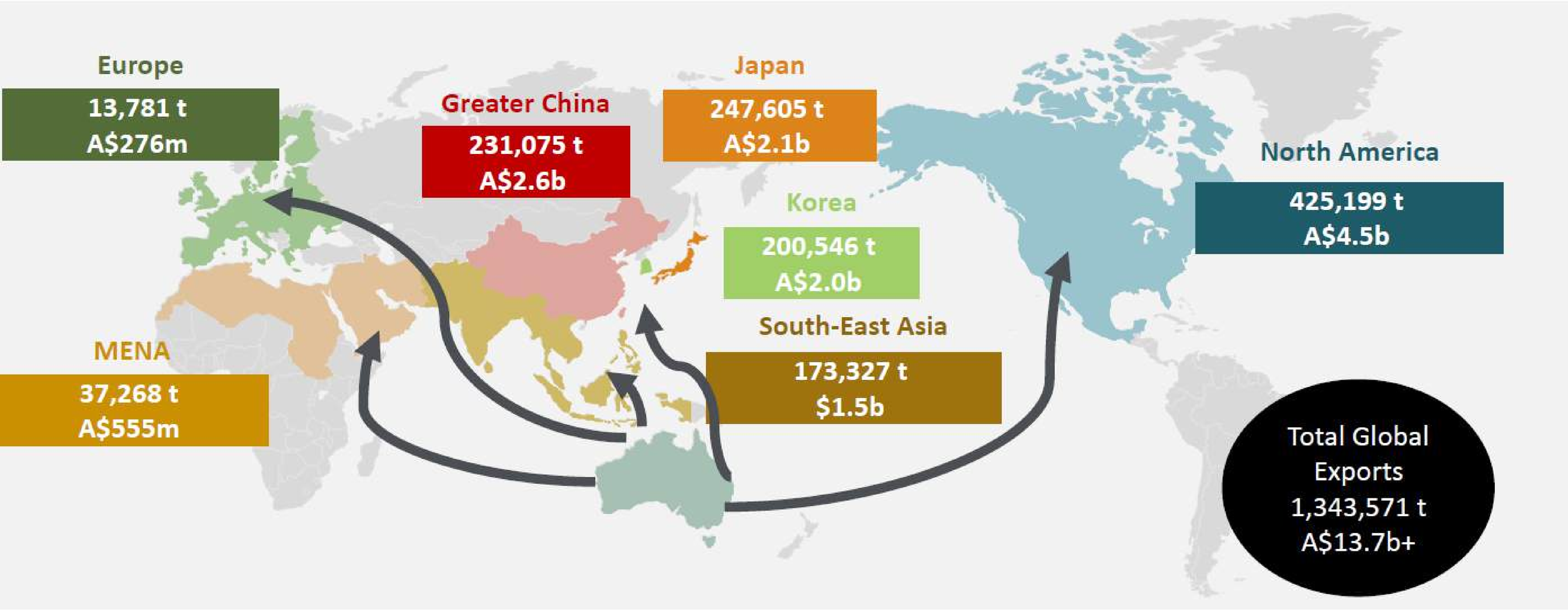


Source: Trade Data Monitor (TDM, MAT November 2024, India's statistics include buffalo meat

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

MEAT & LIVESTOCK AUSTRALIA

Global market overview: Beef exports value & volume



Source: DAFF, S&P MI Global Trade Atlas (GTA), 2023

What makes Aussie Wagyu unique?

What is Aussie Wagyu?

- Second largest Wagyu herd in the world
- Largest Wagyu exporter in the world
  - ~300,000 head
  - 85% Aus Wagyu is exported (67,000t +)
- Ranges F1 to fullblood from 100% Japanese blood lines
  - 70%+ crossbred (F1-F3)
  - <30% Fullblood | or Purebred (F4+)
- Dominant cross: F1 Wagyu x Angus

How did Wagyu develop globally?

Wa = Japanese

gyu = cow

- Cattle were introduced into Japan after the second century AD
- Used as farm animals until the 1860s – meat eating was prohibited until then
- Other cattle breeds were introduced into Japan in 1867, which were crossed with Japanese Black (Black Wagyu) and Japanese Brown (Red Wagyu)
- 221 Fullblood Wagyu cattle were exported from Japan in the 1990s
- Renowned for it’s high intramuscular fat

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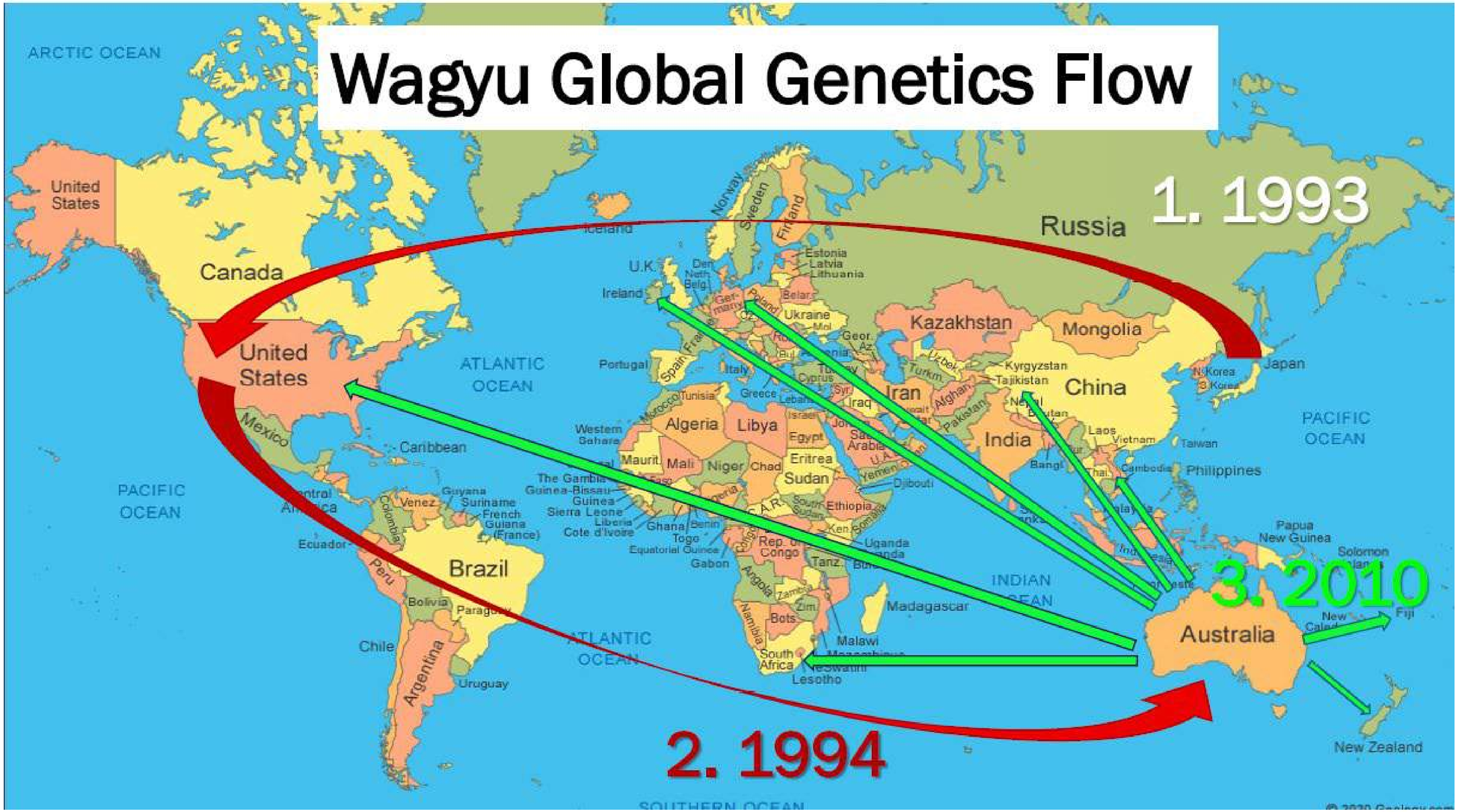
How did Wagyu develop globally?



How does Wagyu achieve higher marbling?

- Marbling is the white **intra**muscular fat (IMF) that is dispersed throughout the muscle
- IMF is from **inter**muscular fat, which is the fat on the outside of the muscle
- Marbling contributes to the flavour and juicy mouth feel
- Wagyu cattle possess a higher concentration of muscle-inhibiting genes called ‘myostatins’
- Intramuscular fat is the last fat an animal will lay down
- While wagyu cattle have the genetic potential for more IMF – feeding is what brings it out

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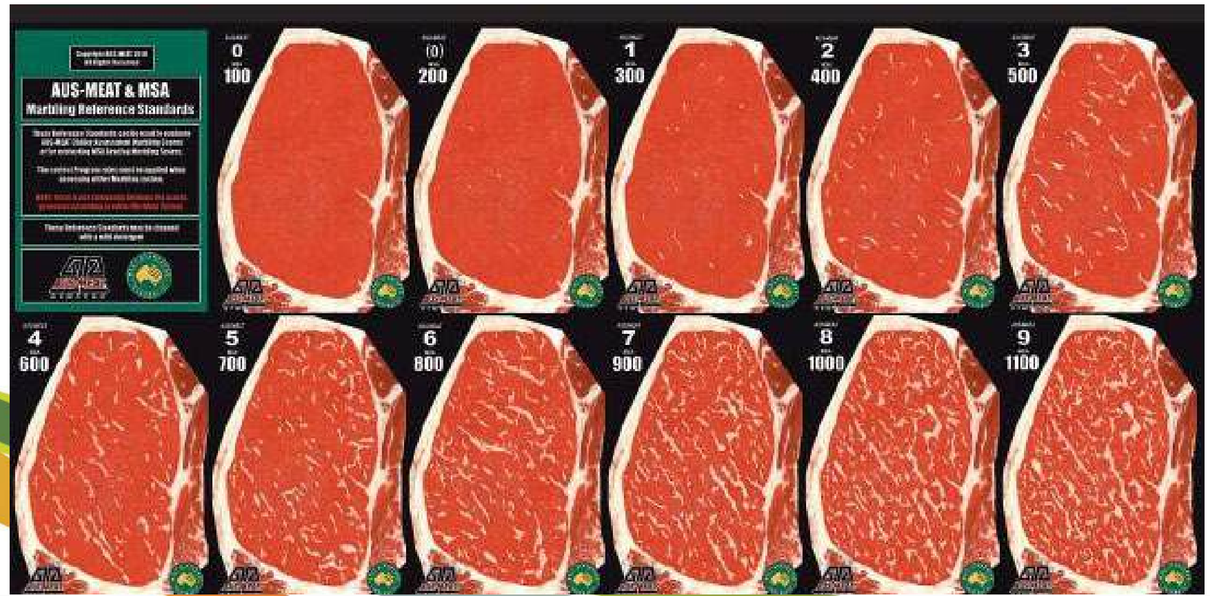
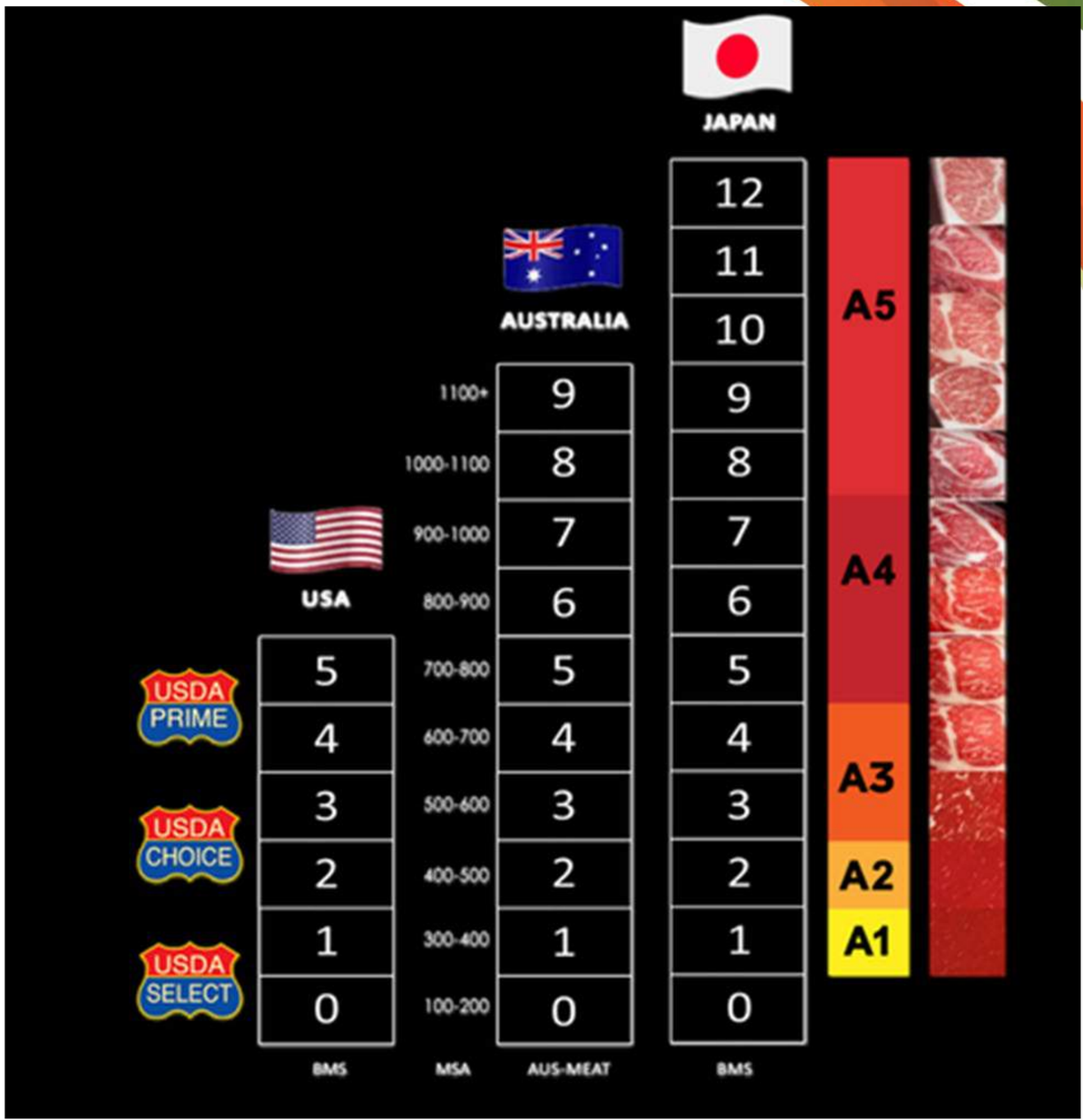
Difference in Aussie marbling grading

- In Aus, the amount of fat within the muscle is graded using the Aus-meat grading system – ranging from 0-9+
- MSA assessors also measure fineness and distribution
- MSA marbling is scored from 100-1190 in increments of 10.





Aussie Wagyu genetics

Michifuku, an influential Fullblood Wagyu sire in Australia

- Australia started importing Wagyu in 1990s
- 35 years on, Australia has the highest number of Wagyu outside Japan
- Three major black Wagyu strains:
  - Tajiri or Tajima
  - Fujiyoshi (Shimane)
  - Kedaka (Tottori)
- Red Wagyu strains:
  - Kochi
  - Kumamoto
- 95% of Wagyu uses Black Wagyu

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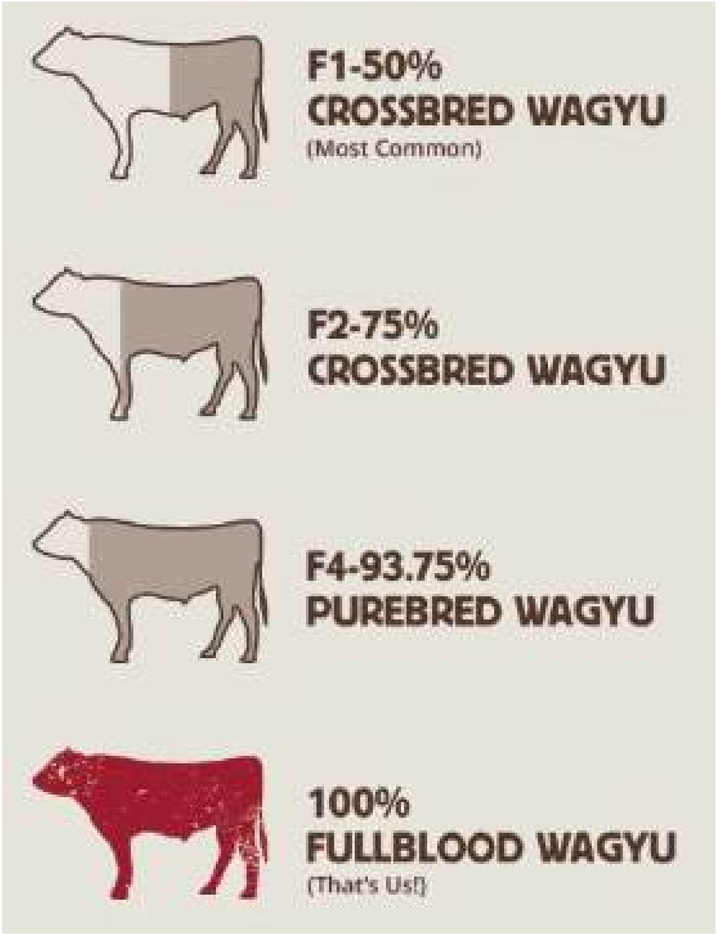
Aussie Wagyu genetics



GENERATION	MIN. % WAGYU CONTENT
0 = Base Animal	Less than 50%
1 = Crossbred Wagyu F1	50+%
2 = Crossbred Wagyu F2	75+%
3 = Crossbred Wagyu F3	87+%
4 = Crossbred Wagyu F4	93+% Purebred if parent verified to sire and dam
Purebred	93+% + PV
Fullblood	PV to 2 Fullblood parents

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Aussie Wagyu genetics

X

Non-Wagyu Female

=

F1 Wagyu Calf

X

F1 Female

=

F2 Wagyu Calf

X

F2 Female

=

F3 Wagyu Calf

X

F3 Female

=

F4 Wagyu Calf

Feeding Aussie Wagyu

- Australian Wagyu typically spends less time on feed (300-500 days) compared to Japanese Wagyu which spend 600+ days on feed.

- Grain feeding mixes in Australia are developed by animal nutritionists and comprise grains (such as wheat, barley and sorghum), protein (sunflower and lupins), vitamins and minerals and is designed to be highly digestible

- Feedlots must meet stringent environmental, waste, planning and animal welfare legislation

- So will spend more of its life out on pasture, roaming on vast grazing lands

- As a result, Australian Wagyu typically has a subtler, more meat-forward, beefier flavour profile.

Sustainability, consistency & trust

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)

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Key sustainability achievements so far…

Australian beef producers have **reduced the water used in raising cattle by 73%** since 1985.

Almost **160m ha** of **beef grazing land** managed for **biodiversity**.

Bioenergy overtook on-site coal use as the **third largest source of energy** in the Aus red meat **processing sector.**

81% of producers are adopting practices to **improve soil water retention.**

78.6% reduction in net **carbon emissions** since 2005 (beef and sheepmeat)

Carbon sequestered through vegetation on beef cattle properties **increases to 31.31Mt CO_2e.**

58% of beef producers are either **purchasing renewable energy or generating their own** on-farm.

New and improved **genetic selection** tools allowing sheep producers to **select for sustainability traits.**

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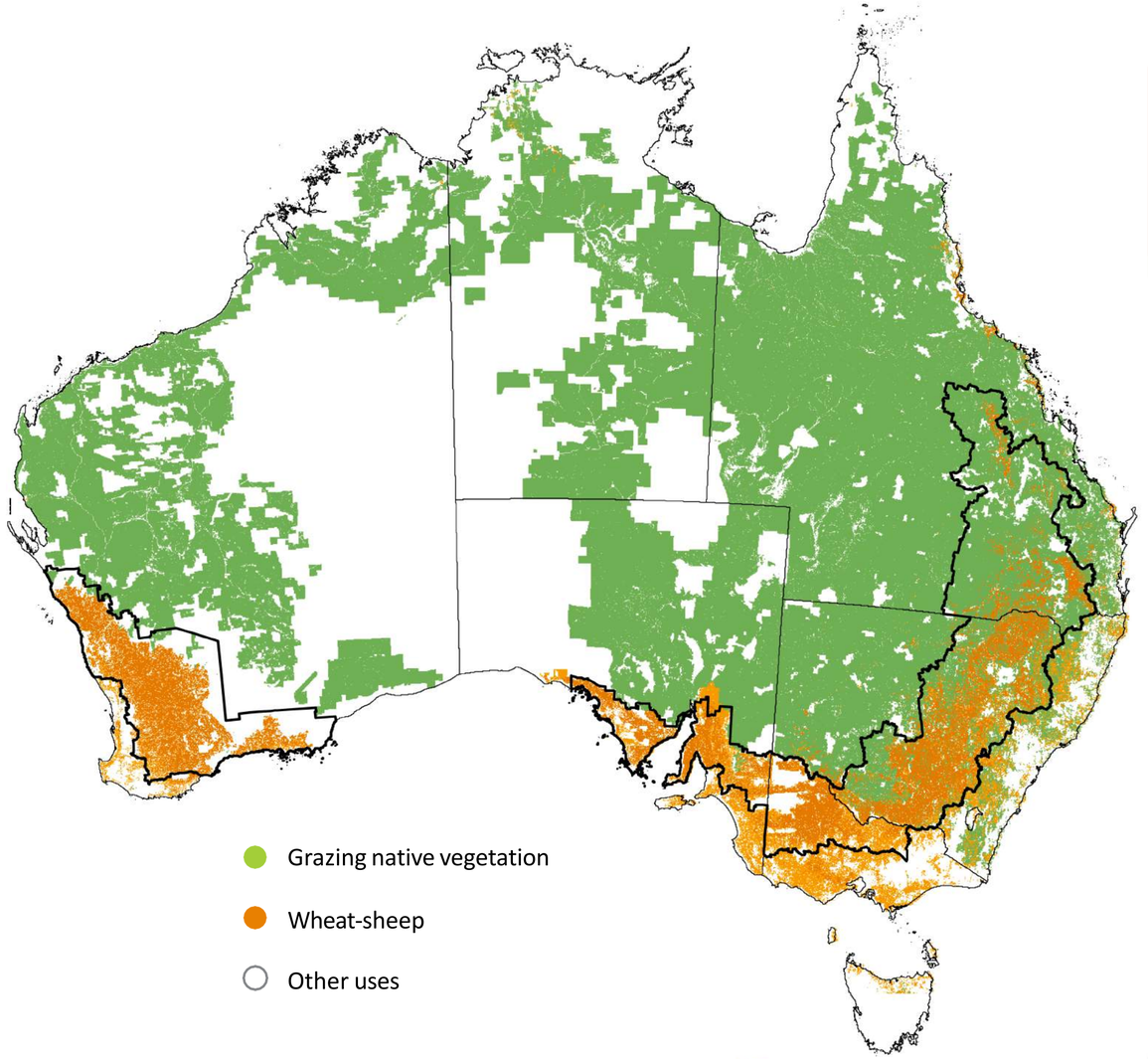
Fit-for-purpose animal welfare standards

- World-leading farm assurance standards governed by Australian Animal Welfare Standards & Guidelines
- Developed for Australia’s unique environmental landscape
- Lifetime traceability of stock throughout supply chain
- Industry aspires to 100% use of pain relief & polled genetics
- Livestock transporters responsible for journey plans, rests, feed, water and safe handling during loading/unloading.



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CN30 | Carbon Neutral 2030

Voluntary target for the Australian red meat industry to achieve **net zero greenhouse gas** (GHG) **emissions** by 2030.

GHG emissions released in production

Carbon stored in soils and vegetation

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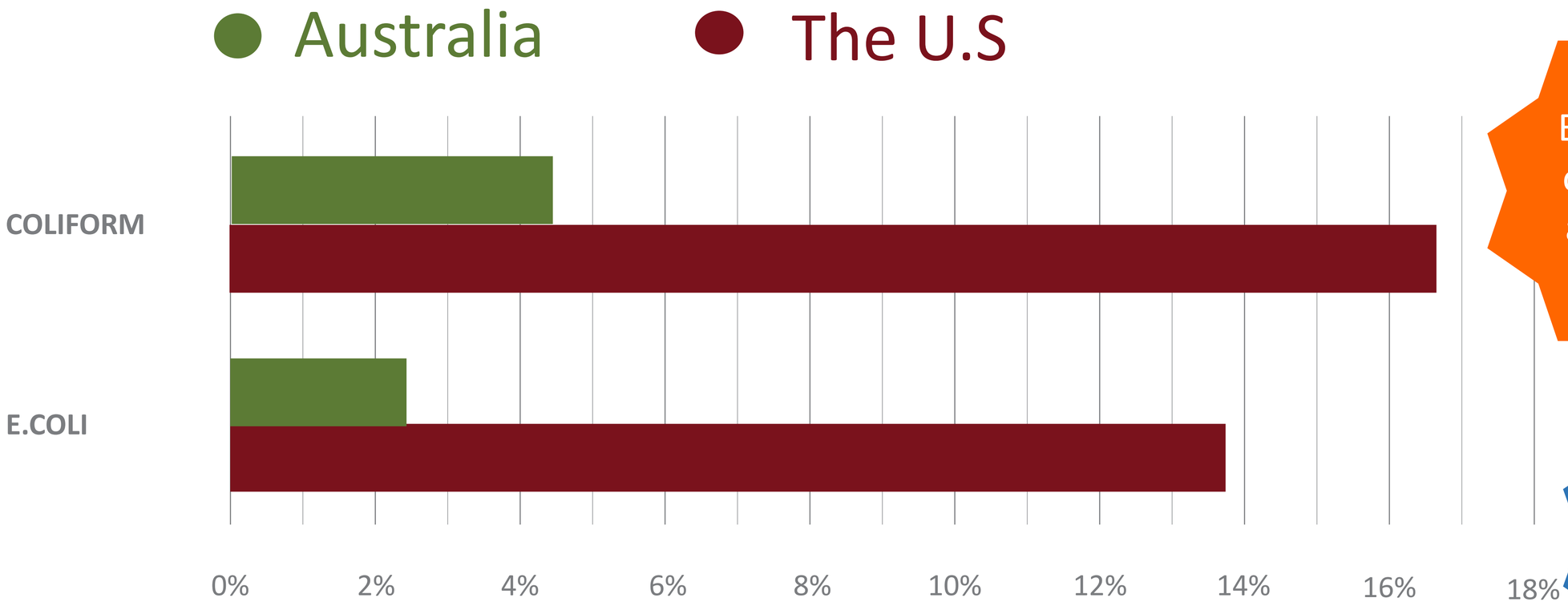
Leading food safety stds = longer shelf life

Carcase microbial survey of Australia and The U.S of E.coli and Coliform presence:



Beef shelf life of at least 12 and up to 20 weeks!

Chilled lamb shelf life up to 12 weeks

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Benefits of wet ageing

- Meat ageing occurs as muscle fibres are slowly broken down by naturally occurring enzymes, resulting in more tender beef with improved eating quality.

- The ageing process doesn’t affect the appearance or safety of the meat, as the breakdown of muscle fibres occurs at a microscopic level with no visible change in the product.

- **This means the journey from Australia improves the eating quality of your beef and lamb as it makes its way to you.**

Get the quality you pay for, every time

- Aus beef and sheepmeat eating quality grading system is recognised as the world's leading
- MSA consumer taste tests all around the world found definition of **quality is consistent, globally**
- **Every single cut** of beef and sheepmeat receives its **own predicted eating quality score**
- If a cut doesn't meet a min level of quality, it doesn't receive the MSA stamp

2MIL consumer taste tests with 250,000+ consumers from 13 countries.

MSA backed Aus brands will deliver the same high-quality taste, juiciness and tenderness, every single time, without fail.

MEAT STANDARDS AUSTRALIA GRADED

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How does MSA compare to USDA?

USDA PRIME

- Whole carcasse quality grade based on marbling and maturity (ossification)
- Producer-focused grading to justify carcase value
- All **primals** receive the same grade = less ability to differentiate quality.

MEAT STANDARDS AUSTRALIA GRADED

- Individual cut-based eating quality prediction – accounts for ageing and cooking method
- Scientifically measures all 14 factors from paddock to plate that influence eating quality
- Individual **primals** receive their own grade – extract more value out of each cut

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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

Identification & Traceability

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

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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