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A Ten-Year Growth Plan for Australia's Live Cattle Industry (2026-35)



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The Plan

This Live Cattle Growth Plan (Plan) has been developed by ALEC and LiveCorp with extensive support from individuals and representative bodies from the beef and dairy cattle industry and government.

These groups have come together in the spirit of shared values and enduring cooperation in recognition of the industry's contribution to regional communities, our overseas neighbours, and the global food system.

By setting a Plan, the industry can take control of its destiny through a roadmap for growth over the decade 2026-35.

KEY OUTCOMES

- Grow government and community support
- Establish a stable policy and regulatory environment
- Foster commercial investment and drive growth
- Increase confidence within the live cattle export industry
- Achieve long-term sustainability

CORE OBJECTIVES

Government support
Informed government policies and actions consistently support the future of live cattle exports.

Community support
Community sentiment shows steadily rising support for an industry whose role and contribution are recognised.

SUPPORTING OBJECTIVES

Animal welfare
The industry demonstrates sustained leadership and performance in animal welfare

Effective regulation
A model regulatory framework successfully balances government and community expectations with commercial realities

International support
New markets, rising trade levels and deeper relationships with importing countries

Industry competitiveness
The industry functions as an efficient, effective and integrated supply chain, from production to consumption

Purpose of the Plan

The Plan provides an agreed framework under which the entire supply chain can work together, from cattle producers to customers in market, and those in between.

The desired outcome is to:

- grow government and community support
- establish a stable policy and regulatory environment
- foster commercial investment and drive growth
- increase confidence within the live cattle export industry
- achieve long-term sustainability.

The core objectives of the Plan are to secure sustained government and community support for the live cattle export industry.

Governments must be engaged at every level through effective representation and advocacy to avoid the industry being impacted by ill-informed decisions. Clear policy support also encourages banks, insurers and long-term investors such as shipping companies to participate more confidently in the sector.

Community sentiment can drive government policies, and clear communication and engagement with the Australian community is required to ensure the industry's role, safeguards and positive contributions are understood.

A range of supporting objectives create a foundation for coordinated effort in pursuit of the core objectives and, in turn, will be strengthened by their achievement:

- Verifiable leadership in animal welfare across the entire supply chain is fundamental to maintaining trust in the industry. Continuous improvement, transparency and accountability are essential.
- A regulatory framework that is robust, transparent and outcomes-focused provides confidence to governments, communities and trading partners. Constructive collaboration between industry and regulators is essential to ensure regulatory frameworks remain effective and practical.
- Strengthening and expanding current markets, as well as opening new ones, allows for greater trade opportunities for exporters.
- Improved efficiency, integration and innovation strengthen the global competitiveness of Australian live cattle exports.





Objective 1: Government support

Informed government policies and actions consistently support the future of live cattle exports.

The live cattle export industry is legitimate. It is a responsible enterprise that has a useful, positive and beneficial role to fulfil. We have every reason to be proud of it, and every reason to stand up for its future, as contributors to outcomes of national and international significance.

Clear and sustained multi-level government support for live cattle exports is critical to the future of the industry. Well-argued, positive, helpful and sustained representations are the most effective ways to increase understanding of the industry and appreciation of its many national and international contributions.

This Plan will strengthen the industry's presence and influence by amplifying and multiplying the number of voices that speak in its favour, domestically and internationally.

Clear and supportive statements and actions by government about the industry, its importance, its contribution and its future will, in turn, support a conducive investment environment. This will include even greater recognition by banks and other financial institutions of the prospects of the industry if it is properly and fairly supported, helping to fund improvements in operations and infrastructure.

In the years ahead, it is imperative that we:

- ***Develop and execute a whole-of-government, multi-year representation and advocacy plan in a joint effort that mobilises peak body and industry resources.***

Leadership: ALEC	In close collaboration with Cattle Australia and Australian Dairy Farmers With the active support of state and territory producer groups and livestock export associations

Objective 2: Community support

Community sentiment shows steadily rising support for an industry whose role and contribution are recognised.

Government support and community support are two sides of the industry's social licence coin.

It is critical to have positive community sentiment toward live cattle exports, and we know how deeply that sentiment carries into the halls of parliament. We also know how much of it centres on the protection and enhancement of animal welfare as an integral part of the trade. Without these fundamental permissions, the industry would face significant constraints.

Surveys in recent years tell of a steady and material improvement in the levels of trust placed in the industry. The regulatory framework supports increased public comfort because of the assurances and guardrails it provides — a confidence strengthened further by the industry's performance improvements. We can also see a rising appreciation of the benefits that the trade brings not only to the nation but to its importing partners.

Fostering community support demands continuous attention and effort, both to protect the gains made and to build upon them.

Industry must speak effectively to the community. It must address community cares and concerns and, beyond that, enable the community to express its support for the trade to governments and weave the live export strand into the broader conversations on the future of Australian agriculture.

Achieving these outcomes requires effective leveraging of available industry resources, channels and platforms.

In the years ahead, it is imperative that we:

- ***Develop and execute a multi-year community communications plan that emphasises the human face of the industry and its activities; and presents and promotes its contribution as a force for economic, financial, environmental and social good, domestically and in importing countries.***

Leadership: ALEC	In close collaboration with LiveCorp and Meat & Livestock Australia With the active support of Cattle Australia, Australian Dairy Farmers, state and territory producer groups, livestock export associations, The Livestock Collective.





Domestic beef and dairy cattle producers

A priority of this Plan is to grow the industry's voice among government and community audiences, ensuring it is strong and united. This will expand on the broad foundation of support which already exists among domestic beef and dairy cattle producers.

It is vital that concerted efforts are made to increase recognition of the mutual prosperity of livestock producers and exporters, and promote the unity of these interests to their businesses and future.

This makes the campaign to increase collaboration between the domestic beef and dairy cattle industries and the live export industry a priority for its message-amplifying power. Enlisting the vocal support of the domestic cattle production community will be a major advance in the broader education, information and communication agenda embedded in this Plan, for government and the wider public.

In the years ahead, it is imperative that we:

- ***Orchestrate and execute a thorough information-sharing and support-garnering campaign among domestic beef and dairy cattle producers to have them recognise and speak up in favour of the live export trade, the viability and prosperity of which are so closely tied to that of their own.***

Leadership: national, state and territory producer groups	In close collaboration with ALEC, LiveCorp and Meat & Livestock Australia

Addressing mis- and dis-information

Governments can be sensitive to community opinion and its shifts, and the livestock export industry faces ongoing campaigns by activists who are generally well organised and funded. Their goal is not improvements in welfare, but the complete cessation of the trade.

Industry must pro-actively tell its story more clearly, more compellingly and more consistently than it ever has, backed by facts and science. Where mis- or dis-information is spread, industry must set the record straight assertively, swiftly and effectively.

In addition, industry must remain alert to the arguments pressing for reductions in red meat consumption in favour of alternative proteins or in herd sizes on environmental management grounds. Given that the bodies putting forward these arguments are national and international in nature, it is important that the industry's voice can join that of bodies representing Australia's positions on red meat and environmental management, in the domestic and international forums concerned with those issues.

In the years ahead, it is imperative that we:

- ***Maintain a proactive, assertive, effective and sustained stance against the propagation of mis-information and dis-information about the industry, whatever the source and dissemination methods used.***
- ***Add the livestock export voice to debates over red meat consumption and environment management as part of Australia's red meat industry, in both domestic and international forums.***

Leadership: ALEC	In close collaboration with Cattle Australia, Australian Dairy Farmers and LiveCorp With the active support of state and territory producer groups, livestock export associations and The Livestock Collective



Objective 3: Animal welfare

The industry demonstrates sustained leadership and performance in animal welfare

Animal welfare is not only a matter of verifiable statements and reported statistics. It is, first and foremost, the visible demonstration of a deeply ingrained and consistent industry-wide culture.

The livestock export industry has achieved significant progress over the past decade when it comes to animal welfare. Improvements have been brought about through many means: research and development, training, advances in infrastructure, collaborative partnerships and evidence-inspired improvements to policy. Above all, it has been a group effort.

However, the industry must remain vigilant: achievements should not only be consolidated but built upon across the length of the supply chain where science and evidence support them and it makes regulatory and commercial sense to do so.

While each and every component of this Plan is critical to the fulfilment of the 2035 ambition, we cannot lose sight of the fact that all depend on the industry's performance and leadership in animal welfare: government expects it as a condition of its support, as does the community.

We also know from experience that breaches anywhere along the supply chain, from the farm gate to destination markets, can have deeply damaging and long-lasting consequences. Where they occur, they affect confidence and trust in the industry.

This is why animal welfare is the foundation of the industry's future and the permanent condition of its licence to operate. In the years ahead, rigorous standards must continue to be met, and be seen to be met; transparency must be the hallmark of operations, nowhere more so than when events occur; and improvements must continue to take place.

In the years ahead, it is imperative that we:

- ***Maintain current standards and improve them further through sensible, science-supported changes to our policies and practices.***
- ***Address any issues, should they arise, frankly, transparently and swiftly.***

Leadership: industry participants	In close collaboration with ALEC and LiveCorp



Objective 4: Effective regulation

A model regulatory framework successfully balances government and community expectations with commercial realities

A strong, transparent and efficient regulatory framework is an integral part of political and community confidence in the industry and its operation by assuring industry performance to agreed standards and protocols.

There has long been concern about the commercial viability of the industry, should the regulatory framework continue to evolve along the restrictive lines particularly evident in recent years.

Exporters point to the number and complexity of the processes affecting operations, to inconsistencies in their application, as well as ageing, inefficient systems in need of upgrade for the benefit of all involved. Continuous pressures on the cost of regulatory services compound these efficiency-based issues and materially increase the regulation-related burden.

As the regulatory agency, meanwhile, the Department of Agriculture, Fisheries and Forestry (department) navigates the wants and requirements of multiple stakeholders: it is bound to apply and administer legislation enacted by Parliament; it must contend with pressures exerted by the industry's opponents; take account of community expectations; and service industry needs.

And while the government has shown a willingness to pursue improvements in its administrative mechanisms, limited resources and funding have so far constrained its efforts in that direction.

Above all, the tone of relations between the department and industry must evolve into a collaborative one, marked by common sense, mutual respect, efficiency, effectiveness and transparency over the years of the Plan.

Bringing about that shift in tone will require that industry:

- include the department in its efforts to reshape the broader relationship it has with government
- continue to foster constructive dialogue with the department through mechanisms that will enable this
- take every opportunity to assist the department in rationalising, streamlining and modernising its processes and practices[1]
- steadfastly argue the case for sensible regulation — i.e. regulation that satisfies obligations while having due regard for the operational, environmental and commercial implications arising from the application of the regulatory framework.

The partnership between the industry and the department (and other regulators, as appropriate) is an obligatory one. Within that partnership, industry and the department must make every effort to ensure that regulatory instruments, administrative processes and oversight frameworks are focused on outcomes, integrated and efficient in application, effective and transparent in practice, and, overarchingly, serve both trade and animal welfare equally.

In the years ahead, it is imperative that we:

- ***Develop and execute a collaborative, multi-year work plan with the department and industry (and, where appropriate, other regulators).***

Leadership: ALEC	In close collaboration with LiveCorp With the active support of industry participants

1 Including better presenting its own independent assurance credentials in a bid to lighten the regulatory impost

Objective 5: International support

New markets, rising trade levels and deeper relationships with importing countries

The Australian livestock export industry offers a particularly compelling proposition to importing markets: high-quality, disease-free cattle coupled with a remarkable record in consignment delivery.

The industry has developed an enviable set of market access arrangements, many of them long-standing and providing significant social and food security benefits. These need to be protected, and every effort made to grow and extend the industry's reach.

The Indonesian market has been the largest and most consistent importer of Australian cattle for decades, and this remains the case. Its feedlot sector and Australia's northern pastoral industry have developed hand-in-hand, creating a single supply chain extending from Australian breeding farms through to value-adding feedlots in Indonesia. Thousands benefit from this close relationship in both countries.

For the purposes of this Plan, we expect Indonesia will continue to be Australia's primary (and, by virtue of its size, critical) live cattle market. That said, we must also recognise that it is (and has long been) an attractive market for competitors, for both beef and dairy cattle. The industry must be pro-active, building on its track record of engagement to deepen and expand its existing dealings and partnerships.

Deeper, strategic partnerships capable of serving the interests of both the Australian and Indonesian Governments are also an important part of this Plan, in parallel with more transactional ones. The fact that, over the next 30 years, Indonesia is expected to become the world's fourth largest economy, speaks to the size of the opportunities likely be on offer for Australia's live cattle exports.

Beside Indonesia, we cannot lose sight of the wider South East Asian market. Geographically close, many of the countries in the region have growing economies. Many of them are, or have been, importers of Australian cattle. They will present their share of opportunities between now and 2035.

Nor can we neglect opportunities associated with the rising global demand in North Asia, the Middle East, North Africa and North America. While Australian exports face strong competitors in these regions, Australian cattle are well-regarded and valued for their quality. Continued efforts to create and capture opportunities in these environments will help diversify the industry's profile, enhance its reputation and mitigate the risk of overconcentration.

Over the coming decade, it will be important for the industry to develop mechanisms for better co-ordinated opportunity spotting and capture in both new and existing markets. To protect market access, ongoing efforts will also be required to protect Australia's biosecurity and support capacity building in importing countries to slow the spread of animal diseases.

In the years ahead, it is imperative that we:

- ***Develop and share a comprehensive, integrated analysis of live beef and dairy cattle export market prospects for 2026-35.***

Leadership: LiveCorp	In close collaboration with ALEC and Meat & Livestock Australia With the active support of state and territory producer groups and livestock export associations

Objective 6: Industry competitiveness

The industry functions as an efficient, effective and integrated supply chain, from production to consumption

In an environment of rising competition and costs, protecting and enhancing industry profitability are critical elements of any long-term supply chain sustainability.

The industry's ability to access, expand and meet market demands, and optimise profitability in the face of cost pressures, depends in many respects on the degree of efficiency it achieves. Extracting the efficiency gains that integrated supply chain processes would produce (particularly through technology, data integration and artificial intelligence) over the ten-year span of the Plan would provide multiple benefits on top of desirable cost savings.

By providing access to real-time performance data, these advances would support speedier, better-informed and more transparent decision-making. The assurance demands of markets, regulators and institutions would also be met with greater ease, speed and accuracy with less administrative cost and burden.

With the broader agriculture and red meat sector rapidly moving toward technology and data-driven efficiency and assurance, the live cattle export sector cannot afford to be left behind when it comes to increasing efficiency and performance.

In the years ahead, it is imperative that we:

- ***Introduce those process improvements and technology/AI-driven advances required to bring about the full integration of supply chain operations and so, enable real-time performance monitoring and decision-making.***

Leadership: LiveCorp	In close collaboration with Meat & Livestock Australia and industry participants





While livestock shipping capacity has always involved a measure of ebb and flow, recent years have witnessed the retirement of several vessels and a marked concentration in the number of shipping companies servicing Australia. If the industry's export growth ambitions are to be realised, new vessels will be needed, and existing ones must be attracted back to Australia.

Commissioning the construction of additional ships depends on assured longer-term market prospects and evident government and community support for the industry. These conditions are essential if investors (local and/or international) are to commit the necessary funds.

It is also important to acknowledge the complexities posed by the exacting regulatory framework for shipping out of Australia, administered by the Australian Maritime Safety Authority (AMSA).

Industry is proud of the world class standards maintained by the requirements. However, it is vital the framework is delivered in a cost-effective and efficient way to support the industry's operations. Consideration should also be given to how globally operating vessels could be incentivised to obtain the required AMSA approvals.

Continued investment in building stronger relationships between the industry and AMSA would help to support these outcomes.

In the years ahead, it is imperative that we:

- ***Identify such measures as are available to mitigate the risks arising from the limitations of the current shipping model.***
- ***Explore longer-term solutions to the industry's shipping needs as a condition of its longer-term sustainability and growth, for discussion with potential backers and investors.***

Leadership: ALEC	In close collaboration with industry participants and ship owners

Delivering the Plan

National and state-based livestock export and producer bodies play an important role in achieving the objectives of the Plan, which will also play a part in guiding industry strategy and levy investment over the next ten years.

An overarching implementation group and a series of working groups have been set up to develop and implement workplans to deliver activities across priority areas.

Principles not addressed by the working groups will be covered by ALEC, LiveCorp and Meat & Livestock Australia (including the jointly funded Livestock Export Program) in alignment with their individual Strategic Plans.

Working groups

The **Cattle Plan Implementation Group** is responsible for strategic direction and overall program governance, overseeing the activities of other groups and monitoring progress, and ensuring alignment across operational and cross-sector activities.

Membership: LiveCorp, ALEC, exporters, Cattle Australia and Meat & Livestock Australia/Livestock Export Program

The **government engagement working group** coordinates structured, consistent and evidence-based engagement with government and other parliamentarians to support a stable, informed and durable policy environment for Australia's live cattle export industry.

Chair: ALEC	**Membership:** ALEC, Cattle Australia, Australian Dairy Farmers, Northern Territory Cattlemen's Association, AgForce Queensland and Kimberley Pilbara Cattlemen's Association

The **community engagement working group** develops, maintains, and coordinates a robust, credible and evidence-based articulation of the live cattle export industry's economic contribution, strategic and geopolitical importance, supply chain role, regional impact and international value.

Chair: Meat & Livestock Australia	**Membership:** ALEC, LiveCorp, Cattle Australia, Dairy Australia, Northern Territory Cattlemen's Association, AgForce Queensland and Kimberley Pilbara Cattlemen's Association

The **regulation and animal welfare working group** supports and strengthens confidence in the live cattle export system as industry continues to demonstrate high standards of animal welfare, regulatory compliance and transparency.

Chair: LiveCorp	**Membership:** ALEC, LiveCorp, Cattle Australia, Meat & Livestock Australia, Australian Dairy Farmers and Dairy Australia



LIVE CATTLE GROWTH PLAN

- Grow government and community support
- Establish a stable policy and regulatory environment
- Foster commercial investment and drive growth
- Increase confidence within the live cattle export industry
- Achieve long-term sustainability

IMPLEMENTATION GROUP

Government engagement working group
Coordinate structured, consistent and evidence-based engagement with government to support a stable, informed and durable policy environment for Australia's live cattle export industry.

Community engagement working group
Develop, maintain, and coordinate a robust, credible, and evidence-based articulation of the live cattle export industry's economic contribution, strategic and geopolitical importance, supply chain role, regional impact and international value.

Regulation and animal welfare working group
Support and strengthen confidence in the live cattle export system by ensuring the industry continues to demonstrate high standards of animal welfare, regulatory compliance and transparency.

CORE OBJECTIVES

Secure sustained government and community support for the live cattle export industry.



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