

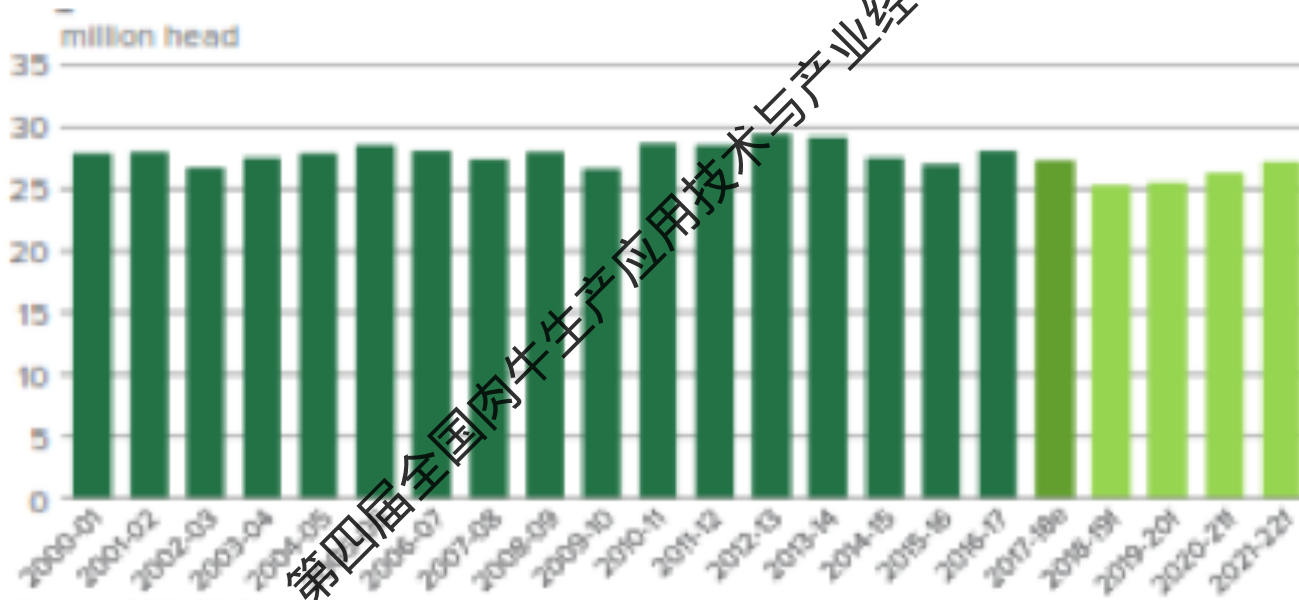
The Australian Beef Industry and the Live Export Process



- Australian Beef Herd –currently estimated at 25.2 million head
- Lowest for a number of years
- Still large numbers of females beginning slaughtered
- Highly impacted by the drought
- Herd numbers state by state

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Current herd numbers



Source: ABS, MLA estimates

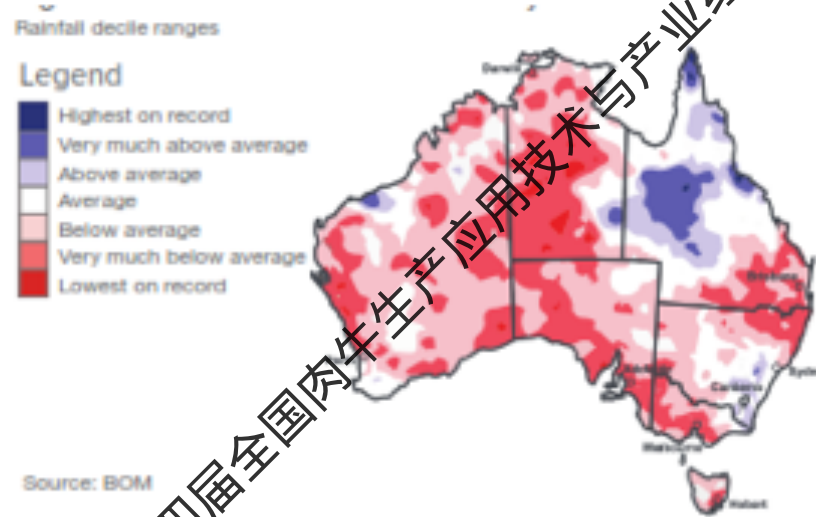
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Female slaughter numbers



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Dry conditions continue

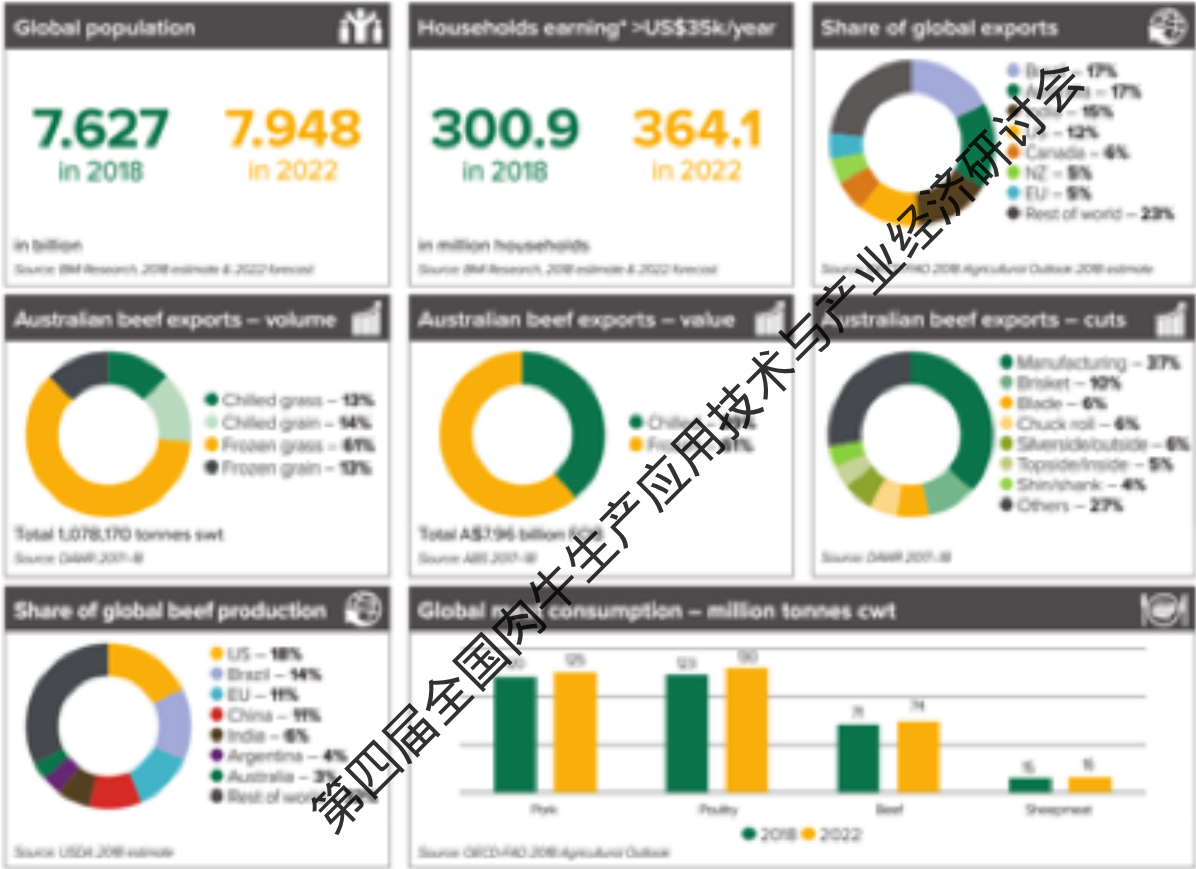


Key Numbers

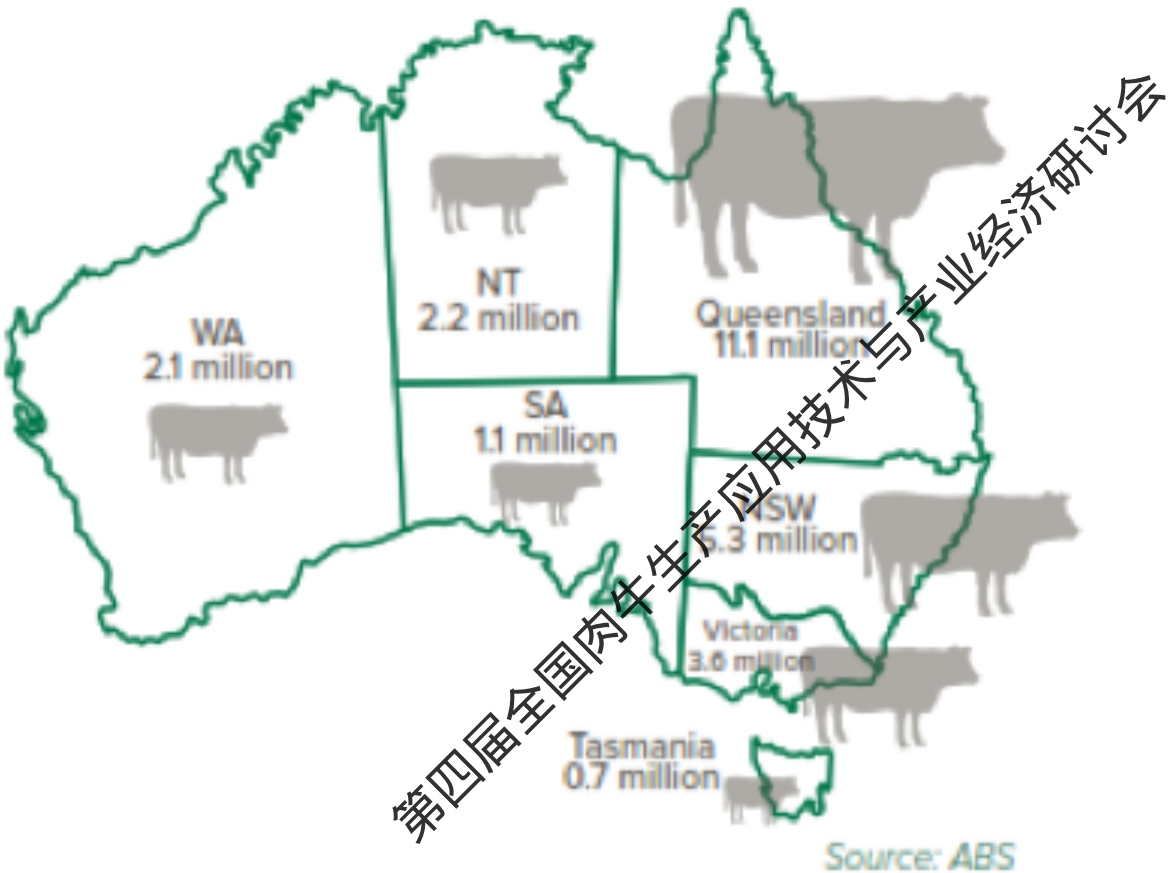


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Key Numbers



Herd numbers by State



Southern Beef Industry



- British Breed
- Small percentage of European breed cattle
- Majority Angus
- Shorthorn, Hereford
- Wagyu premium beef



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North Australian Beef Herd



- Bos indicus cattle
- Main market is the live export trade to South East Asia
- Large land holdings
- Natural pastures

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The Live Export Process



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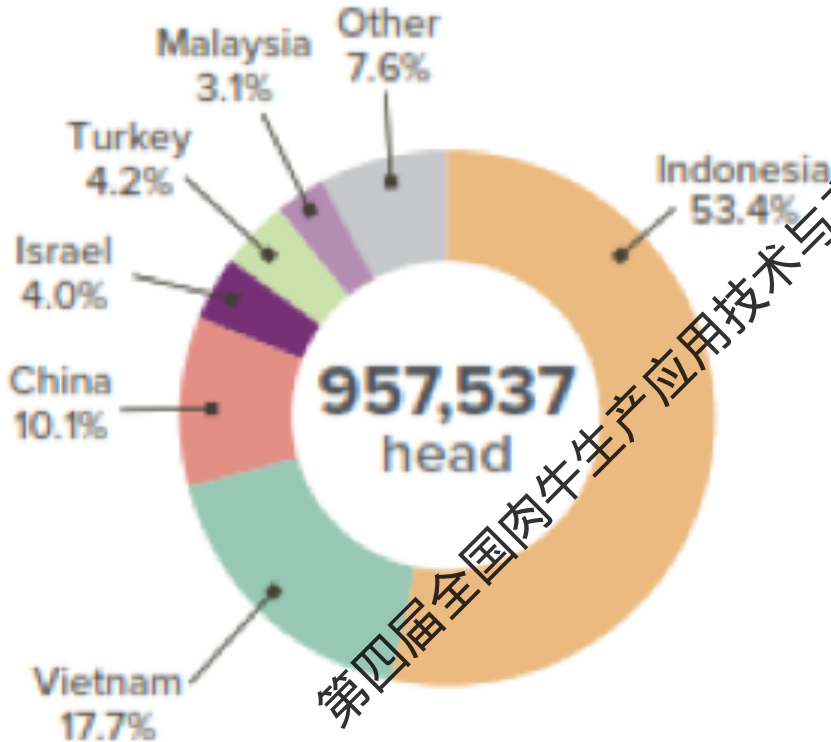
- Well established breeder trade between China and Australia
- Highest of standards throughout the supply chain
- Protocol between both countries is of the highest standard
- CIQ work with exporters at every stage of the supply chain

- Australia's disease free status is significant
- Quarantine period in Australia is 30 days
- Quarantine in China is 45 days
- Voyage duration is 16-18 days
- New regulations in Australia require more space per animal for the voyage meaning less animals on the ship

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Australia's Live Export markets

Australian live cattle exports*

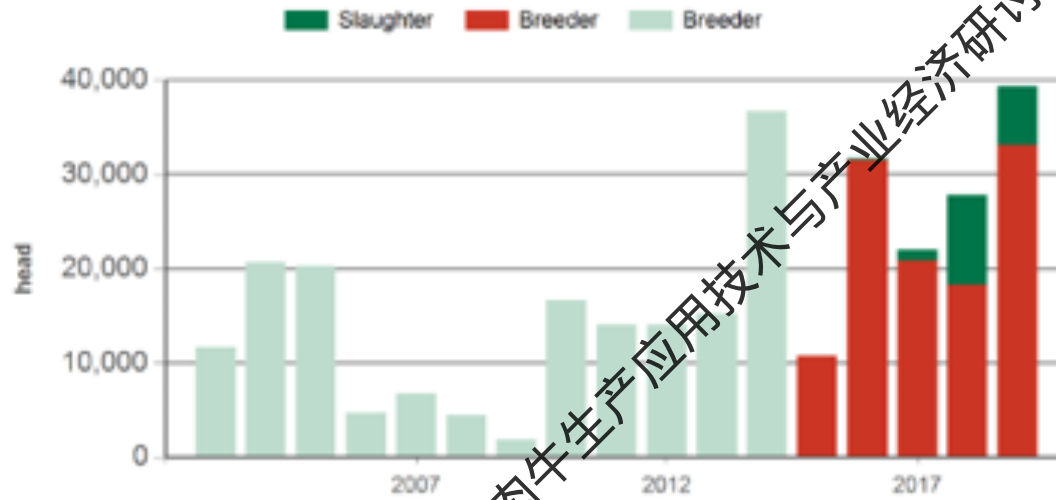


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* includes dairy cattle
Source: DAWR, 2017-18



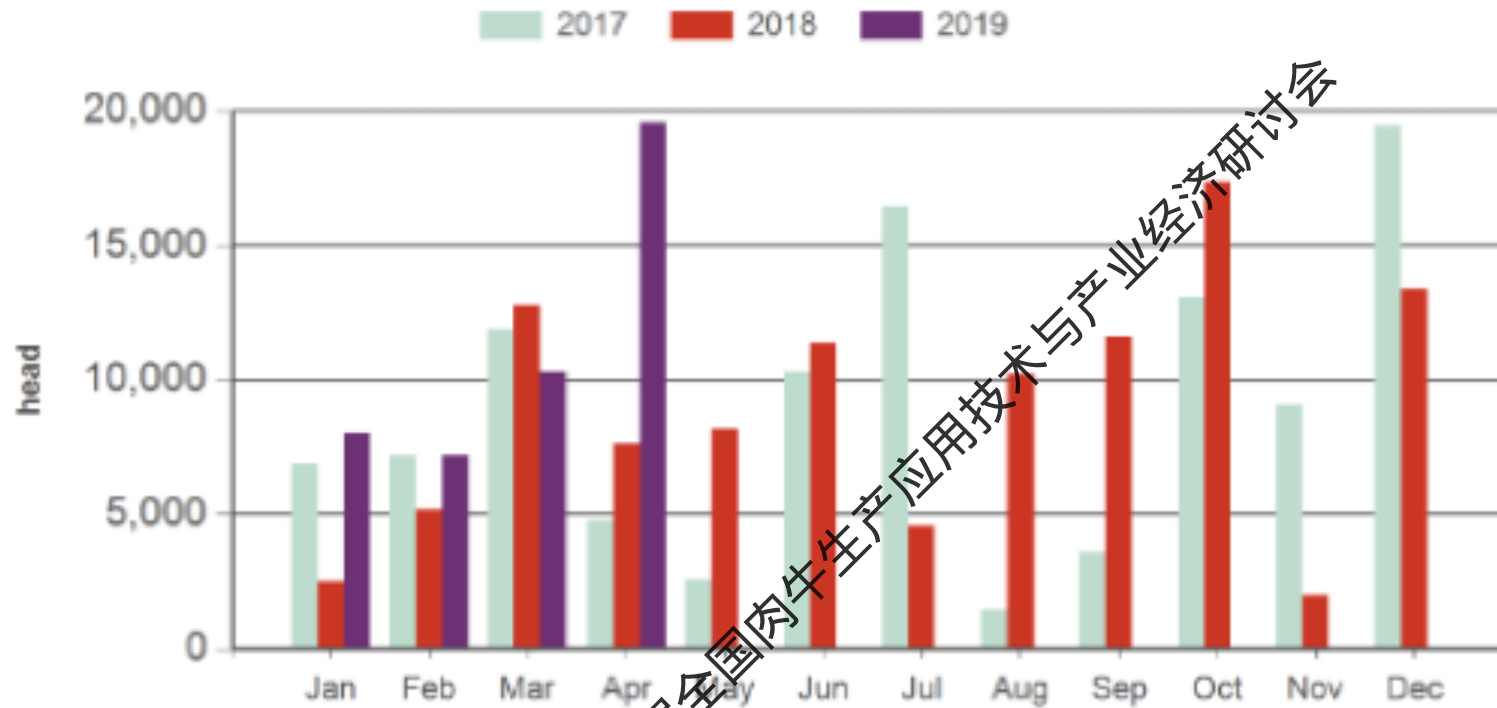
Year-to-April breeder and slaughter cattle to China



Source: ABS (pre-2015), DAWR, Prepared by [unintelligible]

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Monthly breeder cattle exports



Source: DAWR, Prepared by MLA

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Australasian Global Exports



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- Based in Melbourne, Australia
- Partners have been exporting livestock for 20 years to various markets around the world
- Exported over 1 million head of high value breeding cattle around the world



- Own two pre export quarantines in Victoria
- Agreements with other quarantines around the world
- Readily available access to ships



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- Controls the supply chain from the paddock in the supply country to the farm in China
- Supply chains established in Australia, New Zealand and South America
- Both shipping and airfreight options



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- Australasian Global Exports – Supply and Markets



- AGE's China business, Pineview is a Whole Owned Foreign Enterprise (WOFE) based in Beijing.
- Pineview handles the China importation for AGE. Once the livestock and other commodities are 'over the rail' this business manages the complete process from discharge, quarantine and transport to customers farm.
- The export process in China is a replication of the Australian business model. Pineview has agreements with various quarantines strategically situated close to ports to ensure that the process is managed to deliver the best outcome for livestock and customers.
- Dedicated team in China will assist at every opportunity

We at Australasian Global Exports and Pineview
hope you have a very successful conference

