Eating quality and industry prosperity
Both start with the consumer

Michael Crowley – General Manager MLA
The Consumer
Consumer expectations
Consumer taste tests

Testing being conducted at Texas Tech in 2016
Consumer taste tests

- The MSA program is based on over 160,000 consumer taste tests and 1,120,000 samples.
- 12 cooking methods, 69 cuts tested
- Consumer testing has been carried out in 12 countries
- Largest consumer product testing program in the world
Understanding our global consumers’ expectations
Why should we be interested in eating quality of our beef?

- Consumers are only point where money enters the supply chain

- When they are paying more for beef than ever before…..we cannot let them down
The Value Chain
A clear 2020 vision for MSA
Influencing beef eating quality
43% of National cattle slaughter is MSA graded

2.8 million cattle graded in 2016-17 through 42 MSA licensed processors
The MSA Index has continued to improve and is an average of 57.59
## Current participation

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
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<tbody>
<tr>
<td>Producers</td>
<td>53,092</td>
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<tr>
<td>Processors</td>
<td>54</td>
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<tr>
<td>Brands</td>
<td>166</td>
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<td>End users</td>
<td>3700</td>
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Figures as of May 2018
The Farmer
What is the EQ value of your carcase?

Bottom 1% = 46.32

National average = 57.56

Top 1% = 66.19
Return to farm gate

- Price differential for MSA young, non-feedlot cattle = Au$0.23/kg
- Price differential for MSA grainfed cattle = Au$0.11/kg

Grassfed – MSA graded
$65/head premium

Grainfed – MSA graded
$34/head premium

$156m delivered back to the farm gate
New developments focused on consumer outcomes
Investments Shaping the Future
Objective carcase measurement

Hyperspectral cameras

DEXA – dual energy X-ray

NIX colour sensor
Hyperspectral imaging

Potential for

• Eye muscle area
• Fat depth
• IMF / marble score
• Fat colour
• Meat colour
• Ossification
Frontmatec MKI Hyperspectral camera
Frontmatec MKII Hyperspectral camera
Live Footage

Eye has the hottest temperature and is less affected by ambient conditions
Value of Data
myMSA – producer feedback
Linking genetics to consumer outcomes

**Reference population**
- Genotypes and performance
- ‘Hard to measure’ traits
  - Sensory testing
- ‘Late in life’ traits

**Seedstock animals**
- DNA tests on young animals
- Pedigree and performance data still needed

**Commercial animals**
- Animals with EBVs
- Carcase quantity
- Carcase quality

**Processors**
- Slaughter feedback
- Objective carcase measurement
- MSA grading

**Consumers**
International Collaboration

**BROAD CONCEPT FOR DATA STRUCTURE & APPLICATION**

- **APPLICATION**
  - DATABASE WITH STANDARDISED TOOLS UNDERPINNING RESEARCH TRIALS
  - POLISH RESEARCH TRIAL
  - IRISH RESEARCH TRIAL
  - AUST. RESEARCH TRIAL

- **DATA bank**
  - COMPANY B
  - POLAND
  - FRANCE
  - Northern IRELAND
  - IRELAND
  - COMPANY A
  - AUSTRALIA

- **Shared Data**
  - INDEPENDENTLY OWNED DATA HOUSED IN A COMMON DATABASE
  - Share data when mutually beneficial, to agreed rules

- **RESEARCH ACCESS**
  - TRIAL RESEARCH, PUBLICATIONS, ANALYSIS, MODEL DEVELOPMENT,
A vision for the red meat value chain

Cheaper genomic tests
DNA testing animals routine
Beef bred to end market specs
Objective measures of live animals to predict market spec compliance
Technology provides a lean meat yield prior to cut-out

Objective measurement of eating quality traits
Brand specifications, quality and yield reflected in pricing incentives
Producers paid on the value of the carcase
Cuts and portions linked to live animal and producer
Consumers purchase by meal occasion, quality, provenance