

# Eating quality and industry prosperity

Both start with the consumer

**Michael Crowley** – General Manager MLA

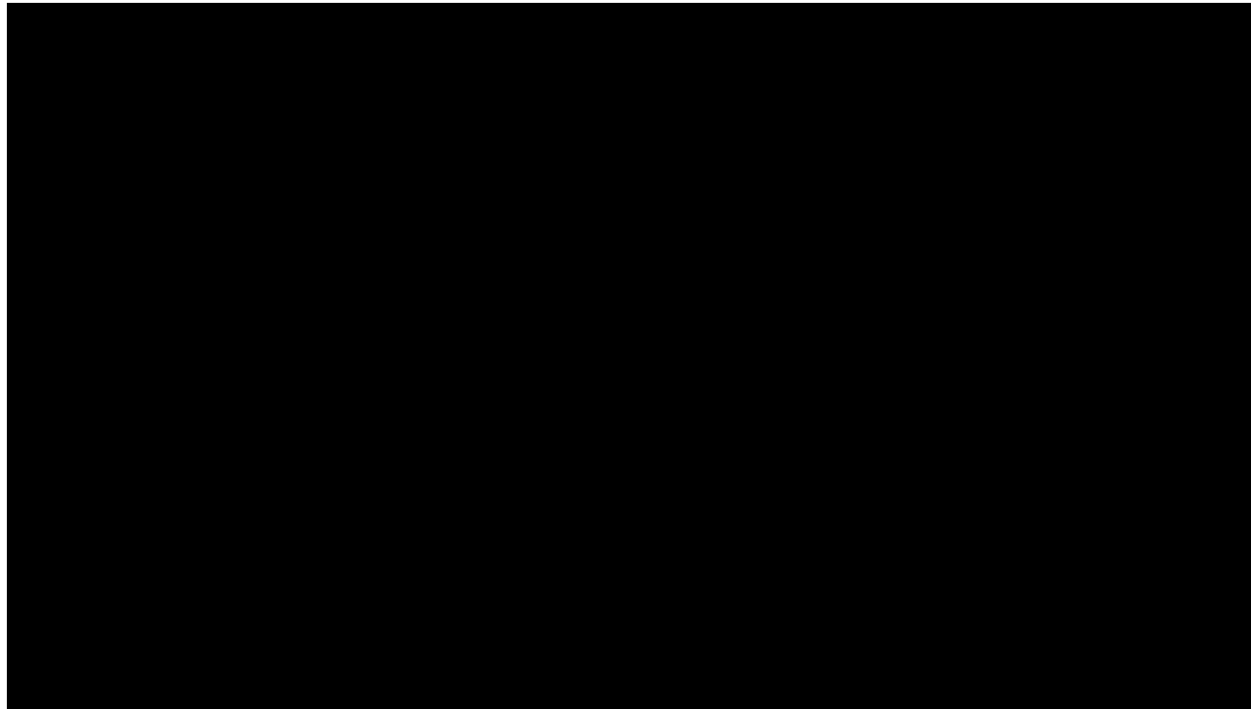


# The Consumer



# Consumer expectations

Consumers

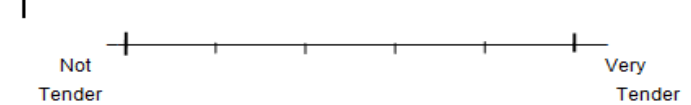


# Consumer taste tests

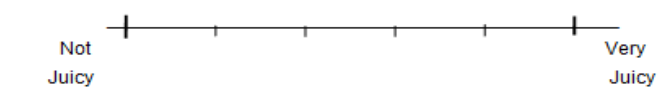


## PRODUCT:

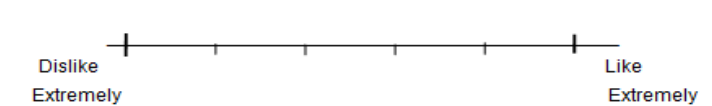
### Tenderness



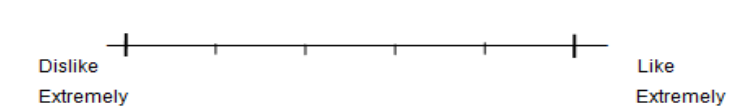
### Juiciness



### Liking of flavour



### Overall Liking



Please tick ☒ one of the following to rate the quality of the beef sample you have just eaten

Choose **one** only (you must make a choice).

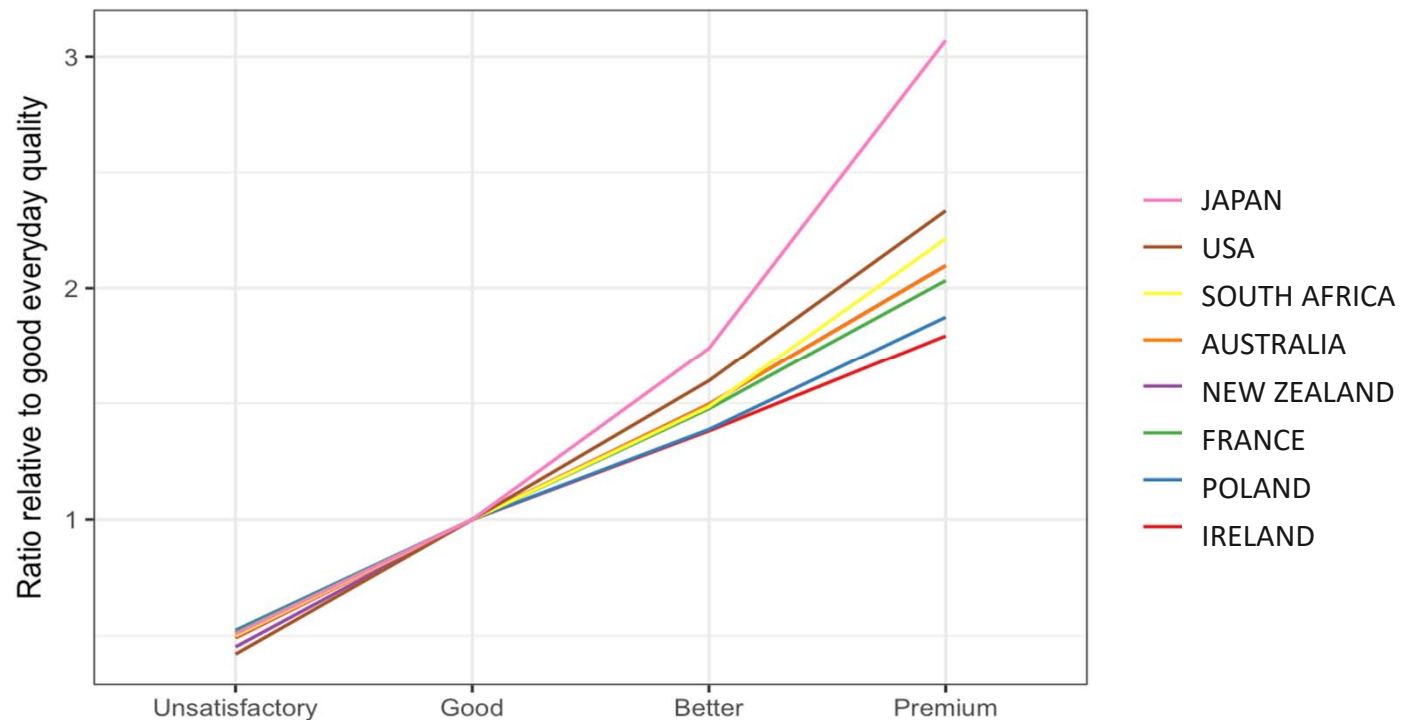
- |                              |                          |
|------------------------------|--------------------------|
| Unsatisfactory               | <input type="checkbox"/> |
| Good everyday quality        | <input type="checkbox"/> |
| Better than everyday quality | <input type="checkbox"/> |
| Premium quality              | <input type="checkbox"/> |

## 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

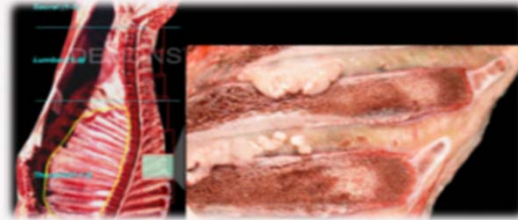




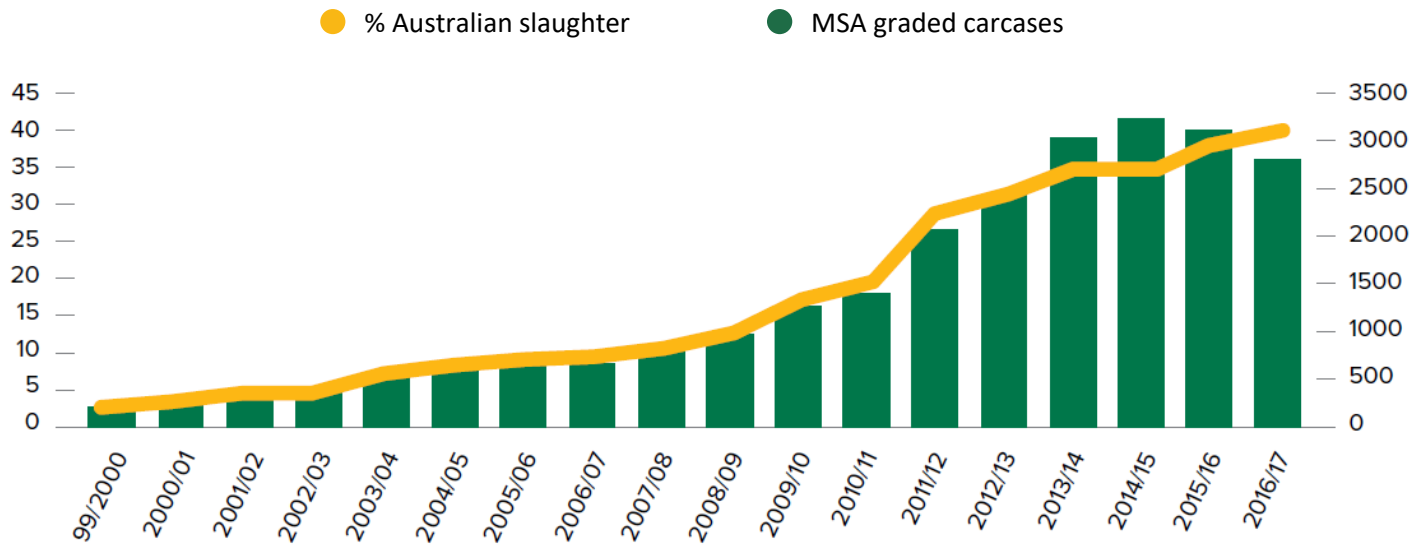
## A clear 2020 vision for MSA



# Influencing beef eating quality



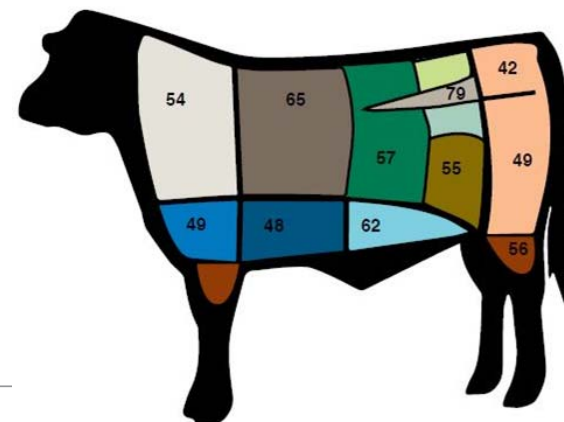
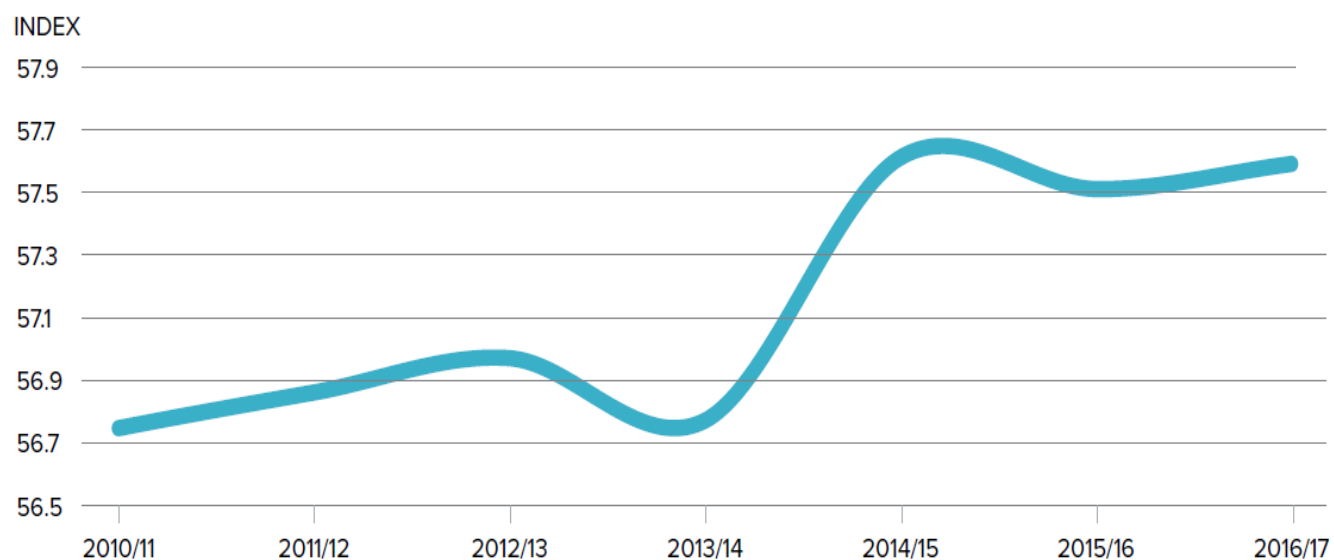
## 43% of National cattle slaughter is MSA graded



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



**Producers**

**53,092**



**Processors**

**54**



**Brands**

**166**



**End users**

**3700**

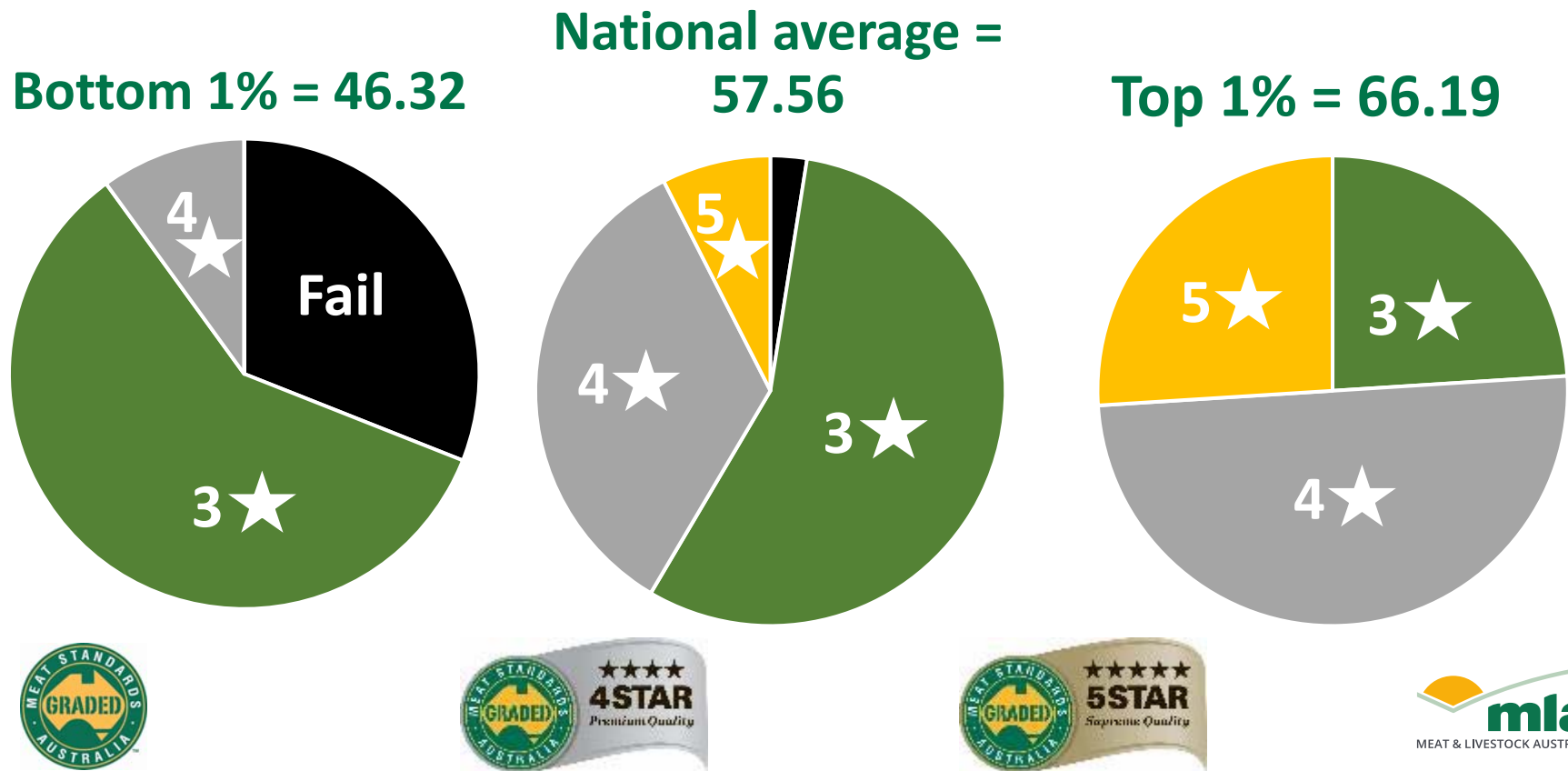
Figures as of May 2018

# The Farmer



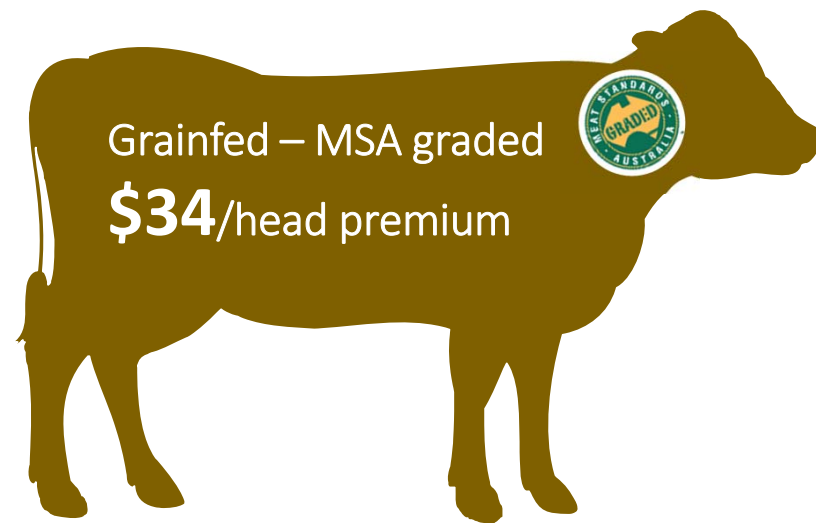


# What is the EQ value of your carcass?



## 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



**\$156m delivered back to the farm gate**



# New developments focused on consumer outcomes

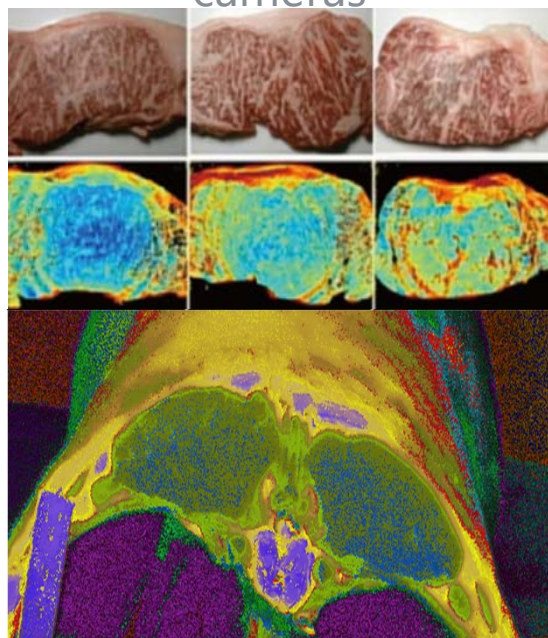


# Investments Shaping the Future

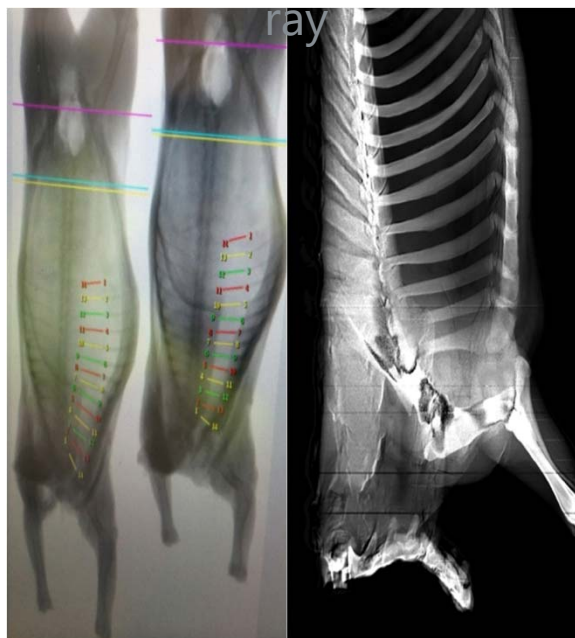


# Objective carcase measurement

Hyperspectral  
cameras



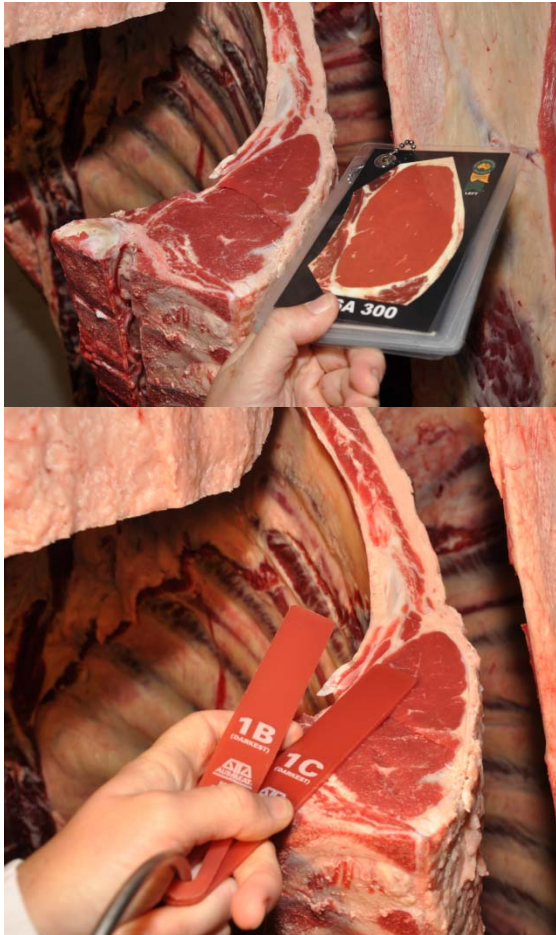
DEXA – dual energy X-  
ray



NIX colour sensor



# Hyperspectral imaging



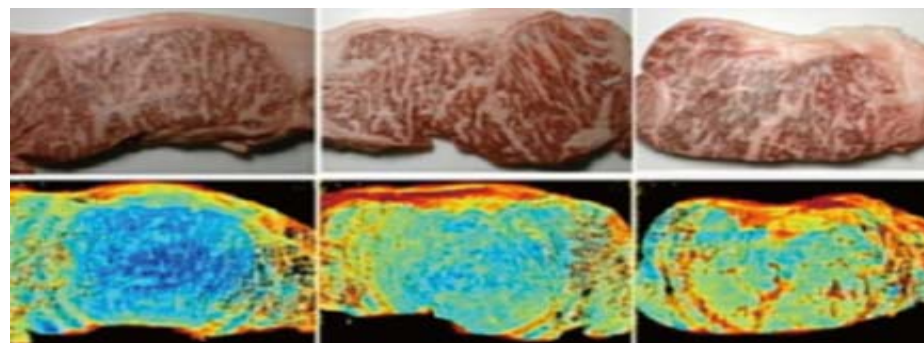
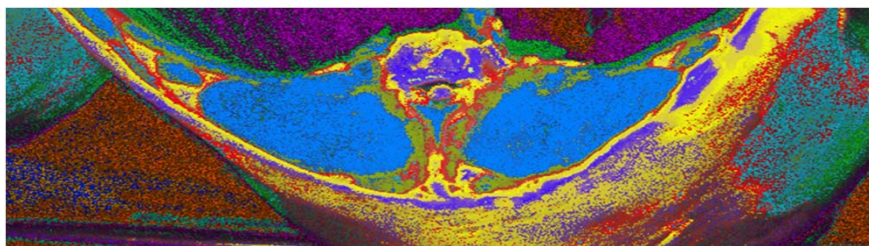
Potential for

- Eye muscle area
- Fat depth
- IMF / marble score
- Fat colour
- Meat colour
- Ossification

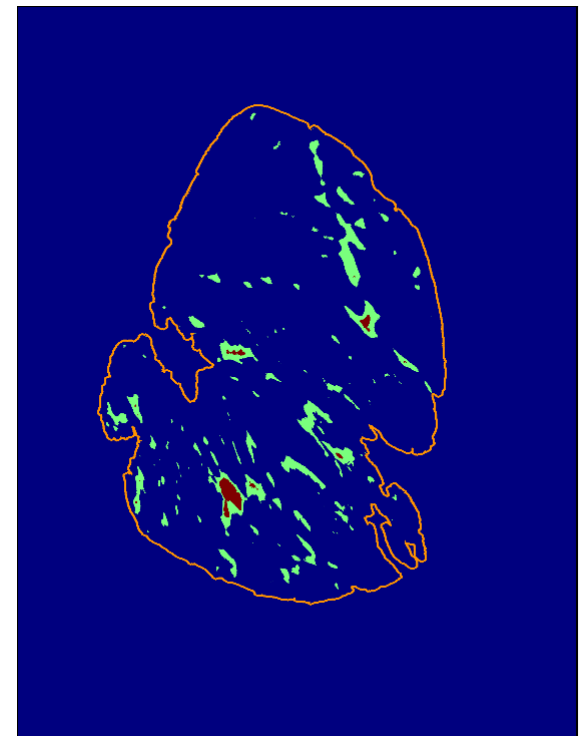
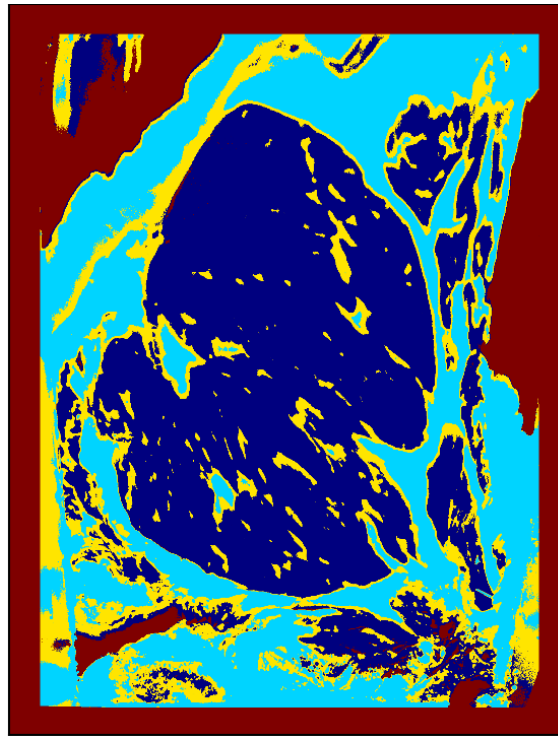




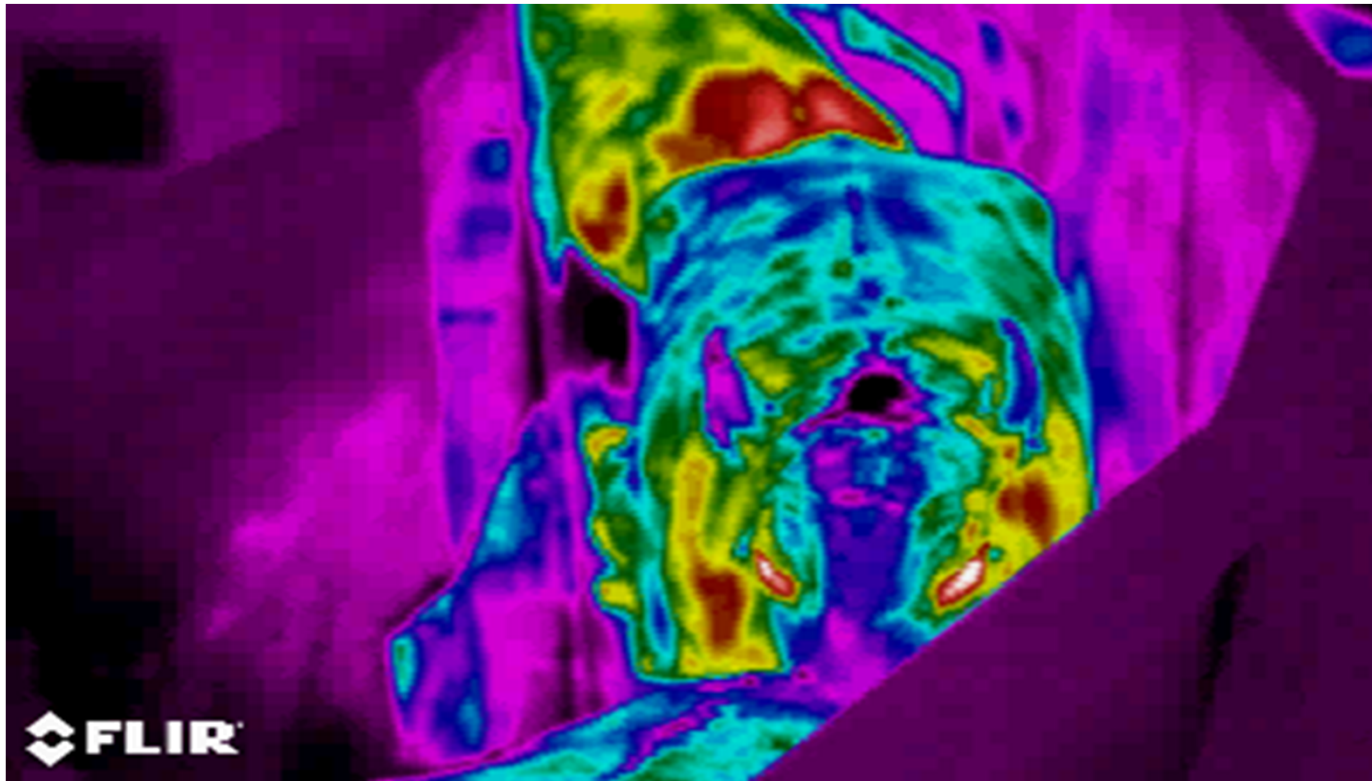
# Frontmatec MKI Hyperspectral camera



# Frontmatec MKII Hyperspectral camera



## Live Footage



Eye has the hottest temperature and is less affected by ambient conditions

## Value of Data





## myMSA – producer feedback

Quick reports   MSA Calculator   My details   MSA Standards   Resources   What's new   Contact us

## QUICK REPORTS

## Daily reports

- > Daily reports

- > Reports over time

> Customise my data

Here you can view MSA grading reports for a single kill date.

### Step 1. Select kill date

Kill Date: 03 Feb 2015

Processor :

### Step 2. Select report to view

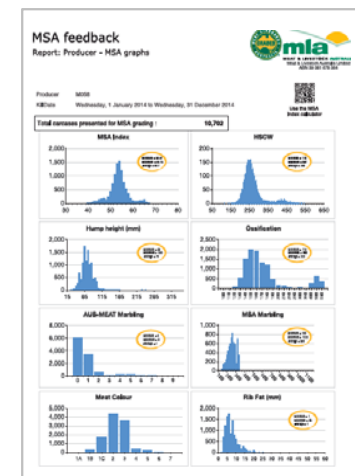
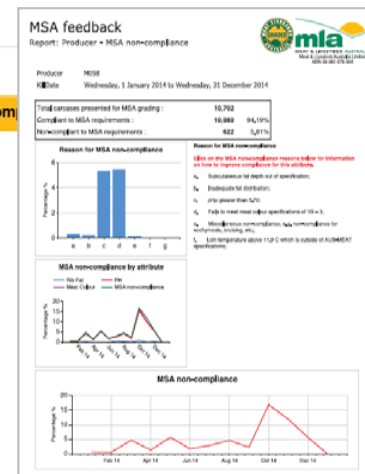
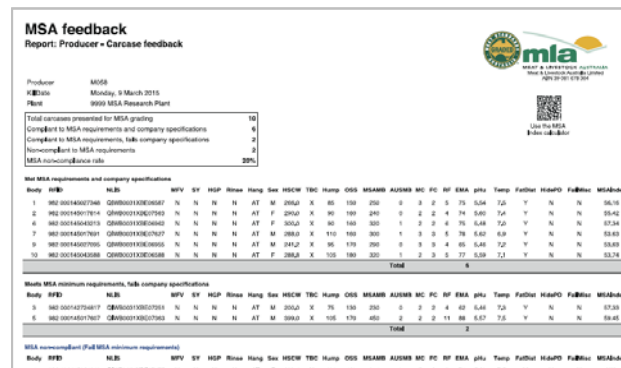
## Beef reports

### Carcase feedback

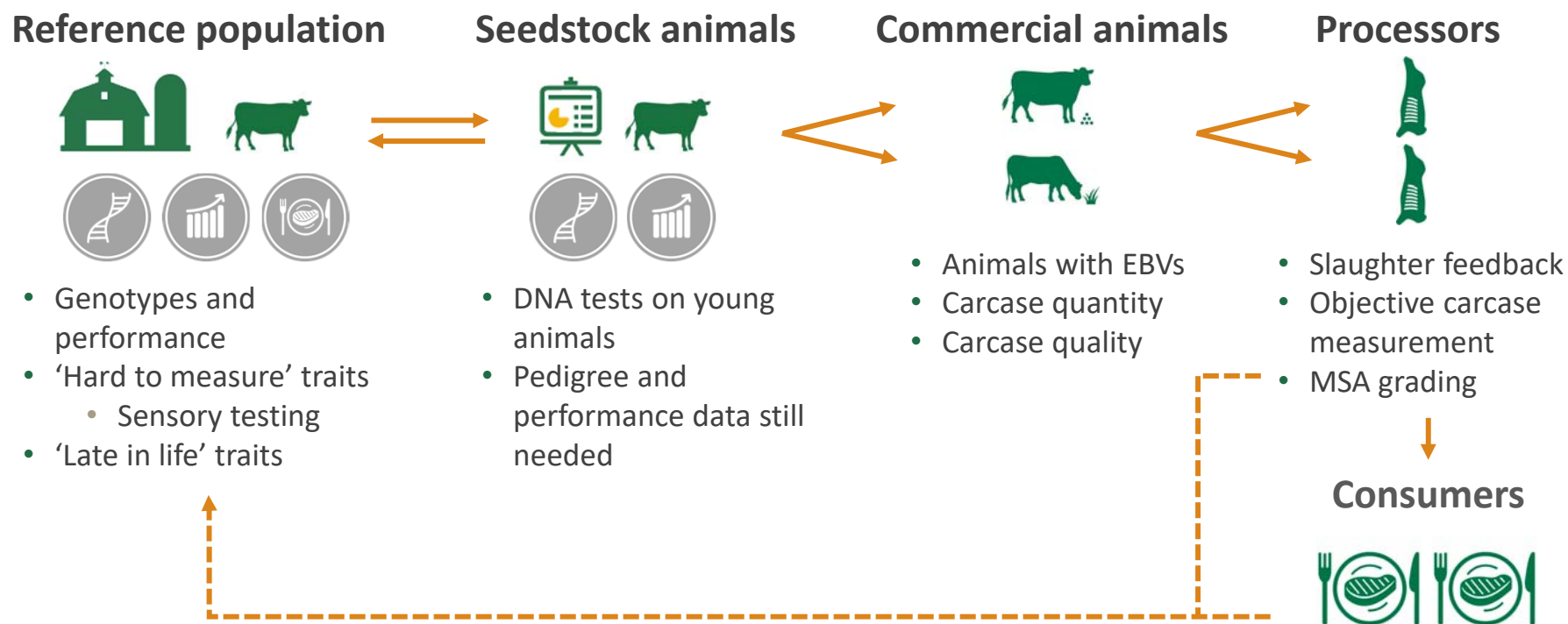
**MSA non-compliance**

### MSA graphs

Company specification non-com

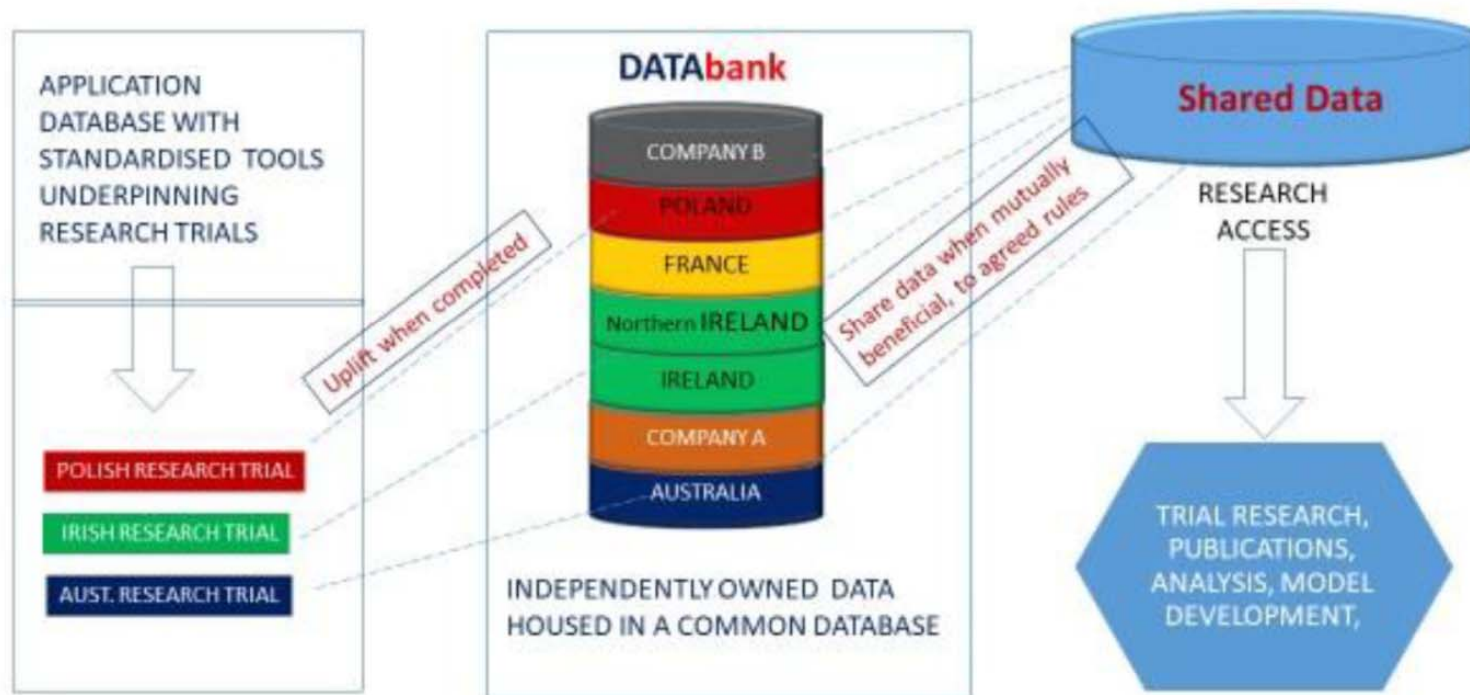


# Linking genetics to consumer outcomes



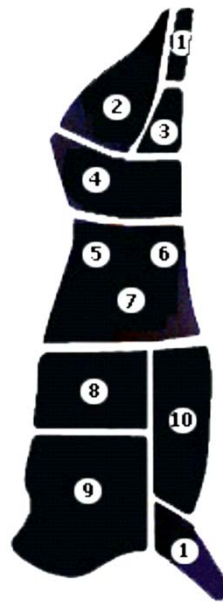
# International Collaboration

## BROAD CONCEPT FOR DATA STRUCTURE & APPLICATION



# 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