



Beef Producer Intentions Survey [BPIS PULSE: July 2024]



August 2024



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The survey, undertaken by MLA, is used to help industry determine grassfed beef cattle production forecasts and to understand the breed composition of the Australian herd on a national, state and regional basis. It is one of the inputs into the MLA beef industry forecasting models.

The research has three primary objectives, namely to:

- ✓ **Measure and report** on herd population, demographics, beef cattle supply information and producer production intentions.
- ✓ Ensure estimates are reliable and based on sufficiently large sample sizes to ensure the **robustness and accuracy** of estimates. The sample should be representative or weighted to be representative of the producer population structure.
- ✓ Provide capacity to **explore and investigate results** at a smaller area and segment level. This will include – among other things – across states and MLA reporting regions.

The following report provides an overview of results for the **JULY 2024 – PULSE** survey.

The July 2024 – PULSE survey

Feedback was the PULSE survey was sought from grassfed beef cattle producers over the period 9th July 2024 – 6th August 2024. Producers were invited to complete the online survey if they had completed the April 2024 survey.

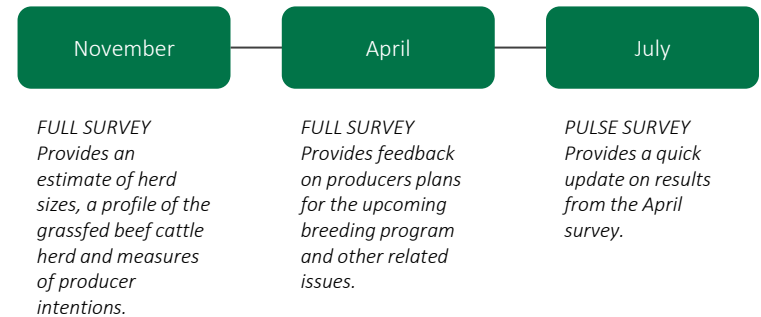
A total of 1,421 producers from across Australia respond to the survey invitation. The feedback was then weighted, using the latest available data from the Levy Payer Register, to produce industry estimates. The weighting was also the same weighting used in the April 2024 survey to ensure consistency across the time periods.

A full breakdown of the sample make up, plus a description of the Levy Payer Register data used and the weighting approach is included as an attachment to this report. Details of the aims of the July PULSE survey are outlined next.

Please note that the BPIS surveys from Nov-23 to Jul-24 were instituted by MLA to support the industry with reliable data because of the reduction in the scope of agricultural surveys being conducted by the ABS. There are number of new design elements and questions and so caution should be exercised when comparing these results with previously released data.

An overview of the research design

Three separate but integrated surveys will be conducted across the calendar year. Each survey will have a specific focus and purpose, as described below.



More detail on the research design is included in the Attachments to this report.

A recap of the April 2024 intentions and estimates

The second wave of the Beef Producers Intentions Survey was launched in April 2024 to measure and report on estimates of herd size, sentiment and forward projections/intentions.

Data was collected across several topic areas, including the following (which are covered in the July 2024 PULSE Survey):

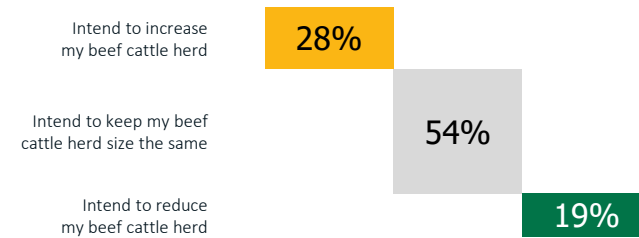
- 12-month intention: this was the producer's intention to increase, keep the same, or reduce their beef cattle herd over the next 12 months;
- Planned autumn calf drop: for producers who indicated they join cows/heifers to deliver calves in autumn, this was a producer forecast of the number of calves to be delivered up to 30 June 2024; and
- Forecast sales: this was a producer forecast of their produced cattle sales across the first half of 2024 (January to June).

These estimates derived from the producer feedback provided from the April 2024 research are shown on the right.

Clearly on-farm, market and climate factors may have impacted producers' behaviours since their participation in the April 2024 Survey.

The July 2024 PULSE Survey was designed to provide a quick update on these April intentions and estimates. An outline of the aims of the July 2024 PULSE Survey now follows.

Producers provided their intention to increase, reduce or maintain their beef cattle herd over the next 12 months. Results (ignoring the size of the herd) were:



2.58 million

Estimate of autumn calves to be delivered in the period up to 30 June 2024



4.58 million

Estimate of produced cattle sales in the period 1 January to 30 June 2024

The aim of the July 2024 survey

The aim of the July 2024 PULSE Survey is to provide updated estimates on those provided in the April 2024 Survey. Specifically, the July 2024 PULSE Survey was designed to confirm:

- **12-month intention confirmation:** this was whether the producer had confidence in their intention provided in April, or whether their intention had now changed;
- **Estimate of autumn calf drop:** for producers who indicated they join cows/heifers to deliver calves in autumn, this will confirm the forecast number of autumn calves provided in April for the period 1 April to 30 June 2024; and
- **Estimate of sales:** this will confirm the total produced cattle sales made in the first half of 2024 with analysis exploring if this revised figure was different to that planned and reported in April and the reasons behind any changes in produced cattle sales last year.

The July PULSE methodology for the re-estimate of the autumn calf drop and the produced cattle sales involved:

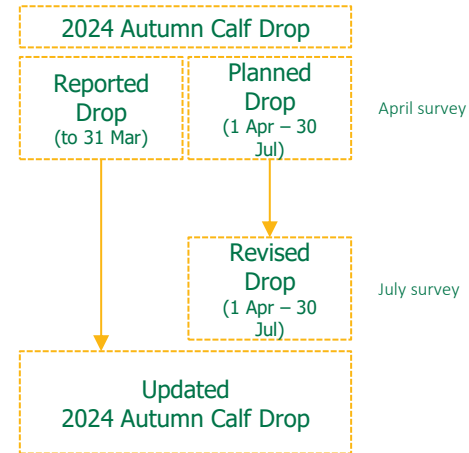
- With a new position now available, producers were asked to provide their estimate of their autumn calf drop (from 1 April to 30 June 2024) and also their produced cattle sales (from 1 January to 30 June 2024).
- Utilising their reported autumn calf drop from 1 January to 31 March 2024, the overall estimates of the autumn calf drop and the produced cattle sales were updated. Analysis will again focus on the differences in forecasts between the April 2024 Survey and the July 2024 PULSE Survey. Also as part of this analysis, the July 2024 PULSE survey explored what reasons were behind producers selling more or less produced cattle than they had planned in April.

The July 2024 PULSE survey will report on producer-level results (e.g. for sales, how many producers sold more, less or the same number of producer cattle as they indicated in April), and also an estimate of the revised totals (e.g. produced cattle sales), acknowledging producers are of varying sizes.

Of note is that there were outliers that needed to be considered, namely those who experienced a severe change in estimate upward (e.g. estimating very little or no calves dropped / sales in April 2024 and then a large amount of reported/expected calves dropped / sales in July 2024). These outliers were removed to ensure the average change within each cells remains within a reasonable limit.

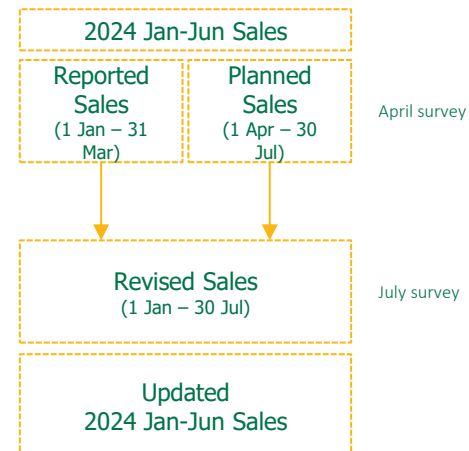
Details of the July 2024 PULSE survey research design are described in the attachments.

Methodology undertaken for the revision of the autumn calf drop estimate



Producers provided an update on how many autumn calves were born from 1 April to 30 June 2024 (more, less, same and numbers)

Methodology undertaken for the revision of the produced cattle sales estimate



Producers provided an update on how many produced cattle they sold in the first half of 2024 (more, less, same and numbers)

The feedback from producers in the July 2024 PULSE Survey has indicated that:

Herd intentions

The majority of producers have confirmed their intention as stated in April – specifically, 82% of producers indicated their intention remained to increase, keep the same, or reduce their beef cattle herd. Of the 18% who reported their intentions have changed:

- 3% now intend to increase their beef cattle herd; whilst
- 8% now intend to keep their beef cattle herd size the same; and
- the remaining 7% now intend to reduce their beef cattle herd.

2024 autumn calf drop

Most autumn calving producers reported a change to their forecast autumn calf drop:

- 36% delivered less calves than previously forecast in April 2024; whilst
- 37% delivered more calves than expected; and
- the remaining 27% reported their calf drop matched their forecast.

When then taking account of the sizes reported, the analysis indicates that the 2024 autumn calf drop was closer to 2.75M than the planned 2.58M (about a 6% uplift).

2024 produced cattle sales

Almost half of producers reported they sold less than previously forecast in April 2024:

- 46% sold less produced cattle in the first half of 2024 than forecast; whilst
- 21% sold more produced cattle than expected; and
- the remaining 33% reported they met their forecast cattle sales.

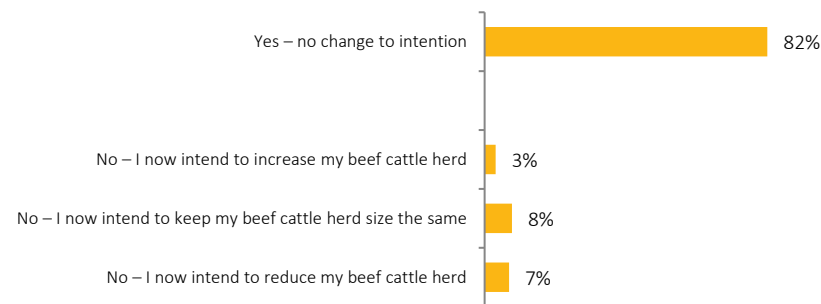
When then taking account of the number of cattle sales reported, the analysis indicates that the first half of 2024 sales was closer to 3.60M than the forecast 4.58M.

Behind the 46% of producers reporting they sold less cattle than expected, the reasons were varied but can be attributed to two key explanations:

- Prices were not strong enough at the time (46% said this); and
- Retaining cattle due to forecast prices look to be stronger (28% said this).

The detailed results from the July 2024 PULSE Survey now follow.

Change in beef cattle herd intention over the next 12 months



2024 Autumn Calf Drop		2024 Jan-Jun Sales	
Reported Drop (to 31 Mar)	Planned Drop (1 Apr – 30 Jul)	Reported Sales (1 Jan – 31 Mar)	Planned Sales (1 Apr – 30 Jul)
2.58 million		4.58 million	

2024 Autumn Calf Drop		2024 Jan-Jun Sales	
Reported Drop (to 31 Mar)	Updated Drop (1 Apr – 30 Jul)	Updated Sales (1 Jan – 30 Jul)	
2.75 million		3.60 million	

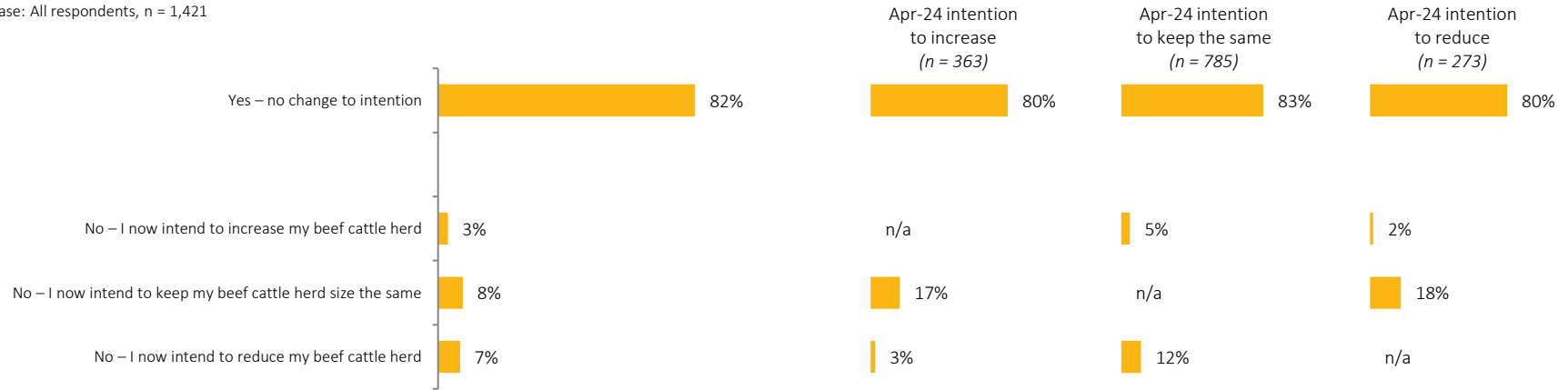


results from the
July PULSE survey

Change in intentions on herd size over the next 12 months

Q1. When we spoke to you in April, you indicated that you intended to [“increase your” / “keep the same size” / “reduce your” Q8 ANSWER FROM APR 2024 SURVEY] beef cattle herd over the next 12 months. Is this still your intention?

Base: All respondents, n = 1,421



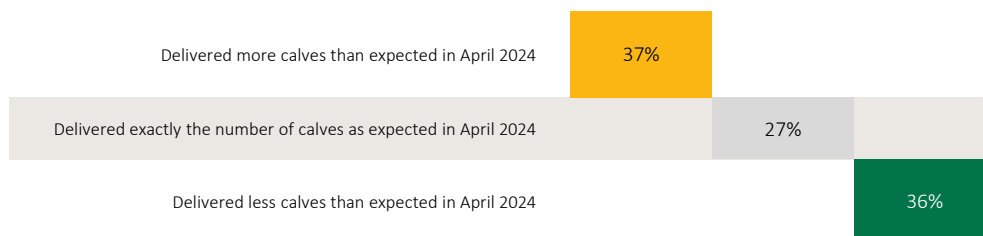
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
<i>Base:</i>	476	360	70	58	327	118	838	226	165	137	29	26
No change to intention	83%	83%	84%	76%	80%	83%	82%	82%	80%	86%	88%	79%
Now intend to increase	4%	4%	0%	0%	3%	4%	3%	3%	2%	4%	6%	7%
Now intend to keep the same	8%	10%	3%	7%	7%	8%	8%	7%	8%	6%	6%	5%
Now intent to reduce	6%	4%	13%	16%	10%	5%	7%	7%	10%	5%	0%	9%

Autumn calving – change in expected calves from April 2024

Q2. When we spoke to you in April, you indicated that you expected [Q16 ANSWER FROM APR 2024 SURVEY] calves to be delivered from your autumn breeding program between 1 April 2024 to 30 June 2024.

How many autumn calves did you actually end up delivering in April-June 2024?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND joined their breeding herd for autumn breeding, n = 622



Note: these results are producer level results and do not reflect the total number of autumn calves delivered across April-June 2024.

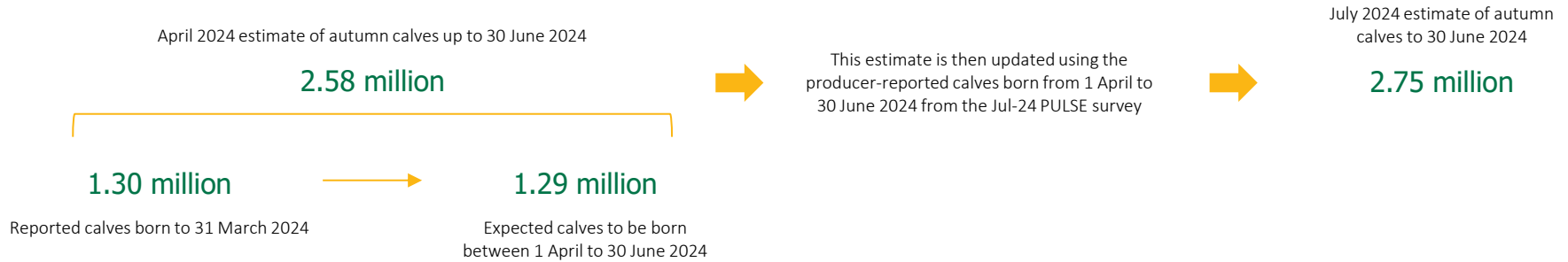
The results provide an indication of the producer experience.

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
<i>Base:</i>	229	57	50	19	174	90	383	111	69	46	10	3
Delivered more calves than expected in April 2024	39%	38%	38%	50%	29%	36%	35%	36%	42%	37%	39%	26%
Delivered exactly the number of calves as expected in April 2024	23%	29%	22%	26%	30%	33%	29%	25%	16%	17%	27%	30%
Delivered less calves than expected in April 2024	38%	33%	40%	24%	41%	30%	36%	39%	43%	45%	33%	44%

Autumn calving – update of actual calves delivered to 30 June 2024

Q2. When we spoke to you in April, you indicated that you expected [Q16 ANSWER FROM APR 2024 SURVEY] calves to be delivered from your autumn breeding program between 1 April 2024 to 30 June 2024.

How many autumn calves did you actually end up delivering in April-June 2024?
 Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND joined their breeding herd for autumn breeding, n = 622



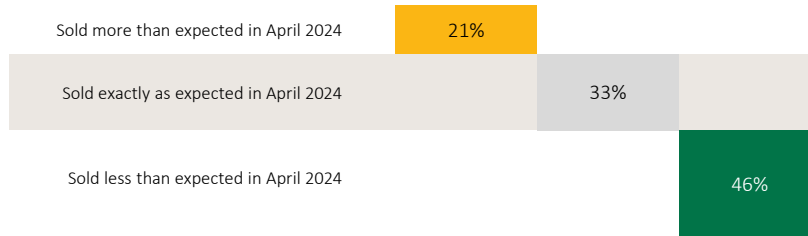
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
<i>Base of Apr-24 estimate:</i>	517	156	108	42	405	173	902	233	156	89	20	5
April 2024 estimate	0.70M	0.28M	0.31M	0.05M	0.80M	0.44M	0.89M	0.45M	0.49M	0.41M	0.22M	0.12M
<i>Base of Jul-24 estimate of change:</i>	229	57	50	19	174	90	383	111	69	46	10	3
July 2024 estimate	0.67M	0.27M	0.35M	0.05M	0.86M	0.54M	0.96M	0.41M	0.50M	0.41M	0.31M	0.15M

Producer sales – change in reported/planned sales from April 2024

Q3. When we spoke to you in April, you indicated that you sold or were planning to sell a total of [SALES FIGURE FROM APR 2024 SURVEY] [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] across the period 1 January – 30 June 2024.

How many [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] did you actually end up selling through January-June 2024?

Base: All respondents, n = 748



Note: these results are producer level results and do not reflect the total number of producer sales across January-June 2024.

The results provide an indication of the producer experience.

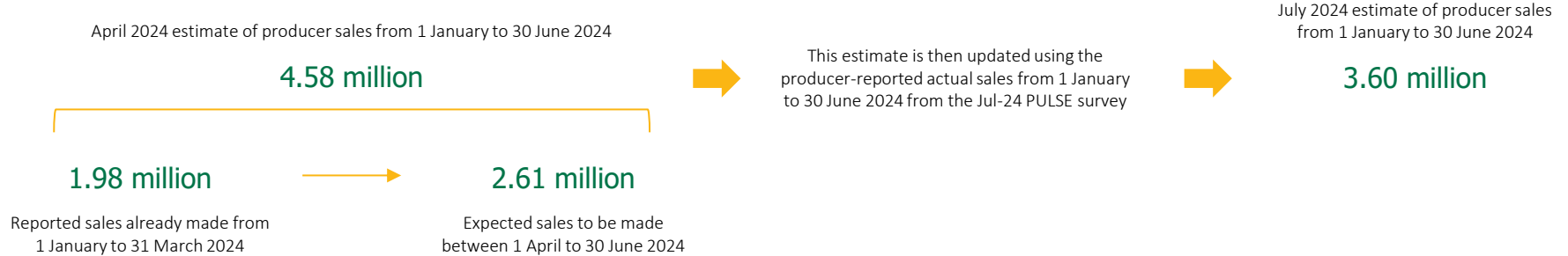
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
<i>Base:</i>	428	322	63	46	272	110	739	198	148	118	26	24
Sold more than expected in April 2024	22%	21%	18%	14%	19%	25%	18%	31%	26%	19%	31%	18%
Sold exactly as expected in April 2024	29%	27%	38%	39%	41%	46%	36%	26%	26%	27%	24%	17%
Sold less than expected in April 2024	49%	52%	44%	48%	40%	29%	45%	42%	48%	54%	45%	65%

Producer sales – update of actual sales through Jan-Jun 2024

Q3. When we spoke to you in April, you indicated that you sold or were planning to sell a total of [SALES FIGURE FROM APR 2024 SURVEY] [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] across the period 1 January – 30 June 2024.

How many [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] did you actually end up selling through January-June 2024?

Base: All respondents, n = 748



	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
<i>Base of Apr-24 estimate:</i>	972	800	132	94	608	224	1,717	438	341	239	71	54
April 2024 estimate	1.12M	1.91M	0.18M	0.25M	0.71M	0.32M	1.18M	0.54M	0.57M	0.68M	0.54M	1.08M
<i>Base of Jul-24 estimate of change:</i>	426	322	63	46	271	110	738	198	148	117	26	23
July 2024 estimate	0.95M	1.13M	0.27M	0.26M	0.57M	0.39M	1.08M	0.39M	0.48M	0.49M	0.40M	0.77M

Reasons for the decline in producer sales against expectation

46% of producers reported they sold **FEWER** of their produced cattle in the period 1 January – 30 June 2024 than planned

We asked these producers what were the reasons behind the difference between the expected sales and what actually happened...



Q4. Why did you end up selling fewer [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] during January-June 2024 than you expected back in April? Please select all the reasons that explain why.
Base: All respondents who reported selling fewer produced cattle than expected, n = 577



* Response has been coded from open-ended feedback via “Other (please describe)”.

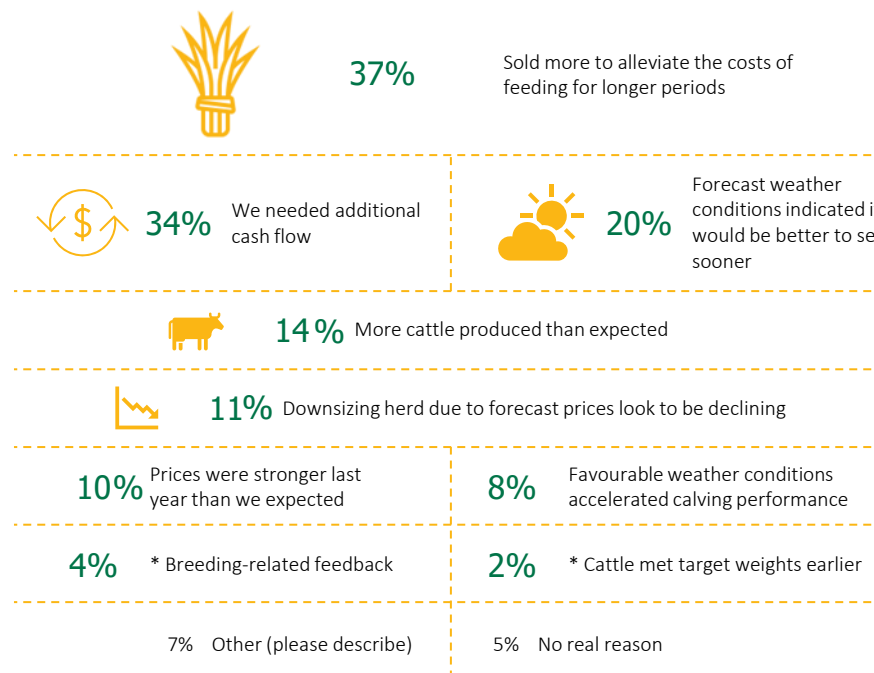
Reasons for the increase in producer sales against expectation

21% of producers reported they sold **MORE** of their produced cattle in the period 1 January – 30 June 2024 than planned

We asked these producers what were the reasons behind the difference between the expected sales and what actually happened...



Q5. Why did you end up selling more [“weaners” / “feeder steers” / “grassfed bullocks” / “live export cattle from your production” / “cattle from your production”] during January-June 2024 than you expected back in April? Please select all the reasons that explain why.
Base: All respondents who reported selling more produced cattle than expected, n = 254



* Response has been coded from open-ended feedback via “Other (please describe)”.



attachments

Comparison of April 2024 and July 2024 sample

April 2024 Survey completes (count)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	3,223	1,949	489	371	268	81	65
NSW	1,074	685	161	115	85	22	6
QLD	899	518	112	106	96	31	36
VIC	721	460	125	87	39	7	3
WA	239	130	38	31	25	7	8
SA	145	81	31	15	9	7	2
TAS	114	60	19	15	11	3	6
NT	18	6	0	2	2	4	4
ACT	13	9	3	0	1	0	0

April 2024 Survey completes (proportion of total)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	100%	60%	15%	12%	8%	3%	2%
NSW	33%	21%	5%	4%	3%	1%	<1%
QLD	28%	16%	3%	3%	3%	1%	1%
VIC	22%	14%	4%	3%	1%	<1%	<1%
WA	7%	4%	1%	1%	1%	<1%	<1%
SA	4%	3%	1%	<1%	<1%	<1%	<1%
TAS	4%	2%	1%	<1%	<1%	<1%	<1%
NT	1%	<1%	0%	<1%	<1%	<1%	<1%
ACT	<1%	<1%	<1%	0%	0%	0%	0%

July 2024 Survey completes (count)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	1,421	838	226	165	137	29	26
NSW	476	297	72	55	40	9	3
QLD	360	202	48	44	44	10	12
VIC	327	203	60	39	21	2	2
WA	118	64	16	12	18	4	4
SA	70	39	16	7	6	1	1
TAS	58	26	12	7	7	2	4
NT	4	2	0	1	0	1	0
ACT	8	5	2	0	1	0	0

July 2024 Survey completes (proportion of total)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	100%	59%	16%	12%	10%	2%	2%
NSW	33%	21%	5%	4%	3%	1%	<1%
QLD	25%	14%	3%	3%	3%	1%	1%
VIC	23%	14%	4%	3%	1%	<1%	<1%
WA	8%	5%	1%	1%	1%	<1%	<1%
SA	5%	3%	1%	<1%	<1%	<1%	<1%
TAS	4%	2%	1%	<1%	<1%	<1%	<1%
NT	<1%	<1%	0%	<1%	0%	<1%	0%
ACT	1%	<1%	<1%	0%	<1%	0%	0%

Survey Program The Beef Producers Intentions Survey, undertaken by MLA, is used to help industry determine on-farm grassfed adult beef cattle production forecasts and to understand the breed composition of the herd on a national, state and regional basis. It is one of the inputs into the MLA beef industry forecasting models.

Methodology The July 2024 survey utilised a wholly online methodology of producers who responded to the April 2024 survey. Producers were contacted up to four times via email invitation to complete the July 2024 PULSE survey.

Sample lists The list utilised was the same list used for the April 2024 survey - approval was sought and received to use the Levy Payer Register as the sample. This data was cleaned for any duplicates by email and phone number before use in the research.

Questionnaire A 3-4 minute questionnaire was used to collect the required information. The survey questionnaire covered the following topic areas:

- Has their intention to increase / keep the same / reduce their beef cattle herd over the next 12 months changed since last asked in April 2024;
- What was the actual reported autumn calves delivered through the period 1 April – 30 June 2024, and was this different to their expectation; and
- What was the actual reported sales through the period 1 January – 30 June 2024, and was this different to their expectation;
 - If different, what was the reason (or reasons) behind selling more or less of their produced cattle than they expected;

Sample size A total of n = 1,421 responses were provided by producers as follows:

	Overall	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
# of surveys	n = 1,421	n = 8	n = 476	n = 4	n = 360	n = 70	n = 58	n = 327	n = 118

Timing The interviewing was undertaken between 9th July 2024 – 6th August 2024.

Weighting The survey results were weighted. A description of the weighting process used for the July 2024 Beef Producers Intentions Survey follows next.

Survey data is often weighted to ensure estimates provide a representative match of the population being estimated and the estimates deliver statistical reliable measures.

For the Beef Producers Intentions Survey, data has been weighted to ensure the sample provides a strong representation of the population of producers as possible. For this survey, it was considered important to weight the survey data to ensure we have:

- Coverage across the various regions as producers will have different operating conditions. For our purposes, a region is a state – so we need to weight so that our final sample is representative of the distribution of producers across states.
- Coverage across farm businesses of different sizes – larger businesses have larger herds so ensuring we have an appropriate mix of small, medium, large and very large producers is vital for the estimation process. As there is no up-to-date record of the herd sizes of producers nationally, we have used the Levy Band the producer is within (11 categories) as a proxy to this. For higher levy bands (categories 6 and above), a national representation was used as opposed to a state representation given the smaller number of producers in these levy bands.

There may be other variables that help describe the possible differences across producers, but these two variables (state and levy band) will more than likely account for the likely differences that exist in the population of all producers.

For this survey, the Levy Payer Register was used as the population structure that guided the weighting approach. Data at a state and levy band segment from the register was approved for use - this data is summarised opposite. The weighting approach involved using the estimate of the total number of agricultural businesses with grassfed beef cattle from the Levy Payer Register as the population estimates (after cleaning for possible duplicate businesses).

This final weighting matrix was then used to weight the April 2024 Beef Producers Intentions survey data. The same weighting matrix was also used to weight the July 2024 Beef Producers Intentions survey data to ensure consistency across the time periods.

Estimated number of agricultural businesses with grassfed beef cattle (Levy Payer Register)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	77,407	52,799	10,933	6,783	4,563	1,413	915
NSW	26,677	18,791	3,648	2,218	1,444	392	184
QLD	20,072	13,267	2,502	1,687	1,546	619	450
VIC	19,513	13,553	3,114	1,762	853	158	73
WA	4,331	2,687	693	458	320	86	88
SA	3,742	2,542	508	360	213	70	50
TAS	2,660	1,739	416	262	162	57	24
NT	247	92	33	27	21	29	46
ACT	165	130	19	9	5	2	1

Reliability of the estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

Calculation of confidence interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:

$$MoE = z * \sqrt{\frac{\hat{p}(1 - \hat{p})}{n}}$$

where *n* is the sample size, \hat{p} is the fraction of responses that you are interested in, and *z* is the [critical value](#) for the 95% confidence level (in this case, 1.96).

This calculation is based on the [Normal distribution](#) and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate		Sample Sizes by State								
		Australia	NSW	QLD	VIC	WA	SA	TAS	NT	ACT
		n = 1,421	n = 476	n = 360	n = 327	n = 118	n = 70	n = 58	n = 4	n = 8
Survey Estimate	50%	± 2.60%	± 4.49%	± 5.16%	± 5.42%	± 9.02%	± 11.71%	± 12.87%	n/a	n/a

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed. Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ($n\hat{p} < 10$ or $n(1-\hat{p}) < 10$).



Beef Producer Intentions Survey

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