

INDONESIA AUSTRALIA RED MEAT & CATTLE PARTNERSHIP



Joint State of the Industry Report 2021

The Joint State of the Industry Report 2021 is a publication of the Indonesia Australia Partnership on Food Security in the Red Meat and Cattle Sector (the Partnership). The publication is produced in both English and Indonesian.

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Photo Credit: Meat & Livestock Australia

Introduction

This Joint State of the Industry Report provides a summary of the red meat and cattle trade between Australia and Indonesia for 2021 and concludes with an industry outlook for 2022 and beyond. The report is published as the world learns to live with the COVID-19 coronavirus and economies are increasingly easing pandemic-related restrictions. It provides a summary of key industry impacts and trends stemming from the pandemic and covers the influence of weather, global commerce, and economic recovery on the bilateral trade in beef and cattle between Australia and Indonesia. The report also underscores some persistent challenges for Australian and Indonesian enterprises along the supply chain.

Key messages

Ongoing tight Australian supply and record-high cattle prices: Australian cattle prices reached record highs for a second consecutive year, with the Eastern Young Cattle Index¹ (EYCI) finishing at A\$1,157 (Rp120,328) per kg carcass weight. Whilst strong domestic and global demand for cattle and beef is likely to keep prices above the long-term

average throughout 2022, increased cattle supply is expected from across Australia's major production centres, from mid-year, as herd rebuilding pressures ease – welcome news for feedlots in Indonesia and Australia.

Feeder cattle numbers down in Indonesia, but value up: The number of Australian feeder cattle imported by Indonesian feedlots declined by 12% in 2021 compared to 2020 numbers, reaching a total of 406,000 head. However, due to the higher prices of cattle, the overall value of live cattle exports to Indonesia increased by 10%.

Profitability was constrained across the supply chain: Stakeholders across the live cattle supply chain have worked to absorb rising costs to meet price expectations from Indonesian consumers and government. Live exporters reported subdued demand and difficulty in sourcing stock at affordable prices. Indonesian feedlots continued to experience trading losses on live cattle imports, with landed cattle costing approximately Rp56,000 (AU\$5.38) per kg liveweight and slaughter cattle selling for a maximum of Rp48,000 (AU\$4.62) per kg liveweight. With feed and logistics costs also increasing, most feedlots struggled to remain profitable. Abattoirs, meat traders and beef importers were also squeezed as they attempted to trade profitably

¹ The Eastern Young Cattle Indicator (EYCI) is a seven-day rolling average of young cattle from 25 saleyards across Queensland, NSW and Victoria. It's expressed in cents per kilogram carcass (or dressed) weight (¢/kg cwt) and is rounded to the nearest ¼ cent. The EYCI is produced by Meat & Livestock Australia's National Livestock Reporting Service (NLRs).

whilst maintaining the Government of Indonesia's reference price for fresh beef. Continued commercial challenges are expected for Indonesian feedlots and abattoirs in 2022.

Profitability challenges drive innovation and efficiency: Driven by the challenging commercial environment, Indonesian feedlots and abattoirs pursued efficiencies in purchasing and production,

and innovations in processing and marketing. Feedlots have looked to import lighter cattle to minimise trading losses, addressed labour inefficiencies, and developed more efficient feed rations. Commercial abattoirs have increased their value-adding options by producing sliced meats, sausages and bakso balls, and by selling direct to customers.

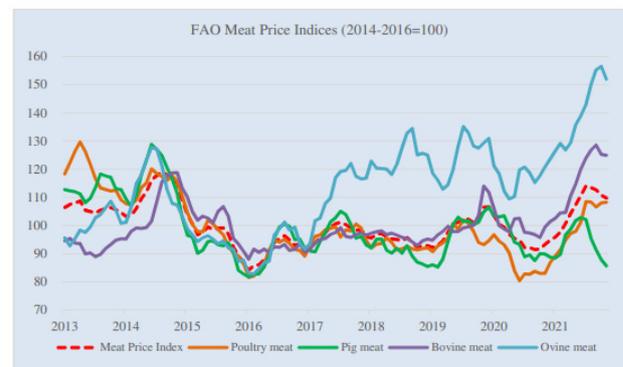
Sharply rising global food and beef prices



Photo Credit: Meat & Livestock Australia

The price of all major food commodities rose sharply on a global basis in 2021. The Food and Agriculture Organization (FAO) of the United Nations reported a 20% rise in its Food Price Index² over the 12-month period to February 2022. The organisation's global Beef Price Index increased even more dramatically, up by almost 30% for the year, with the FAO posting a new record high for the index in February (Figure 1). According to the FAO, the increase was driven by "strong global demand amidst tight supplies of slaughter-ready cattle in Brazil and high demand for herd rebuilding in Australia".

Figure 1: Global Meat Price Indices from 2013 to February 2022



Source: Food and Agriculture Organization of the United Nations

² The FAO Food Price Index (FFPI) is a measure of the monthly change in international prices of a basket of food commodities. It consists of the average of five commodity group price indices weighted by the average export shares of each of the groups over 2014–2016.

Australian export cattle prices continue to break records



Photo Credit: QLD country life

High global beef and cattle prices were driven by strong international demand for cattle and beef, supply constraints in major cattle-producing countries and COVID-19-related supply chain disruptions. Not surprisingly, the bilateral feeder cattle trade was directly impacted. The price of feeder steers shipped from Darwin fluctuated throughout 2021, but never dipped below AU\$4.00 (Rp41,600) per kilogram (kg) liveweight (Figure 2). Prices then rose steadily through the second half of 2021 to finish at AU\$4.70 (Rp48,880) — an historic high and almost 15% higher than the AU\$4.10 (Rp42,460) posted in January 2021. Strong domestic markets for restockers, feedlot and slaughter cattle in Australia contributed to these record prices, with the EYCI reaching AU\$1,157 (Rp120,328) per kg carcass weight.

Figure 2: Feeder Steer and Slaughter Cattle Prices, 2019–2021



Note: Feeder steer prices are ex-Darwin and landed in Indonesia. Landed price assumes AU\$1.00 per kg liveweight for shipping and logistics and an exchange rate of AU\$1.00: RP10,400).

Source: Southeast Asian Beef Market Report.

Upward price pressure driven by constrained cattle supply

Although cattle prices in Australia rose, northern Australia producers had relatively few cattle to sell. The Australian cattle herd slumped to 24.6 million head in 2020 and supply remained tight throughout 2021. The national herd grew by only 5% to 25.9 million head. The abundant pasture available across most of northern Australia enabled producers

to retain existing stock and purchase additional breeders. As a result, both domestic cattle supply and live cattle and beef exports were constrained. In addition, the number of cattle slaughtered in Australia slumped to a 36-year low in 2021, down to 6 million head.

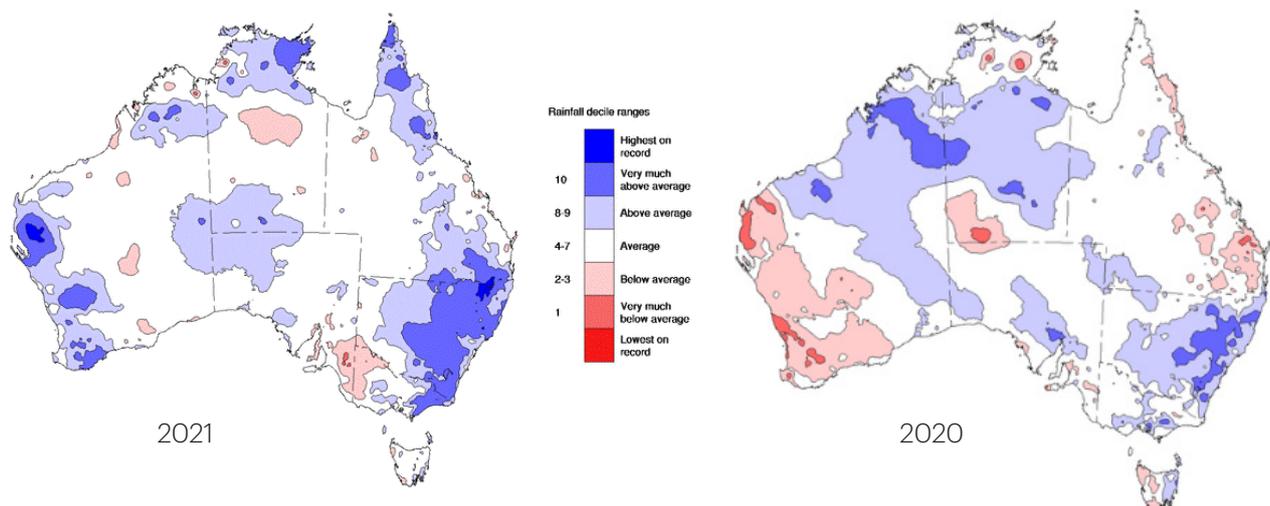
Favourable seasons see Australian herd rebuilding

The favourable seasonal conditions experienced across much of Australia in 2020 continued and improved throughout 2021 (Figure 3). This resulted in an abundance of pasture in all major cattle-producing regions, along with a good grain harvest for a second consecutive year. These factors underpinned national herd growth through restocking of previously drought-stricken regions and high calving and weaning rates.



Photo Credit: Forge Farm

Figure 3: Australian Rainfall Averages, 2021 compared to 2020



Source: Australian Bureau of Meteorology

Australian feedlots and abattoirs challenged by high cattle prices

Australian feedlots fed a record number of cattle in 2021. With capacity reaching 1.4 million head, feedlots produced 50% of domestically consumed beef for the first time. On the back of the relatively tight supply, lotfeeders were holding cattle on feed for longer to balance out the initial higher feeder cattle purchase prices.

Australian abattoirs were constrained by ongoing pandemic-related labour shortages and the high cost and limited availability of slaughter-ready cattle. In November 2021, the Australian Meat Industry Council reported that many abattoirs were running at 80% of capacity and experiencing losses of over AU\$300 (RP3,120,000) on each beast processed.

Australia's global beef export volumes down



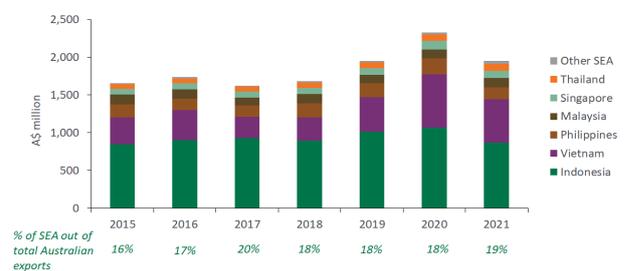
Photo Credit: Farm Online

Australian beef exports in 2021 declined by 36% to 888,000 tonnes, compared to 2020 - also a year of declining beef exports. However, export value was down by only 4% on 2020 levels due to the higher value of beef in international markets. Japan, South Korea, the People's Republic of China, and the United States took a combined 78% of all Australian beef exports (by value). While Indonesia accounted for only 5% of Australia's total beef exports, the country remains an important market for Australian beef offal, which makes up approximately 40% of beef exports by volume.

Southeast Asia has consistently accounted for 18 to 20% of Australian cattle and beef export revenue over the past five years (Figure 4). Indonesia retained its position as the most valuable Southeast Asian market for Australian live cattle and beef exports, although the actual value dropped by 18%

(to AU\$871 million) compared with 2020 levels. Indonesia accounted for 45% of the value of all Australian cattle and beef exports to Southeast Asia and was of significantly higher value than the next most important destination, Vietnam, which accounted for 29% export value.

Figure 4: Value of Australian Beef and Cattle Exports to Southeast Asia



Source: Meat and Livestock Australia

Australian cattle exports to Indonesia decline for a second year



Photo Credit: Gettyimages

Australia's volume of live cattle exports to Indonesia fell by 12% to 406,871 head compared with 2020 numbers (Figure 5). Despite the lower numbers, the overall value of live cattle exports increased by 10% to around \$600 million, driven by the higher price of feeder cattle throughout 2021.

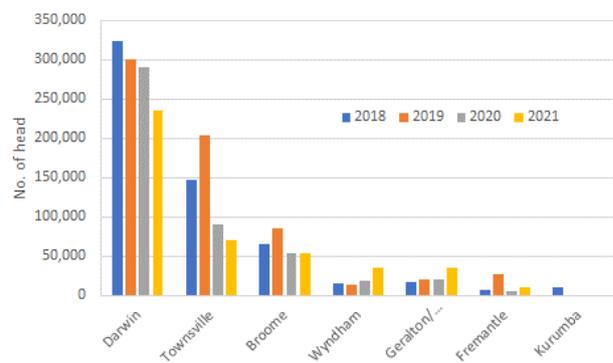
Figure 5: Annual Live Cattle Exports from Australia into Indonesia



Source: Meat & Livestock Australia

Cattle were predominantly exported to Indonesia through Darwin, with numbers from Townsville declining steadily since a peak in 2019 (Figure 6). Northern Queensland cattle producers are now supplying southern Australia markets, a trend expected to continue at least until mid-2022.

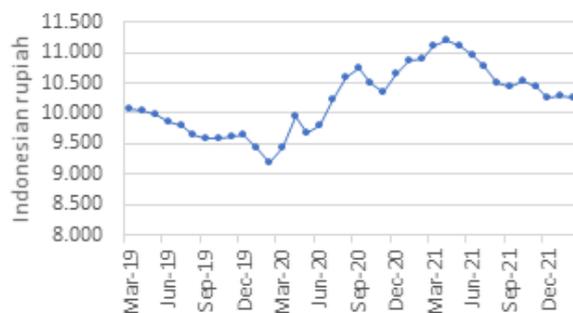
Figure 6: Source of Cattle Exported to Indonesia from Australian Ports



Source: Australian Bureau of Agricultural and Resource Economics (ABARES)

In Q2 and Q3 of 2021, Australia's cattle exports to Indonesia fluctuated in line with the landed cattle price and the appreciation of the Australian dollar against the rupiah (Figure 7). Indonesian cattle importers found it increasingly difficult to source Australian feeder cattle as the year progressed.

Figure 7: Australian Dollar Exchange Rate Against the Indonesian Rupiah



Source: OANDA

Indonesian beef and cattle prices edge higher



Photo Credit: Meat & Livestock Australia

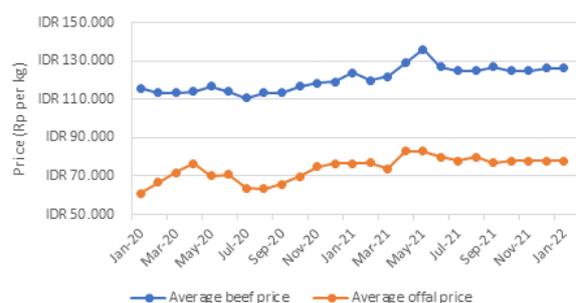
In 2021 beef prices in Indonesian markets were relatively stable (Figure 8) and generally in line with the Ministry of Trade's reference price³. Prices averaged Rp126,000 (AU\$12.12) per kg, up from Rp116,000 (AU\$11.15) in 2020. Consistent with previous years, the price of beef spiked during the festive period of Ramadhan and Eid al Fitr. In December 2021 there was a further increase in the cattle price, in line with the increasing costs of production. These prices were however quickly dampened by soft consumer demand and the Government of Indonesia's reference price policy.

The price of Brahman-cross slaughter cattle increased by around 8% to Rp48,000 per kg liveweight, up from Rp44,500 (AU\$4.28) per kg liveweight in 2020. Local Indonesian cattle (predominantly Bali and Ongole breeds) were

considerably more expensive than imported cattle, reaching Rp58,200 (AU\$5.60) per kg by the end of 2021. This equated to a 7% increase on 2020 prices providing additional income to rural households.

Local meat traders, who dominate Indonesia's cattle market, generally purchase and slaughter one beast per day. They prefer to purchase local cattle as they are cheaper than large Brahman-cross cattle and allow the unrefrigerated processed carcass to be sold the same day following slaughter. Smaller beef volumes are also more likely to clear quickly in Indonesia's wet markets.

Figure 8: Fresh Beef and Offal Prices in Jakarta and Medan Wet Markets



Note: Prices are averages across wet markets.
Source: Meat & Livestock Australia (Indonesia office)

Indonesian processors absorb costs to shore up demand

Most feedlots and abattoirs in Indonesia absorbed their high operational costs during 2021 to support meat traders and ensure ongoing strong demand. Jakarta's butchers and meat sellers commonly go on strike in the lead-up to Ramadan in response to increases in slaughter cattle and beef prices. However, strike action planned by the Indonesian Meat Butcher and Trader Network (JAPDDI) for early 2022 was cancelled because of the increasing

consumer acceptance that beef prices had risen due to upstream cost increases. The Government of Indonesia worked with JAPDDI to raise consumer awareness of these issues. JAPDDI reported that the Government of Indonesia's beef price intervention had contained price surges to between Rp125,000 (AU\$12.02) and Rp130,000 (AU\$12.50) per kg, lower than a potential increase to Rp140,000 (AU\$13.46) per kg.

³ Ministry of Trade Regulation 7/2020 is aimed at maintaining stable prices for rice, corn, soy, sugar, cooking oil, shallots, eggs, chicken, and beef. An informal beef reference price of Rp120,000 (AU\$11.54) to Rp130,000 (AU\$12.50) was reported in February 2022.

Indonesian feedlots work to minimise losses

By the end of 2021, Australian feeder cattle were costing between Rp67,000 (AU\$6.44) and Rp70,000 (AU\$6.73) per kg at the Indonesian feedlot gate. Meanwhile, the selling price for slaughter-ready cattle ranged from Rp48,000 (AU\$4.62) to Rp50,000 (AU\$4.81) per kg liveweight, resulting in considerable trading losses.

Feeding margins needed to be exceptionally good to make up for such trading losses, but feedlots reported substantially tightened margins due to increasing feed and fuel costs.

Strategies being implemented by feedlots to address profitability concerns included: buying lightweight feeder cattle to reduce trading losses and maximise feeding gains; implementing efficiency measures

to reduce labour costs; developing more efficient feed rations; and buying Australian buffalo and/or local Indonesian cattle when available, although the availability of both was tight. Despite these measures, Indonesian feedlot managers reported operating at break-even or below.

Active members of the Indonesian Feedlot Association (GAPUSPINDO) decreased from 24 at the end of 2020 to only 16 by the end of 2021. Industry stakeholders recalled the Asian Financial Crisis of 1997, when feedlot numbers dropped from around 40 pre-crisis to 10 post-crisis. Given the current business environment a similar outcome is possible by the end of 2022. The feedlot industry did however recover steadily in the decades following the Asian Financial Crisis.

Government of Indonesia programs bolster domestic production

Indonesian beef production continued to meet almost half of the country's domestic demand in 2021, with production dominated by smallholder farmers breeding Ongole and Bali cattle.

In 2019, the Government of Indonesia established the Cattle Corporation Village (CCV) Program to distribute breeder and feeder cattle to smallholder farmer groups and cooperatives. In the 2021 iteration of the CCV program, approximately 4,500 breeders from Australia and 2,500 local feeder cattle were distributed to target Indonesian provinces.

The Government of Indonesia is also promoting cattle breeding under oil palms, known by the acronym "SISKA" – Sistem Integrasi Sapi Kelapa Sawit or Integrated Cattle and Oil Palm System. SISKA production has the capacity to be nationally significant given the large land area in Indonesia



Photo Credit: PKH

suitable for integrated cattle grazing – estimated to be over 3 million hectares. The Indonesia-Australia Partnership on Food Security in the Red Meat and Cattle Sector is working with the Government of Indonesia and the oil palm sector to promote SISKA production, at both smallholder and commercial scales.

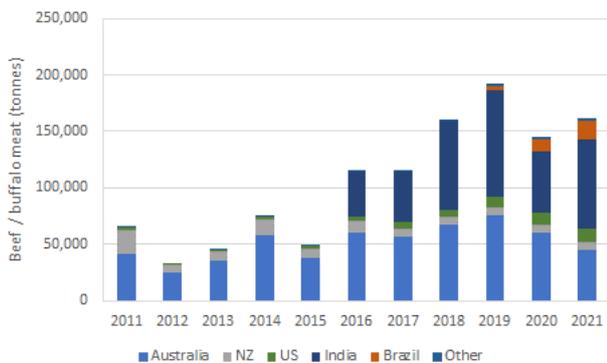
Indian buffalo meat dominates beef imports



Photo Credit: Media Indonesia

Indonesia has rapidly increased its importation of beef and buffalo meat over the past 10 years, importing almost five times the volume in 2021 compared to that imported in 2012 (Figure 9). Australia’s dominance as a supplier of beef has reduced progressively since 2016, when Indonesia commenced importing Indian buffalo meat (IBM). In 2021, Indonesia’s state-owned enterprises⁴ imported just under 80,000 tonnes of IBM compared with 45,000 tonnes of Australian beef. With imports of Brazilian beef also increasing, the switch to lower-cost suppliers of beef is set to continue.

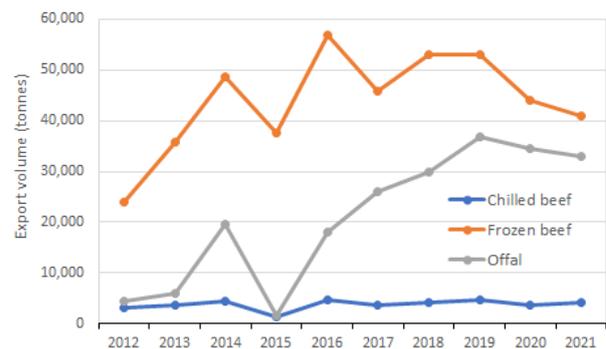
Figure 9: Importation of Beef and Buffalo Meat into Indonesia



Source: Meat & Livestock Australia

Compared with 2020 levels, in 2021 Indonesia’s import volumes of Australian frozen beef and offal declined by 7% and 4% respectively (Figure 10), with this downward trend starting in 2019. In contrast, importation of chilled beef lifted by 14% suggesting the development and growth of a niche market catering to these specialty and higher-value products. However, chilled beef imports are only 10% of the frozen beef import volume.

Figure 10: Importation of chilled and frozen beef and offal from Australia



Source: ABARES

⁴ Particularly the Indonesia Logistics Bureau - Badan Urusan Logistik (BULOG), which manages procurement, distribution and price control of staple foods, and PT Berdekari, a livestock production and meat importation business. Both are government-owned companies.

Indonesian industry lobbies to broaden cattle and beef supply

The Indonesian cattle and red meat industry continued to request Indonesian government ministries to expand government-to-government arrangements for live cattle and boxed beef importation. GAPUSPINDO has specifically targeted live cattle from Mexico and Brazil, due to the perception that they are potentially lower cost than cattle from Australia. This follows the importation of slaughter-ready Brazilian cattle into Vietnam in the second half of 2021.

There are challenges with importing live cattle into Indonesia from both countries, including the cost of cattle from Mexico, which may not be significantly cheaper than Australian cattle, the Foot and Mouth Disease status of Brazil, and the long sea voyage required from both countries. However, Brazil and Mexico's comparatively relaxed regulatory settings for live animal exports does increase their competitiveness.

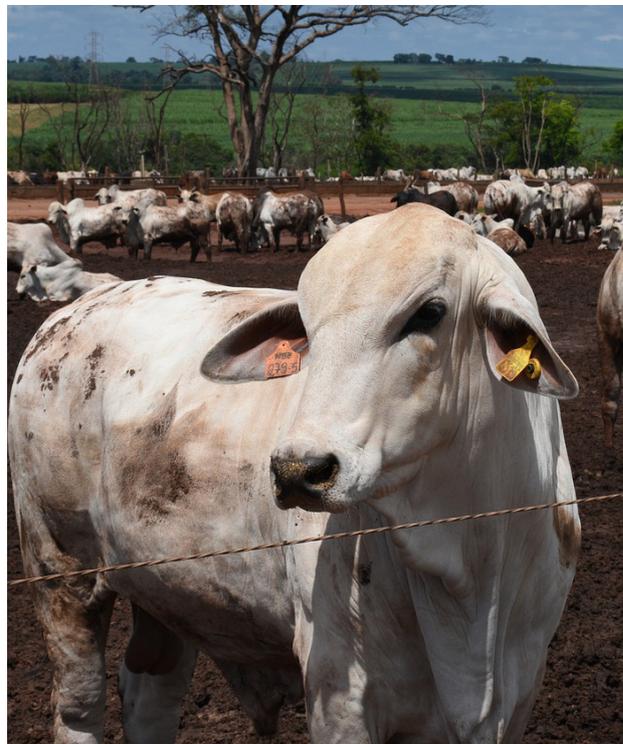


Photo Credit: getty images

Fresh beef substituted with cheaper options in Indonesia



Photo Credit: Media Indonesia

Consumer demand for beef remained in relative balance with the weaker supply environment, with imports of both live cattle and beef down significantly on pre-pandemic levels. Regional

markets such as Medan experienced weaker demand than the greater Jakarta region. Rabo Bank has warned that further price increases may result in consumers moving to other protein sources or a reduction in beef consumption.

Bakso balls represent an important market for fresh beef in Indonesia, accounting for approximately 50% of total beef demand. Once made only from fresh beef, bakso makers are now substituting increasing quantities of frozen beef and chicken meat to reduce overall cost. High levels of fresh beef substitution reduces bakso ball quality, but bakso makers are improving their ability to use lower cost ingredients. Fresh beef producers are concerned that this trend will reduce future beef demand.

Pressure on “last-mile” logistics as online markets grow

Most of Indonesia’s beef is still sold through traditional channels – predominantly wet markets. However, trade through modern retail and online avenues is growing, catering to different consumer segments, including a digital-savvy younger generation. Consumers are increasingly receptive to purchasing fresh food products, including beef, from online shops, rather than venturing into wet markets or supermarkets.

Continued growth in online marketing will require the development of effective cold chain and logistics from producer/processors through to the consumer. Reports of spoiled meat being delivered to consumers have been common over the past two years—the result of inadequate last-mile logistics and cold chain systems.

Three models of last-mile delivery dominate in Indonesia. Fresh produce businesses, such as Sayurbox, Segari, Brambang, Happyfresh and

Tanihub utilise their own delivery fleets, equipped with storage to maintain product temperature, from packing to delivery in major urban centres. The second model involves e-commerce marketplaces such as Shopee, Tokopedia, and Lazada, which facilitate fresh produce purchases and arrange delivery through on-demand logistics providers, such as Grab, Gojek, and Lalamove. These companies have the capacity to provide immediate or same day delivery, but may not ensure cold chain integrity. In contrast, Paxel collects products using refrigerated vehicles and transports them to a warehouse freezer for sorting and delivery. This model allows route optimisation and efficiencies of scale, but generally has a longer delivery time.

With business-to-consumer channels developing rapidly in the red meat sector, establishing reliable and traceable logistics channels that maintain food safety will be essential.

Short-term challenges: supply issues ahead of Ramadan

Ramadan commenced in early April and Eid al Fitr falls in early May 2022. The period will be accompanied by the usual spike in demand for beef and cattle to meet religious obligations. There are concerns that there will be insufficient live cattle for the 2022 Eid al Fitr. Feedlots cancelled orders for Australian feeder cattle in late 2021 and early 2022 due to high cost and tight supply, and there are unlikely to be further shipments of cattle arriving in time to be fattened ahead of Eid al Fitr. Supplies of live local cattle from Kupang and Bali are reported to be tight due to high take-off rates in recent years and their high prices. Beef imports are expected to meet the supply gap.

The Indonesian Meat Importers Association (ASPIDI) reported that members who had been hoping to fill their freezers to meet Eid al Fitr demand were facing delays in obtaining import permits. State owned enterprises have considerable stockpiles of frozen beef and IBM and are expected to import an additional 20,000 tonnes of IBM and 1,500 tonnes of Brazilian beef prior to the festive season. The competition from state owned enterprises during the most profitable sales period presents a significant challenge to commercial beef importers.

Longer-term outlook for the bilateral trade

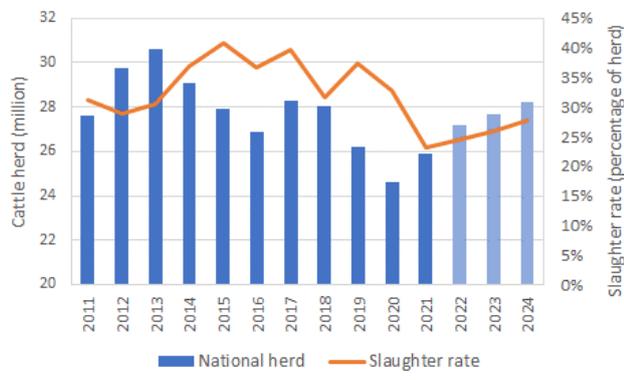


Photo Credit: Meat & Livestock Australia

Interrelated factors will continue to constrain the red meat and cattle trade between Australia and Indonesia.

Australia’s beef and cattle prices are forecast to remain well above average, at least for the first half of 2022, consistent with global beef and cattle prices. On a positive note, Australian cattle supply is expected to improve, by mid-2022. Meat & Livestock Australia expects the current pace of Australia’s national herd growth to continue in 2022, with the herd reaching 27.2 million head by the end of the year. Herd numbers are expected to top 28 million by 2024 (Figure 11).

Figure 11: Australian National Herd and Slaughter Rate to 2021 and Projections to 2024



Source: Australian Bureau of Statistics and Meat & Livestock Australia

This growth will be led by production in the southern Australian states and in Queensland, which received above average rainfall through to early March 2022. Increases to the North Australian herd will be dependent on a favourable wet season in late 2022 and/or early 2023. Meat and Livestock Australia predicts that this improved cattle production will underpin a 15% increase in Australian beef exports in 2022, whereas global beef production is predicted to decline by an estimated 4%, largely due to tighter cattle supplies in the United States.

Strong growth in slaughter numbers is also expected in 2022, with an 11% increase from 2021 numbers as calves from the 2020 season mature and herd rebuilding slows. Additional growth in slaughter rates is expected for 2023 and 2024.

For Australian abattoirs, labour shortages are expected to ease in 2022 as pandemic restrictions are lifted and new working visa programs commence. The Australian industry employs many meat workers from Pacific Island nations and labour demand remains very strong. The Government of Australia is facilitating an ASEAN working visa, expected to commence in 2022, which should see work opportunities for a substantial number of participating country meat workers.

The World Bank predicts Indonesia’s economic growth rate to be 5.2% in 2022, provided Indonesia can avoid another severe COVID-19 spike, achieve 70% vaccination coverage in most provinces and maintain conducive monetary and fiscal policies. Indonesian feedlots are however likely to face another challenging year with few options to increase the price of slaughter cattle. Feedlots are expected to continue to be constrained by a combination of high Australian feeder cattle prices and increasing feed and logistics costs. As local feed costs increase the option to import feed grains will become increasingly attractive. In early March 2022, the Government of Indonesia expressed its intention to explore the issuance of import licences for feeder cattle from Mexico, starting in the second



Photo Credit: Livecorp

half of 2022, to be followed by Brazil. Indonesian feedlots are expected to move rapidly on this opportunity. The financial outcomes of these future shipments will determine the extent to which live exports from Australia are impacted.

While record cattle prices and high production costs created profitability challenges for Australian feedlots throughout 2021, an abundance of rain damaged feed grain at reasonable prices improved margins in early 2022. The Russia-Ukraine war is however expected to drive grain prices higher in the medium term.

The Government of Indonesia has set annual import quotas for the Indonesia Logistics Bureau - Badan Urusan Logistik (BULOG), for 2022, at 100,000 tonnes for IBM and 20,000 tonnes for Brazilian beef. There is also an expectation that another state-owned enterprise, PT Berdikari, will be issued permits to import a further 40,000 tonnes of IBM and 20,000 tonnes of Brazilian beef.

Following lobbying by the Indonesian Meat Importers Association, the Government of Indonesia has eased trade restrictions so that commercial meat traders can now directly import IBM and Brazilian beef.⁵ Until early 2022, only state-owned enterprises were permitted to import boneless beef products, such as

IBM and Brazilian beef. Meat importers are expected to take maximum advantage of this opportunity, although importation allowances may be restricted. The feedlot sector is concerned that the increased supply and low price of IBM and Brazilian beef will lead to entrenched lower demand for fresh beef.

The identification of Lumpy Skin Disease (LSD) virus in Sumatra in January 2022 presents a new challenge for cattle sectors in both Indonesia and Australia. The LSD virus was originally identified in Southern Africa in the 1970s. It has since spread north into the Middle East and Central Asia, across to South Asia, and then through Southeast Asia. The LSD virus is transmitted via biting insects, such as flies and mosquitoes, and causes serious illness to cattle and buffalo, reducing livestock productivity and occasionally resulting in death⁶. Vaccines for the virus are available but they have limitations. The Australian government is currently working with Indonesian authorities to support Indonesia's LSD virus response, including procuring vaccines and delivering capacity-building initiatives. An incursion of LSD into Northern Australia is of significant biosecurity concern, and efforts are now underway to bolster Australian biosecurity measures.

5 Government of Indonesia Regulation 11 of 2022

6 For more information on LSD, go to <https://www.beefcentral.com/news/lumpy-skin-disease-confirmed-in-sumatra-raising-alert-for-australia/>

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