



8 December 2025

The Joint Standing Committee on Foreign Affairs, Defence and Trade

PO Box 602, Parliament House,
Canberra ACT 2600

Dear Committee Members,

Submission: *Keeping the Australian Livestock export Legacy Alive - in Africa*

On behalf of Snowy Mountains Pty Ltd, I am pleased to submit our proposal for Committee consideration. We commend the Government's decisive leadership in phasing out live sheep exports by sea (including cattle), a bold step that reinforces Australia's global reputation for animal welfare and ethical, higher-value agriculture. Yet a phase-out need not mean an end - with the right vision, it can become a transformation, a new beginning.

We would like to propose a win-win solution: **relocate live export operations to Tanzania**. This single step could safeguard Australia's livestock legacy, and open doors to vast new markets across Africa – but also the Middle East. Importantly, this initiative could be absorbed within the existing transition assistance - not as a hand-out, but as a new innovative investment turning the phase-out into an Australian business catalyst:

- **Relocation as opportunity:** It allows the Government to turn a difficult reform into a celebrated achievement. Rather than removing opportunity, it makes the Government the architect of new opportunity - answering public concerns, and transforming criticism into recognition.
- **Relocation as partnership:** It is a perfect opportunity for Australia to engage with Africa in a direct, and economically beneficial way. Instead of the usual aid and research grants, it becomes a hands-on partnership that transfers phased-out historical expertise to strengthens ties with Africa. Tanzania would be the ideal launchpad.
- **Relocation as globalization:** This is outsourcing in its most constructive form. Australia turns globalisation into a force for mutual growth. It allows Australia to honour its phase-out commitments, while still providing producers with a viable path to prosper abroad, as well as forge new economic ties with Africa.

Such an initiative could turn a challenge into a pivot: positioning Australia as a builder of industries and a global agricultural incubator instead - building new partnerships and markets for decades to come. It would be a win for the industry, Australia and Africa.

We stand prepared to present our ideas to the Committee at their convenience.

Sincerely,

Bruce Campbell - Managing Director
Snowy Mountains Pty Ltd

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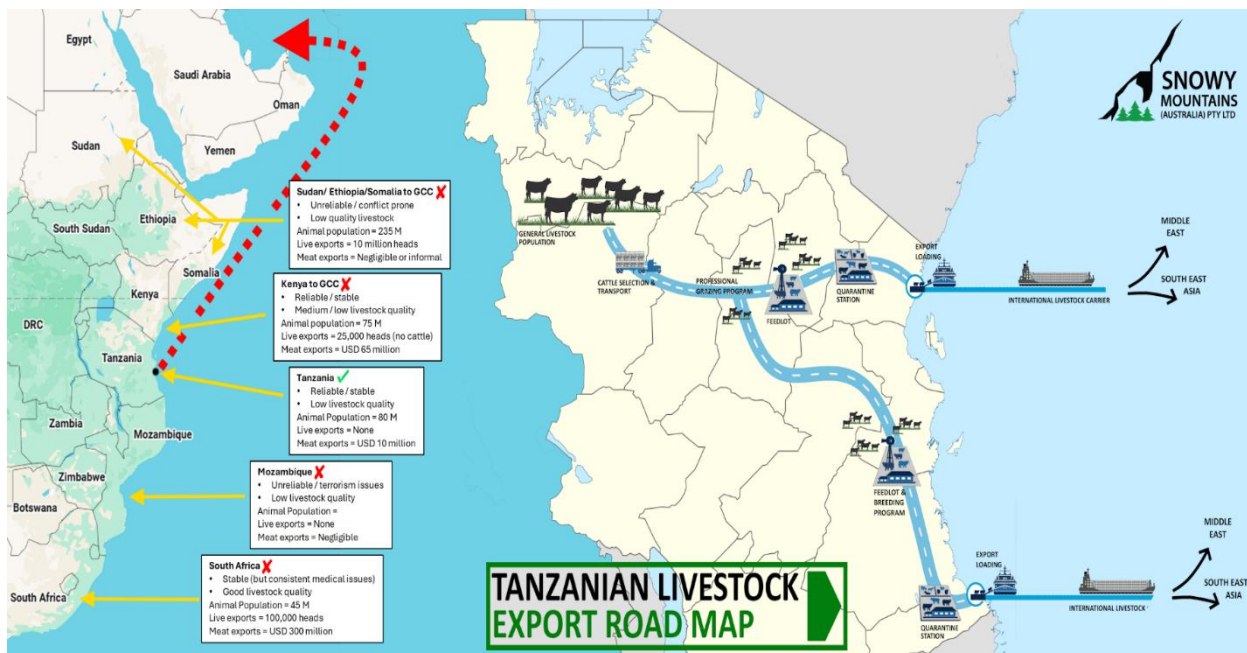
SUBMISSION FOR COMMITTEE

4th of December 2025

KEEPING THE AUSTRALIAN LIVESTOCK LEGACY ALIVE – IN AFRICA

Reference: Submission to Australian Government Joint Standing Committee on Foreign Affairs, Defence and Trade pertaining to Australian trade investment ideas in Africa.

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1 | EXECUTIVE SUMMARY

Purpose

To seek Committee approval for a government-backed investment in Tanzania's livestock sector which the Government could use to mitigate the phase-out of Australian livestock exports, and at the same time create a commercial bridgehead for Australian agribusiness expansion into Africa. The idea would be to position the phase-out of live exports not as an 'end', but as a 'transformative new beginning' – thereby preserving Australia's livestock legacy while also adding new opportunities for Australian producers to keep growing offshore. The strategy attempts to move Australia beyond traditional aid and research funding by establishing more enduring commercial, and diplomatic engagements between Australia, Tanzania - and Africa.

Background

The Government's decision to phase out live sheep exports by sea - and potentially cattle - marks a turning point that will inevitably reshape Australia's livestock industry. While the policy reflects a commitment to animal welfare and higher standards, it also means forfeiting a trade valued at approximately AUD 1.0 billion (1). For decades, live export has underpinned employment, sustained family enterprises, and supported regional economies; its removal risks dismantling an entire legacy built over generations.

Equally significant are the consequences for Australia's long-standing customers in the Middle East and Indonesia. Customers who have relied on Australian live animals to sustain their domestic supply chains are unlikely to substitute finished packaged meat for live imports. Instead, Australia's customers for live animals will turn to alternative suppliers such as Brazil, Uruguay, or South Africa. The outcome would not only be the loss of export revenues and a historical market share, but also the erosion of a livestock legacy that has been integral to building the nation itself. If there is scope for this legacy to endure - even in a different form - it would be worthwhile to consider how continuity might serve both Australia and its partners abroad.

By making just a small economic adjustment, Australia could change the story entirely - from winding down to building up. Instead of phasing out, there could be talk of a strategic relocation. For example: Relocating Australian livestock expertise to Tanzania could offer a bold, forward-looking solution preserving the knowledge and traditions of our industry, yet at the same time open new markets for Australian companies, strengthens Australia's agricultural footprint in Africa, and contributes to food security as well as stronger economic / diplomatic ties in Africa.

Implications:

- **Preserve continuity for producers:** Relocate Australian expertise to Tanzania to safeguard livelihoods and sustain industry capacity post-ban.
- **Expand Australia's global footprint:** Position Australia as a leader in African agricultural modernization, spanning grain, feed, livestock, and meat.
- **Strengthen trade ties with Africa:** Use Tanzania as a bridgehead to deepen engagement with Africa while securing further a Middle Eastern live animal markets.

2 | RELOCATING THE AUSTRALIAN LIVESTOCK EXPORT INDUSTRY TO TANZANIA BENEFITS AUSTRALIA

Relocating Australian livestock expertise to Tanzania could provide not just a lifeline for the industry, but a strategic transformation of Australia's agricultural presence abroad. Rather than watching producers exit the sector, relocation offers them continuity through offshore operations where they can continue raising world-class animals while adapting to new realities. This ensures that Australia's livestock legacy is not lost, but re-anchored in a new geography where it can thrive.

The advantages are multi-layered. Economically, relocation would preserve billions in trade value by maintaining supply to long-standing customers in the Middle East and Indonesia, while simultaneously opening new African markets. It would also generate diversified income streams for Australian agribusinesses, financing, and training institutions through joint ventures, technology transfer, and capacity-building programs. By embedding Australian genetics, feed technology, veterinary standards, and logistics expertise into Tanzanian supply chains, Australia would secure both continuity of its export markets and new opportunities for innovation.

Domestically, the relocation strategy would safeguard livelihoods for producers and ranchers, while sustaining jobs in allied industries such as feed production, veterinary services, and logistics. It would also preserve Australia's hard-won reputation for excellence in livestock management by ensuring that its standards and practices remain embedded in global supply chains.

Diplomatically, this approach would give the Australian Government a unique opportunity to engage with Africa in a way that moves beyond the traditional channels of humanitarian aid, research grants, or short-term assistance. While such methods have often been the default for Western countries, they have not always delivered the tangible, lasting change that African partners seek. By contrast, direct participation through genuine economic investment and partnership signals a more enduring commitment. Relocating Australia's livestock expertise to Tanzania would embody this shift - demonstrating that Australia is prepared to stand alongside African nations in building industries, creating jobs, and strengthening food security and protein requirements in this part of the world. At a time when developed economies are slowing and globalisation increasingly favours lower-cost producers, such partnerships allow Australia to remain competitive while cultivating goodwill and influence in rapidly growing markets.

Most importantly, relocation reframes the phase-out not as a loss, but as a transformation. It allows Australia to carry forward a legacy that has been integral to building the nation, while adapting it to new contexts where it can continue to deliver value. In doing so, Australia would not only protect its market share but also expand its agricultural footprint into Africa, turning a domestic policy challenge into a global opportunity.

Implications:

- **Reframe the phase-out as transformation:** By relocating rather than ending, Australia turns a domestic policy challenge into a global opportunity, protecting market share while expanding its agricultural footprint.

- **Transplant Australia's livestock legacy offshore:** Invest in Tanzania and relocate Australia's live animal export infrastructure to Tanzania, thus preserving industry knowledge, tradition and continuity.
- **Maintain critical export markets:** Middle Eastern and Indonesian buyers continue receiving "Australian standard" animals, safeguarding billions in trade value.
- **Expand into Africa's growth markets:** Establishing operations in Tanzania opens access to rapidly growing protein demand across the continent.
- **Create diversified income streams:** Producers, ranchers, and service providers retain continuity, while feed, veterinary, logistics – even financing sectors - sustain jobs and innovation, while all types of Australian agribusinesses can gain new opportunities through joint ventures, technology transfer, and capacity-building programs.
- **Strengthen Australia's diplomatic footprint:** Direct economic partnership signals a more enduring commitment to Africa, moving beyond traditional aid and research grants.
- **Secure first-mover advantage:** Act now to prevent competitors from embedding supply chains and displacing Australian influence.

3 | BENEFITS FOR TANZANIA

For Tanzania, the relocation of Australia's livestock expertise would represent more than an inflow of investment - it would be a catalyst for national transformation. The initiative would accelerate modernization of Tanzania's livestock sector by embedding world-class genetics, feed technology, veterinary standards, and logistics systems directly into local supply chains. This would generate employment across rural communities, build technical capacity through knowledge transfer – it would mark an immediate transformation - and immediately establish Australia as a trusted and willing bilateral partner in the eyes of African nations.

Why Tanzania, and why now?

The window is open - but perishable. Australia's former customers – Southeast Asia and the Middle East - will source animals (and meat) from elsewhere; the only question is whether Australia will lead that supply from a new base. Acting now secures first-mover status. Delay invites Brazil, China, or regional competitors to embed supply chains, standards, and brand narratives that displace Australian influence. Once entrenched, supply relationships are sticky - logistics, protocols, and buyer trust compound over time. For Tanzania, Australia's reputation for standards is the differentiator; it must be anchored in place before others set the rules.

With over 33.9 million cattle, 18 million sheep, and 25 million goats (2) - Africa's second-largest livestock keeper after Ethiopia - Tanzania really offers a uniquely compelling opportunity to transplant the Australian livestock expertise. More importantly, Tanzania's geography position and geopolitical stability make it the most natural hub for regional livestock trade on the African east coast by far.

If Australia chose to relocate its live export industry to Tanzania, the benefits would be immediate. Tanzania would be able to strengthen its food security, while also positioning itself as a regional gateway for Africa's growing protein demand. This would be invaluable to Tanzania, not to mention that having Australian ranchers working alongside Tanzanian counterparts introducing modern systems - from grain and feed production to animal husbandry - would build long lasting sustainable development and strong ties able to be leveraged in other bilateral business sectors. This collaboration would be a game-changer for Tanzania and, at the same time, align perfectly with Australia's broader foreign policy objectives."

A comparative advantage to other African nations:

Tanzania's livestock sector already possesses the scale to become a major supplier to Gulf markets. With a national herd of over 18 million sheep, improved breeding and logistics could enable Tanzania to supply volumes comparable to Australia's historical 500,000–700,000 live sheep shipped annually to the Middle East (3). At its peak in 2015, Australia exported more than 1.3 million sheep to Kuwait, the UAE, and Bahrain combined (3), generating hundreds of millions of dollars in trade. Today, GCC countries still import around 10 million live sheep and goats each year (4), and Tanzania could easily be well-positioned to cater for a percentage of this demand.

The same potential exists in cattle. Markets like Indonesia, Vietnam, Saudi Arabia, the UAE, and other GCC states, import an average of 1–1.5 million head annually from global suppliers (4), and Tanzania could readily match Australia's ~720,000 head of cattle exported in 2024 (3).

Tanzania's geographic proximity offers a decisive advantage: shipping from Dar es Salaam to Gulf ports is roughly 40% shorter and cheaper than from Fremantle or Darwin (5), making Tanzanian exports more competitive once systems are modernized.

Equally important is market fit. Middle Eastern buyers prefer sheep and cattle over buffalo, which dominate Indian exports, and they demand reliability - something South Africa struggles to provide due to recurring foot-and-mouth disease outbreaks. With its large herds and extensive land availability, Tanzania has the scalability to expand rapidly once feedlots, quarantine facilities, and logistics networks are upgraded. This positions Tanzania not only as a viable replacement for Australia's phased-out exports, but as a long-term hub for supplying high-quality livestock to some of the world's most demanding markets.

Diplomatically, the partnership would elevate Tanzania's profile as a nation capable of attracting and sustaining high-value international investment. Unlike traditional aid or research grants, this initiative represents direct economic participation - an honest partnership that builds industries rather than temporary projects. This is what globalisation is about. For Tanzania, this means long-term resilience, stronger trade ties, and recognition as a leader in Africa's agricultural modernization.

Implications:

- **Modernize Tanzania's livestock sector:** Deploy Australian expertise to improve breeds, veterinary services, and infrastructure.
- **Leverage geographic advantage:** Use Tanzania's proximity to the Middle East to reduce costs and secure competitiveness.
- **Establish Australian-branded production:** Replicate world-class systems to deliver trusted "Australian standard" livestock from Tanzania.

- **Scale exports strategically:** Position Tanzania to match just a percentage or more of Australia's historical volumes, by generating possibly AUD 300–600 million annually.
- **Strengthen food security and employment:** Build domestic protein supply and create rural jobs through large-scale ranching.
- **Boost export revenues:** Enable Tanzania to capture premium prices in Middle Eastern and African markets.

4 | IMPLEMENTATION STRATEGY

We do not make this submission empty-handed. This submission is not theoretical. It is grounded in preparation: Snowy Mountains has visited Tanzania repeatedly, engaged with authorities, and secured more than 25,000 hectares of prime land for grain, grazing, feedlots, and quarantine stations, with commitments for an additional 150,000 hectares as development scales.

Tanzania offers a uniquely pragmatic base for relocating Australian livestock expertise. Its climate and rangelands mirror northern Australia, reducing adaptation risks, while coastal access and direct shipping routes to Gulf markets deliver a competitive edge over distant suppliers such as Brazil, Argentina, Uruguay, or South Africa.



The way forward is structured as a controlled sequence of phases:

- **Phase 1 – Establish Bases:** Formalize land agreements for initial 20,000 hectares in north and south Tanzania. Build housing, sheds, and quarantine facilities. Order critical machinery (dozers, tractors, fencing, prime movers, etc.).

- **Phase 2 – Cropping & Feedlots:** Clear land, plant fodder crops, and assemble feedlots to prepare animals for export. Surplus fodder sold locally and to Middle Eastern buyers. This can be achieved in Year 1. Live cattle exports could start Year 2.
- **Phase 3 – Expansion & Share Farming:** Scale operations by partnering with large landowners and the Tanzanian Government (initially committed to 150,000 hectares, but possibly much more). Introduce broadacre crops - sorghum, maize, sunflowers, cotton, soybeans, rice - enabling feed pellet production for East Africa and GCC markets.
- **Phase 4 – Breeding & Abattoirs:** Launch breeding programs combining Australian genetics with select African breeds to create export-quality livestock. Construct modern abattoirs to produce high-quality meat for premium markets in the Middle East and Europe.
- **Phase 5 – Vertical Integration:** Develop pellet feed plants, grain storage, silos, and export infrastructure. Establish a fully integrated system covering grain production, feed manufacturing, feedlots, abattoirs, quarantine facilities, and port logistics.

Investment & Timeline: Initial set-up (livestock, equipment, fencing, fuel) could be estimated at USD 20 million – depending the start-up scope. Expansion (additional land, livestock, fencing, fertilizer, seed) could require a second round of USD 20 million down the line – likely in private funding, and the added pelleting capacity and abattoirs could potentially require another USD 20 million (again depending on scope). By Year 4, at least 150,000 hectares could be developed, with further growth funded organically from project revenues. Within 10 years the aim could be to reach a minimum of 100,000 heads of cattle, and over 1 million sheep and goat under management.

Market Potential: Tanzania's population is projected to reach 100 million by 2050, with beef demand rising 200% by 2030 (6). This provides strong domestic cover while the primary target remains GCC nations, which import 1.5 million cattle and 10 million sheep and goats annually. Proximity to Europe halves shipping costs compared to Australia, opening new premium markets.

Outcome: With government support, Australian-run ranches in Tanzania will replicate proven systems - breeding, veterinary standards, water management, feed optimization - to produce "Australian-branded" livestock and meat in Tanzania, trusted by international buyers. This blueprint positions Tanzania as a major global exporter while giving Australia a strategic bridgehead in Africa: safeguarding its industry, projecting its expertise, and establishing "**Australian Branded Meat – Made in Tanzania.**"

5 | RECOMMENDATIONS

This submission recommends the following actions to establish a commercial bridgehead in Tanzania:

- **Authorize a spearhead ranch investment:** Provide government-backed capital to establish the Australian-led, vertically integrated bridgehead in Tanzania.
- **Secure enabling agreements:** Negotiate land tenure assurances, long-term leases, and biosecurity corridors with Tanzanian authorities to de-risk operations.

- **Fast-track export pathways:** Align quarantine, certification, and animal welfare standards to expedite shipments to GCC markets under Australian oversight.
- **Mobilize knowledge transfer:** Mandate university/TAFE delivery of on-site training and certification tied to the ranch's operational needs.
- **Deploy trade diplomacy:** Conclude buyer agreements in the Middle East for "Australian standard" livestock produced in Tanzania, locking in volumes and premiums.
- **Establish financing frameworks:** Utilize Export Finance Australia and co-financing with international partners to support infrastructure and working capital.
- **Phase expansion milestones:** Approve a staged scale-up from moderate to high-volume exports, contingent on verified performance and compliance.
- **Embed brand governance:** Protect the "Australian Standard Livestock – Raised in Tanzania" mark with quality assurance, audits, and traceability systems.
- **Mitigate perception risk:** Issue a government position statement endorsing the project to reassure institutional investors regarding Africa exposure.
- **Monitor strategic outcomes:** Implement KPI-based oversight (export volumes, jobs, compliance, market share) to ensure national interest objectives are met.

6 | CONCLUSION

The decision before **the Joint Standing Committee on Foreign Affairs, Defence and Trade** is perhaps safeguarding Australia's livestock heritage and projecting it into a geography where it can thrive. Transferring or relocating capabilities to Tanzania could turn the domestic phase-out of live exports into an opportunity and safeguard an industry central to Australia's identity, while simultaneously strengthening the engagement with Africa. This could be a win-win.

The particular strength of this initiative lies in its simplicity and scalability: one ranch could serve as the nucleus for expansion, opening pathways for more Australian companies to follow and enter Tanzania's livestock sector. This bridgehead logic could be highly cost-efficient, sustaining the industry offshore while preserving profits, and building Australian brand reputation across Africa – all at the same time.

With only some initial government backing, partnerships between Australian producers, Tanzanian stakeholders, and international financiers could be mobilized quickly. This could be a new approach - bold new thinking - when older models of aid and research funding have yet to solve Africa's economic woes. None have actually improved Australia's engagement with Africa. With modest government backing, partnerships between Australian producers, Tanzanian stakeholders, and international financiers could be activated quickly – but more importantly this could represent a bold new thinking at a time when traditional aid and research models have yet to solve Africa's economic challenges and/or deepen Australia's engagement across Africa.

So, why not pursue something new that barely impacts the bottom line of Australian policy, but instead offers transformative potential for both Australia and Tanzania? It is a win-win: Livestock ranching in Tanzania should be treated as a strategic priority, because this could be Australia's chance to reframe a domestic constraint as a strategic power play.

7 | REFERENCES

1. Phaseout of Australian Live Sheep Exports

- **AUD 1.0 billion live export industry value**

Article in Sheep Central May 27, 2025: Australian livestock exports valued at \$911 million in 2024

<https://www.sheepcentral.com/australian-livestock-exports-valued-at-911-million-in-2024/>

2. Tanzania Livestock Population

- **36.6 million cattle (2024)**

World Bank. *Tanzania Economic Update: Harnessing the Opportunity for a Climate-Smart and Competitive Livestock Sector*. June 2024.

<https://www.worldbank.org/en/news/feature/2024/06/26/tanzania-economic-update-harnessing-the-opportunity-for-a-climate-smart-and-competitive-livestock-sector-in-afe-tanzania>

- **18 million sheep, 25 million goats (2022 baseline)**

United Republic of Tanzania, Ministry of Livestock and Fisheries. *Livestock Sector Transformation Plan (LSTP) 2022/23–2026/27*.

<https://faolex.fao.org/docs/pdf/tan223748.pdf>

3. Historical Australian Export Volumes

- **2015 live sheep exports: Kuwait (576,350), UAE (454,233), Bahrain (315,000)**

Parliament of Australia. *Live animal exports to the Middle East*.

https://www.aph.gov.au/-/media/02_Parliamentary_Business/24_Committees/244_Joint_Committees/JFADT/Foreign_Affairs_Defence_and_Trade/Middle_East/chapter5.pdf

- **2024 cattle exports: 722,085 head; sheep exports: 430,000 head**

Beef Central. *Where Australian livestock were exported in 2024*. May 2025.

<https://www.beefcentral.com/live-export/where-australian-livestock-were-exported-in-2024/>

4. GCC Import Demand

- **~10 million live sheep & goats imported annually by GCC countries**

Agriculture and Agri-Food Canada. *Sector Trend Analysis – Meat trends in the Gulf Cooperation Council*. 2023.

<https://agriculture.canada.ca/en/international-trade/market-intelligence/reports-and-guides/sector-trend-analysis-meat-trends-gulf-cooperation-council>

- **1–1.5 million cattle imported annually by GCC countries**

Gani, A. *A policy perspective on the determinants of live animal imports in the Gulf*

Cooperation Council countries. ResearchGate, 2025.

https://www.researchgate.net/publication/392593449_A_policy_perspective_on_the_determinants_of_live_animal_imports_in_the_gulf_cooperation_council_countries/fulltext/6849b776e7be56124ab59611/A-policy-perspective-on-the-determinants-of-live-animal-imports-in-the-gulf-cooperation-council-countries.pdf

5. Shipping distance calculators

- **Shipping from Dar es Salaam to Gulf ports is roughly 40% shorter and cheaper**

Shipping calculators confirm that the Tanzanian route is about 40–60% shorter than any Australian route.

<https://www.searates.com/distance-time/>

<https://sea-distances.org/>

<https://nauticalcalculator.com/port-to-port-distance/>

6. Tanzania Demographics & Beef Demand

- **Population projected to reach 100 million by 2050**

National Bureau of Statistics (Tanzania). *National Population Projections 2023–2050*. September 2024.

<https://nbs.go.tz>

- **Beef demand projected to increase by 200% by 2030**

Tanzania Investment and Sustainable Economic Zone Authority (TISEZA). *Livestock Overview, and World agriculture: towards 2015/2030 (An FAO perspective)*.

<https://www.tiseza.go.tz/pages/livestock>

<https://www.fao.org/4/Y4252E/y4252e07.htm>



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ADDENDUM TO SUBMISSION: Keeping the Australian Livestock Legacy Alive – in Africa

Date: 16/12/2025

From: Snowy Mountains Pty Ltd

To: The Joint Standing Committee on Foreign Affairs, Defence and Trade

Subject: Proposed Coordination Structure: Australia - Livestock Legacy for Africa Council (ALLAC)

Dear Committee Members,


Following our initial submission dated 8 December 2025, we wish to provide this addendum to propose a possible coordination framework that could underpin the relocation of Australian livestock expertise to Tanzania.

We recognize that for any government-backed initiative to succeed - especially one involving international operations, industry continuity, and strategic diplomacy - it must be supported by a credible, transparent, and inclusive structure. To that end, we propose the establishment of a dedicated industry-led body such as the **Australia - Livestock Legacy for Africa Council (ALLAC)** to conform to the Government's ambitions in three key areas and provide a single, credible interface through which to channel support, monitor outcomes, and ensure that national interest objectives are met.

1. **Strategic Continuity:** preserving industry knowledge, market access, and producer livelihoods
2. **Diplomatic Engagement:** deepening ties with Africa through direct economic partnership
3. **Accountable Investment:** providing a transparent vehicle for grants, co-financing, and performance oversight

Should the Committee express interest in the relocation model, Snowy Mountains Pty Ltd stands ready to convene founding members and initiate the formal establishment of: **Australia - Livestock Legacy for Africa Council (ALLAC)**, if so required.

We thank the Committee for its consideration and remain committed to ensuring that Australia's livestock legacy is not only preserved, but projected into new geographies where it can continue to thrive.


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