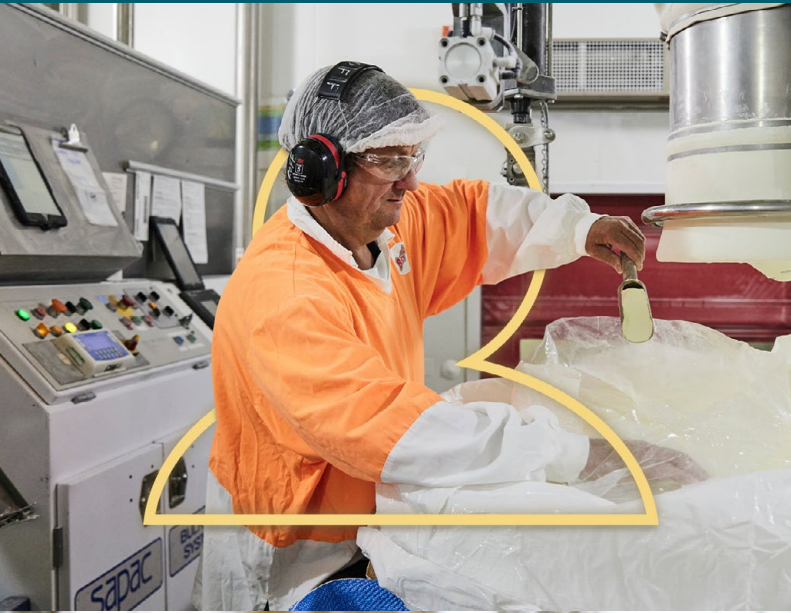




Australian Dairy Sustainability Framework



2025 Sustainability Scorecard



Introduction to the 2025 Sustainability Scorecard

Sustainability is central to the future of Australian dairy. The Australian Dairy Sustainability Framework, in place since 2012, aims to transparently address stakeholder sustainability expectations, while supporting a profitable, resilient dairy industry that can deliver positive and lasting change. Through the framework, the industry reports progress against *Our Dairy Promise* – **to provide nutritious food for a healthier world.**

This 2025 Sustainability Scorecard presents the latest available data, tracking progress across our four sustainability commitments: best care for animals, strengthening economic viability and communities, improving wellbeing, and protecting the environment. Together, these commitments reflect the dairy industry's responsibility to farmers, manufacturing, communities, customers and the natural systems that underpin production.

This year also marks an important step forward in the framework's evolution. Following a dedicated review of current and emerging animal care and welfare issues, Commitment 3 – Providing best care for animals – has been refreshed to better align with industry priorities and contemporary best practice. A new goal dedicated to biosecurity (goal 8) has been added, reflecting the need for stronger focus on maintaining Australia's privileged biosecurity status. The 2025 Animal Husbandry and Genetics Survey establishes new baseline data for these updated goals, while maintaining longitudinal insight where data has previously been reported.

The framework continues to evolve in response to a changing operating environment. Building on the 2024 double materiality assessment – which identified the sustainability topics most significant to the industry and its stakeholders by considering both industry impacts and sustainability-related financial risks and opportunities – working groups are reviewing goals, targets and data sources across the remaining commitments. This work will refine and optimise existing measures, incorporate new annual data sources and introduce goals addressing emerging priorities such as climate risk and resilience. These updates will be reflected in the 2026 scorecard.

Sustainability is not a fixed destination. It requires ongoing reflection, adaptation and improvement. This scorecard captures where the Australian dairy industry stands today and how it is strengthening its performance to ensure a sustainable, profitable and trusted future.

Acknowledgement of Country

The Australian dairy industry acknowledges the Traditional Owners of Country where we work throughout Australia and recognises their continuing connection to lands, waters and communities. We pay our respect to Aboriginal and Torres Strait Islander cultures, and to Elders both past, present and emerging.

A healthier world. For everybody. Every day.

At the heart of sustainability in the Australian dairy industry is a promise: to provide nutritious food for a healthier world. This promise is underpinned by four commitments and 12 goals:

ENHANCING ECONOMIC VIABILITY AND LIVELIHOODS

Creating a vibrant industry that rewards dairy workers and their families, communities, business and investors

-  **1** Increasing competitiveness and profitability
-  **2** Increasing community resilience and prosperity
-  **3** Everyone home safely, every day
-  **4** Providing a productive and rewarding workplace

Alignment of Framework with the UN SDGs:



IMPROVING WELLBEING OF PEOPLE

Providing nutritious, safe, quality dairy food

-  **5** Ensuring safe dairy products
-  **6** Contributing to improved health outcomes

Alignment of Framework with the UN SDGs:







PROVIDING BEST CARE FOR ANIMALS

Striving for health, welfare and best care for our animals throughout their lives

-  **7** Providing best care for animals for whole-of-life
-  **8** The Australian dairy industry strives to maintain its privileged animal biosecurity status and access to high value export markets

REDUCING OUR ENVIRONMENTAL IMPACT

Meeting the challenges of climate change and providing good stewardship of our natural resources

-  **9** Improving land management
-  **10** Increasing water use efficiency
-  **11** Reducing GHG emissions intensity
-  **12** Reducing waste

Alignment of Framework with the UN SDGs:



April 2026

Progress report

Commitment 1

Enhancing economic viability and livelihoods

Goal	Data source	Baseline	2023	2024	2025	2030 Target	Progress	
Goal 1. Increase the competitiveness and profitability of the Australian Dairy Industry								
1.1	More than 50% of farm businesses achieve at least \$1.50 EBIT/kg MS over a rolling five year average	<i>DairyBase, Dairy Farm Monitor Project</i>	20% (2018)	60% (2022/23)	72%	72%	>50%	●
1.2	Increase the Australian dairy industry's share of global dairy trade to 10% by volume	<i>In Focus</i>	6% (2018)	5%	4%	4%	10%	●
1.3	Increase R&DE expenditure in the dairy sector by 2% per annumⁱ	<i>Dairy Australia Annual Reports</i>	\$47m (2019)	\$56.2m (2022/23)	\$50.9m (2023/24)	\$56.5m (2024/25)		
	% dairy farmers constantly looking for new information to improve farm business ⁱⁱ	<i>National Dairy Farmer Survey</i>	79% (2018)	NDA	NDA	NDA		
	% dairy farmers reporting new farming ideas were very important to them ⁱⁱ	<i>National Dairy Farmer Survey</i>	74% (2018)	NDA	NDA	NDA		
	% dairy farmers reporting they were amongst the first in their area to try new ideas and products ⁱⁱ	<i>National Dairy Farmer Survey</i>	46% (2018)	NDA	NDA	NDA		
1.4	Provide consumers with greater choice and access to a variety of dairy products and/or ingredients to meet their specific nutritional needsⁱⁱⁱ	<i>Trust Tracker</i>	85% (2018)	85%	NDA	NDA		●
Goal 2. Increase the resilience and prosperity of dairy communities								
2.1	Increase the contribution the dairy industry makes to supporting the economy of dairy regions							
	The total value of payments made to dairy farmers in Australia	<i>In Focus</i>	\$4.3b (2018)	\$6.1b	\$6.2b	\$5.9b		●
	The number of people directly employed in the dairy industry	<i>In Focus</i>	42,600 (2018)	33,500	31,300	30,400		●
2.2	Increase the recognition of the dairy industry's benefit to regional communities							
	% of people in regional areas who think dairy is an essential part of their community	<i>Trust Tracker</i>	88% (2018)	85%	84%	87%	95%	●
	% of farmers who agree people in my region appreciate the role that dairy farmers like myself play in our community	<i>National Dairy Farmer Survey</i>	67% (2018)	77%	75%	70%	90%	●
2.3	Increase the contribution people in dairy make to social capital (community initiatives) in their community							
	% of farmers who say they/their employees actively participate in their local community initiatives	<i>National Dairy Farmer Survey</i>	69% (2019)	76%	74%	80%	100%	●
	% of farmers who believe it's important for them/their employees to support their local community initiatives	<i>National Dairy Farmer Survey</i>	87% (2019)	92%	93%	90%	100%	●
	% of dairy companies investing funds and participating in local community initiatives				NDA	NDA		
	% of dairy people who feel their community has effective dairy leaders and strong social networks – scale of 1 (strongly disagree) to 7 (strongly agree)	<i>Regional wellbeing survey</i>	4,6 (2018)		NDA	NDA		

Key for data gaps

Where data is not reported it can be for several reasons. These are:

- An indicator is under development (NIA)
- A target metric is yet to be finalised (NTM)
- No data available at this time (NDA)

Key for progress

- Progress towards 2030 targets against baseline
- Result maintained or marginal change
- Regression

Goal	Data source	Baseline	2023	2024	2025	2030 Target	Progress
Goal 3. Everyone home safely, every day							
3.1	Zero workplace fatalities on farm and in manufacturing						
Dairy farming	Safe Work Australia	2 (2017)	NDA	2	0	0	●
Dairy companies	Safe Work Australia	0 (2017)	NDA	1	0	0	●
3.2	100% of dairy farmers and manufacturing facilities to have a documented Work Health and Safety (WHS) Plan						
Dairy farming	Power of People Dairy Workforce Survey	NDA	NDA	58%	NDA	100%	●
Dairy companies		NDA	NDA	NDA	NDA	100%	
3.3	30% reduction in Lost Time Injury Frequency Rate for farm and manufacturing workplaces on figures reported in 2017						
Dairy farming	Safe Work Australia	9.3 (2017)	NDA	12.6	NDA	6.5	●
Dairy companies	Safe Work Australia	6.4 (2017)	NDA	8.8	NDA	4.5	●
Goal 4. Provide a productive and rewarding work environment for all dairy people							
4.1	Rates of dairy remuneration are similar to or higher than for other regional industries						
		NDA	NDA	NDA	NDA	Yes	
4.2	80% of dairy employees are retained within the industry year-on-year						
	Power of People Dairy Workforce Survey	71% (2017)	NDA	78%	NDA	80%	●
4.3	Less than 20% of dairy employers report difficulty in sourcing suitable applicants						
	Power of People Dairy Workforce Survey	70% (2020)	NDA	48%	NDA	<20%	●
4.4	More than 70% of dairy farm owners have an agreed farm transition/succession plan by 2030						
	Power of People Dairy Workforce Survey	21% (2017)	NDA	56% (2020)	NDA	>70%	●
4.5	Human rights – dairy industry has a national human rights position – indicators to be developed						
		NIA	NIA	NIA	NIA	NTM	

i Dairy Australia expenditure only – not including government and private contribution

ii No longer asked in survey

Commitment 2

Improving wellbeing of people

Goal	Data source	Baseline	2023	2024	2025	2030 Target	Progress	
Goal 5. All dairy products and ingredients sold are safe								
5.1	Zero non-compliant chemical residues found during the Australian Milk Residue Analysis Survey	Australian milk residue analysis survey	0 (2018)	0	0	0	0	●
5.2	Zero product recalls due to food contamination	FSANZ/Product Safety Recalls Australia	8 (2018)	8	2	2	0	●
5.3	95% of consumers agree Australia produces safe and high quality dairy products							
	The dairy industry produces safe products	Trust Tracker	81% (2018)	85%	82%	84%	95%	●
	The dairy industry produces high quality products	Trust Tracker	83% (2018)	85%	89%	91%	95%	●
5.4	Food Safety Culture embedded into the dairy food business – under development				NIA	NIA	NTM	
Goal 6. Dairy contributes to improved health outcomes for all Australians								
6.1	Improve consumers' perception of the health and nutrition benefits of dairy foods							
	90% of consumers believe dairy foods such as milk, cheese and yoghurt play an important role in a healthy well-balanced diet	Trust Tracker	67% (2019)	NDA	83%	64%	90%	●
	90% of individuals agree 'Dairy foods are essential for good health and wellbeing'	Trust Tracker	72% (2018)	79%	80%	82%	90%	●
	<20% of individuals agree 'I'm concerned consuming dairy foods will increase my weight'	Trust Tracker	32% (2018)	39%	21%	33%	<20%	●
6.2	The National Health and Medical Research Council (NHMRC) Australian Dietary Guidelines continue to recommend milk, cheese and yoghurt as part of a healthy diet		Recognised		Recognised	Recognised	Recognised	●
6.3	Australians meet recommended daily serves for dairy	Australian Bureau of Statistics	NDA	No	No	No	Yes	●
6.4	All dairy companies adopt a stated position on responsible consumption by 2020 and publicly report on progress by 2030 – under development				NIA	NDA	100%	

Commitment 3

Providing best care for all our animals

Goal	Data source	Baseline	2023	2024	2025	2030 Target	Progress
Goal 7. Provide best care for all animals for whole of life							
7.1	An Australian dairy industry animal care assurance program is developed				In progress	NTM ⁱⁱⁱ	●
7.2	A whole-of industry surplus calf roadmap is developed				Completed 2025		●
7.3	All farmers adopting relevant recommended industry practices for animal care						
	All calves disbudded:	AHGS	81% (2022)		83%		●
	• prior to two months of age	AHGS	29% (2022)		50%		●
	• with an anti-inflammatory	AHGS	37% (2022)		51%		●
	• and where possible pre-operative local anaesthetic	AHGS					
	All animals receive pain relief for conditions which are assessed to be painful, including clinical mastitis, lameness, and dystocia	AHGS	89% (2022)		68% mastitis 77% dystocia 72% lameness		●
	All farmers implementing an appropriate lameness management strategy that includes key practices for prevention, early detection, and effective treatment (including pain relief)	AHGS	96% (2022)		93%		●
	All farmers implementing appropriate strategies to manage inclement weather, including access to drinking water at all times from birth, and sufficient mitigation strategies to minimise heat or cold stress	DA Strategic Portfolio Tracker 2025	96% (2022)		87%		●
	Downer cows are assessed and treated, including appropriate nursing, or euthanised if required without delay	AHGS	88% (2025)		88%		
	For animals requiring euthanasia, it is performed:	AHGS	76% immediately 81% within 2 hours (2025)		76% immediately 81% within 2 hours		
	• as soon as possible	AHGS					
	• by a trained and competent individual	AHGS	NDA		NDA		
	• by close-range, appropriate firearm or captive bolt to the brain	AHGS	85% (2022)		95%		
	All farmers implementing a colostrum-feeding program to ensure passive transfer of immunity, which may include the feeding of supplementary, high quality, first-milking colostrum within 12 hours of birth	AHGS	87% (2025)		87%		
7.4	The dairy industry is committed to antimicrobial stewardship and uses antimicrobials responsibly, as little as possible, as much as necessary, to protect the health and welfare of animals, people, and the environment						
	All dairy farmers use antimicrobials appropriately under veterinary direction:	AHGS	74% (2025)		74%		
	• All farmers following treatment protocols for common conditions that have been developed with their veterinarian						
	All farms have an annual veterinary visit which includes a review of:	AHGS	59% (2025)		59%		
	• Treatment protocols for common conditions						
	• Dry cow antibiotic therapy strategy	AHGS	41% (2025)		41%		
	• Where used, antimicrobials of high importance to human health	AHGS	59% (2025)		59%		
	• All S4 in-feed antimicrobials, with the farms' nutrition consultant	AHGS	29% (2025)		29%		
	The Australian dairy industry monitors dairy cattle for the development of resistance in bacteria to antibiotics of high importance to human health in Australia		Project underway		Incomplete, surveillance program in development		●
Goal 8. The Australian dairy industry strives to maintain its privileged animal biosecurity status and access to high value export markets							
8.1	A whole-of-industry Emergency Animal Disease Action Guide is developed and maintained				Completed 2025		●
8.2	The dairy industry increases and maintains the number of trained Liaison – Livestock Industry (LLI) and Consultative Committee for Emergency Animal Disease (CCEAD) personnel for ensuring adequate representation in the event of an EAD	ADF/AHA LLI Dairy Booster Training 2025/26	32		68		●
8.3	All dairy businesses implementing a documented biosecurity plan, for the management of exotic and endemic diseases	AHGS	62% Written Plan 68% Implemented		74% Written plan 68% Implemented		●

iii No targets for commitment 3 have been determined.

Commitment 4

Reducing environmental impact

Goal	Data source	Baseline	2023	2024	2025	2030 Target	Progress
Goal 9. Improve land management							
9.1	100% of stock excluded from waterways	Land Water Carbon Survey	76% (2015)	83%	NDA ^{iv}	NDA	100% ●
9.2	100% of riparian zones actively managed and maintained	Land Water Carbon Survey	NDA		NDA	NDA	100%
9.3	100% of farmers complete and implement a soil and nutrient management plan	Land Water Carbon Survey	49% (2015)	59%	NDA	NDA	100% ●
9.4	100% of farmers have and implement a documented biodiversity action plan	Land Water Carbon Survey	17% ^v (2018)	14%	NDA	NDA	100% ●
9.5	Net zero deforestation by 2020 – under development				under review	under review	
Goal 10. Increase water use efficiency							
10.1	Reduce the consumptive water intensity of dairy companies by 30% by 2030 (on 2010/11 levels) (ML water consumed per ML of milk processed)	Dairy Manufacturers Sustainability Council	1.75 (2010)	2.02	2.1	2.15	1.22 ●
10.2	Improve water use and water productivity to utilise 2.0 tonnes of dry matter per ML used		NIA		NDA	NDA	2
10.3	100% of farmers recycling water from dairy sheds	Land Water Carbon Survey	75% (2015)	80%	NDA	NDA	100% ●
10.4	100% of farmers monitoring water consumption	Land Water Carbon Survey	45% (2020)	43%	NDA	NDA	100% ●
10.5	100% of farmers have a water security risk management plan by 2020 and are implementing it by 2030	Land Water Carbon Survey	60% (2019)	59%	NDA	NDA	100% ●
Goal 11. Reduce greenhouse gas emissions intensity							
11.1	Reduce greenhouse gas emissions intensity by 30% across the whole industry on 2015 levels						
	Manufacturers (tonnes CO ₂ e/ML milk processed)	Dairy Manufacturers Sustainability Council	140 (2016)	125.5	118	121.2 ^{vi}	98 ●
	Farmers (kg CO ₂ e/kg fat and protein corrected milk (FPCM))	Dairy Farm Monitor Project (DFMP)	1 (2016)	0.92 ^{vii}	0.93 ^{vii}	0.96 ^{vii}	0.72 ●
Goal 12. Reduce waste							
12.1	100% diversion rate from landfill (for dairy companies) (tonnes of waste diverted from landfill per tonnes of waste produced)	Dairy Manufacturers Sustainability Council	81% (2018)	84%	81%	86%	100% ●
12.2	100% of silage wrap recycled (for farm)	Land Water Carbon Survey	28% (2015)	NDA	NDA	NDA	100% ●
12.3	All dairy companies participate in the Australian Packaging Covenant (APC) or equivalent scheme	Australian Packaging Covenant Organisation (APCO)	9 (2018)	23	NDA	31	All dairy companies ●
12.4	100% of Australian dairy packaging to be recyclable, compostable or reusable by 2025 or earlier		NIA	NDA	NDA	NDA	100%
12.5	Halve food waste by 2030	Dairy Sector Food Waste Action Plan	710,000t (2020/21)	612000t	NDA	NDA	●

^{iv} The Land Water Carbon survey is completed every three years, with the next survey to be completed in 2026.

^v Baseline adjusted.

^{vi} The small increase in emissions intensity on farm and in processing reflects improved data accuracy as more farms provide higher-quality feed and manure data, giving a more accurate picture.

^{vii} Carbon emission methodology was updated in 2024 due to new emission factors – baseline and all previous data has been recalculated based on the updated methodology.

dairy.com.au/sustainability

Scorecard produced on behalf of ADIC.

Disclaimer

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