



SPRING 2024

INSIGHTS, ASSETS
+ INFORMATION



Index of Seasonal Resources

CLICK IMAGE TO GET TO THE SECTION OF INTEREST



LEARNING MORE ABOUT SHEEP SUSTAINABILITY



THE LATEST CATTLE AND SHEEP PROJECTIONS ARE OUT NOW



MARKET PERFORMANCE @RETAIL



THE NEW SPRING LAMB CAMPAIGN



SPRING RECIPE INSPIRATION



RARE MEDIUM THINKS BIG



DISCOVERING THE BEST LOCAL EATS TO INSPIRE YOUR NPD



INSIGHTS – CONSUMER SENTIMENT RESEARCH 2024 RESULTS



MAKE EVERY BITE COUNT FOR A BALANCED APPROACH TO NUTRITION

AUSTRALIAN SHEEP SUSTAINABILITY FRAMEWORK

LEARN MORE ABOUT THE SHEEP SUSTAINABILITY FRAMEWORK (SSF) – A COLLABORATION ACROSS INDUSTRY DEFINING SUSTAINABLE SHEEP PRODUCTION IN AUSTRALIA, PRIORITISING INDUSTRY ISSUES AND MEASURING INDUSTRY PERFORMANCE AGAINST INDICATORS ACROSS FOUR PILLARS:

1. Caring for our sheep
2. Enhancing our environment and climate
3. Looking after our people, our customers and community
4. Ensuring a financially resilient industry

[CLICK HERE FOR THE LATEST:
2024 REPORT](#)



2024 AUSTRALIAN CATTLE MARKET FORECASTS



Herd

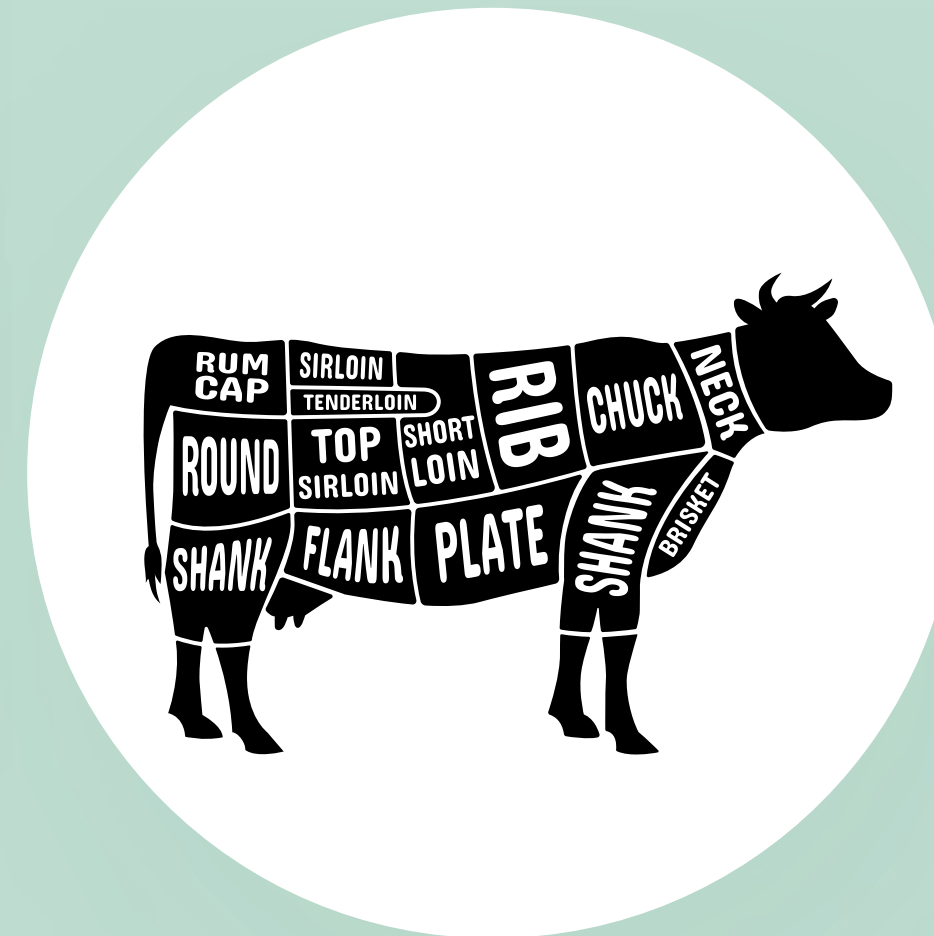
Herd will reach 30.2 million head in 2024



Slaughter

Slaughter forecast to rise 20% to 8.18 million head in 2024

[CLICK FOR SHAREABLE FACT SHEET](#)



Production

Production forecast to rise to 2.53 million tonnes in 2024



Cattle Prices

Cattle prices forecast to remain strong entering 2024

2024 AUSTRALIAN LAMB MARKET FORECASTS



Flock

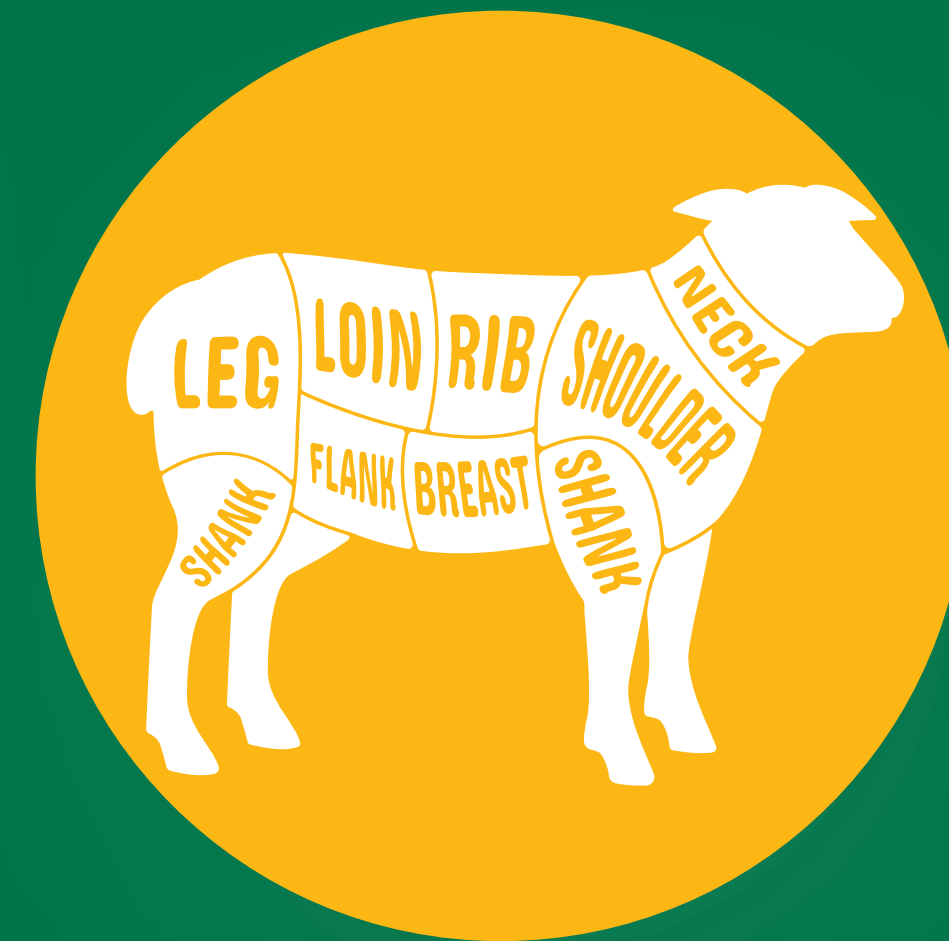
Sheep flock second highest since 2007, 79.1 million head in 2024.



Slaughter

Lamb slaughter to reach records in 2024, over 27 million head

[CLICK FOR SHAREABLE FACT SHEET](#)



Production

Record lamb production forecast for 2024, rising to 665,000 tonnes



Lamb Prices

Lamb prices forecast to remain steady in 2024

MARKET PERFORMANCE

NIELSEN IQ: AUSTRALIA 12WKS ENDING 11.08.24







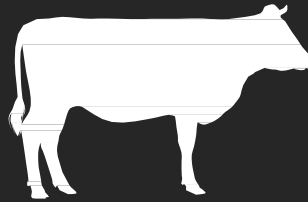
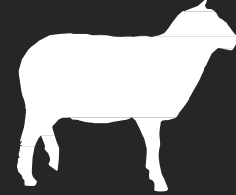
THE HEADLINES

- Consumer packaged goods value growth rebounded, further easing in price inflation
- Households still shopping more often, but now picking up bigger baskets. Online shopping continues to grow.
- Fresh Meat more affordable, volumes growing ahead of value
- Fresh beef continues growth driven by more frequent shopping and bigger baskets
- Fresh Lamb continued volume growth, cycling record growth from year ago. Value growth slips due to frequent promotion



LATEST 12WK PERFORMANCE UPDATE

NIELSEN IQ: AUSTRALIA 12 WKS ENDING 11.08.24

	 Penetration	 Trips per Household	 Vol/Trip	 Price/KG	 Total Purchase Volume	 Total Purchase Value
	82.2% (-0.2pts vs LY)	5.8x (+2.2% vs LY)	+1.8% (vs LY)	-3.8% (vs LY) \$16.68/KG	+5.9% (vs LY)	+1.9% (vs LY)
	48.3% (-0.5pts vs LY)	2.8x (+1.6% vs LY)	+3.0% (vs LY)	-9.0% (vs LY) \$15.55/KG	+5.9% (vs LY)	-3.6% (vs LY)
HEADLINE	Gains from core buyers not enough to offset losses.	Frequency of trips growing ahead of category	Shopping bigger & more often	Price declines easing from less price promotion	Households consuming more beef & lamb	Greater affordability for beef & lamb
Commentary	<ul style="list-style-type: none"> Beef penetration gains from young families, independent singles & established couples but not enough to offset loss Lamb gain buyers amongst households without young kids 	<ul style="list-style-type: none"> Households purchasing more frequently per household for beef and lamb 	<ul style="list-style-type: none"> Households continue to buy greater volumes per trip Shift towards greater at-home consumption 	<ul style="list-style-type: none"> Price deflation for Lamb slowing, but still at its lowest price since 2019 Price change is also much lower than total fresh meat 	<ul style="list-style-type: none"> Strong purchase volume (KG) growth across Beef & Lamb with red meat winning in volume share performance vs total fresh meat growing +4.7% vs LY 	<ul style="list-style-type: none"> Beef's positive value growth ahead of total fresh meat growth of 1.7%. Purchase \$ value growth for Beef & Lamb behind

FY25 BRAND CAMPAIGNS

MAKE THE MOST OF WHEN AND WHY THEY ARE HAPPENING IN THE YEAR AHEAD FOR YOUR OWN PROGRAMS

FY25	2024						2025					
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
BEEF				NEW BEEF					NEW BEEF			
	RED MEAT x ETHNICITY		BEEF MIDWEEK MEALS						RED MEAT x ETHNICITY			
LAMB			SPRING LAMB				SUMMER LAMB					

Share the Lamb

100% AUSTRALIAN



SPRING LAMB

Recruiting the future base of Australian consumers by building relevance with younger consumers

SUMMER LAMB

Drive mass reach and consideration for Lamb by strengthening its ties to Australian culture

YOU'RE THINKING BEEF



NEW BEEF CAMPAIGN

Build superiority by inspiring Australians to choose Beef as their #1 choice when they want the best protein

BEEF MIDWEEK MEALS

Defend the mid-week by strengthening consideration of Beef in Australia's weekly meal repertoire

SPRING LAMB CAMPAIGN OVERVIEW

OPPORTUNITY TO RECRUIT YOUNGER SHOPPERS



Majority of regular/frequent Lamb buyers still skew older



But FY24 saw positive brand growth from younger segments

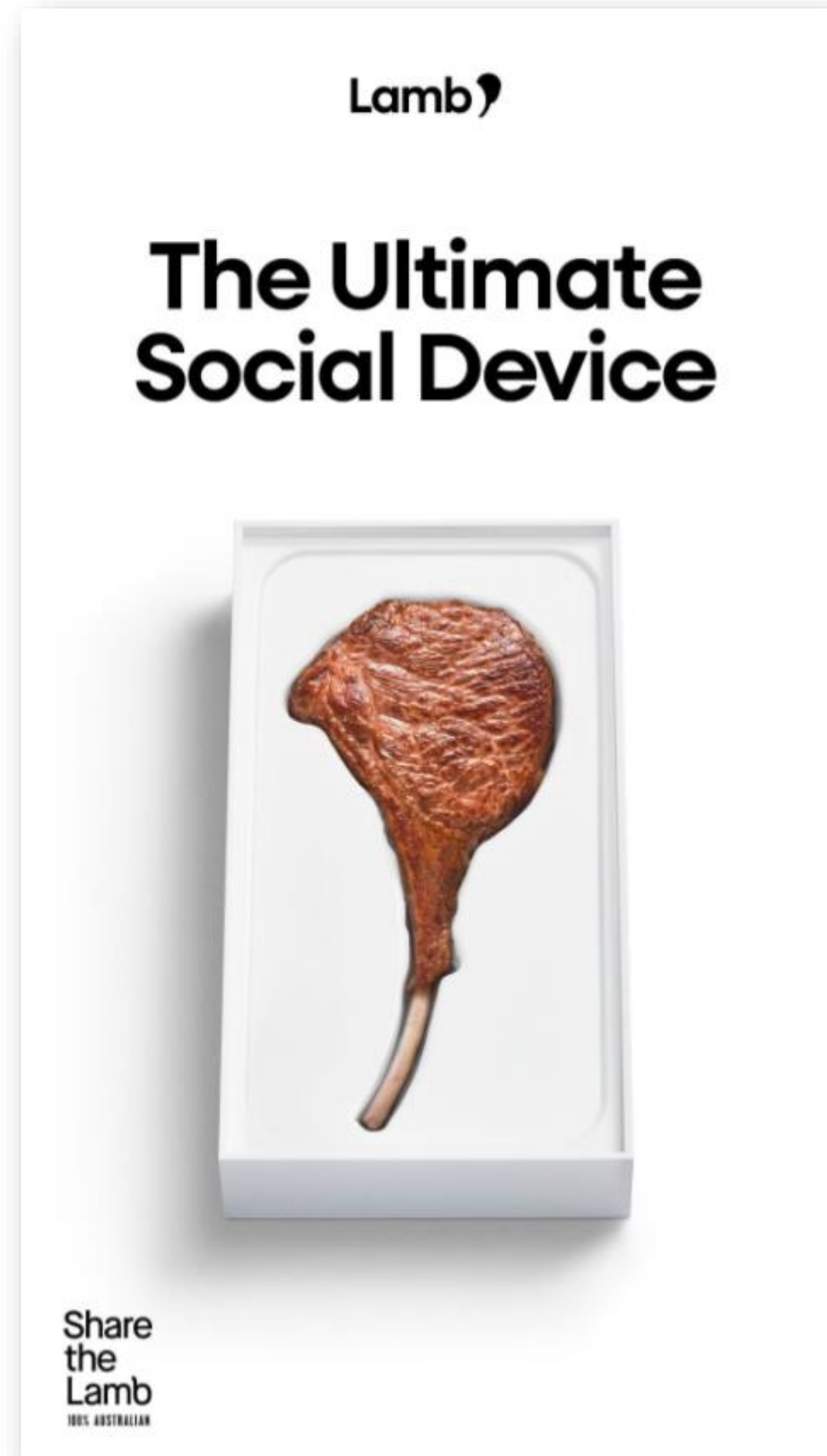


We need to directly engage <35s to make Lamb meaningful + appealing for a younger buyer



While keeping Lamb top of mind for those who already love us and buy us

SPRING LAMB CAMPAIGN NOW LIVE



Increase consideration and purchase of Lamb by younger shoppers in Spring

Spring Lamb campaign launched on 15 September



Watch and share the new campaign [here](#)

SPRING LAMB out-of-home:

Skyscraper style billboards appearing close to stores



LAMB CAMPAIGN ASSETS

NEW SPRING LAMB ASSETS FOR YOUR PROMOTIONAL ACTIVITIES

We have the hero visual for the new spring lamb campaign. Use this on your socials or digital communications or share them with your customers to use.

[CLICK ON IMAGES TO DOWNLOAD](#)



Lamb

The Ultimate Social Device



Share
the
Lamb
100% AUSTRALIAN

BEEF CAMPAIGN ASSETS

SUPPORT YOUR PROMOTIONAL ACTIVITIES

We have developed a suite of shareable assets for you to use in your business. Here you will find short recipe videos and inspiring meal solution visuals. Use them on your socials or digital communications or share them with your customers to use.

[CLICK TEXT TO ACCESS VIDEO](#)

[CLICK ON IMAGES TO DOWNLOAD](#)



Fried Rice



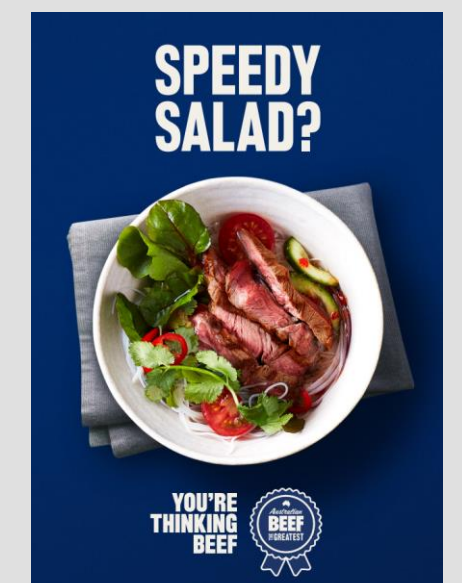
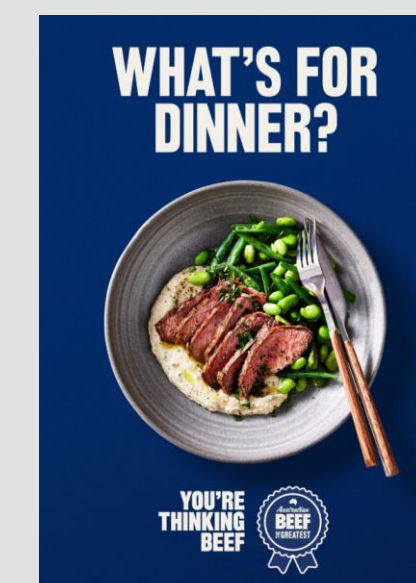
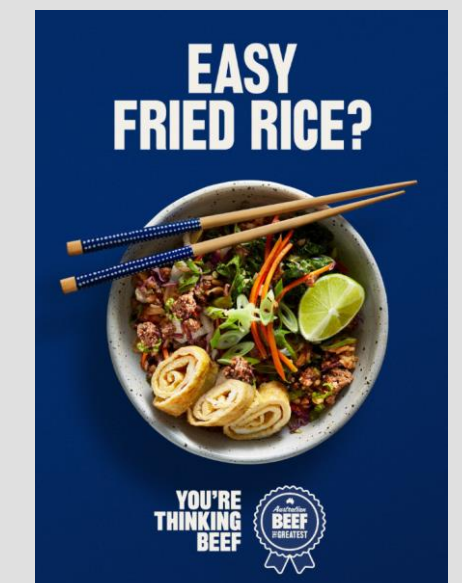
Scotch fillet with white bean puree



Tacos



Thai beef salad



LAMB Recipe Inspiration

LAMB CUTS IN FOCUS:
LAMB SHOULDER, LAMB LEG, CUTLETS, CHOPS,
RUMP AND DICED LAMB

Inspiring recipes and still images to share on socials or with customers.
Click on the images below to access the recipe and click on the active
yellow button for high resolution still images.



[CLICK HERE TO DOWNLOAD RECIPE IMAGES](#)



BEEF Recipe Inspiration

BEEF CUTS IN FOCUS: RUMP, SIRLOIN AND MINCE

Inspiring recipes and still images to share on socials or with customers. Click on the images below to access the recipe and click on the active yellow button for high resolution still images.



[CLICK HERE TO DOWNLOAD RECIPE IMAGES](#)



RARE MEDIUM

THE RED MEAT EXPERTS

SEASONAL EMAGAZINE

Welcome to Issue 27 where it's all about thinking big – and how that concept comes to life in a variety of ways. Whatever your perception of thinking big – we hope you find inspiration in this big issue! Click on the below link to view our latest E-mag.

[DOWNLOAD E-MAG](#)

What's **Good** in the *Hood*

Myffy Rigby shows us what's good in various hoods – discovering the best local eats and treats across the country. This month, Myffy explores Victoria Street in Richmond VIC which is rich in bistros, wine bars, Vietnamese restaurants and even a sandwich shop that'll blow your mind. Check out the video below to see how these places are offering up creative dishes to inspire the next generation of value-added items or cuts for shoppers.

CLICK TO WATCH VIDEO



AUSTRALIAN COMMUNITY SENTIMENT RESEARCH 2024

MLA has been tracking the community sentiment towards the red meat industry for 15 years. The full 2024 results have now been released and can be accessed [here](#). Check out below for some key insights,

1. Health and nutrition are the key drivers for increasing consumption of red meat.
2. Cost is by far the main reason for consumers to reduce their consumption of red meat.
3. Trust in red meat producers remains high, but trust to care for the environment is not as strong, especially for younger and female audiences.
4. Farmers are amongst the most trusted professions in Australia.



MAKE EVERY BITE COUNT

INFOGRAPHICS, ANIMATIONS AND VIDEOS FOR YOU TO SHARE

Use these assets to curate and share tips to help your audiences enjoy balanced meals with no food waste. This quarter we show different ways to prepare and serve lean beef mince and lamb to create meals that are nutritious, affordable and delicious.

[CLICK ON IMAGES TO DOWNLOAD](#)



MEAT & LIVESTOCK AUSTRALIA

COPYRIGHT & ACKNOWLEDGEMENT NOTICES AND DISCLAIMER POLICY

1. General Care has been taken to ensure the accuracy of the information contained in this publication. However, MLA, MDC and ISC (“MLA Group”) do not accept responsibility for the accuracy, currency or completeness of the information or opinions contained in this publication. This publication is intended to provide general information only. It has been prepared without taking into account your specific circumstances, objectives, or needs. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.

2. Third party information contained in this publication is obtained from a variety of third-party sources. While MLA, MDC and ISC (“MLA Group”) have attempted to ensure that this information has been obtained from reliable sources, we are not responsible for its accuracy, currency, or completeness. It has been prepared without taking into account your specific circumstances, objectives, or needs. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.