



SUMMER 2024/2025

INSIGHTS, ASSETS
+ INFORMATION



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CLICK IMAGE TO GET TO THE SECTION OF INTEREST



THE 2024 STATE OF THE INDUSTRY REPORT



MARKET PERFORMANCE @RETAIL



THE NEW SUMMER LAMB CAMPAIGN



BEEF THE GREATEST CAMPAIGN



SUMMER RECIPE INSPIRATION



RARE MEDIUM'S 'YES CHEF'



INSIGHTS – RED MEAT AND ETHNICITY TEST



MAKE EVERY BITE COUNT FOR A BALANCED APPROACH TO NUTRITION

STATE OF THE INDUSTRY REPORT

The 2024 State of the Industry Report provides a comprehensive snapshot of the economic impact and landscape of the Australian red meat and livestock industry for the 2023 period.



In 2022–23, Australia’s red meat and livestock industry turnover was \$81.7 billion, contributed \$22.9 billion to GDP, and employed 418,921 people



Australia was the second largest exporter of beef and the largest global sheepmeat and goat exporter.



We remain one of the world’s largest consumers of beef and is the largest consumer of sheepmeat per-capita.

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

STATE OF THE INDUSTRY REPORT

Exploring the economic impact and landscape of the Australian red meat and livestock industry using comprehensive data from 2023.



MARKET PERFORMANCE

NIELSEN IQ: AUSTRALIA 12WKS ENDING 03.11.24







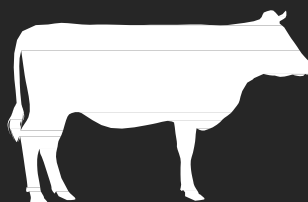
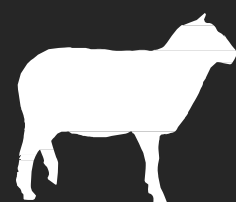
THE HEADLINES

- CPG value growth at 4.6%. Easing price inflation continues.
- Fresh Meat prices gradually coming back up after a period of discounting.
- Fresh Beef continues growth. More frequent shopping and bigger baskets.
- Fresh Lamb cycling record from one year ago.



LATEST 12WK PERFORMANCE UPDATE

NIELSEN IQ: AUSTRALIA 12 WKS ENDING 03.11.24

	 Penetration	 Trips per Household	 Vol/Trip	 Price/KG	 Total Purchase Volume	 Total Purchase Value
	81.8% (-0.5pts vs LY)	5.8x (+1.2% vs LY)	+0.4% (vs LY)	-0.1% (vs LY) \$16.61/KG	+3.3% (vs LY)	+3.1% (vs LY)
	47.1% (-5.2pts vs LY)	2.8x (-5.9% vs LY)	-5.9% (vs LY)	+9.6% (vs LY) \$16.88/KG	-18.5% (vs LY)	-10.6% (vs LY)
HEADLINE	Lost red meat buyers	Frequent purchases for beef but a slowdown on lamb	Shopping more quantity of beef but less of lamb	Price up for lamb after a period of decline	Households consuming more beef, reduction on lamb	Positive beef value
Commentary	<ul style="list-style-type: none"> • Beef penetration gains from small scale and bustling families, established couples, and independent singles but not enough to offset losses from other groups. • Cycling from high penetration from last year, Lamb lost buyers across life stages. 	<ul style="list-style-type: none"> • Households purchasing more frequently per household for Beef. • Reduced frequency noted for Lamb. 	<ul style="list-style-type: none"> • Households continue to buy greater volumes of Beef per shopping trip. • However, Lamb is less purchased per occasion. 	<ul style="list-style-type: none"> • Beef is on-par to YA. • While Lamb price growth has resulted from reduced price promotion, cycling heavy promotion levels LY . 	<ul style="list-style-type: none"> • Strong purchase volume (KG) growth and volume share gains for Beef. • The price sensitivity of Lamb is resulting in purchase volume decline with the level of retail price growth,. 	<ul style="list-style-type: none"> • Beef's positive value growth ahead of total fresh meat growth resulting in a positive share of +1.7pts vs YA. • Lower volume purchased impacting Lamb's value.

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



SUMMER LAMB

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



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

SUMMER LAMB CAMPAIGN 2025 ASSETS

THE NEW SUMMER LAMB CAMPAIGN IS CURRENTLY IN THE WORKS!

We are currently developing a suite of shareable assets including the new lamb video campaign for you to use in your business to promote lamb during Summer 2025. In the meantime, you can access the Summer 2025 Key video below.

[CLICK ON IMAGES TO DOWNLOAD](#)

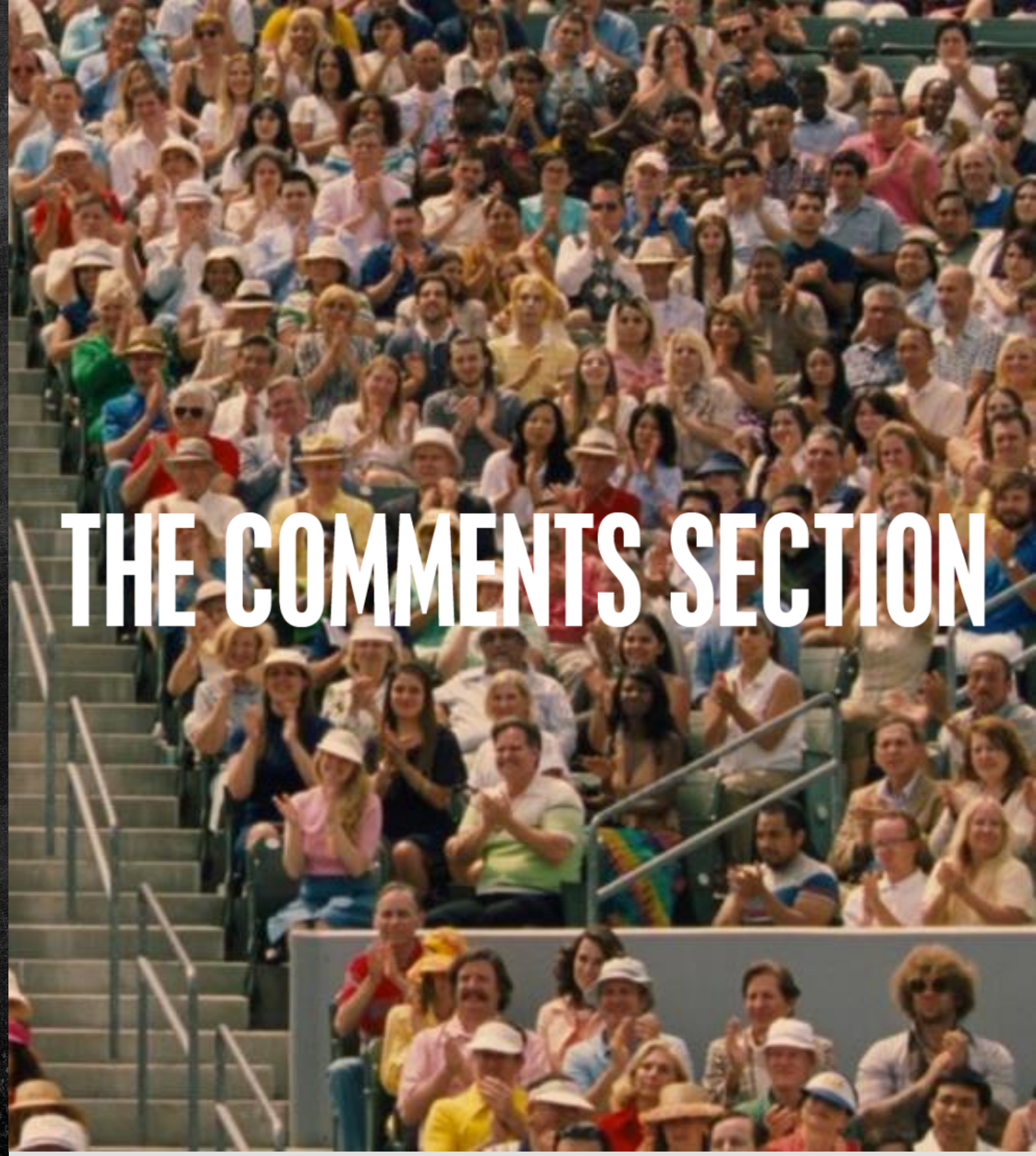


SUMMER LAMB CAMPAIGN 2025

WHILE WE WAIT FOR THE SUMMER 2025 AD TO LAUNCH, HERE IS SOME SNEAK PEAK INFORMATION BELOW.

- The Summer Lamb 2025 ad will be called 'The Comments Section' and feature real Australian comments from social media platforms.
- The 120" Summer Lamb ad will kick off the month-long campaign and premier on the 7th January 2025.
- We expect 1.56M people to see the ad launch on the 7th January 2025.
- For the first time ever, we will be showing the Summer Lamb ad across Hoyts, Events, Village, Dendy, Palace and Reading cinemas. This means that there will be an estimated 240,000 audience members during the campaign period.
- The Summer Lamb ad will also be showcased across social media platforms and OOH location around the nation.

THE COMMENTS SECTION

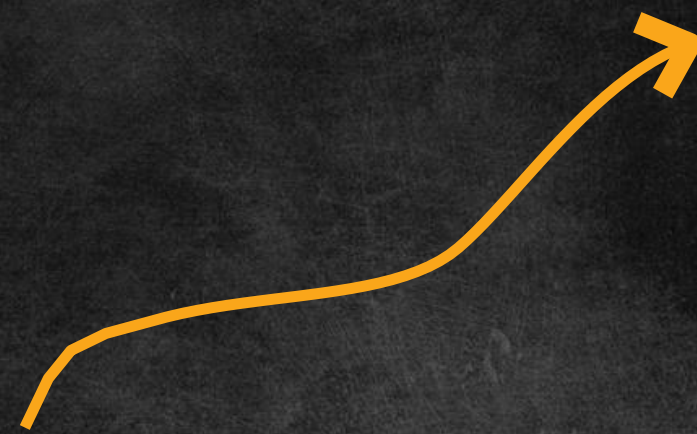


BEEF CAMPAIGN ASSETS

NEW BEEF THE GREATEST TVCs

We are excited to share the new Beef 'The Greatest' TV commercials which recently launched. Click on the images which will direct you to the videos which you can share them on your socials or share them with your customers to use.

[CLICK IMAGES TO WATCH VIDEOS](#)



[The Greatest – Kitchen 30”](#)



[The Greatest – Ship 30”](#)

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 VIDEOS](#)

[CLICK ON IMAGES TO DOWNLOAD](#)



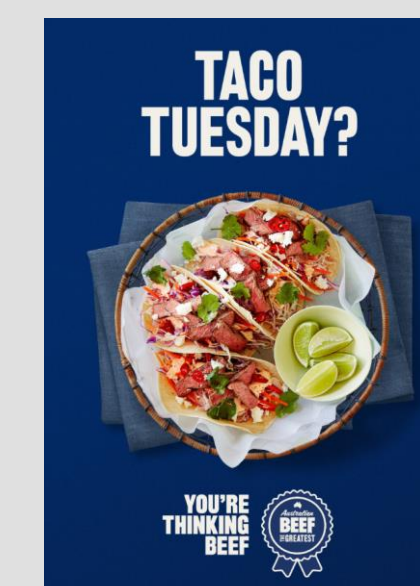
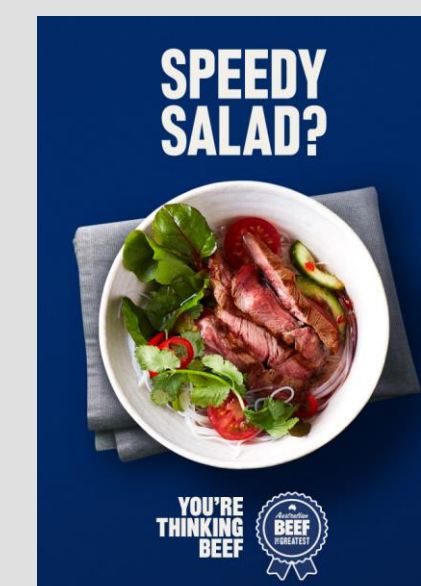
Stir Fry



Tacos



Thai beef salad



LAMB Recipe Inspiration

LAMB CUTS IN FOCUS: LAMB LOIN CHOP, LAMB LEG ROAST AND LAMB SHOULDER

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](#)

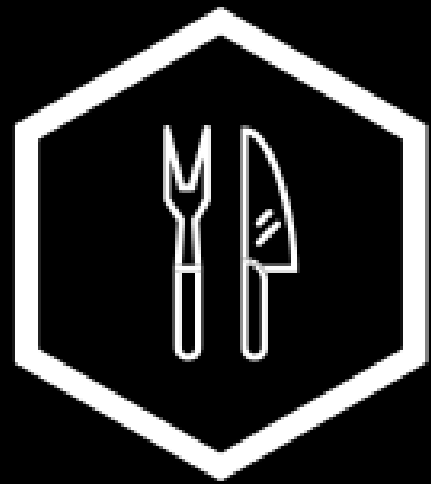
BEEF Recipe Inspiration

BEEF CUTS IN FOCUS: T-BONE, 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

YES CHEF! WITH MYFFY RIGBY

In our new series, Myffy Rigby explores classic and signature dishes at restaurants and venues around Australia. First up, we visit chef Brent Savage at Monopole in Sydney's CBD to try the classic French favourite, filet de Boeuf au Poivre – aka pepper steak. Head to Monopole to try it first-hand, or use Brent's tips and tricks to provide your customers the basics for cooking the perfect steak dinner. Steak Au Poivre? Yes Chef.



[Click to access video](#)

Building relevance for a more culturally diverse diner

TO CONNECT WITH AUSTRALIA'S CULTURALLY DIVERSE POPULATION, MLA LAUNCHED A 'TEST & LEARN' INITIATIVE WHICH FOCUSED ON INCREASING BEEF AND LAMB CONSUMPTION.



RED MEAT FOR CULTURALLY DIVERSE COMMUNITIES

To connect with Australia's culturally diverse population, Meat & Livestock Australia launched a 'Test and Learn' initiative which focused on increasing beef and lamb consumption, particularly amongst Chinese-Australian households.

What We Did

- 1. Understanding the market:** We began by visiting stores and conducting in-depth interviews to uncover the main challenges Chinese-Australian households face when it comes to buying and cooking beef and lamb.
- 2. Partnering with local butchers:** Collaborating with MD Meats, a trusted Chinese butcher in Hurstville, NSW to promote more frequent and larger purchases of premium beef cuts.
- 3. Celebrating Lamb in Restaurants:** We introduced the "Join the Lamb Trail" campaign to encourage food lovers to try lamb dishes at selected Sydney restaurants (Biang Biang Noodles in Haymarket, Xi'an Eatery in Burwood and Haidilao Hot Pot in Chatswood). These restaurants showcased unique techniques to highlight lamb's delicious flavour while addressing concerns about gaminess.

The Goal

This initiative aims to make beef and lamb more relevant to culturally diverse communities in Australia by offering tailored resources and partnerships that resonate with their preferences.

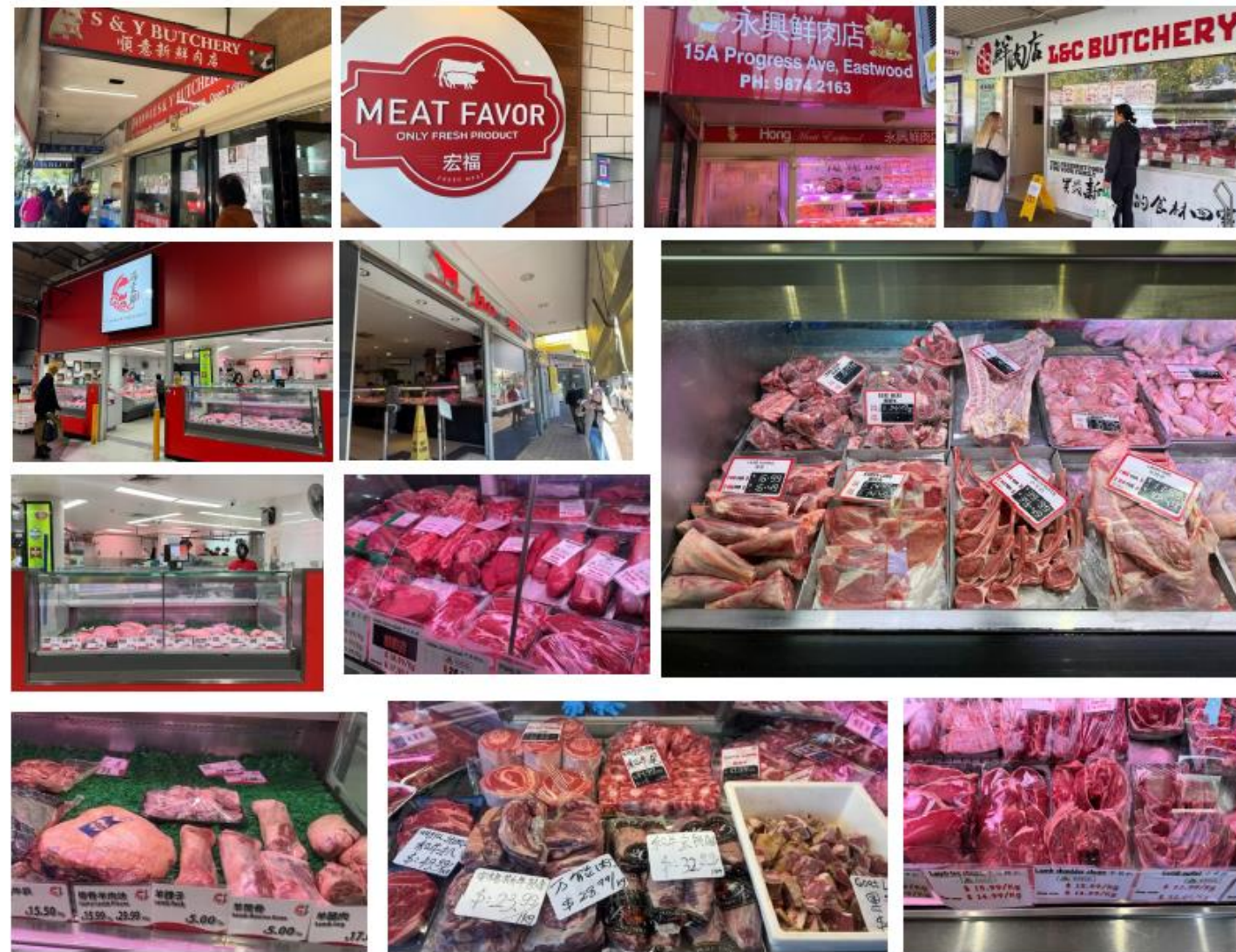
The Outcome

This initiative successfully increased our understanding of our target audiences' needs while driving strong engagement and sales growth through tailored campaigns. Check out the following slides for detailed results and insights.



TEST & LEARN OVERVIEW

Phase 1: Cultural Discovery



In-store visits/in-depth interviews to identify key barriers to Beef and Lamb consumption amongst Chinese-Australian households.

Phase 2: Beef & Lamb test activations in market

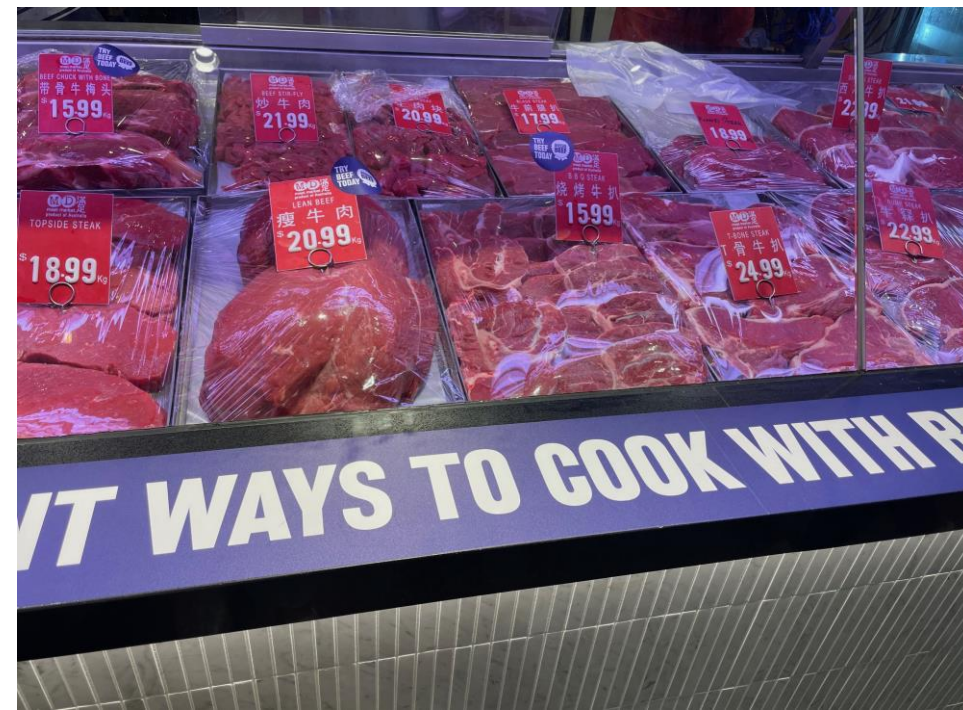


Partnership with Chinese butcher MD Meats (Hurstville Westfield) to drive frequency + vol uplift of Beef purchase.



'Join the Lamb trail' food service campaign as the call-to-action to explore more Lamb dishes and restaurants – chosen for their techniques to elevate lamb's flavour while minimising perceived gaminess (primary consumption barrier).

CAMPAIGN HIGHLIGHTS: BEEF AT MD MEATS

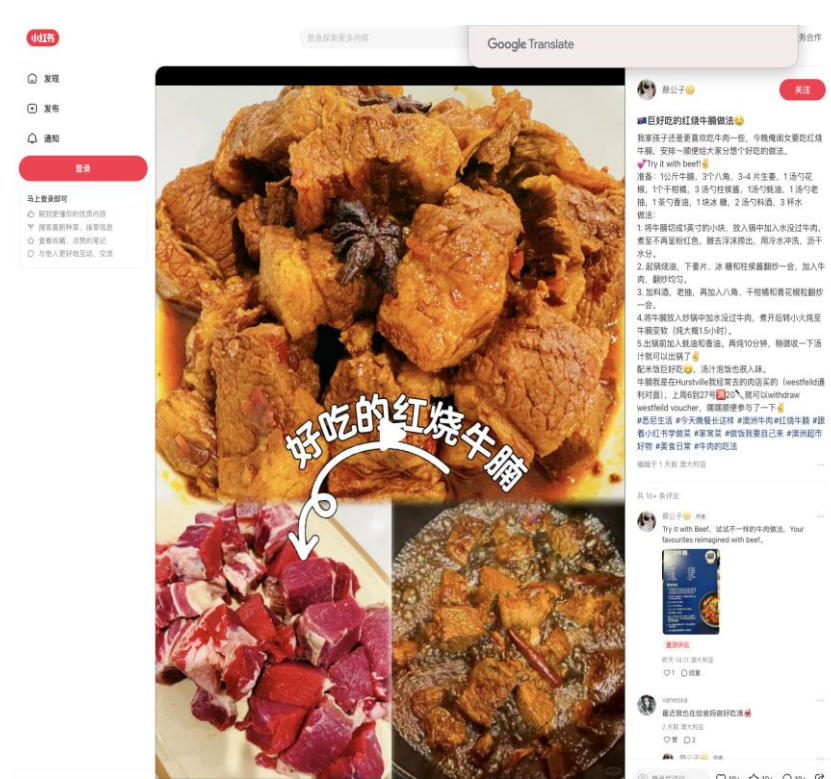
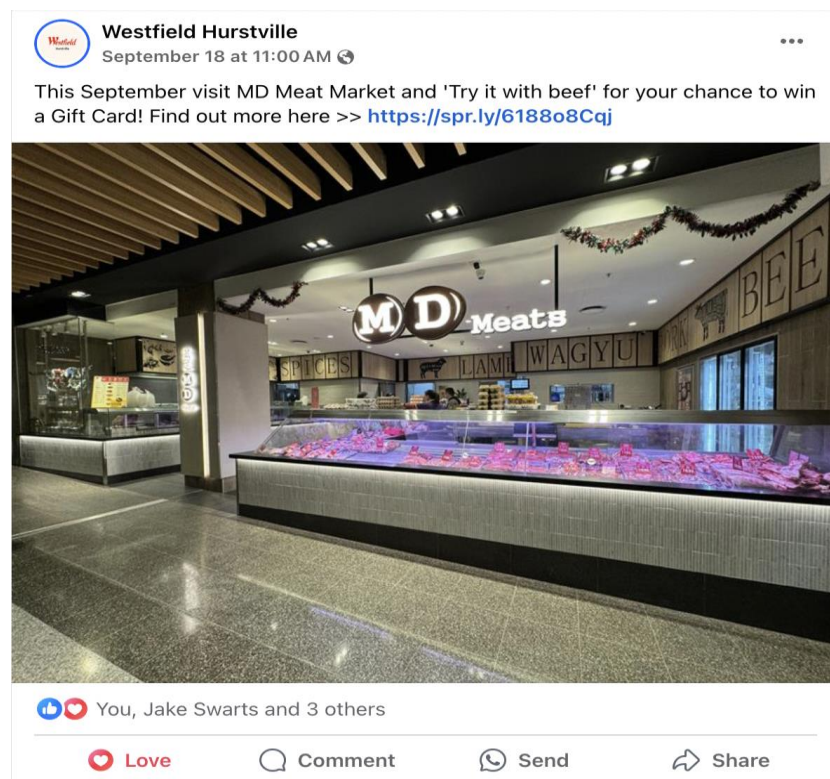


- **+10% avg. uplift on kg ordered volume and +16% avg. uplift on \$ ordered** for beef by MD Meats in the 3 weeks of the campaign vs. pre-campaign week

- **95,000 combined views** from Little Red Book influencer content amplification (Chinese social media app)

- **7,624 total engagements** (likes, shares, saves, comments)

- Highly positive sentiment to campaign from influencers – *“...I received messages from followers sharing photos of the meals they've prepared based on my videos, which is a great sign that the content is encouraging them to experiment in the kitchen.”*



CAMPAIGN HIGHLIGHTS: LAMB TRAIL ACROSS SYDNEY



- Biang Biang Noodles (Haymarket): **Total lamb dishes served increased +11%** from 700 dishes/month pre-campaign to 780 dishes/month during campaign.
- Xi'an Eatery (Burwood): **30% increase of total lamb orders for the month** vs. prior month.
- Haidilao Hot Pot (Chatswood): **+9% avg. weekly vol uplift** on lamb ordered by customers vs. pre-campaign period. Restaurant owner feedback on Lamb Trail activity being the primary driver.
- **144,273 total views, 47,221 total impressions and 2,755 total engagements** (likes, shares, saves, comments) from 5 Chinese food and lifestyle influencers on Little Red Book.
- *"My experience is excellent. Lamb dishes were delicious (lamb skewers, lamb rib meat and lamb rib). Experience was perfect. Nothing else to change. Would love to do more of this."* – Lilian Tan, influencer.

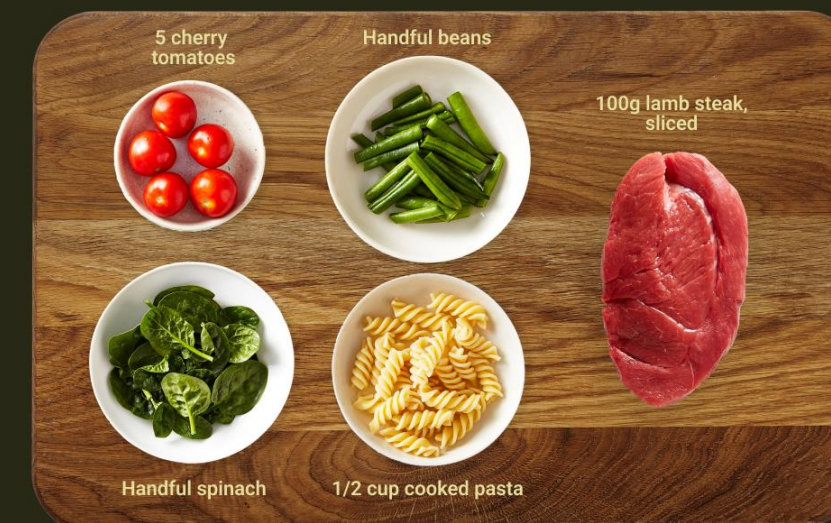
MAKE EVERY BITE COUNT

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 how to prepare a serve meals with a balance of protein, vegetables, and carbohydrate foods.

[CLICK ON IMAGES TO DOWNLOAD](#)

Making meals balanced and delicious is easy



Portion sizes of core ingredients per serve

#mebctips

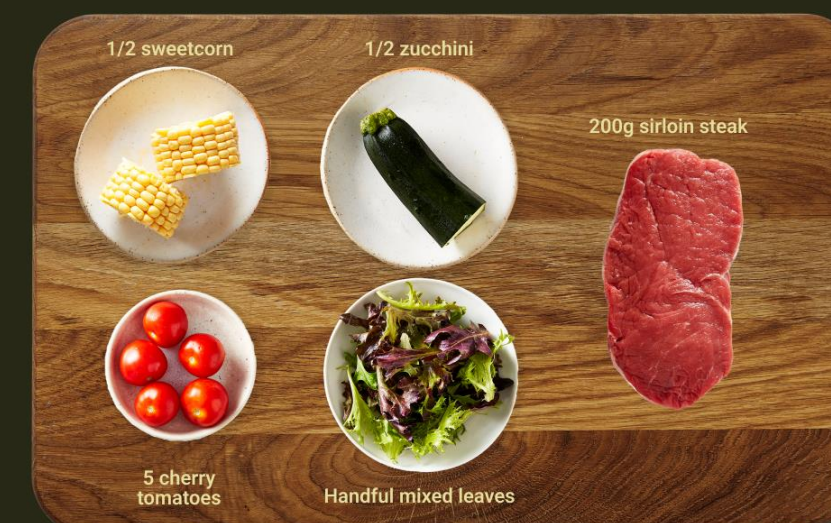
Swipe to reveal

Simply duplicate your ingredients for as many serves as needed

Lamb Salad

#mebctips

Making meals balanced and delicious is easy



Portion sizes of core ingredients per serve

#mebctips

Swipe to reveal

Simply duplicate your ingredients for as many serves as needed

Beef Kebabs

#mebctips

MEAT & LIVESTOCK AUSTRALIA

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