



# WINTER 2024

INSIGHTS, ASSETS  
+ INFORMATION



# Index of Seasonal Resources

CLICK IMAGE TO GET TO THE SECTION OF INTEREST



UNDERSTANDING INDUSTRY'S SUSTAINABILITY PROGRESS



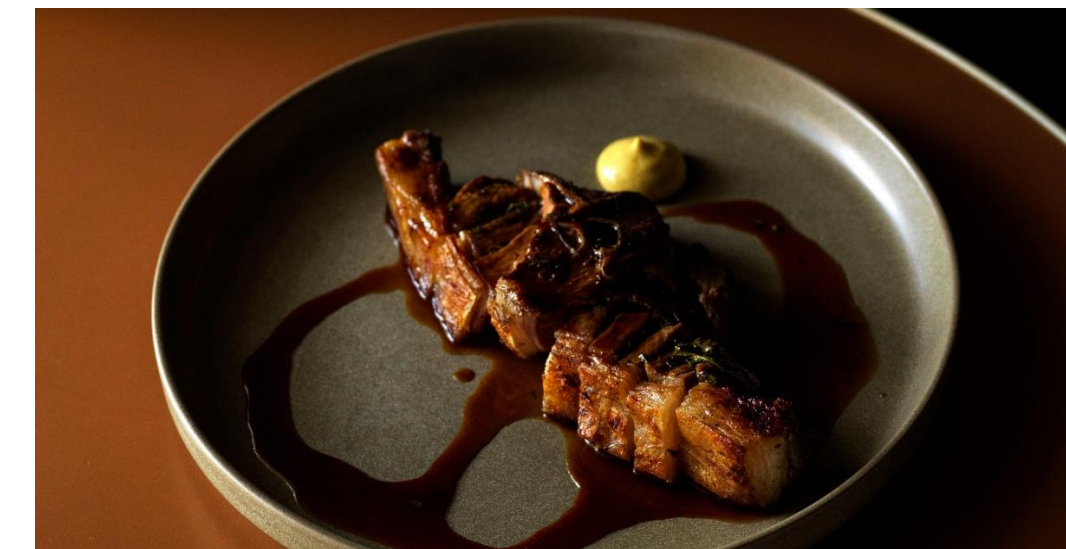
MARKET PERFORMANCE @RETAIL



BRAND CAMPAIGNS... INCLUDING THE NEW BEEF CAMPAIGN



WINTER RECIPE INSPIRATION



RARE MEDIUM DIVES INTO PERTH CULINARY SCENE



INSPIRING CUSTOMERS WITH GOAT



INSIGHTS – GOING GLOBAL FOR LATEST FOOD TRENDS



TOOLS TO COMMUNICATE ABOUT ANIMAL WELFARE

# AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK

THE 2024 ANNUAL UPDATE HAS JUST BEEN RELEASED AND THERE ARE SOME POSITIVE HIGHLIGHTS TO TELL YOUR CUSTOMERS

- **78.2%** reduction in net CO<sub>2</sub>e emissions in 2021 from 2005 baseline
- **55%** of grazing land actively managed for biodiversity outcomes (almost 160 million hectares)
- **81%** of producers are adopting practices to improve soil water retention

The Australian Beef Sustainability Framework tracks the performance the beef industry against a series of indicators grouped under four themes:

1. Best Animal Care
2. Economic Resilience
3. Environmental Stewardship
4. People and The Community

[CLICK FOR THE FULL 2024 REPORT](#)

# Annual Update 2024

# MARKET PERFORMANCE

NIELSEN IQ: AUSTRALIA 12WKS ENDING 19-05-24







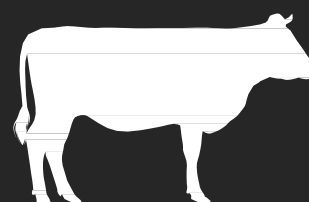
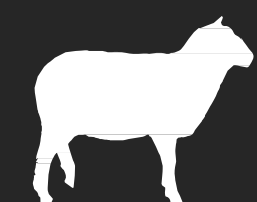
## THE HEADLINES

- Slowdown CPG value growth – further easing price inflation
- Spending on smaller baskets and shopping more often & a return to online purchasing
- Fresh meat more affordable, volumes growing ahead of value growth
- Fresh beef winning with more buying households shopping more frequently
- Fresh lamb continued volume growth cycling record growth from year ago



# LATEST 12WK PERFORMANCE UPDATE

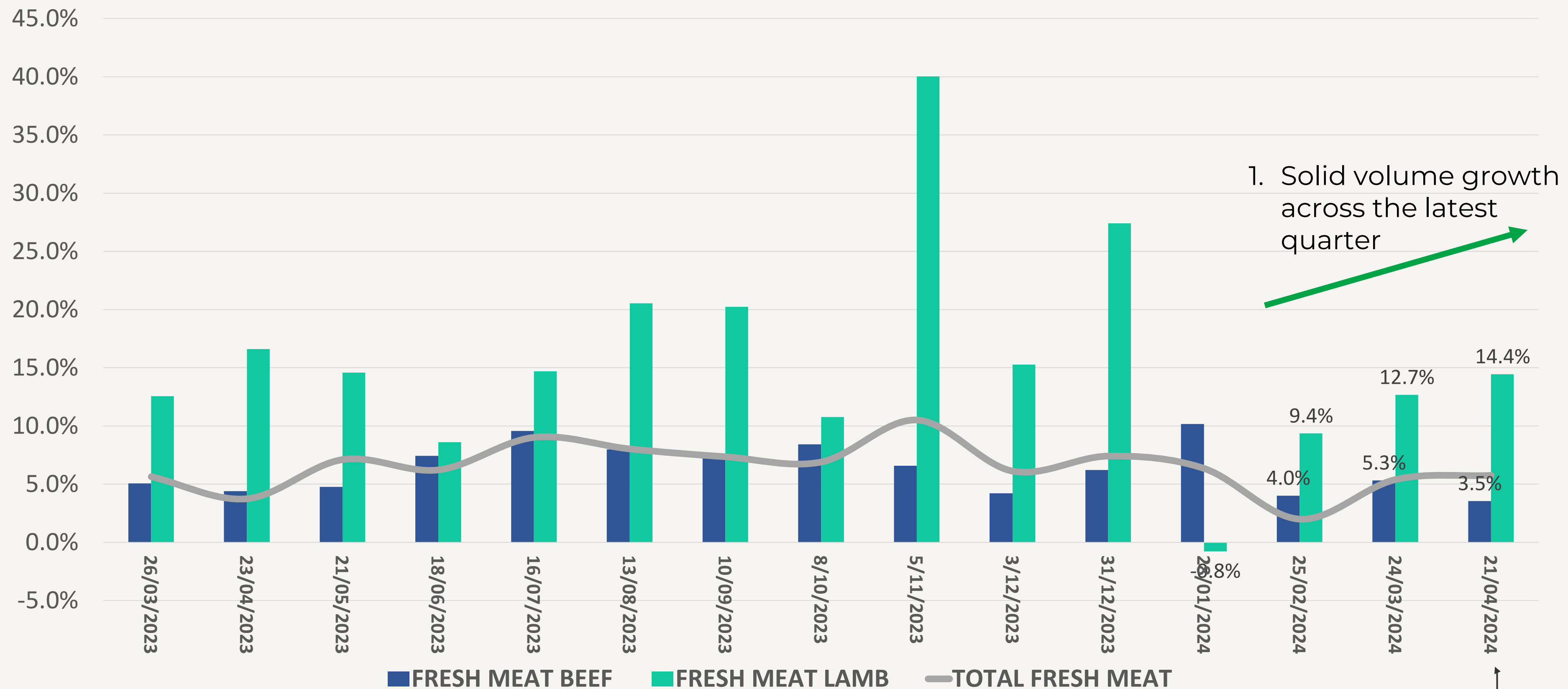
NIELSEN IQ: AUSTRALIA 12 WKS ENDING 19.05.24

	 Penetration	 Trips per Household	 Vol/Trip	 Price/KG	 Total Purchase Volume	 Total Purchase Value
	<b>83.1%</b> (+0.0pts vs LY)	<b>5.8x</b> (+3.5pts vs LY)	<b>+0.4%</b> (vs LY)	<b>-4.7%</b> (vs LY) \$16.00/KG	<b>+4.3%</b> (vs LY)	<b>-0.6%</b> (vs LY)
	<b>52%</b> (+1.8pts vs LY)	<b>2.9x</b> (+3.2pts vs LY)	<b>+4.5%</b> (vs LY)	<b>-16.2%</b> (vs LY) \$14.70/KG	<b>+12.1%</b> (vs LY)	<b>-6%</b> (vs LY)
<b>HEADLINE</b>	More households buying beef & lamb	Frequency of trips growing ahead of category	Purchase vol/trip showing – shopping smaller more often	Price declines easing from less price promotion	Households consuming more beef & lamb	Greater affordability for beef & lamb
<b>Commentary</b>	<ul style="list-style-type: none"> <li>• Beef penetration gains from Older &amp; younger households offset by families</li> <li>• Lamb penetration resulting from gains from small scale families &amp; independent singles along with senior couples</li> </ul>	<ul style="list-style-type: none"> <li>• Households purchasing more frequently per HH for beef and lamb</li> <li>• Beef &amp; lamb gaining share of shopping trips</li> </ul>	<ul style="list-style-type: none"> <li>• Households continue to buy greater volumes per shopping trip but slowing for both Beef &amp; Lamb</li> <li>• Shift towards greater at-home consumption</li> </ul>	<ul style="list-style-type: none"> <li>• Price deflation for Lamb significantly lower than total fresh meat (\$/KG -4.6% vs LY) with average price below 2019 levels</li> </ul>	<ul style="list-style-type: none"> <li>• Strong purchase volume (KG) growth across Beef &amp; Lamb with red meat winning in volume share performance vs total fresh meat growing +4.4% vs LY</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase \$ value growth for Beef &amp; Lamb behind total fresh meat growth benchmarked at -0.4% due to level of discounting over the quarter</li> </ul>

# LATEST 12WK PERFORMANCE UPDATE

NIELSEN IQ: AUSTRALIA 4 WKS ENDING 19.05.24

Beef & Lamb Volume % Growth vs LY  
Total Aus - Nielsen IQ 4wk ending 19-05-24



1. Solid volume growth across the latest quarter

2. Latest 3 periods cycling solid growth from same period YA

# 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			
	BEEF MIDWEEK MEALS											
	RED MEAT x ETHNICITY									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

# NEW BEEF CAMPAIGN TO LAUNCH THIS YEAR!

THERE ARE LONG-TERM CHALLENGES FOR FRESH BEEF



**-2.1%**

5-year decline in purchase volume across fresh beef



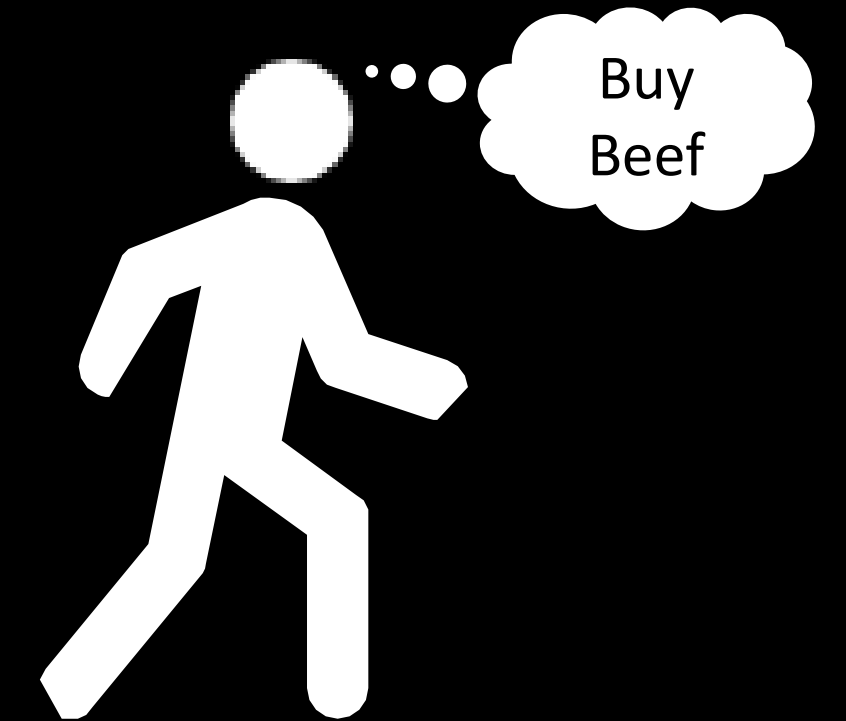
**-3.1pts**

Decline in the number of Australian households buying fresh beef



**+71% Premium**

Vs Chicken means Beef needs to continue showing it is worth more



**87%**

**Awareness**

#1 when it comes to Fresh Meat

# NEW BEEF CAMPAIGN – WHY WE ARE DOING IT ?

WHILE THERE ARE CHALLENGES FOR FRESH BEEF, THERE ARE ALSO OPPORTUNITIES...



## The Long-Term Challenge

Long term erosion of Beef consumption as the preferred protein of choice exacerbated from the widening premium to competing proteins



## Beef's Enduring Strength

The good news is consumer willingness to pay more has climbed over time. We need to continue building equity via emotive campaigns to ensure Beef remains top of mind.



## The Current Gaps

To sustain Beef's price premium and continued volume growth, the job to be done is to justify Beefs superiority in consumers' minds



## Reinforce Premium Position

Positioning Beef as the 'cut-above' of all proteins and the proud choice when serving meals

# NEW BEEF CAMPAIGN – THE YEAR AHEAD

INSPIRE AUSTRALIANS TO CHOOSE BEEF AS THEIR  
#1 CHOICE WHEN THEY WANT THE BEST PROTEIN



**1.** Position Beef as the superior protein choice

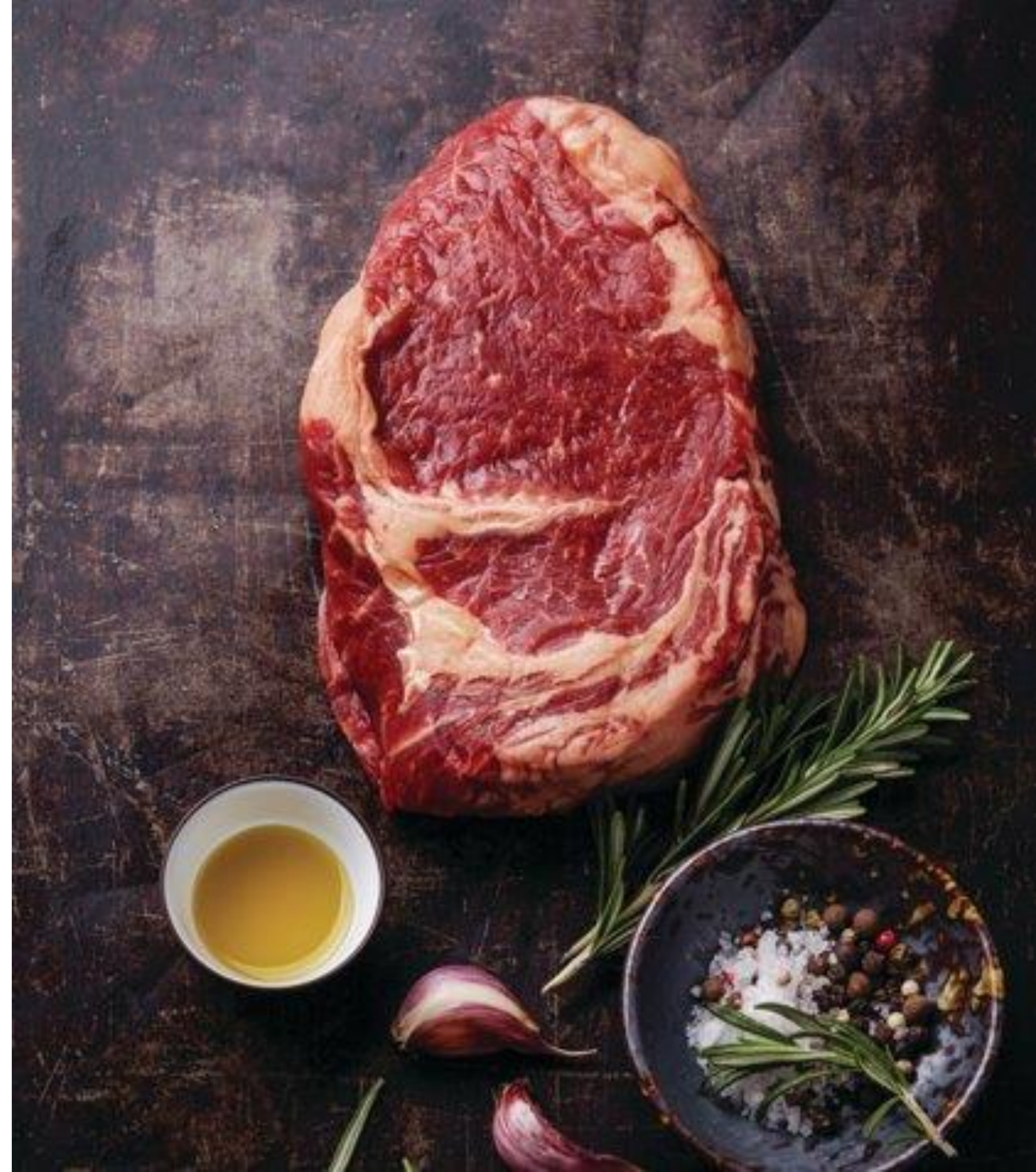
**2.** Build stronger emotional connection to Beef



**3.** New Beef TV ad planned for FY25

LAUNCH EXPECTED  
OCTOBER 2024

Stay tuned for updates on  
timing and creative



# BEEF CAMPAIGN ASSETS

## WARM UP 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



Beef curry with cauliflower rice



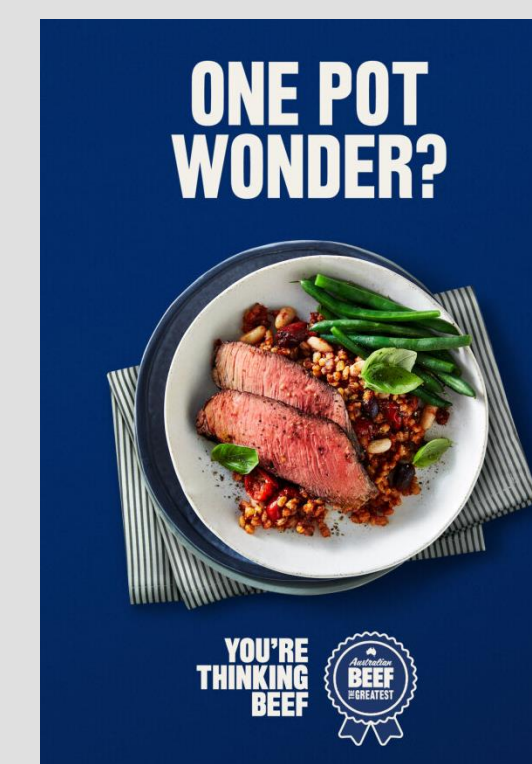
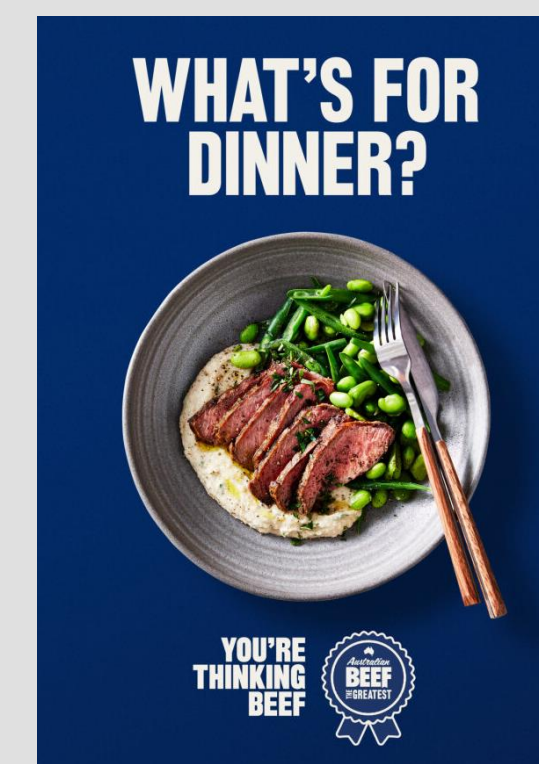
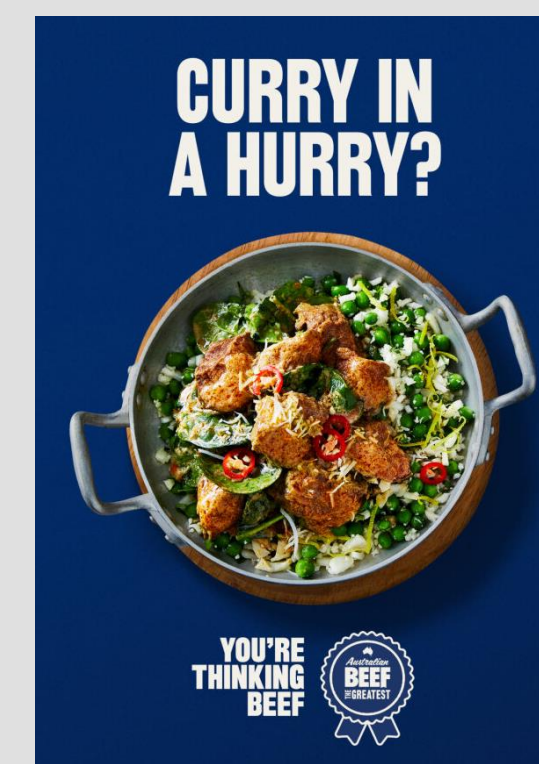
Scotch fillet with white bean puree



Italian beef pot roast



Lemongrass tamarind beef stir fry



# LAMB CAMPAIGN ASSETS

## WARM UP YOUR PROMOTIONAL ACTIVITIES

We have developed a suite of shareable assets for you to use in your business. Here you will find links to 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

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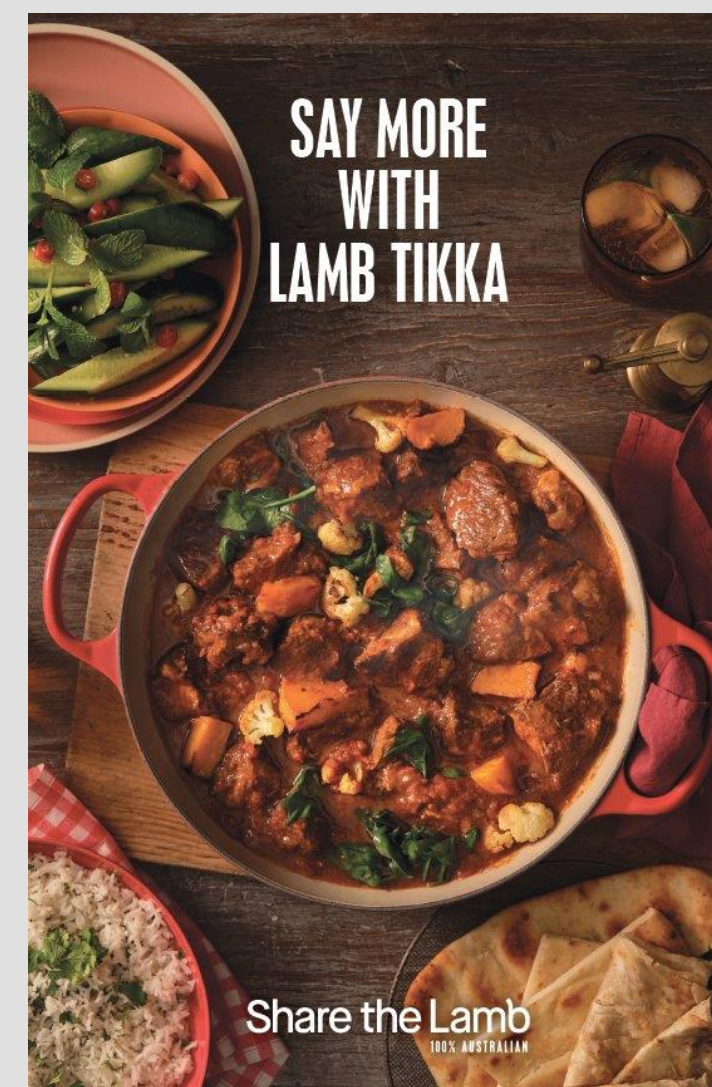
Red wine lamb shoulder



Grandma's roast leg of lamb



Lamb Tikka Curry



# 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 26 where we finally make it back to Western Australia – albeit only dipping a toe in the water of Australia’s largest state with an issue dedicated entirely to Perth. To help us navigate Perth’s bubbling food service scene, we are excited to have our special guest editor Max Veenhuyzen join us for this issue. Click on the below link to view our latest E-mag.

[DOWNLOAD E-MAG](#)

# SYDNEY'S GOAT TRAIL

Two-time Masterchef alumni and now chef and co-owner of Ogni in Surry Hills, Sarah Tiong, takes us on a tasty trail around Sydney – to uncover just some of the delicious goat dishes on menus around Australia's largest city. Get inspired or inspire your customers on the Goat Trail with a world of delicious cuisines and dishes featuring goat.

[CLICK TO WATCH VIDEO](#)



# UNVEILING THE NEXT BIG FOOD TRENDS

OFTEN A PRECURSOR FOR WHAT IS ABOUT TO LAND ON OUR SHORES, THIS QUARTER WE DISCOVER THE HOTTEST FOOD TRENDS THAT ARE HITTING THE USA

## 1. The Versatility of Birria

Chefs are embracing the trend of birria – a spicy, sweet and smoky stew traditionally made from Lamb or Goat. Commonly paired with tacos, this versatile dish is now appearing in sandwiches, nachos, pasta and more.

Learn more [here](#).

## 2. Cinnamon Suprises

Cinnamon is breaking free from its traditional uses. This versatile spice is now enhancing global dishes like Vietnamese pho, Middle Eastern shawarma, Indian garam masala and Greek Moussaka, sparking growing interest in its innovative applications. Learn more [here](#).

## 3. Tallow's Renaissance

Fat is trending in menu development, with tallow rising in popularity. Chefs are using it to enhance fries, vegetable sides, sauces, vinaigrettes and cocktails. It is also featuring in modern dishes like beef tallow fries and lamb tallow roasted vegetables. Learn more [here](#).



# GOOD MEAT RESOURCES

## INFOGRAPHICS, ANIMATIONS AND VIDEOS FOR YOU TO SHARE

Animal welfare can be a tricky subject to navigate. Use these resources to highlight the Australian red meat industry's commitment and progress towards further improving the wellbeing of animals.

CLICK ON IMAGES TO DOWNLOAD



The Australian red meat industry is committed to the

# 5 domains of animal welfare

Mental state · Environment  
Behaviour · Nutrition  
Health

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Australian red meat is:

Ethically raised  
High quality  
Safe

WWW.GOODMEAT.COM.AU

The Australian sheep industry is tracking animal welfare performance

SHEEP SUSTAINABILITY FRAMEWORK

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The Australian beef industry is tracking animal welfare performance

Australian Beef Sustainability Framework

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# MEAT & LIVESTOCK AUSTRALIA

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