

2025 Australian Growth Drivers

September 2025

Global Market Insights





What's changed?

The previous six growth drivers been updated and expanded to reflect:

- Increased demand for *convenience and inspiration*
- Stronger focus on *snacking and occasion-based eating*
- A richer, more nuanced view of *sustainability and diverse tastes*

From 2021 → 2025: What's Changed?

2021 Growth Drivers	2025 Growth Drivers	Retail Focus Growth Area	Foodservice Focus Growth Area
Healthy You →	Healthy & Nutritious	Reinforce 'healthy' red meat everyday meals	More 'healthy' red meat foodservice offerings/occasions
I Care →	We Care	Sustainability	
Easy Everyday →	Easy Preferred Meals	Convenience: ease, time, effort	Convenience: More red meat 'everyday' meal occasions e.g. lunch opportunities
	Inspiring Meals	Convenience: providing inspiration, driving versatility perception, improve cooking confidence (reducing barriers)	Convenience: red meat meal inspiration and building preference and presence
	More Snacking	Convenience: NPD, more red meat meal occasions	
Superior Choice →	Superior Choice, Pure Enjoyment	Experience Driven – Quality + Enjoyment: 'Superior' quality everyday → Premium indulgence	
Pure Enjoyment →	Make it a Moment	Experience Driven – Occasions: Broaden range of meal occasions where red meat can feature/is considered	
Modern Australia →	Evolving Australian Tastes	Capturing changing demographics	New and different: evolving Australian tastes, authenticity

Trends Behind the Shifts



Healthy & Nutritious



We Care



Easy Preferred Meals



Inspiring Meals



More Snacking



Superior Choice, Pure Enjoyment



Make it a Moment



Evolving Australian Tastes

Supporting Facts for Category Drivers

83% have concerns about their physical health and 67% have concerns about their mental wellbeing

Almost half of Australians are sustainably minded and act at an individual to reduce impact and minimize waste

Quick or easy preparation and availability are the key aspects of convenience across meal occasions

Most meat shoppers have some idea of what they want to purchase in store but 2 in 3 are open to influence at shelf

Strong growth forecast for the global savoury snack market, particular in meat snacks segment

There is a deeper emotional connection with red meat beyond price and function*

Almost half of Australians actively seek 'food for social connection' – shared moments that bring us closer together

Australia's population growth is underpinned by immigration with around 30% of the population born overseas in 2021

Despite cost pressures, health is an area consumers are willing to pay for

Australians trust industry to hold a high standard of integrity and expect businesses/ brands to lead the way in sustainability

Shoppers value convenience and are willing to pay more for it. Red meat pre-prepared have headroom for growth

Meat shoppers seek guidance and inspiration on pack but can't find it on what's currently on offer in market*

Snacking occasions represent around one third of eating occasions

While budget is a concern and consumers seek 'value' beyond price and choosing 'quality'

While consumers continue to 'trade in' for at home occasions to manage budgets, many may still 'splurge' on these occasions

As migrants integrate into Australia over time, important elements of their ethnic identity such as food and occasions are retained

Nutrition is the key reason consumers choose to increase their meat consumption

Animal welfare is important to consumers, they seek assurance animals are slaughtered humanely and don't want to feel guilty

Increased frequency and penetration is driving growth for fresh meat online

Beef and lamb is seen to be trusted quality and superior – opportunities in inspiring consumers to choose for everyday meals

Meat snacks have growth potential, given developed segment share in other markets and Australians appetite for savoury snacks

To consumers, lamb is something 'a bit special' and 'worth paying more for' while beef is a superior, elevated everyday choice

Consumers see red meat as 'superior' and 'trusted quality' – premium qualities to elevate any occasion

Australians enjoy a broad and diverse range of international cuisines and flavours, particularly among younger consumers

Trends Behind the Shifts



Healthy & Nutrition



We Care



Easy Preferred Meals



Inspiring Meals



More Snacking



Superior Choice, Pure Enjoyment



Make it a Moment



Evolving Australian Tastes

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Demand for inspiration

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Almost half of Australians seek food for connection

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Supporting Facts for Category

Sustainability + Ethics is expected

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1 in 3 meal occasions = snacking

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While consumers continue to 'trade in' for at home occasions to manage budgets, many may still 'splurge' on these occasions

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Convenience meals + online growth

Nutrition is the key reason consumers choose to increase their meat consumption

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Demand for cultural relevance

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Healthy & Nutritious + We Care

(Health & Sustainability)

- These reinforce health and values
- Lean cuts, clear benefits and ethical sourcing are key factors
- Aligns with premiumisation and growth of functional foods
- Consumers are willing to pay for health, but it's also become an expectation across food as consumers are increasingly prioritising health and wellbeing
- Sustainability is a pillar of trust, a reputation driver and a responsibility for the industry to uphold
- These drivers work together to build trust, reduce guilt and maintain relevance



Want more details on the drivers? Find the updated Australian drivers and more on [AussieMeatTradeHub](https://aussiemeattraderhub.com.au)

Everyday Meals + Ideas + Snacking (Convenience & Inspiration)

Convenience

Easy, Preferred Meals

Inspiring Mealtimes

More Snacking

Go to Midweek protein

NPD

Value Added / Preprepared Meals

More red meat occasions

Time Saving

Cooking confidence

No Fuss

Versatile (flavours/cuisines)

Good/easy for kids

Cuts to suit my budget

Online channel

Everyday Meals + Ideas + Snacking (Convenience & Inspiration)

GROWTH DRIVER | AUSTRALIA

EASY, PREFERRED MEALS

With my busy lifestyle, I rely on red meat as a **simple and tasty** foundation for **healthy everyday meals**

PRIME TARGETS

Consumers*
SINKs/ DINKs†
Families with children
Busy professionals

Channels

- Supermarkets and online
- Meal kits
- QSR to casual dining

KEY FACTORS FOR THIS DRIVER

- Quick, easy and convenient
- Options that fit my budget
- Meal solutions
- Easy/good for kids

PRODUCT/SOLUTION OPPORTUNITIES

- Core beef and lamb range
- Ready-to-heat/eat/cook
- Portioned size (no need to cut)
- Easy, simple recipes
- Meal kits, home

Today many consumers think...

With everything else I have

CHANGE WE STRIVE FOR WITH THIS DRIVER

I can rely on red meat to

KEY CONSUMER INSIGHTS AND TRENDS

- Quick or easy preparation and availability are the key aspects of convenience across meal occasions*
- Shoppers value convenience and are willing to pay more for it. Beef and lamb prepared have headroom for growth**
- Increased frequency and penetration driving growth for red meat online**

Sources: *MLA Consumer Protein Landscape | **Nielsen IQ, Homescan 52 weeks to Sep 2024
†Single Income No Kids, Double Income No Kids.

GROWTH DRIVER | AUSTRALIA

MORE SNACKING

Red meat is my ideal **go-to** as a **tasty, protein-packed** snack that fits into my healthy lifestyle

PRIME TARGETS

Consumers*
SINKs/ DINKs†
Health-conscious individuals (18-49 yo)
Single person households

Channels

- Across retail and foodservice

KEY FACTORS FOR THIS DRIVER

- Convenient
- On the go / multitask / not messy
- Fills me up/keeps me going

PRODUCT/SOLUTION OPPORTUNITIES

- Reframe red meat in snacking occasion
- NPD
- Functional foods

Today many consumers think...

I don't consider red meat when seeking a snack between meals

CHANGE WE STRIVE FOR WITH THIS DRIVER

Red meat is my healthier and tastier go-to snack

KEY CONSUMER INSIGHTS AND TRENDS

- Strong growth forecast for the global savoury snack market, particular in meat snacks segment*
- Snacking occasions represent around one third of eating occasions**
- Meat snacks have headroom for growth given developed segment share in other markets and Australians appetite for savoury snacks*



Sources: * GlobaData, Market Segment Analyser 2024 | ** Consumer Protein Landscape 2022
†Single Income No Kids, Double Income No Kids.

GROWTH DRIVER | AUSTRALIA

INSPIRING MEALS

PRIME TARGETS

Consumers*
SINKs/ DINKs†
Families with children
Busy professionals

Channels

- Supermarkets
- Online
- QSR to casual, mid-tier foodservice

KEY FACTORS FOR THIS DRIVER

- Cooking confidence
- Variety that suits my budget
- Recipe inspiration
- Cooking guidance
- Couple with other drivers e.g. Evolving Australian Tastes

...but it's all feels like more of the same

seeking, red meat has options that are exiting and inspiring

KEY CONSUMER INSIGHTS AND TRENDS

- Most meat shoppers have some idea of what they want to purchase in store but 2 in 3 are open to influence at shelf*
- Meat shoppers seek guidance and inspiration on pack but can't find it on what's currently on offer in market*
- Beef and lamb is seen to be trusted quality and superior – opportunities in inspiring consumers to choose for everyday meals**



Sources: *MLA Packaging Playbook 2024 | **MLA Domestic Consumer Tracker 2024
†Single Income No Kids, Double Income No Kids.

Everyday Meals + Ideas + Snacking (Convenience & Inspiration)

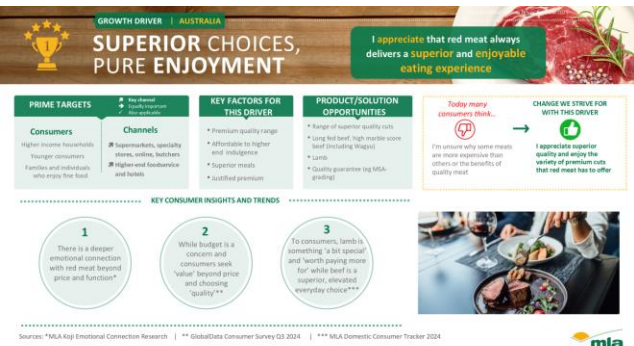


The broad umbrella of convenience is where these next drivers play. Convenience isn't just “fast”, it's also reliable, easy, inspiring and accessible. Snacking is a whitespace for red meat as it's no longer just about chips or protein bars. In more developed snacking markets, we're seeing the rise of meat snacks in formats like skewers, sticks, sliders — even high-end jerky — paired with wellness cues. Australia hasn't fully tapped that yet.

- **Easy Preferred Meals:** quick, family-friendly, reliable
- **Inspiring Meals:** more variety, fresh ideas, cooking guidance
- **More Snacking:** new occasions, functional meat snacks

Want more details on the drivers? Find the updated Australian drivers and more on [AussieMeatTradeHub](https://aussiemeattradehub.com.au)

Superior Quality + Connection + Culture (Emotional & Experience Driven Eating)



This theme is all about meaning – elevating red meat beyond function – elevated experiences, cultural relevance and ‘making a moment’. These drivers help reposition red meat from “what we always eat” to “what I choose because it makes sense for me”. This could mean creating theatre in foodservice, premium cuts with a story in a butcher shop or highlighting ‘celebration’ moments and diverse dishes. Red meat is still the ‘go-to’ when the moment matters – dinner parties, rituals, recipes passed down.

- **Superior Choice, Pure Enjoyment:** premium quality, indulgence
- **Make it a Moment:** red meat = celebration
- **Evolving Tastes:** cultural relevance, new cuisines

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RED MEAT GROWTH DRIVER SUMMARY | AUSTRALIA 2025



VISION: For Australian red meat to be the PREMIUM CHOICE for Australians

Driver name	Healthy & Nutritious	We Care	Easy Preferred Meals	Inspiring Meals	More Snacking	Superior Choice, Pure Enjoyment	Make it a Moment	Evolving Australian Tastes
Opportunity area	Healthy & Natural	Sustainability	Convenience	Convenience	Convenience	Quality	Experience Driven	Experience Driven
Driver definition	I am confident red meat is naturally nutrient-rich and supports my wellbeing and lifestyle	I trust the industry makes responsible choices—caring for animals, the environment and our community	With my busy lifestyle, I rely on red meat as a simple and tasty foundation for healthy everyday meals	I love exploring the variety of red meat options, to make every meal more exciting	Red meat is my ideal go-to as a tasty, protein-packed snack that fits into my healthy lifestyle	I appreciate that red meat always delivers a superior and enjoyable eating experience	Red meat is my preferred choice for any occasion to deliver great taste and elevate any moment	I excited to discover red meat meals that reflect the rich diversity of Australia and suit my tastes and traditions
Key factors	<ul style="list-style-type: none"> • Healthy me & my family • Balanced diet • Natural nutrition • Wellness 	<ul style="list-style-type: none"> • Sustainable practice and innovation • Socially conscious • Localism 	<ul style="list-style-type: none"> • Quick, easy and convenient • Options that fit my budget • Meal solutions • Easy/good for kids 	<ul style="list-style-type: none"> • Cooking confidence • Variety that suits my budget • Recipe inspiration • Cooking guidance 	<ul style="list-style-type: none"> • Quick, easy and convenient • On the go / multitask / not messy • Fills me up/keeps me going 	<ul style="list-style-type: none"> • Premium quality range • Affordable to higher end indulgence • Superior meals • Justified premium 	<ul style="list-style-type: none"> • Range of occasions e.g. solo treats → elevated everyday → premium • Shared connection • Makes the occasion ‘a bit special’ 	<ul style="list-style-type: none"> • New flavours • Authenticity • New occasions • Familiarity and cooking confidence among CALD†
Change we strive for with this driver	<p> (from) I like red meat, but I limit how often I eat it, because I’m unsure it’s healthy</p> <p> (to) Red meat is an essential part of a healthy, balanced diet and fits my wellbeing and lifestyle needs</p>	<p> (from) Unsure if eating red meat is sustainable</p> <p> (to) I am confident that red meat matches my sustainability values</p>	<p> (from) With Everything else I have going on, cooking meats can be a chore</p> <p> (to) I can reply on red meat to provide options that are convenient, easy and delicious</p>	<p> (from) We love eating red meat, but it’s it all feels like more of the same</p> <p> (to) No matter what I’m seeking, red meat has options that are exciting and inspiring</p>	<p> (from) I don’t consider red meat when seeking a snack between meals</p> <p> (to) Red meat is my healthier and tastier go-to snack</p>	<p> (from) I’m unsure why some meats are more expensive than others or the benefits of quality meat</p> <p> (to) I appreciate superior quality and enjoy the variety of premium cuts that red meat has to offer</p>	<p> (from) I don’t care which types of fresh meats or seafood I use for any occasions</p> <p> (to) Beef and lamb always impresses for any occasion, elevating any moment</p>	<p> (from) Not familiar with red meat</p> <p> (to) Red meat caters for me and/or my family’s unique taste (to) Red meat options can be different and exciting</p>
CONSUMERS*	<ul style="list-style-type: none"> • Families with children • Health-conscious individuals (18-49 yo) 	<ul style="list-style-type: none"> • Consumers with an interest in sustainability • Younger consumers 	<ul style="list-style-type: none"> • SINKS/DINKS† • Families with children • Busy professionals 	<ul style="list-style-type: none"> • SINKS/DINKS† • Families with children • Busy professionals 	<ul style="list-style-type: none"> • SINKS/DINKS† • Families with children • Health-conscious individuals (18-49 yo) 	<ul style="list-style-type: none"> • Higher income HHs • Younger consumers • Consumers that enjoy fine food 	<ul style="list-style-type: none"> • Consumers seeking enjoyment and interaction with others through food 	<ul style="list-style-type: none"> • CALD† households • Consumers seeking new and exciting taste experiences
CHANNELS	All retail QSR, casual dining	Selected segments within mainstream retail/online & foodservice	Supermarkets and online, Meal kits QSR to casual dining	Supermarkets and online, Meal kits QSR to casual dining	Across retail and foodservice	Supermarkets, specialty stores, online, butchers Higher-end foodservice	Retail and online, QSR (high \$ items), Mid to higher-end venues	Across retail and foodservice, ethnic butchers, specialty stores
Product/ solution opportunities	Grassfed / Organic, balanced meal offerings, health information on pack, portioned packs	Regenerative, animal welfare, organic, paddock to plate story, packaging	Core beef/ lamb range, ready-to-heat/eat/cook, pre-portioned size, easy and simple recipes, meal kits, home delivery	Pre-prepared beef and lamb, mince, inspirational imagery on pack, reframe red meat usage, sous vide / slow cooked	Reframe red meat in snacking occasion, NPD, Functional foods	Range of superior quality cuts, long fed beef, high marble score beef, Wagyu, lamb, quality guarantee	Sharing plates, wholistic experience (food, ambience, presentation), gourmet, menu indulgence	Lamb, Red meat in new flavours/cuisines/occasions, value added products/ secondary cuts, Halal

* † SINKS = Single income no kids, DINKS = double income no kids, CALD = culturally and linguistically diverse

Growth Drivers in *Action*

“Healthy & Nutritious” to guide shoppers on lean cuts

“More Snacking”
NPD for portion-controlled beef strips

“Evolving Australian Tastes” incorporating multicultural lamb dishes on menu

“Make it a Moment”
to frame at home premium weekend treat

“Superior Choice, Pure Enjoyment” to position at home premium in retail

Storytelling with **inspiration, indulgence, culture** and **snacking** moments

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