



AUTUMN 2025

Insights, Assets +
Information



Index of Seasonal Resources

Click image for your section of interest

Cattle Industry Projections

- Herd: 30.1m
- Slaughter: 8.54m
- Carcass Weights: 307 kg/head
- Production: 2.62m tonnes out

- In 2025 the national herd is forecast to ease due to continued elevated slaughter, reaching 8.5m head.
- Record production and exports are expected once again in 2025 as carcass weights remain high.
- Global demand will stay strong given protein shortages across the world.

Click to view 2025 Cattle Industry Projections Summary

mia MEAT & LIVESTOCK AUSTRALIA

Industry Projections

Key Headlines
Australia 12wks ending 29-12-24

- CPG value growth at 5.1%. Easing price inflation continues.
- Fresh meat leading market growth.
- Fresh beef remains strong, with steak being a key driver.
- Easy to cook lamb cuts staying popular in value, but unable to offset loss from larger cuts.

Publinter: NebelHQ Aus Advertiser

mia MEAT & LIVESTOCK AUSTRALIA

Shopper Spending

2025 Summer Lamb Campaign

Running January to February 2025, the "Comments Section" installment of the Summer Lamb campaign sought to drive peak salience and mental availability throughout Summer.

- 20m views, making it the second most viewed Summer Lamb ad.
- 738 PR stories, reported across all FTA TV networks.
- 772 YouTube comments from an engaged audience.
- 97.3% positive sentiment.

mia MEAT & LIVESTOCK AUSTRALIA

Campaign Summaries

FY25 Activity
Make the most out of your programs by aligning with our calendar

	2025					
	QUARTER 3			QUARTER 4		
	JAN	FEB	MAR	APR	MAY	JUN
BEEF			The Greatest			
LAMB		Beef Midweek Meals			Beef Midweek Meals	
		Summer Lamb				Always on Social

Share the Lamb Always On Social

Aussie Beef: The Greatest
Build superiority by inspiring Australians to choose beef as their #1 choice when they want the best protein.

Beef Midweek Meals
Build up the mid-week meal by increasing beef consideration through desire and inspiration.

mia MEAT & LIVESTOCK AUSTRALIA

Activity Calendar

Beef Recipe Inspiration

Beef Cuts in Focus: Porterhouse + Scotch Fillets

Inspiring recipes and still images to share on socials or with customers.

Click Images For Recipes

Click Here For Downloadable Assets

mia MEAT & LIVESTOCK AUSTRALIA

Recipe Inspiration

Rare Medium: Foodservice Trends

Where do the hottest food trends start? In foodservice kitchens!

Chefs are innovators, shaping what we eat long before it filters through to home cooks. Rare Medium offers a window into this dynamic world, giving you a direct line to these trends, offering practical inspiration for product development and innovation, as well as staff training.

Want to see what's cooking? Head over to Rare Medium to explore the latest in foodservice trends.

- Kokorotaj? Yes Chef.
- Smoked Brisket with Luke Powell
- Lamb Sausages? Yes Chef.

Watch Video Here

RARE MEDIUM

mia MEAT & LIVESTOCK AUSTRALIA

Rare Medium Trends

Australian Good Meat

Infographics, animations and videos for you to share

Nutrition questions? Sometimes, finding the facts can be challenging, and with consumers being increasingly interested in it, these resources provide the tools to effectively communicate the advantages of Australian red meat to your audience.

Explore the nutrition resources available on Australian Good Meat today.





- Eat lean red meat 3 to 4 times a week
- Nutrition at key life stages
- Take meat

Australian Good Meat

Australian Good Meat

Cattle Industry Projections



-  **Herd:** 30.1m
-  **Slaughter:** 8.54m
-  **Carcase Weights:** 307 kg/head
-  **Production:** 2.62m tonnes cwt

- In 2025 the national herd is forecast to ease due to continued elevated slaughter, reaching 8.5m head.
- Record production and exports are expected once again in 2025 as carcass weights remain high.
- Global demand will stay strong given protein shortages across the world.

[Click to view 2025 Cattle Industry Projections Summary](#)



Sheep Industry Projections



- ↪ **Flock:** 73.2m
- ↪ **Lamb Slaughter:** 26.2m
- ↪ **Lamb Production:** 629,000 tonnes cwt

- The sheep flock is expected to ease in 2025 due to increased turn-off of older breeding ewes drive by the maturity of the flock.
- Lamb slaughter will remain elevated in 2025, marking the second largest annual lamb slaughter at 26.2 million head.
- Mutton production will ease by 17% after the elevated turn-off of mutton at the end of 2024.

[Click to view 2025 Sheep Industry Projections Summary](#)





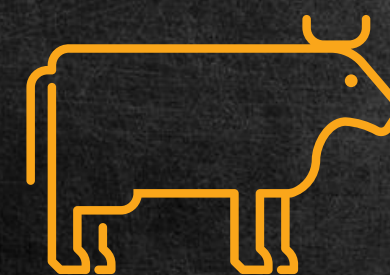
Retail performance

Australia 12wks ending 23.02.25



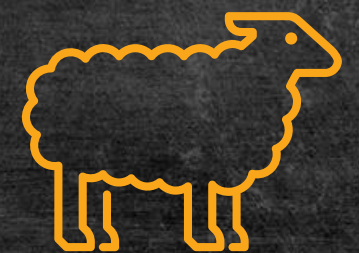
CPG value growth at 7.3% fueled by increased trips and rising prices.

Strong Fresh Meat growth with beef driving value gains and chicken leading volume.



Fresh beef sustained growth as existing buyers purchasing more.

Lamb staying positive in value growth, but unable to hold the volume due to higher price.


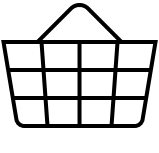
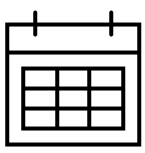


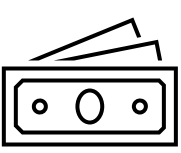
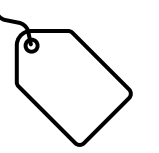


Retail summary

Australia 12wks ending 23.02.25

1. With CPG still growing, but the strain from cost of living remaining, frequency has dipped in Fresh Meat.
2. Beef has retained a strong position, growing in frequency, volume per shopper, purchase volume and purchase value.
3. Lamb, despite a large drop in volume, has retained purchase value by way of increased pricing. While lamb prices have increased from 2024, they are still tracking below 2023 levels.
4. 2YA pricing across all categories reflects a more stable outcome for both household and category KPIs.

Reach out to us for more information

Household KPIs				Category KPIs			
							
1 Year Ago	Penetration	Penetration vs YA	Frequency vs YA	Vol per Shop vs YA	Purchase Volume Vs YA	Purchase Value vs YA	Price/KG Vs YA
Fresh Meat	94.1%	(0.6)	(0.9%)	3.6%	4.4%	9.1%	4.5%
Beef	81.8%	(1.5)	0.6%	3.3%	4.4%	10.0%	5.3%
Lamb	47.0%	(3.0)	(6.2%)	(2.3%)	(11.7%)	8.7%	23.1%

2 Years Ago	Penetration vs 2YA	Frequency vs 2YA	Vol per Shop vs 2YA	Purchase Volume Vs 2YA	Purchase Value vs 2YA	Price/KG Vs 2YA
Fresh Meat	(0.2)	2.0%	6.4%	12.8%	10.2%	(2.4%)
Beef	(0.3)	3.9%	5.5%	13.6%	11.2%	(2.1%)
Lamb	(3.0)	0.1%	3.8%	1.7%	(0.9%)	(2.5%)

Reference: NielsenIQ Aus Homescan

2025 Summer Lamb Campaign

Running January to February 2025, the "Comments Section" installment of the Summer Lamb campaign sought to drive peak salience and mental availability throughout Summer.



20m views, making it the second most viewed Summer Lamb ad



738 PR stories, reported across all FTA TV networks



772 YouTube comments from an engaged audience



97.3% positive sentiment



Aussie Beef. The Greatest.

Airing October to November 2024, “Aussie Beef. The Greatest.” was designed to showcase beef as the superior protein and reinforce the consumers’ willingness to pay more.

Exceeding expectations, the campaign delivered exceptional results in market.



THE GREATEST



Volume sales
+4.8% vs YA



Penetration
+1.4pts vs YA



Value sales
+4.6% vs YA



Willingness to pay more
reached 34%,
continuing an upward
trajectory

Aussie Beef. The Greatest.

After testing, “Aussie Beef. The Greatest.” ads, we saw a strong response regarding branding and overall enjoyment, with a strong increase in likelihood to eat beef.

[Watch The Kitchen Here](#)

[Watch The Ship Here](#)

The Kitchen
30/15s



The Ship
30/15s



FY25 Promotional Activity

Make the most out of your programs by aligning with our calendar

	2025					
	QUARTER 3			QUARTER 4		
	JAN	FEB	MAR	APR	MAY	JUN
BEEF			The Greatest			
	Beef Midweek Meals				Beef Midweek Meals	
LAMB	Summer Lamb					
			Always on Social			



Always On Social

Build on awareness and consideration for lamb with younger generations with targeted social advertising.



Aussie Beef: The Greatest

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

Beef Midweek Meals

Build up the mid-week meal by increasing beef consideration through desire and inspiration

Beef Recipe Inspiration

Beef Cuts in Focus:
Porterhouse + Scotch Fillets

Inspiring recipes and still images to share on socials or with customers.

[Click Images For Recipes](#)

[Click Here For Downloadable Assets](#)



Smokey scotch fillet with warm chickpea and capsicum salad



T bone with chimichurri & quinoa salad



Porterhouse steak with onion gravy

Lamb Recipe Inspiration

Lamb Cuts in Focus:
Shoulder + Leg

Inspiring recipes and still images to share on socials or with customers.

[Click Images For Recipes](#)

[Click Here For Downloadable Assets](#)



Slow cooked lamb leg



Garlic & rosemary lamb shoulder roast



Smokey Moroccan lamb stir fry & vegetable couscous

Rare Medium: Foodservice Trends

Where do the hottest food trends start? In foodservice kitchens!

Chefs are innovators, shaping what we eat long before it filters through to home cooks. Rare Medium offers a window into this dynamic world, giving you a direct line to these trends, offering practical inspiration for product development and innovation, as well as staff training.

Want to see what's cooking? Head over to Rare Medium to explore the latest in foodservice trends.

Kokoretsi?
Yes Chef.



[Watch Video Here](#)

Smoked Brisket
with Luke Powell



[Watch Video Here](#)

Lamb Sausages?
Yes Chef.



[Watch Video Here](#)

Australian Good Meat

Infographics, animations and videos for you to share

Nutrition questions? Sometimes, finding the facts can be challenging, and with consumers being increasingly interested in it, these resources provide the tools to effectively communicate the advantages of Australian red meat to your audience.

Explore the nutrition resources available on Australian Good Meat today.

Eat lean red meat 3 to 4 times a week

Nutrition at key life stages

Fake meat

- Australian -
Good Meat
MORE THAN JUST GOOD FOR YOU



THANK YOU!

Meat & Livestock Australia

Copyright, Acknowledgement Notices, and Disclaimer Policy

All information contained within this presentation and supplied in connection with it, including any oral commentary and answers to questions, is supplied to recipients for information purposes only. No representation, warranty or other assurance is made as to the currency, fairness, accuracy or completeness of the information contained within this presentation or supplied in connection with it. The information contained within this presentation is in summary form only and is not, and does not purport to be, comprehensive or contain all information that any recipient may require or consider material.

Although all care has been taken in preparing this presentation, viewers of this presentation should not alter their position, or refrain from doing so, relying on this presentation, and should seek independent advice for their own situation. 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. Your use of, or reliance on, any content is entirely at your own risk and MLA, MDC and ISC (“MLA Group”) accept no liability for any losses or damages incurred by you as a result of that use or reliance.

The views or judgements expressed within this presentation are those of the author and not the MLA Group. These views and judgements do not reflect the views and judgments of the MLA Group, its employees or agents.

Full terms can be found here: [MLA Terms of Use](#). You may not copy, republish, download, transmit, communicate, or otherwise use this content in any way without the prior written consent of Meat & Livestock Australia Limited ABN 39 081 678 364. Any such enquiries should be directed to info@mla.com.au, or the Content Manager, PO Box 1961, North Sydney, NSW 2059.