

July 2022

# Global Tracker: Canada *Presentation Deck*

*Brought to you by your Kantar Team:*  
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& Carolina Ferrando



# Flow of the presentation today



## MACRO-MARKET CONTEXT

A quick look at the market context and post covid trends that are impacting consumer choice in the Canadian market.



## PROTEIN LANDSCAPE

Setting the scene by looking at the awareness, claimed consumption and perceptions of the key proteins in market. This also includes general beef buying behaviours.



## IMPORTED BEEF CONSUMPTION & COUNTRY OF ORIGIN

Looking at the key associations with COO brands and trust in those brands.

How does this flow through to brand equity and Power.



## COMMUNICATING TO GROW BEEF & LAMB

Looking at what associations drive brand choice and premium perceptions to understand what we can leverage.



## Final Thoughts & Discussion

What levers can we pull and what should we continue to communicate to build likely AU product choice.

## The Central Question

How can Australian Beef and Lamb leverage current assets to build perceptions that will grow relevance of AU product for Canadian consumers?

We have conducted the global tracker in 22 markets over the last 8 years, with Canadian fieldwork back in 2022 after a break since 2017.

MARKETS	 Japan	 Korea	 China	 Indonesia	 Singapore	 Malaysia	 Philippines	 Taiwan	 Thailand	 Vietnam	 USA	 Canada	 KSA	 UAE	 Oman	 Jordan	 Kuwait	 Qatar	 UK	 Hong Kong	 Mexico	 Chile	Total # of markets	
2015	█	█	█	█		█	█	█			█	█	█	█									11	
2016	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█									15
2017	█	█	█	█	█	█					█	█	█	█		█							11	
2018	█	█	█	█		█			█		█		█	█					█	█	█	█	13	
2019	█	█	█	█		█					█		█	█			█	█					10	
2020	█	█	█	█		█		█			█		█	█									9	
2021	█	█	█	█		█			█	█	█		█	█					█				11	
2022	█	█	█		█		█			█	█	█	█	█				█					11	





# INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

*Diverse markets, with some universal truths.*

## 2022 Study Details:



8,300 interviews



11 Markets (See right)



20-minute online survey  
(supported by interviewer in MENA)



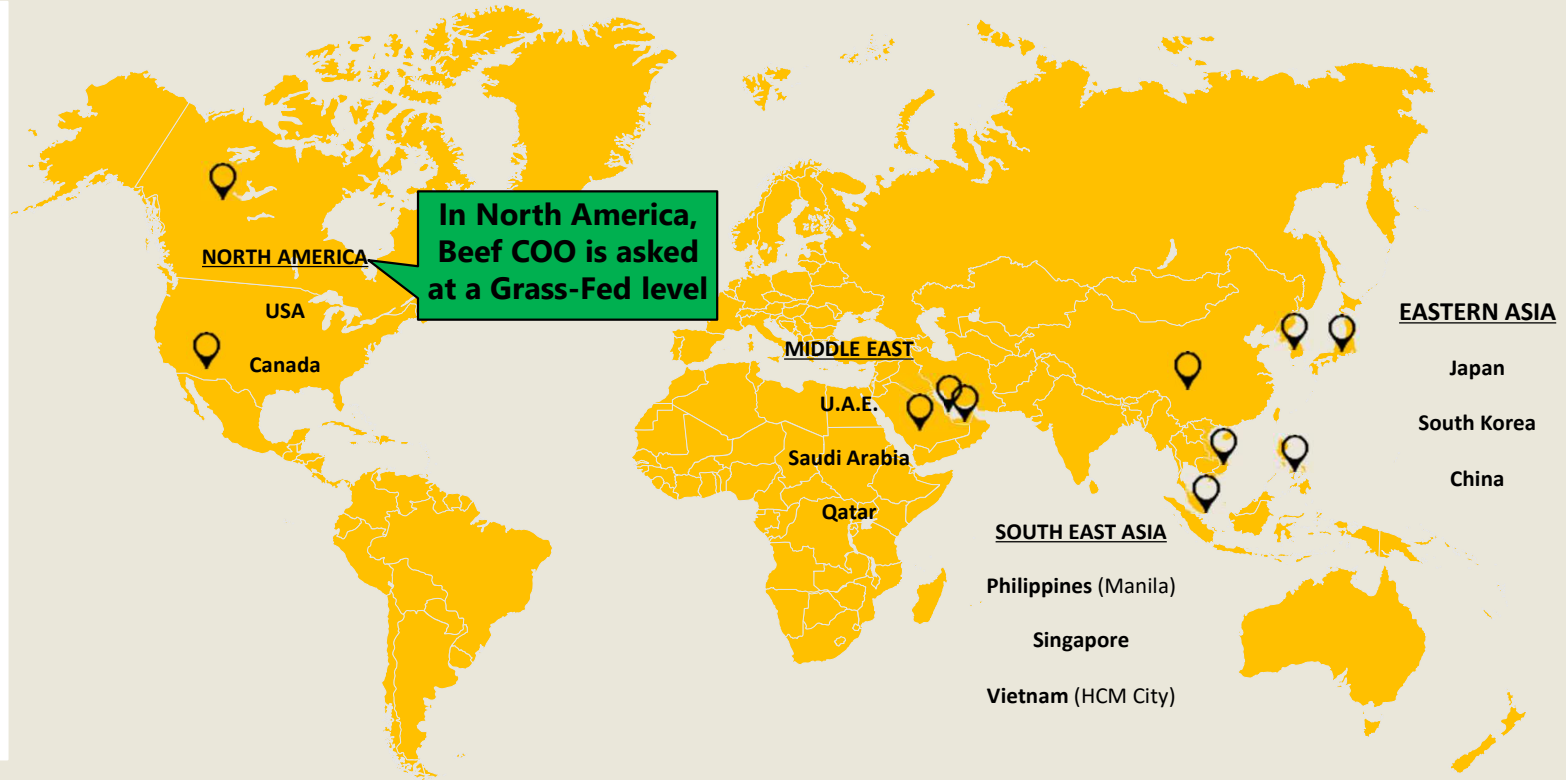
Consumers aged 18-64  
Grocery buyers, meal planners  
Affluent households (skew)  
Selected based on potential  
openness and ability to buy AU  
Beef and/or Lamb  
*(Not representative of total market)*



Captures meat consumption habits,  
attitudes, perceptions of COO Beef  
& Lamb, purchase drivers,  
channels, trust and True Aussie



Conducted annually, this study  
collects historical data allowing the  
tracking of trends overtime



## Canada Sample – a deliberate skew (not Nationally Representative)



**Sample is made up of 500 consumers**

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	36%
	Female	50%	64%
Age	18-34	-	29%
	35-49	-	37%
	50-64	-	35%
Cities	Toronto	8%	53%
	Vancouver	2%	47%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	87%
Children	Households with Children	-	31%
Annual HH Income	Less than 50K	-	31%
	50K – 90K	-	34%
	90K and more	-	36%



# MACRO- MARKET CONTEXT



## There are 3 broad macro-contextual factors that are impacting markets and these are filtering down to four consumer considerations



### Economic

The post-covid economic environment, has increased concerns across developed markets around managing household income and rising costs and inflation this has left consumers preparing for affordability challenges



### Trade Relations & Politics

Political forces at play have altered the landscape for beef trade impacting accessible product, in particular Bi-lateral trade agreements



### Covid

Covid response has been to refocus on health & well-being, and re-evaluate brand choices. Health consciousness entrenched post-COVID, has impacted food choices, and use of e-commerce to procure products, including groceries.



### Value

Consumers are seeking value, whether buying better - premium products and categories, or bringing value options into their repertoire



### Accessibility & Availability

Supply challenges mean physical availability is increasingly important for maintaining relevance



### Health

A focus for particular segments of society who are finding ways to better manage their mental and physical health through diet and exercise



### Omni-channel experience

Pandemic has changed our mix of channels and comfort with online driving a greater mix of how we access product including groceries.

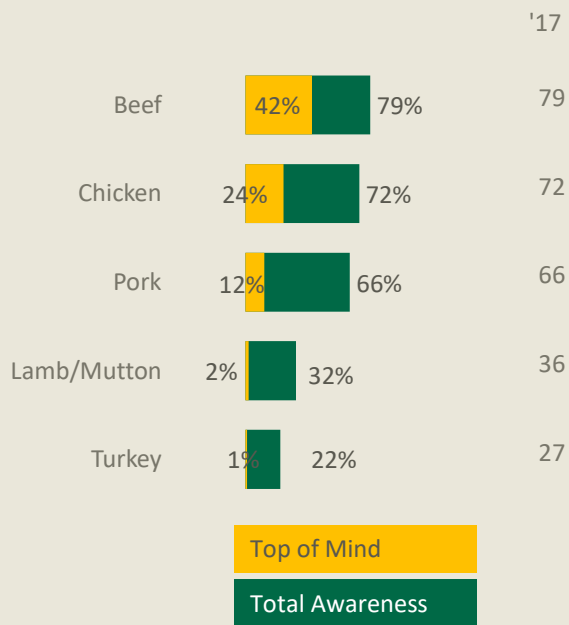
# PROTEIN LANDSCAPE



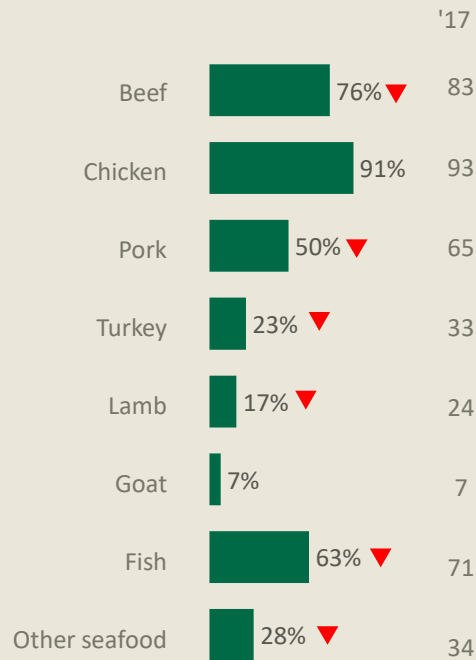
While salience of proteins is stable vs 2017, past month purchases has declined across the board, apart from Chicken and Goat. Chicken remains the top purchased and consumed protein.



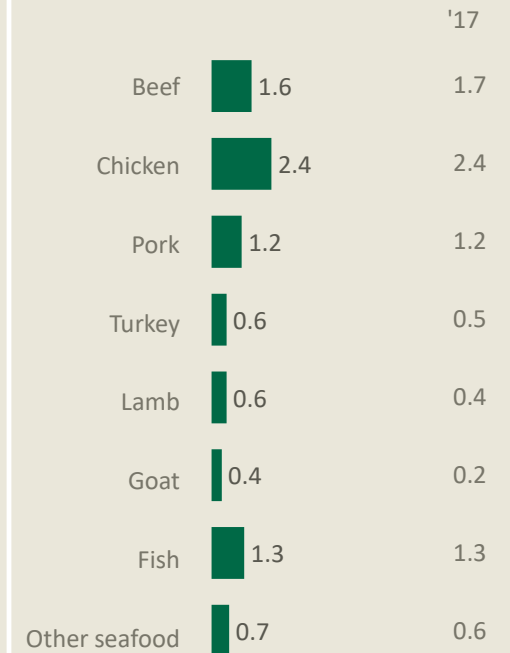
### SPONTANEOUS AWARENESS



### BOUGHT IN LAST MONTH



### AVERAGE SERVES LAST 7 DAYS



NOTE: GENERAL BEEF LEVEL

**KANTAR**

CH1 Spontaneous Awareness – When thinking about meat, which types come to mind?  
 CH10 How many meals that included the following meats have been prepared and eaten in your home in the last 7 days? CH2 Bought in the last month – Which types of meat have you bought in the last month to prepare for a meal at home?  
 Base: '22 (n=500), '17 (n=745)

▲ ▼ Sig. different at 95%



A reminder, we know that there are some consistent themes of what the proteins stand for across all of our markets. Beef is the Superior protein.



### THE STAPLE



- Cheap and easily available
- Versatile and easy to prepare
- Doesn't play to taste
- Not very nutritious
- Animals treated poorly
- Questionable safety
- *Pork: Consistent quality, favourite and taste in key markets like China, Taiwan, US, Jp, SK)*



### THE SUPERIOR



- Good quality, good taste, superior meat
- Worth paying more for
- Nutritious
- *In MENA, beef is a Staple*

### THE CURIOSITY

- Unfamiliar, occasional purchase
- Premium option
- Not sure what to do with it
- Fatty
- Taste is a barrier for some
- *In MENA lamb is a Prime*



### THE SPECIALTY



- Few strengths or weaknesses
- Weakly positive on animal welfare and sustainability
- Taste is a barrier
- Lean/tough
- Unfamiliar and uncommon except amongst certain groups



### THE HEALTHY ALTERNATIVE

- Fresh
- Nutritious – especially for children
- Low in fat
- Tricky to use
- Welfare is not great
- *In SEA, fish is a cheap, low value protein - elsewhere it is premium*



# Proteins have a similar role in Canada as they do in USA: Beef combines accessibility with superiority and taste making it a the prime choice in the protein repertoire. Chicken is seen as easy everyday.

Tasty, premium, versatile



## Beef

### Strengths vs others

- Tastes delicious
- Versatile
- Easy/convenient to purchase and prepare
- Family's favourite meat
- Is the most superior meat

### Weaknesses vs others

- Not low fat
- Not Safe

Easy, affordable, healthier



## Chicken

### Strengths

- Cheaper
- Versatile
- Easy/convenient to purchase and prepare
- Essential for healthy children's diet
- Family's favourite meat

### Weaknesses

- Not fresh
- Not well-cared for
- Not high nutritional value
- Not guaranteed safe
- Not Superior
- Not worth paying more for

Fresh, nutritious, low fat



## Fish

### Strengths

- High nutritional value
- Low fat
- Essential for healthy children's diet

### Weaknesses

- Not cheaper
- Not well-cared for
- Not versatile
- Not quality
- Not superior
- Not safe
- Not favourite

*Seafood low fat and willing to pay more*

Easy, affordable, tasty



## Pork

### Strengths

- Cheaper
- Versatile
- Easy/convenient to purchase & prepare

### Weaknesses

- Not high nutritional value
- Not low fat
- Not willing to pay more for *(slight improvement)*

*Turkey low fat but not favourite or easy to purchase*

Superior, unfamiliar



## Lamb

### Strengths

- Is well-cared for
- Tender
- Superior
- Willing to pay more for

### Weaknesses

- Not versatile
- Not easy/convenient to purchase or prepare
- Essential for healthy children's diet

NOTE: GENERAL BEEF LEVEL

**KANTAR**

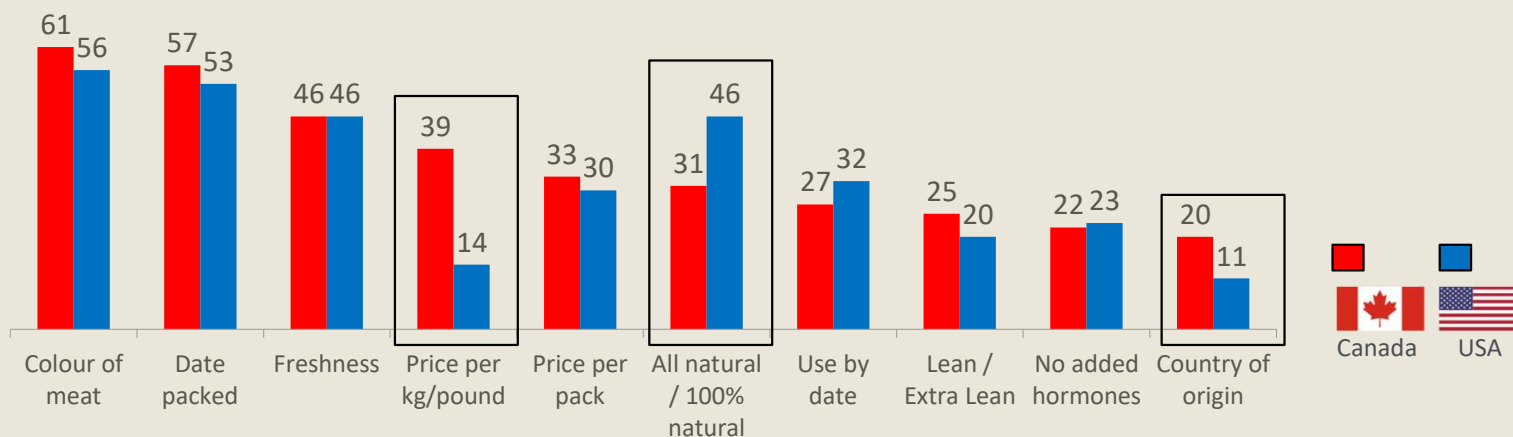
Based on image profiles which show relative strengths and weaknesses relative to other proteins in the consideration set. The consideration set is different for every market hence these are broad characterisations only.

  
MEAT & LIVESTOCK AUSTRALIA

Canadian beef consumers are foremost seeking cues for freshness and quality (like everywhere else). Some differences reflect how Canadians shop fresh meat, in comparison to the USA and global markets.



On pack cues sought when buying beef -  
Top 10 for Canadian consumers:



Global average  
2022  
Ranking

55%	46%	48%	25%	25%	39%	26%	13%	15%	31%
#1	#3	#2	#8	#9	#4	#7	#16	#12	#5

NOTE: GENERAL BEEF LEVEL

**KANTAR**

PACK 1- Can you please select up to 6 things you look for (on the pack, on the shelf etc.) when buying beef?  
Base: (n=1393)



Since 2017 regular use online channels for Beef purchase has increased significantly, where all other channels have remained stable. Under 35s and families have higher use of channels than other Canadians, suggesting a more nuanced strategic opportunity to access these important audiences.



ALL BEEF PLACES OF PURCHASE – NET MONTHLY OR MORE:

TOTAL

	'17 %	'22 %
Supermarket	80	82
Warehouse club	21	20
Butcher	22	19
Online retailer	3	10 ▲
Convenience store	6	10
Direct from farm/farmer's market	9	10

Higher usage vs. Total



Similar to the US, monthly channels use for Lamb increased (butcher, online, convenience, other)

NOTE: GENERAL BEEF LEVEL

KANTAR

QR3A. How often have you bought beef from each of these locations in the last six months? Base: '22 (n=284), '17 (n=445)

▲ ▼ Sig. different at 95%

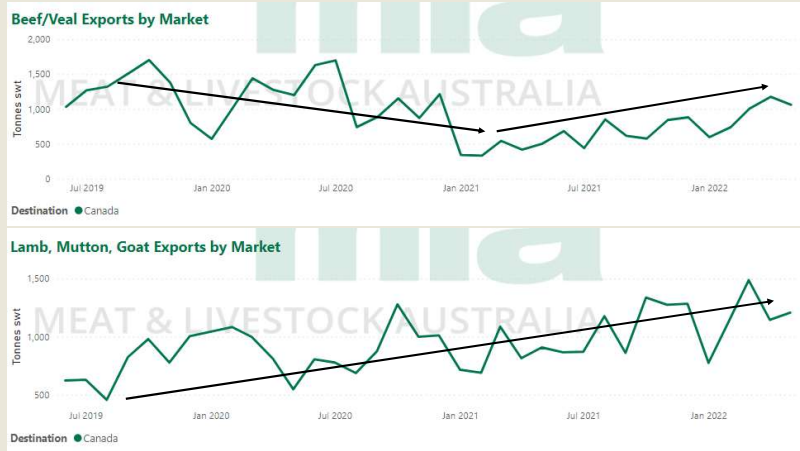


# IMPORTED BEEF CONSUMPTION & COUNTRY OF ORIGIN



All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported grass-fed beef.

Over the past 12 months, Australian Beef volume into Canada is -8% (and lower vs 2017). A reduction in import tariffs (and elimination from 2023) offers future opportunity for growth.



### MLA Australian Beef Exports Report:

#### 12-months ending May

Volume (tonnes swt)	Chilled		Frozen		Total		
	12-months ending May	Y-O-Y % chg.	12-months ending May	Y-O-Y % chg.	12-months ending May	Y-O-Y % chg.	
TOTAL	Nth America	49,213	-23	100,636	-18	149,849	-20
	US	46,816	-24	93,067	-19	139,883	-21
	Canada	2,322	-8	7,149	-8	9,471	-8
	Mexico	75	83	491	773	566	482

Previous Dip

Current Dip

#### Historical beef exports - Calendar year totals

Volume (tonnes swt)	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Nth America	310,042	243,938	264,834	193,149	178,672	240,070	231,097	431,731	459,218	261,425	254,190	254,781	266,982	225,498	152,797
US	296,099	234,779	251,479	185,035	167,820	224,111	212,703	397,889	415,951	242,018	234,112	231,187	251,822	211,754	145,264
Canada	12,311	8,543	12,319	6,949	10,148	15,661	17,898	32,972	42,575	19,316	19,954	22,990	13,997	13,701	7,034
Mexico	1,633	616	1,036	1,166	703	298	497	870	692	96	124	604	1,163	43	499

<https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/may-2022/2205---australian-beef-exports---north-america-summary.pdf>

<https://www.mla.com.au/prices-markets/overseas-markets/export-trade-dashboard/>

### Canada – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	2021: 8.6% 2022: 4.4% 2023: 0%	US and Mexico: USMCA, no quota; New Zealand: 29,600 tonnes quota, in quota 0% tariff, out 13.2%	Quota of 35,000 tonnes, out of quota pays tariff	E. coli and salmonella sampling programs, label approvals and port mark compliance

Best access  Major challenges

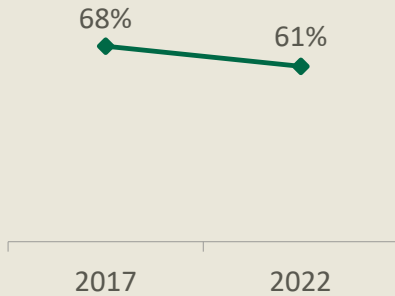
Source: Trade agreements DFAT, MLA

[https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2021-north-america-market-snapshot-red-meat\\_r2\\_141221\\_distribution.pdf](https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2021-north-america-market-snapshot-red-meat_r2_141221_distribution.pdf)

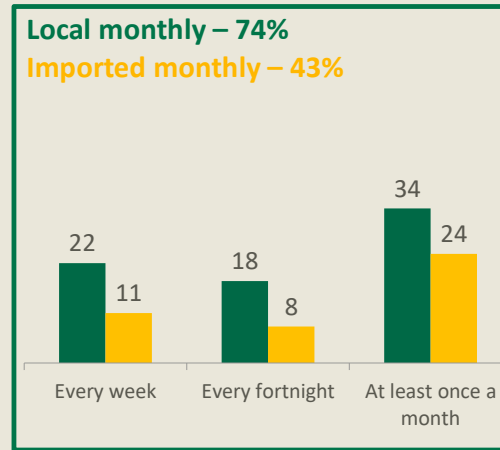
COO recall has declined since 2017. Monthly purchase of imported beef has increased since 2017 and now at about half of Canadians who are still buying local more frequently.



Know Country of Origin?



FREQUENCY OF BUYING LOCAL AND IMPORTED BEEF



IMPORTED BEEF MONTHLY (+7% vs 2017)

Imported at least monthly

62% of under 35s  
54% of Families with kids

While those who have 'never' bought beef imports has significantly reduced, the number who don't know or don't buy remains at around 1 in 3 and skews heavily to older consumers.

NOTE: GRASS FED LEVEL



(GF3B) Do you know the country of origin of the beef you buy? ('22 n=484, '17 n=263)  
 (CH4) How often do you buy imported beef? ('22 n=484, '17 n=742)  
 (CH4LOC) How often do you buy local beef? (n=484)

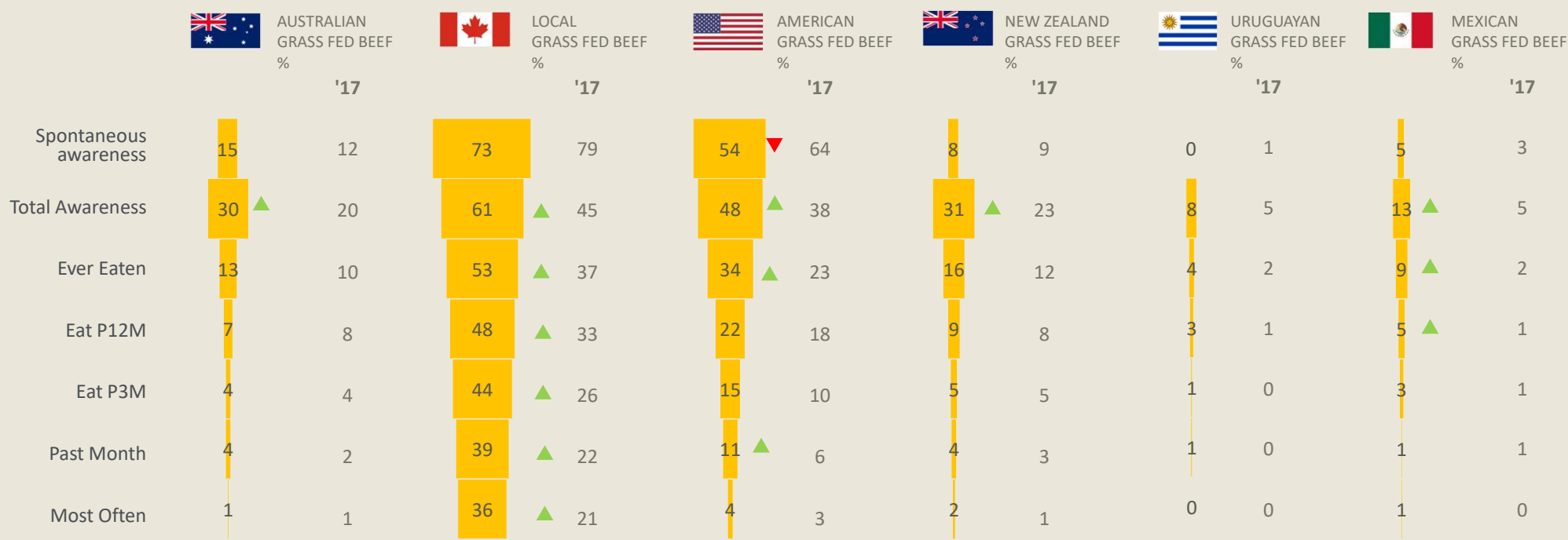
▲ ▼ Sig. different at 95%



Local grass-fed is strongest by some way, with very high conversion through the funnel and significant uplifts on use since our last measurement. US grass-fed is #2 and has also improved at all levels.



BRAND HEALTH – BEEF



NOTE: GRASS FED LEVEL



BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often  
 Base: '22 (n=274), '17 (n=354), – Bought beef in past month or ever buy beef

 Sig. different at 95%



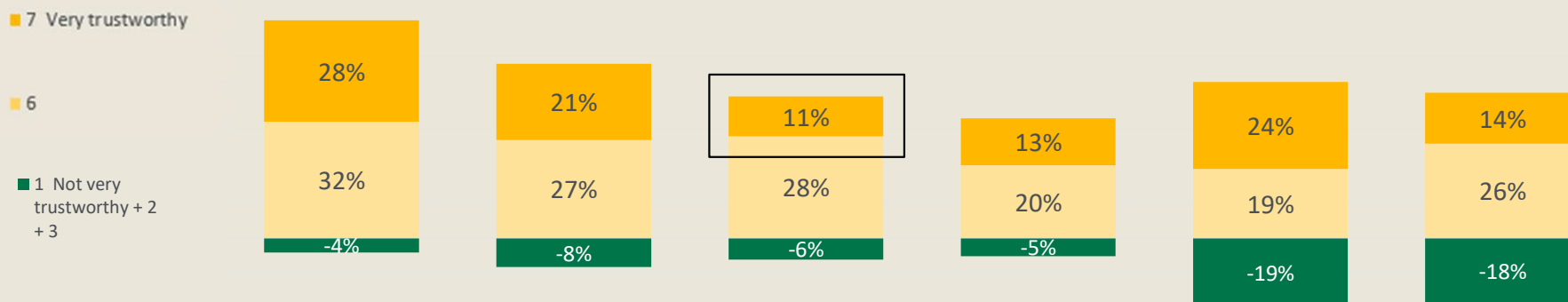
Unusual in comparison to other markets, AU beef has the lowest top box trust score at 11%. The variability across the different COO beef types suggests a more polarised customer base, with some loyalists and rejectors holding stronger views.



Trustworthy - COO BEEF

Monthly imported purchasers drive AU trust more than any other COO (45% T2B)

Top 2 Box	60%	48%	40%	33%	43%* LOW BASE	40%* LOW BASE
	Local grass fed beef	New Zealand grass fed beef	Australian grass fed beef	American grass fed beef	Uruguayan grass fed beef	Mexican grass fed beef



And they are also not trusting of Uruguayan product

NOTE: GRASS FED LEVEL



BTR2B. How trustworthy is the imported beef from these countries – 7 point scale  
 Base: Local grass fed beef (167) Australian grass fed beef (81), New Zealand grass fed beef (85), Uruguayan grass fed beef (21), Mexican grass fed beef (35), America Grass fed Beef (131)

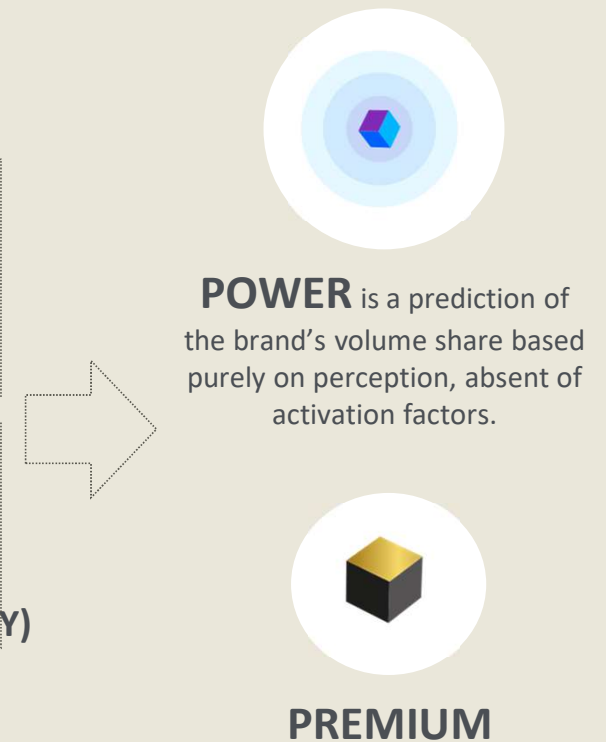
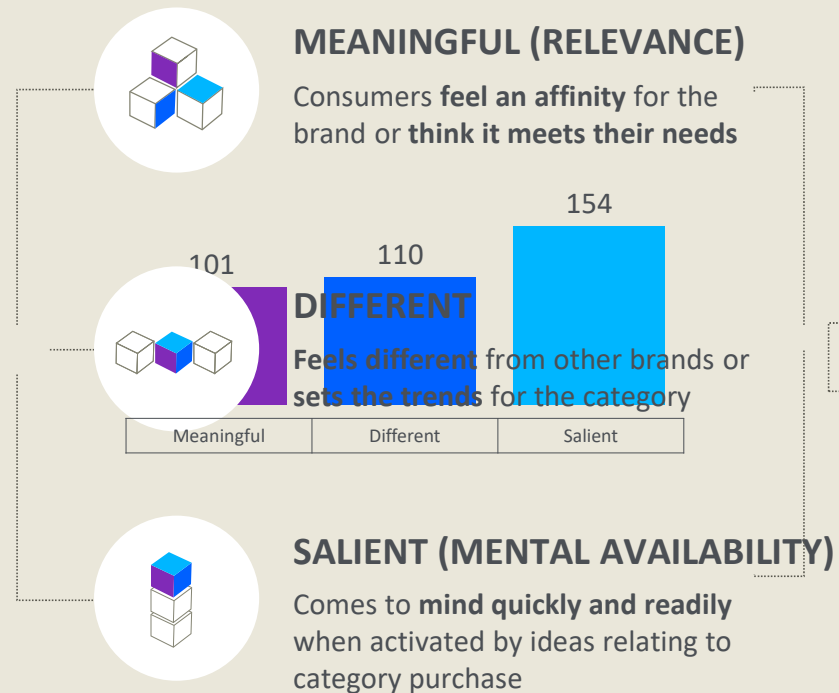
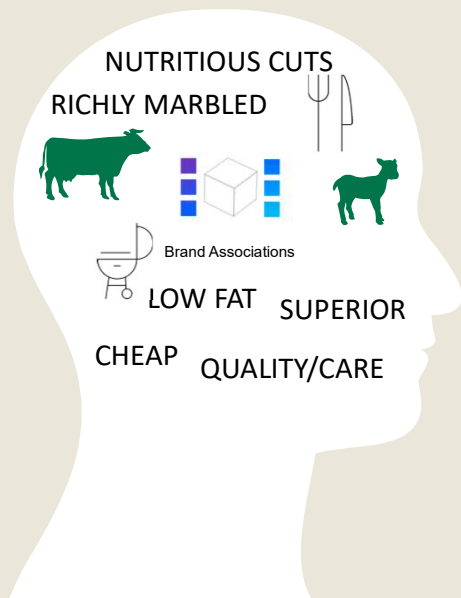
Sig. different at 95%



So what associations do people hold of different COO brands?



The elements of a successful brand associations that ensure you are relevant, build an emotional connection, are differentiated from the crowd and mentally available when it matters.



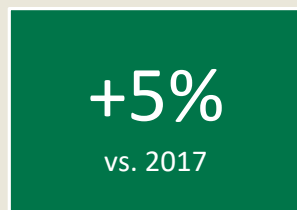
# Clarity of perceptions has increased across COOs, suggesting an increasing familiarity with product in the markets, and relative gains are stronger for AU and NZ compared to US and Local Canadian.



| % Change in absolute endorsement vs. 2017



AUSTRALIAN  
GRASS FED BEEF



LOCAL  
GRASS FED BEEF



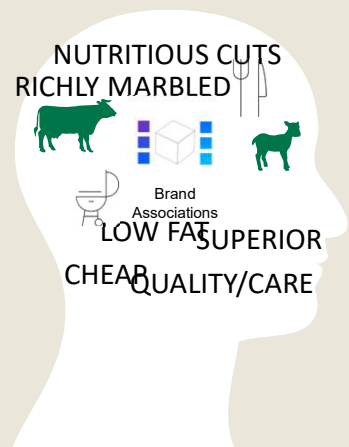
NEW ZEALAND  
GRASS FED BEEF



AMERICAN  
GRASS FED BEEF



URUGUAYAN  
GRASS FED BEEF



## TOP 5 attributes with significant shifts vs. 2021

Consistent quality standards
The meat is usually tender
The animal is well-cared for
Guaranteed safe to eat
Is the most superior beef

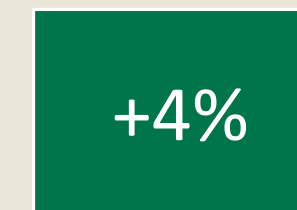
Is easy and convenient to purchase
Fresh
Family's favourite beef
Cheaper
Consistent quality standards

Consistent quality standards
The animal is well-cared for
More nutritious
The meat is usually tender
Guaranteed safe to eat

Consistent quality standards
Is the most superior beef
Is easy and convenient to purchase
The meat is usually tender
Family's favourite beef



MEXICAN  
GRASS FED BEEF



Quality improves for all, and AU and NZ grow on similar associations.

NOTE: GRASS FED LEVEL

**KANTAR**

Base: '21 (n=274), '17 (n=354)

QBBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.

 Sig. different at 95%



The associations that consumers hold in their minds for beef in Canada group up into themes, and they appear to be intuitive in comparison to other markets.



### EASY EVERYDAY

Fresh  
Is my/my family's favourite beef  
Is easy and convenient to purchase



### TENDER

The meat is usually tender  
Consistent quality standards



### SUPERIOR NUTRITION

Is the most superior beef  
More nutritious



### FATTINESS

Low in fat  
The fat is nicely marbled



### CHEAP CUTS

Cheaper  
Offers a variety of cuts that suit the meals I make



### WELL LOOKED AFTER

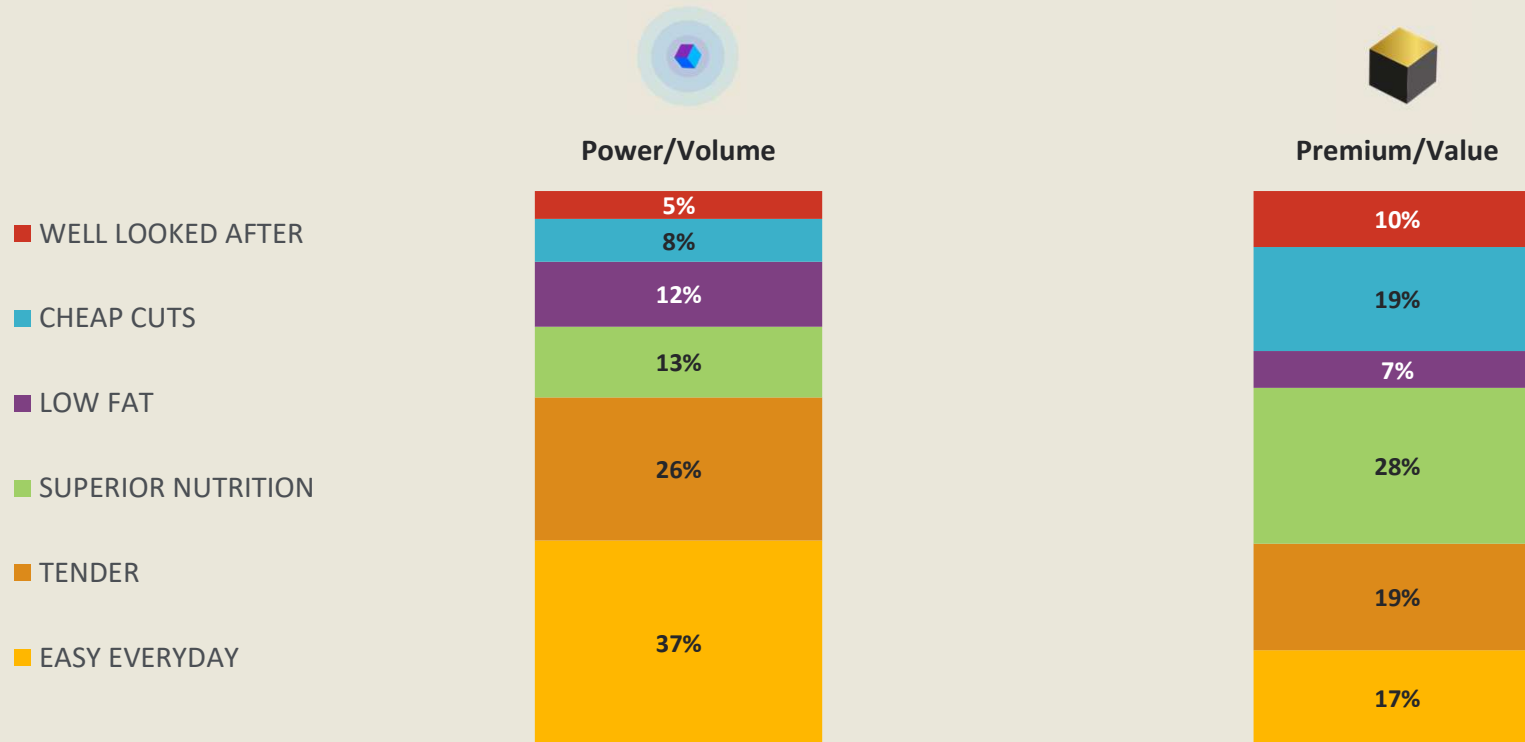
Guaranteed safe to eat  
The industry is environmentally sustainable  
The animal is well-cared for

NOTE: GRASS FED LEVEL

**KANTAR**

  
MEAT & LIVESTOCK AUSTRALIA

There is some difference in the impact that each of these groups of associations has on either the likelihood to choose on product over the other (Power) or the likelihood to pay more (Premium).



NOTE: GRASS FED LEVEL

**KANTAR**

**mla**  
MEAT & LIVESTOCK AUSTRALIA

As with the US, local product is very clearly defined, owning Freshness, Accessibility, Cheaper and Family's favourite (local full house). In contrast to some definition for NZ and US, nothing owned by AU beef yet.



### LOCAL GRASS-FED BEEF

Fresh  
Family's favourite beef  
Is easy and convenient to purchase  
Cheaper

The meat is usually tender  
Consistent quality standards  
Low in fat  
The fat is nicely marbled  
Guaranteed safe to eat  
The industry is environmentally sustainable  
The animal is well-cared for



### AUSTRALIAN GRASS-FED BEEF

No defining strengths  
or weaknesses

Consistent with  
previous years



### NEW ZEALAND GRASS-FED BEEF

Nutritious  
Well-cared for



### AMERICAN GRASS- FED BEEF

Easy & convenient to  
Purchase

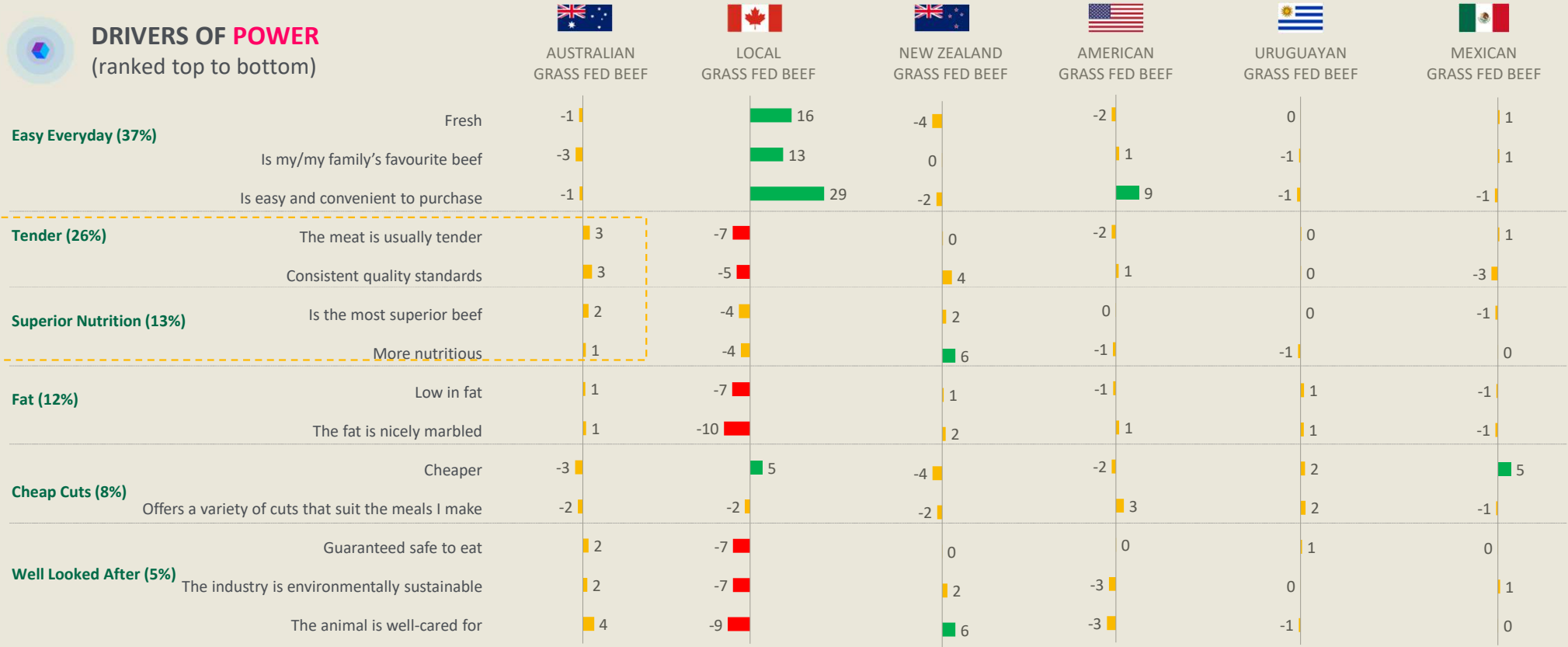
NOTE: GRASS FED LEVEL

**KANTAR**

BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.. Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given an appropriate, summary name.



**AU Beef is undifferentiated in market. Canadian beef owns Easy Everyday attributes. US Beef is seen as convenient and NZ beef has built some associations in familiar territories of nutritious and welfare.**



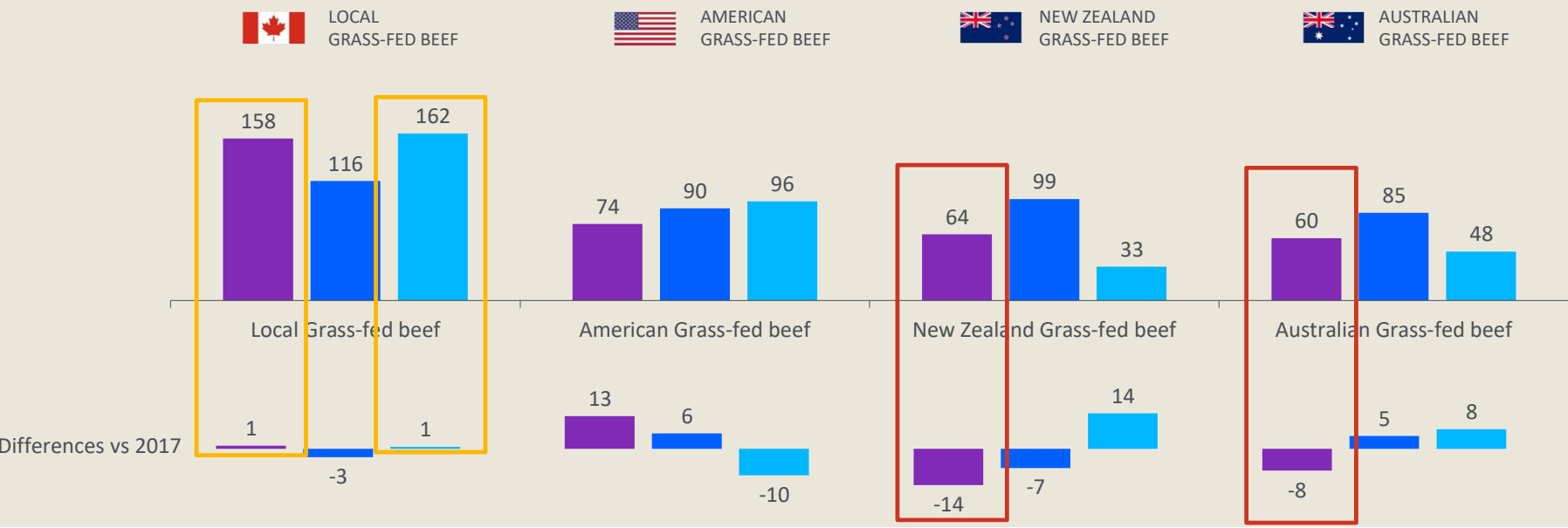
NOTE: GRASS FED LEVEL

**KANTAR**  
+5 or more = relative category strength  
-5 or less = relative category weakness.

BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=274). Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given an appropriate, summary name.



Canadian local product has maintained its position, with strong relevance to local consumers, and equally strong salience. Australian and New Zealand product lack these, suggesting limited physical availability (in consumers eyes) and lack of trial to establish a role in Canadians day to day.



NOTE: GRASS FED LEVEL



- Meaningful
- Different
- Salient
- Power
- Differences vs 2017



Two ways to grow meaning. Easy Everyday which is owned by local or Tender (which includes consistent quality) and Superior nutrition, where we have a right to play, but NZ lead.




*Driving these perceptions...*

*Contribute to driving...*

	Group of Perceptions	Meaning (relevance)
1	EASY EVERYDAY	36%
2	TENDER	23%
3	SUPERIOR NUTRITION	21%
4	LOW FAT	5%
5	CHEAP CUTS	10%
6	WELL LOOKED AFTER	3%

 LOCAL GRASS-FED BEEF  
Local specialty, we can't own this

 NEW ZEALAND GRASS FED BEEF  
We will need to compete with NZ for these

Easy everyday contributes to around 50% of Brand Salience


NOTE: GRASS FED LEVEL

While growing awareness is a key challenge, connecting the AU GF Beef proposition with perceptions of consistent quality and nutritious are opportunities to grow volume and willingness to pay (if backed with availability).



Top 5 Associations to Grow - Volume & Value:  
(Ordered based on impact on building equity\*)

Associations for AU to communicate



1.  
Easy and convenient  
to purchase




2.  
Fresh




3.  
Family  
Favourite

Build



4.  
More nutritious

Implicit



5.  
Consistent  
Quality

More explicit

Distribution challenge to be  
addressed

Difficult to achieve when  
competing vs. a local product

Supported by perceptions of Australia as a clean rearing environment

NOTE: GRASS FED LEVEL



\*These associations are simulated in the Meaningfully Different model to ascertain which will drive the greatest growth in Power and Premium



# COMMUNICATING TO GROW LAMB

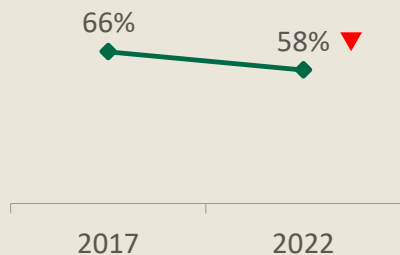


All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.

COO recall has also declined for lamb purchases. As we saw with USA, imported lamb is purchased just as frequently as local lamb with just over 1 in 3 Lamb buying Canadians buying on a monthly basis.

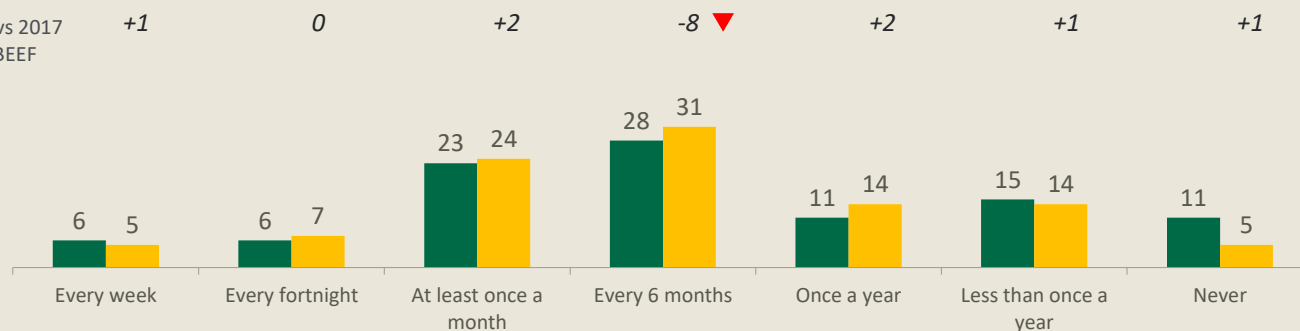


### Know Country of Origin?



### FREQUENCY OF BUYING LOCAL AND IMPORTED LAMB

Differences vs 2017  
IMPORTED BEEF



NOTE: GRASS FED LEVEL

**KANTAR**

(LBH1A) Do you know the country of origin of the lamb you buy? Base: '22 (n=316), '17 (n=481)  
 (CH7) How often do you buy imported lamb/Halal compliant lamb? Base: '22 (n=316) '17 (n=481)  
 (CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: '22(n=316) '17 (n=481)

▲ ▼ Sig. different at 95%



Over the past 36 months, Australian Sheep/Goat meat volume into Canada is increasing. A reduction in import tariffs (and elimination from 2023) presents further opportunity.



<https://www.mla.com.au/prices-markets/overseas-markets/export-trade-dashboard/>

## Canada – Market access overview



Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	2021: 8.8% 2022: 4.4% 2023: 0%	<b>US and Mexico:</b> USMCA, no quota; <b>New Zealand:</b> 29,600 tonnes quota, in quota 0% tariff, out 13.2%	Quota of 35,000 tonnes, out of quota pays tariff	E. coli and salmonella sampling programs, label approvals and port mark compliance

Best access Major challenges

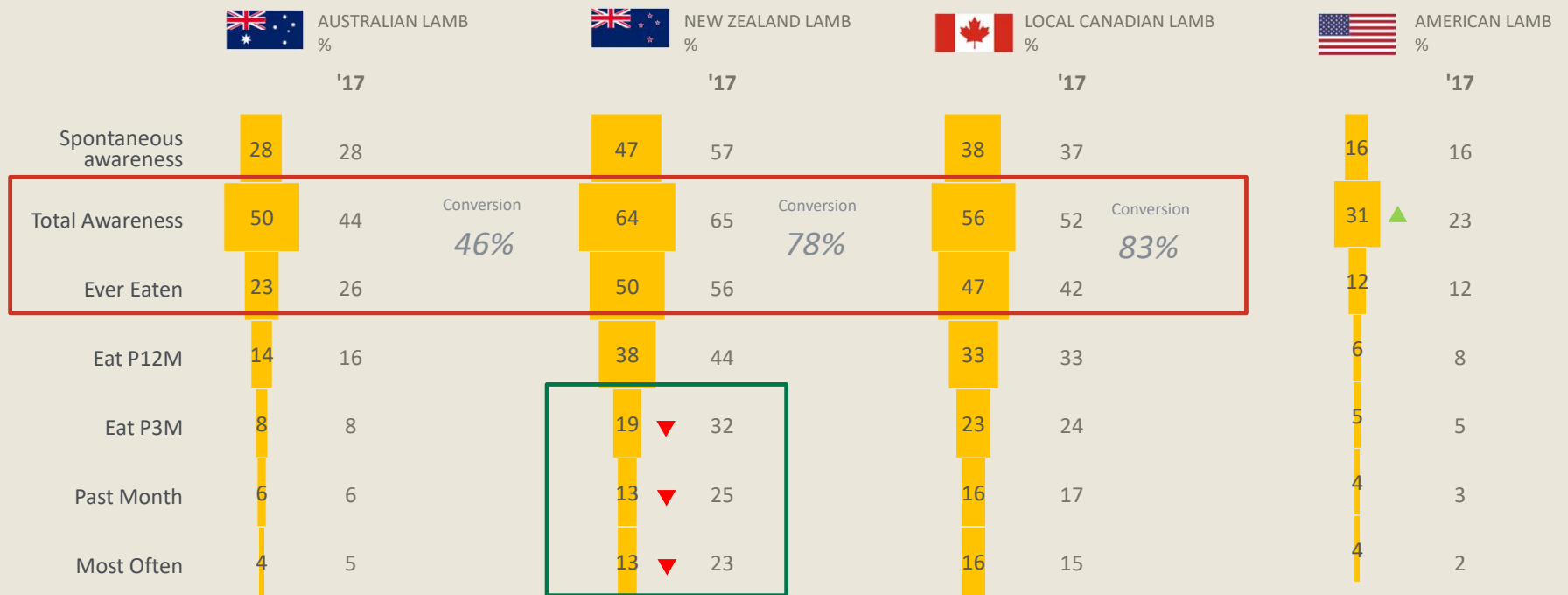
Source: Trade agreements DFAT, MLA

[https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2021-north-america-market-snapshot-red-meat\\_r2\\_141221\\_distribution.pdf](https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/red-meat-market-snapshots/2021-north-america-market-snapshot-red-meat_r2_141221_distribution.pdf)

**Total awareness of American lamb has increased since 2017, while all other COOs remain stable.  
Consumption of NZ lamb has declined, making local lamb the most consumed COO.  
AU has weaker conversion from awareness into trial.**



**BRAND HEALTH – BEEF**



NOTE: GENERAL LAMB LEVEL

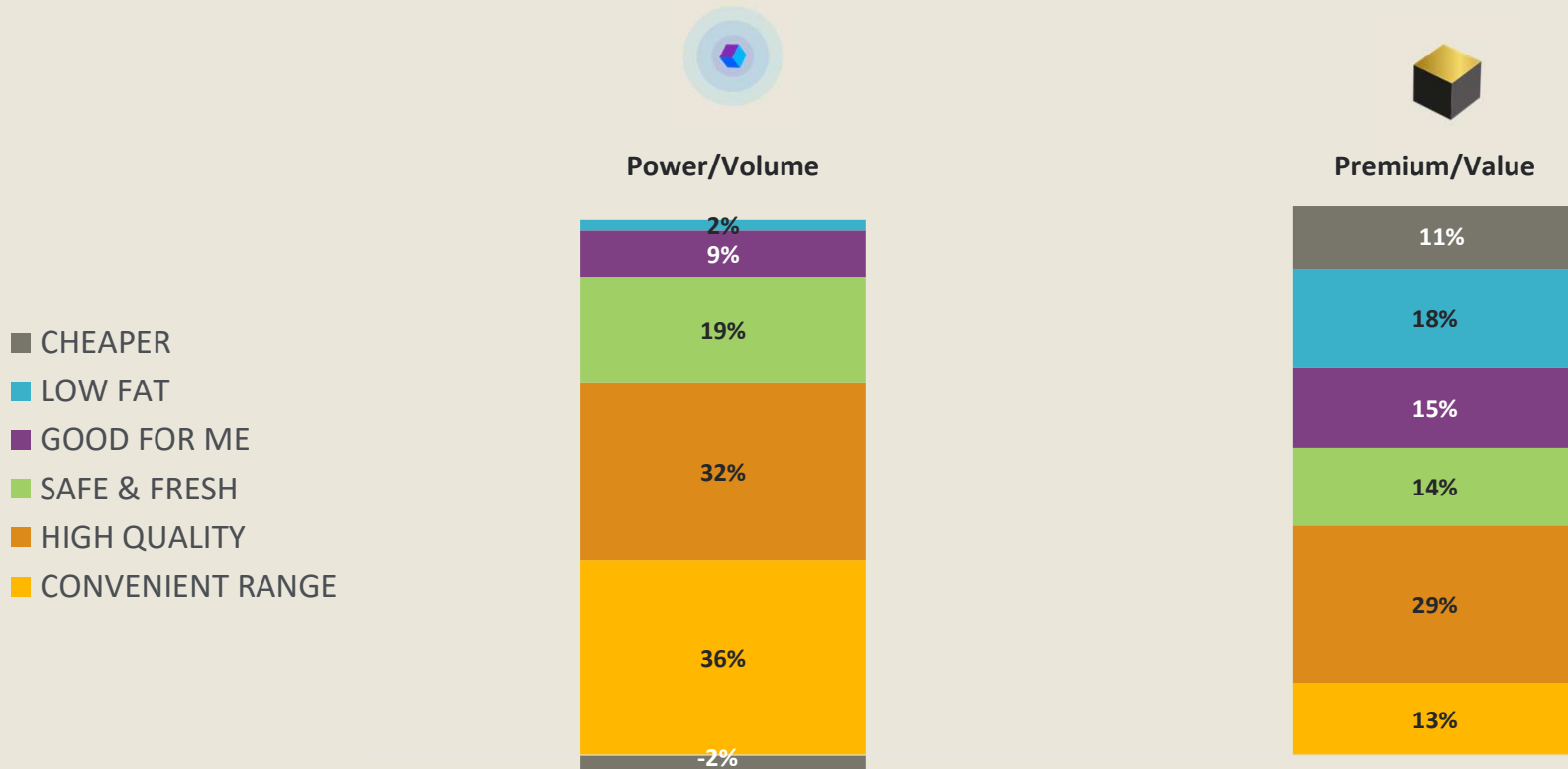


LBH1. Spontaneous Awareness, LBH2. Prompted Awareness, LBH3. Ever Eaten, LBH4. Eaten last year, LBH5. Eaten in the last 3 months, LBH6. Eaten last month, LBH8. Most often  
Base: '22 (n=226), '21 (n=0), '20 (n=0), '19 (n=0) – Bought lamb in past month or ever buy lamb

 Sig. different at 95%







The Canadian lamb category reflects greater differentiation on the perceptions that drive volume versus what drives premium, than we observe in other markets.



NOTE: GENERAL LAMB LEVEL

## Endorsement of local and American lamb has increased since 2017, while AU and NZ remain stable.



	 AUSTRALIAN LAMB		 LOCAL CANADIAN LAMB		 NEW ZEALAND LAMB		 AMERICAN LAMB	
<b>Average (brand clarity) %</b>	<b>16</b>	<b>18</b>	<b>29</b>	<b>38</b>	<b>33</b>	<b>32</b>	<b>7</b>	<b>12</b>
	'17 %	'22 %	'17 %	'22 %	'17 %	'22 %	'17 %	'22 %
Fresh	11	15	43	60 ▲	25	26	6	13 ▲
Cheaper	9	6	19	34 ▲	12	11	9	15 ▲
The animal is well-cared for	14	16	25	30	28	23	6	10 ▲
The industry is environmentally sustainable	16	15	25	26	27	21	6	11 ▲
Consistent quality standards	26	27	34	47 ▲	47	45	7	14 ▲
Offers a variety of cuts that suit the meals I make	22	23	34	44 ▲	44	40	8	17 ▲
Low in fat	11	15	19	31 ▲	23	28	5	9 ▲
Guaranteed safe to eat	22	26	34	45 ▲	40	36	8	16 ▲
Is my/my family's favourite lamb/goat	9	14	26	35 ▲	36	38	4	7
Is the most superior lamb/goat	11	13	23	26	35	35	4	9 ▲
More nutritious	17	15	23	28	26	25	7	12 ▲
Is easy and convenient to purchase	15	20	35	48 ▲	41	40	7	15 ▲
The meat is usually tender	21	26	33	45 ▲	49	47	9	14 ▲

NOTE: GENERAL LAMB LEVEL

**KANTAR**

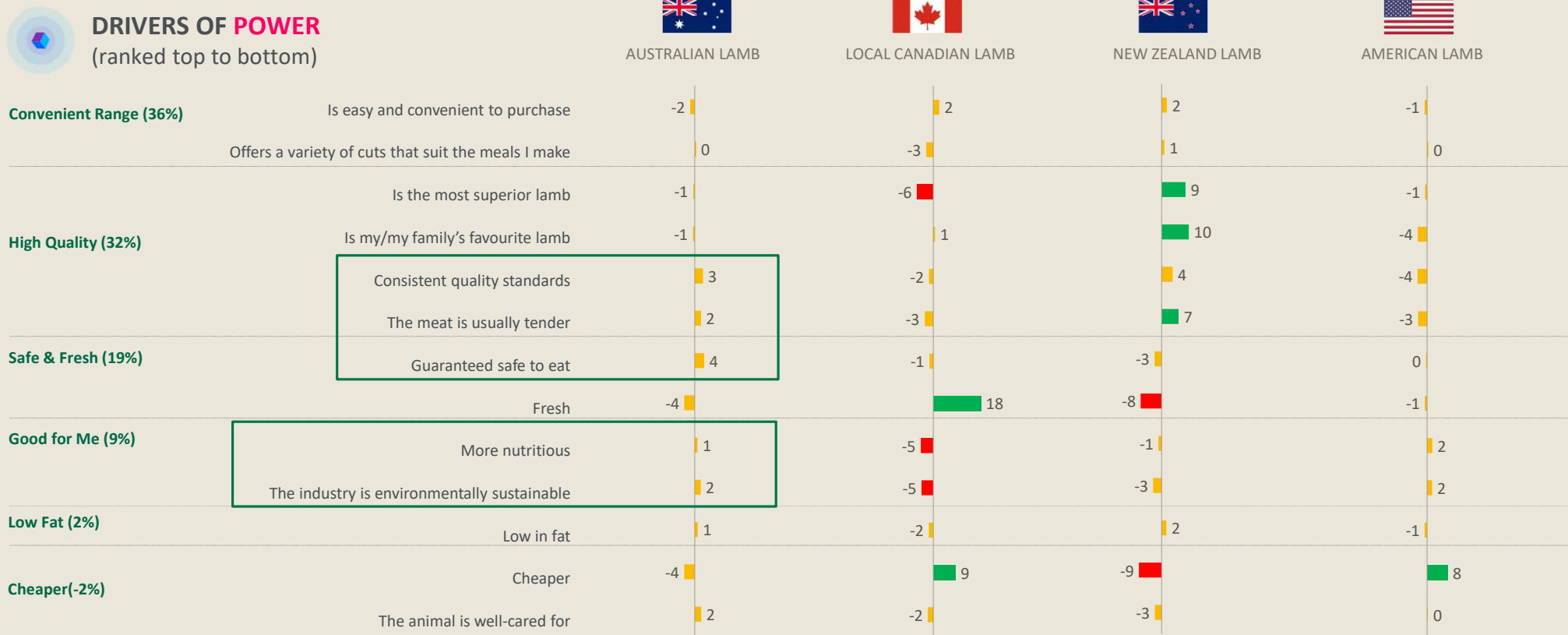
Base: '22 (n=226), '17 (n=391)

QLBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to Lamb from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.

▲ ▼ Sig. different at 95%



Local lamb is seen as fresh and cheap, NZ stands out on high quality perceptions.  
 AU lamb lacks definition, but our platform of current perceptions are similar to NZ.  
 Some opportunity in the 'good for me' territory.



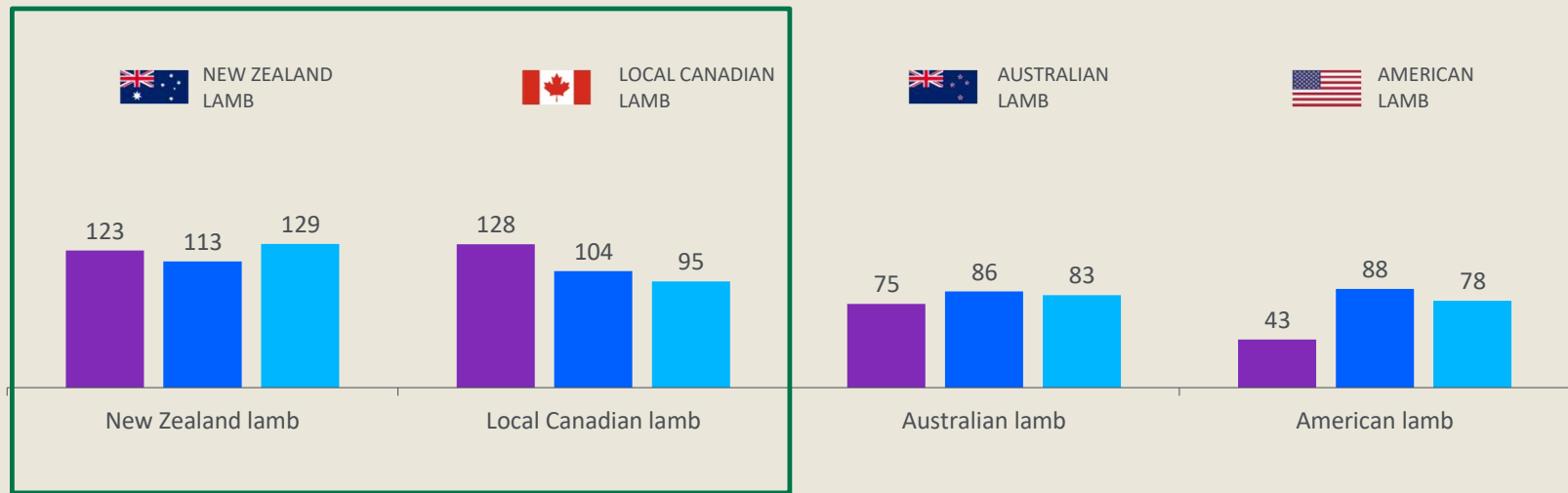
NOTE: GENERAL LAMB LEVEL

**KANTAR**  
 +5 or more = relative category strength  
 -5 or less = relative category weakness.

LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to lamb from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=226). Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given an appropriate, summary name.



While maintaining leadership, NZ has lost brand Power. AU, local and USA lamb all increased in power, with AU showing positive shifts across meaning, difference and salience since 2017, but still some way back in terms of current equity.



NOTE: GENERAL LAMB LEVEL

KANTAR

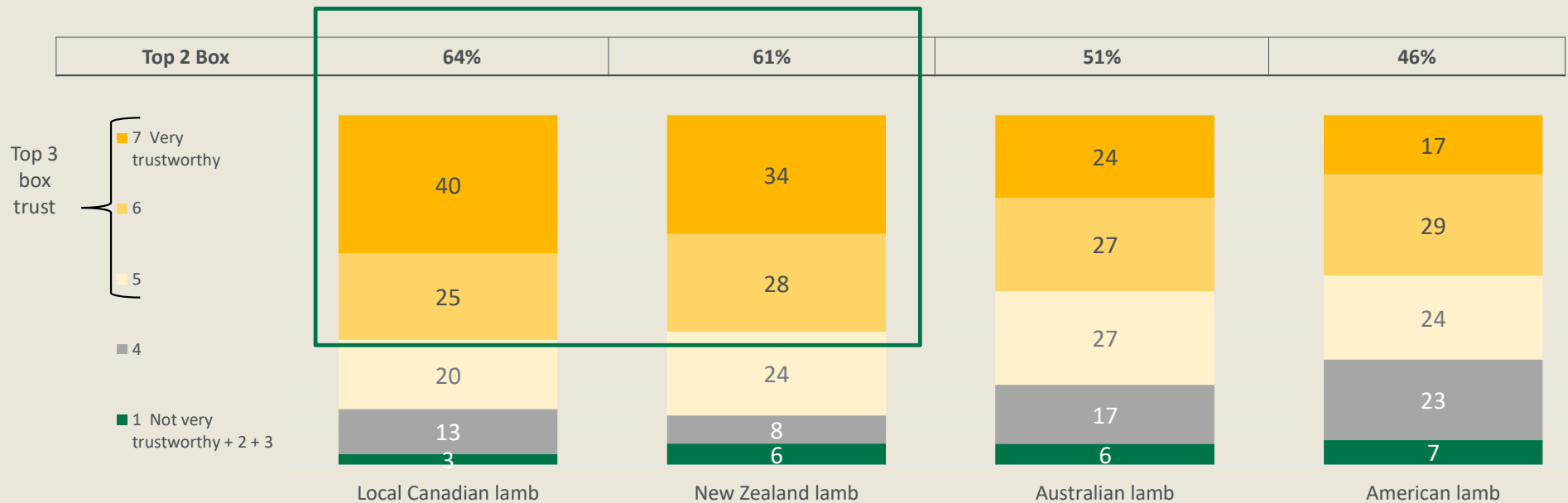
● Meaningful 
 ● Different 
 ● Salient 
 ● Power 
 ● Differences vs 2021



Despite having the strongest brand equity and clearest quality and superior perceptions, New Zealand lamb is still slightly less trustworthy than local product, highlighting the inherent challenge imports have in building trust in developed markets.



Trustworthy - COO Lamb



NOTE: GENERAL LAMB LEVEL



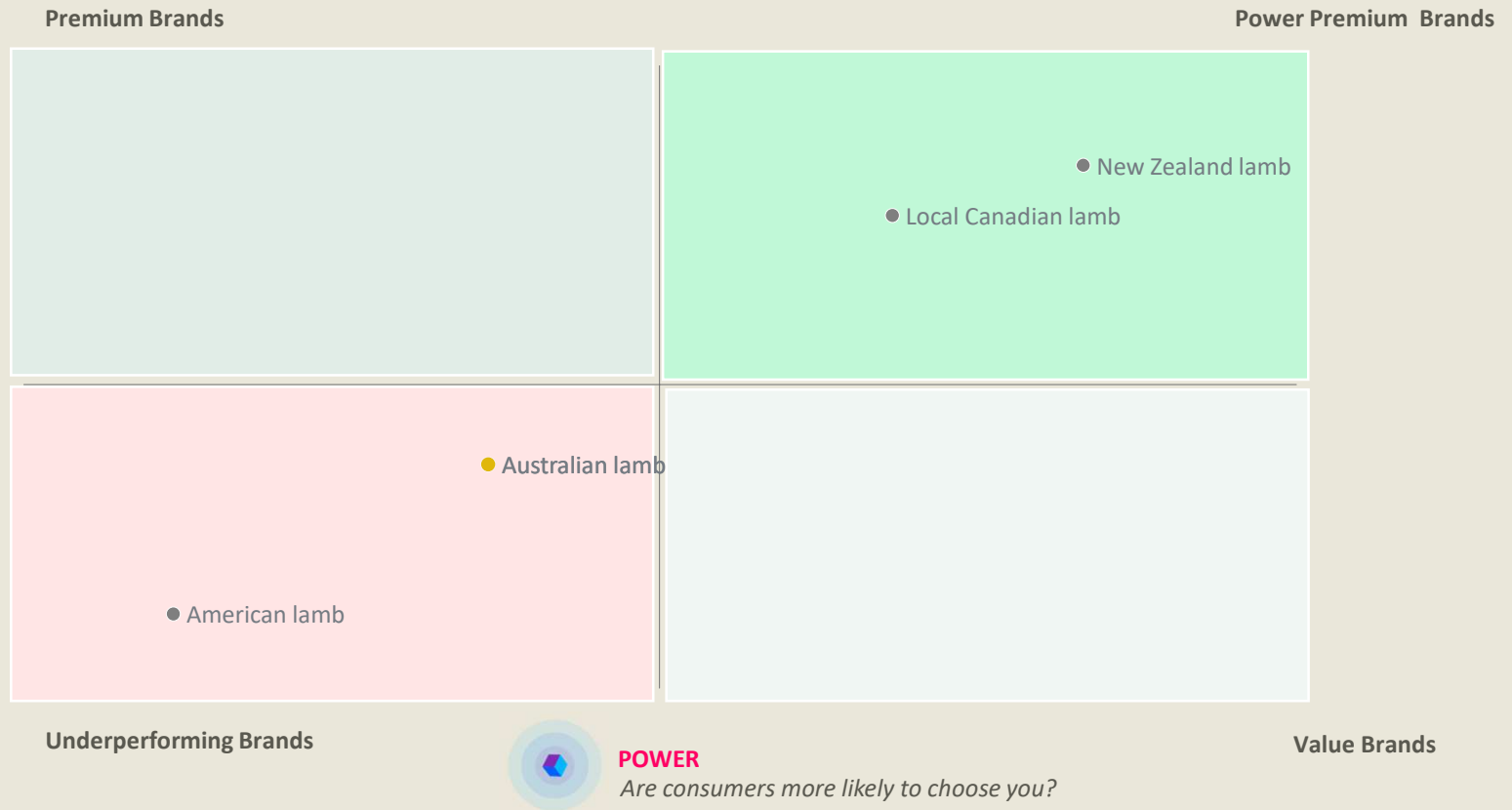
BTR2L. How trustworthy is the imported lamb from these countries  
 Base: Local Canadian Lamb (126), Australian lamb (113) New Zealand lamb (145), American lamb (70)



This strong relevance and salience flows through to very strong brand and premium equity for NZ and Local lamb.



**PREMIUM/VALUE**  
*Are they willing to pay more for you?*



NOTE: GENERAL LAMB LEVEL

**KANTAR**






**mla**  
MEAT & LIVESTOCK AUSTRALIA



Continuing our focus consistent quality and tenderness in our messaging, to suggest greater BFY credentials which will support volume growth and premium perceptions. Can be communicated through provenance and more sustainable story.



Top 5 Associations to Grow - Volume & Value:  
(Ordered based on impact on building equity\*)

 <p>1. Is my family's favourite</p>	 <p>2. Offers a variety of cuts</p>
<p>Currently dominated by strong NZ brand</p>	
 <p>3. Superior</p>	

Associations for AU to communicate

<p>Build</p>	
 <p>4. Consistent quality standards</p>	 <p>5. The meat is usually tender</p>
<p>More explicit</p>	
<p>Nutritious + Sustainable through our provenance story and best place to raise lambs.</p>	

NOTE: GENERAL LAMB LEVEL



\*These associations are simulated in the Meaningfully Different model to ascertain which will drive the greatest growth in Power and Premium



# FINAL THOUGHTS & DISCUSSION

## Recapping what we have seen today

Managing health and eating well has increased in importance. Economic concerns remain a consideration, particularly for families.

As with the USA, proteins have very clear roles in Canada, and beef has a sweet spot of being accessible delicious, yet premium, while Lamb plays a more premium role

There has been a shift to online that has remained post-pandemic. This is particularly strong amongst younger consumers, and families. But also regular buyers of imported product.

Some green-shoots of trust and brand preference for AU established amongst those who consume imported product regularly.



Local beef remains strongest by some way, with clear definition. USA seen as accessible and NZ nutritious and animal well cared for.

Connecting the AU GF Beef proposition with perceptions of consistent quality and nutritious are opportunities to grow volume and willingness to pay, but support availability.



NZ is the category leader, with Local having also established strong equity. AU and USA perceptions some way behind.

Build salience, and seek to communicate quality and reflecting superior growth while justifying premium. Differentiate on elements of goodness such as sustainable and nutritious.

## What & where should we communicate?



**1. Seek opportunities to drive consistent quality perceptions, reinforcing nutritious, and justifying the premium for AU beef.**



**2. Build out consistent quality, leverage tenderness as a proof point and seek to establish ownable differentiating associations with sustainable practices, and nutritious as an outcome of quality product.**



**3. Our clean, safe rearing environment can be leveraged as reason to believe for safe, nutritious, higher quality product**

**4. Tap into alternative retail channels such as growing online channel and warehouse clubs, and to meet regular consumers of imported consumers where they are shopping.**

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