June 2022

Global Tracker: **Japan**
Presentation Deck

Brought to you by your Kantar Team:
Akiko Kosukegawa, Muneori Otaka,
Nick Bounds, Lynsey Chung (Irwin),
& Carolina Ferrando

MEAT & LIVESTOCK AUSTRALIA

The flow of the story today

Macro-market context

Understanding the context for the Japanese market in which to interpret the consumer behaviours and perceptions we have observed in the last 5 years

Protein Landscape, Channel & COO

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.

Coo brand health, trust & perceptions

Understanding current role of imported product in people’s day-to-day lives, the usage of, Trust in and perceptions of imported COO brands, in particular AU vs USA.

What next for AU beef in Japan

Identifying the key benefits that AU Beef needs to communicate to regain ground lost to USA beef in the Japanese market.

The Central Question

How can Australian product maintain its current positioning as Everyday accessible Premium product for Japanese consumers, and hold off the growing challenge of USA beef?

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We have conducted the global tracker in 22 markets over the last 8 years, with Japan fieldwork run every year.

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*

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MACRO-MARKET CONTEXT

3 broad macro-contextual factors are impacting Japanese consumers which filter down to 4 consumer considerations

Economic

The post-covid economic environment, falling value of the Yen has accentuated the relationship between local vs. imported and affordable vs. premium, and stagnant wage growth has left Japanese consumers preparing for affordability challenges

Trade Relations & Politics

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

Covid

Covid response of Japanese consumers has been to refocus on health & well-being, and re-evaluate their brand choices. Health consciousness entrenched as a trend post-COVID, as Japanese attempt to remain healthy, reduce stress, as working from home becomes the new norm

Value

Consumers are seeking value, whether buying better - premium products and categories

Accessibility & Availability

Supply challenges mean physical availability is increasingly important for maintaining relevance

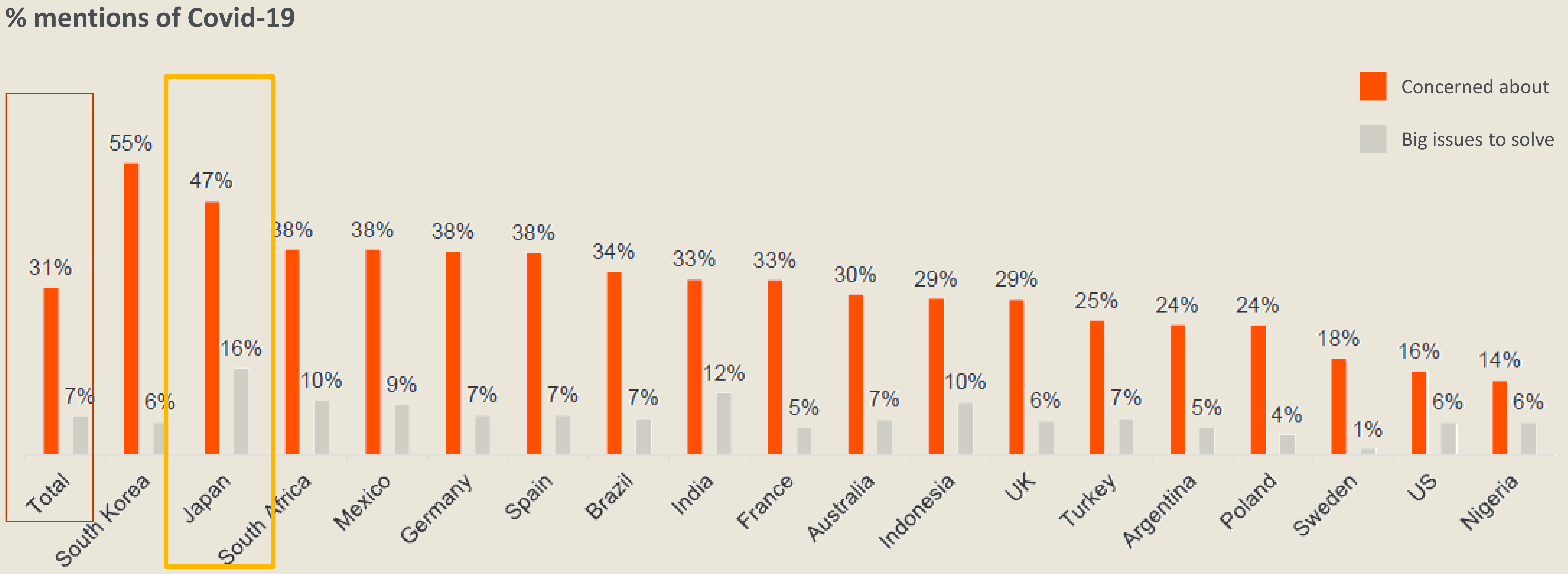
Health

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

Local

Buying locally produced products and supporting Japanese brands. Japanese consumers have traditionally shown a strong willingness to buy local products even at higher costs

After 2 years, Covid is still a key concern for Japanese consumers.
It remains top of mind as a big issue to solve and sets the context for broader challenges.



Q16 Can you name 3 things happening in the world that you are most concerned about right now? Open ended question
Q1b What are some of the big issues in society that you think something needs to be done about? Open ended question

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Source: Kantar Global Issues Monitor, wave 2, February 2022

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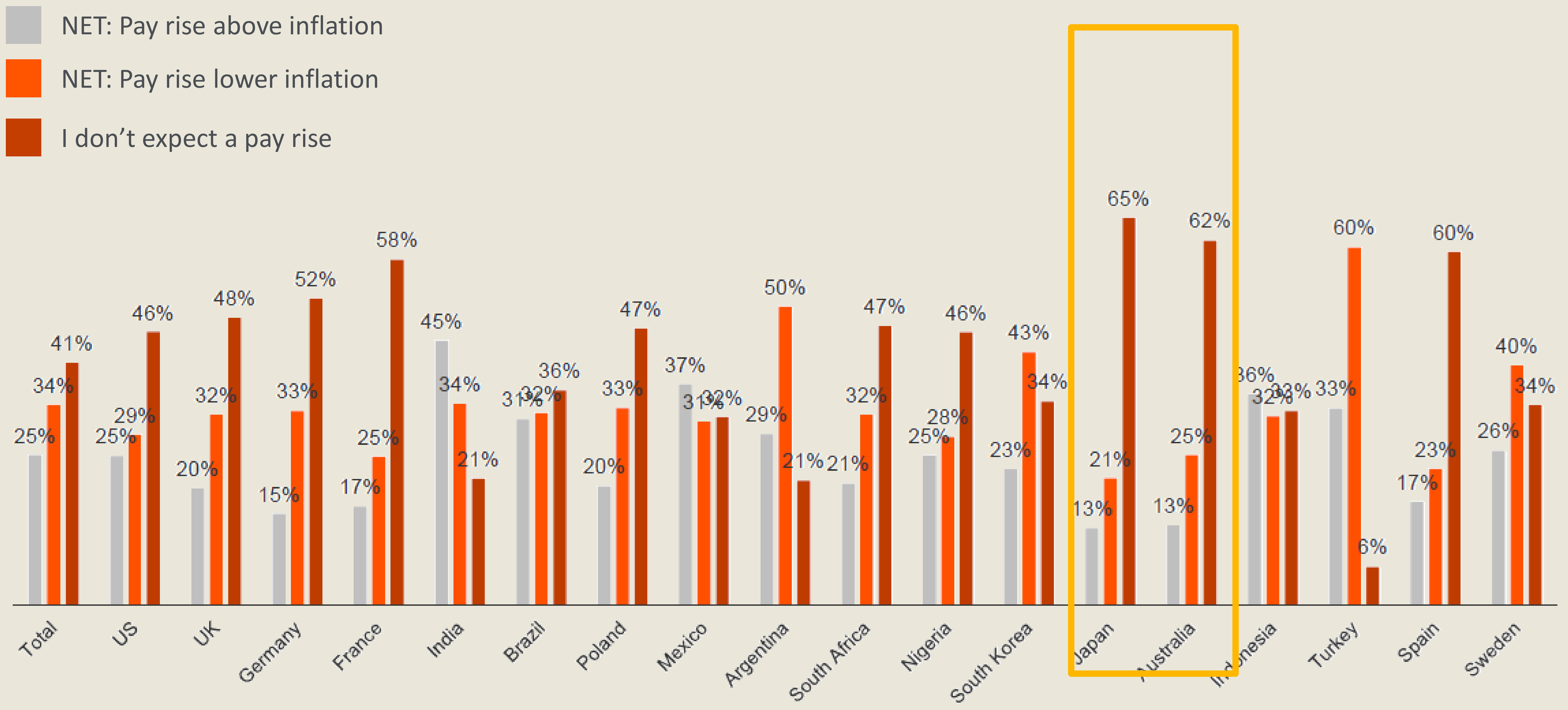
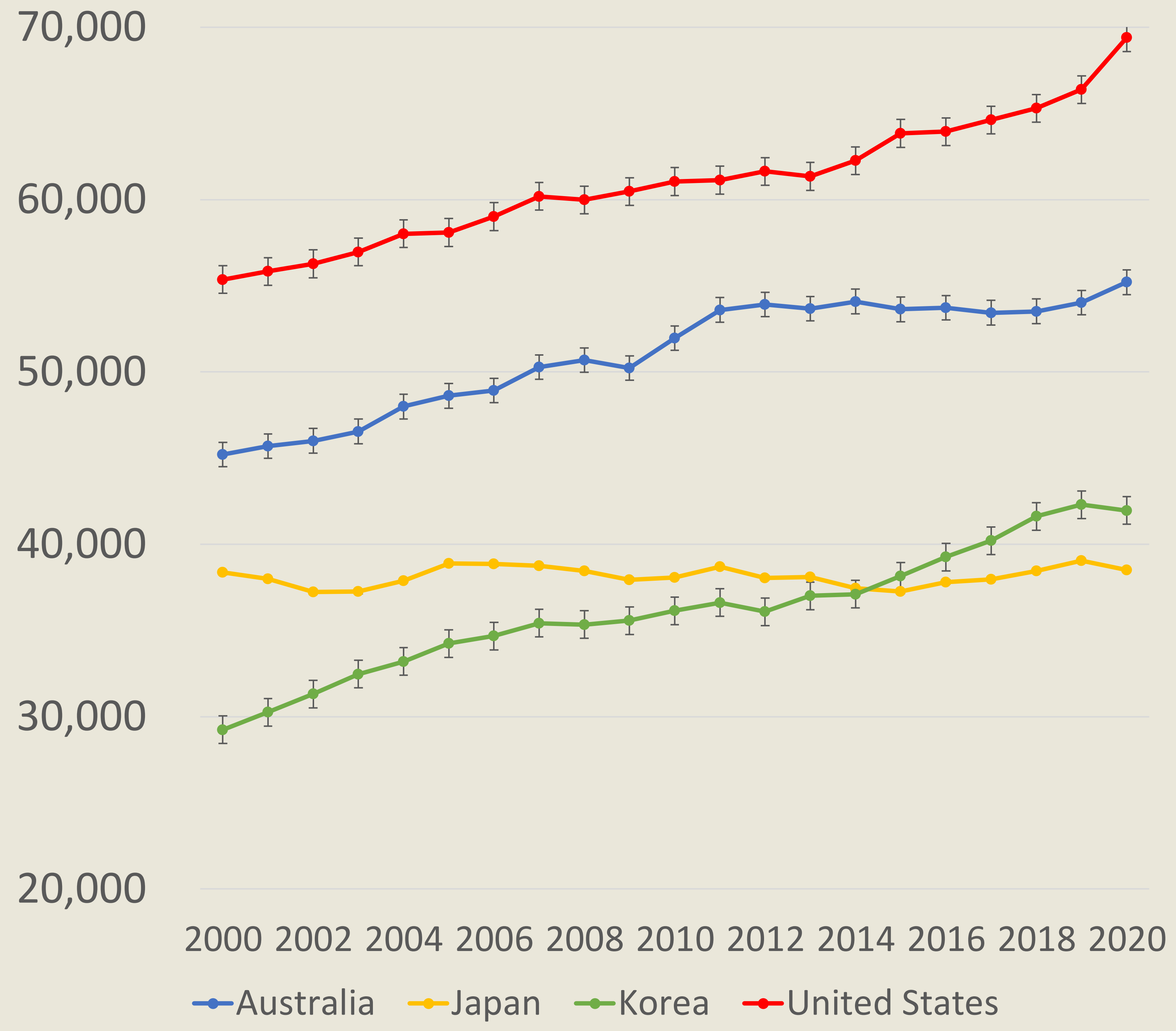
In a global context, Japanese consumers have the lowest expectations of HH income increasing in the near future with wages stagnant for 2 decades.

Incomes will not keep pace with inflation – many people will be worse off



Q26: Have you received or are you expecting to receive a pay rise from your company this year?
Base: People who work

Average Annual Wages
(US Dollar)



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Source: Kantar Global Issues Monitor, wave 2, February 2022
OECD, data extracted on 20 June 2022

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The shift to local and a focus on greater value, can be seen in other categories in Japan.

74.1%

Japanese who 'care' whether the ingredients are domestically produced when buying food remained unchanged.

By age group, the higher the age group, the higher the proportion of respondents who 'care’.

56.2%

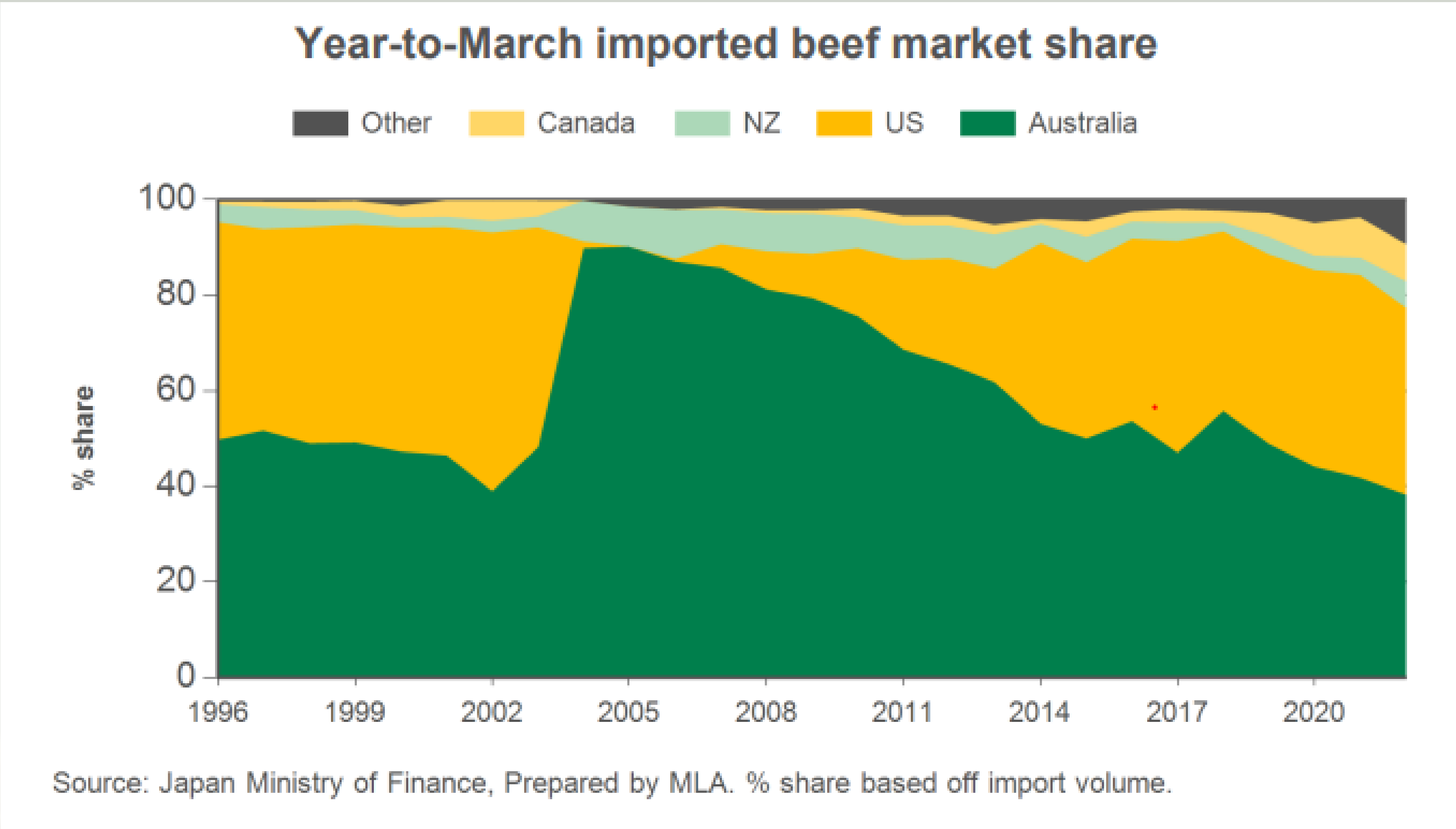
Japanese consumers 'very concerned' and 'somewhat concerned' about support for local products.

This proportion is 11% higher than the proportion before covid (responses looking back before January 2020), suggesting that awareness of support for production areas has increased due to covid.

Local Japanese Whisky and example of a category in growth

US/Japan free trade agreement establishes challenge for AU product to remain ‘accessible premium’. The outcome, as we know, is US beef sales have continued to grow, giving US product greater presence.

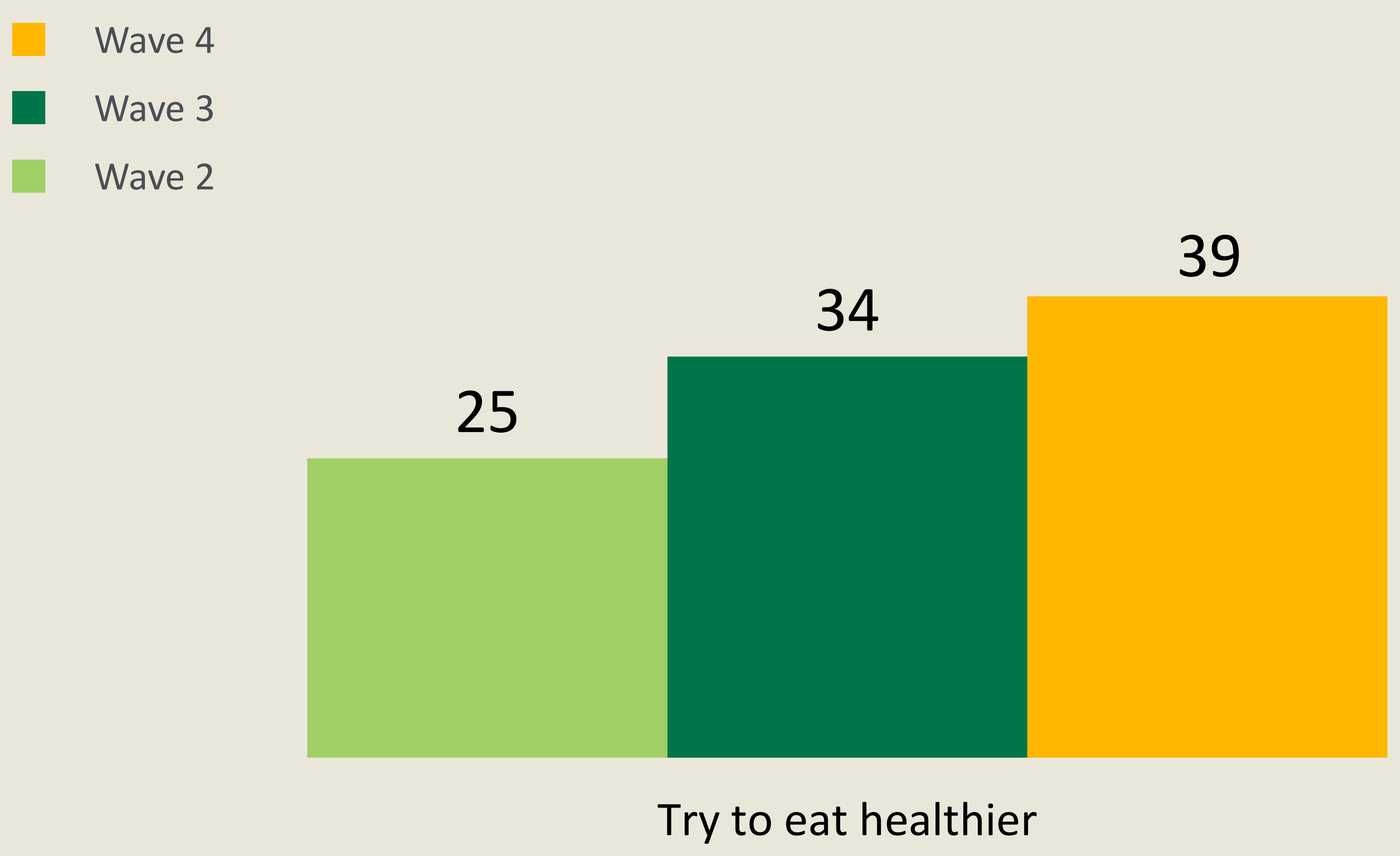
*Japan is the United States' **largest export market for beef**, based on value. Under the free trade agreement signed in 2019, **the United States will obtain market access conditions equal to CP-TPP countries, with tariffs for fresh, chilled, and frozen beef reduced from 38.5 percent to 9 percent in 15 years**.*



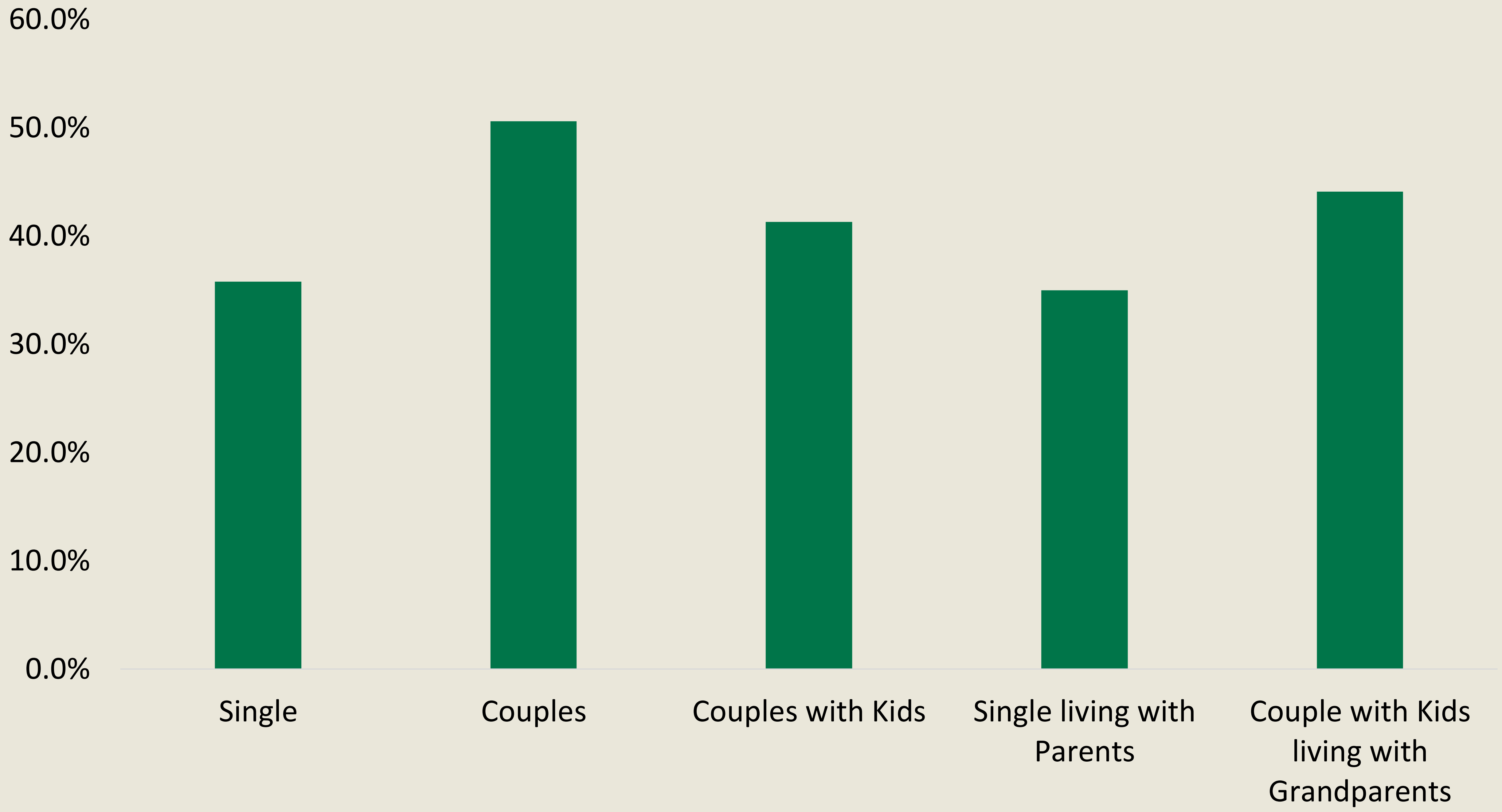
Source: https://ustr.gov/about-us/policy-offices/press-office/fact-sheets/2019/october/provisions-of-the-us-japan-trade-agreement-beef#:~:text=Japan%20is%20the%20United%20States,9%20percent%20in%2015%20years.

Health a greater focus, especially for families, with increased management via diet during the pandemic; plus more general focus on well-being

Changes to eating habits compared to last month (%)
Top 2 Box (4;5)



Importance of Health in Eating Habits



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Source: Q25. In comparison to last month, how have your eating habits in home changed? Please select the scale point that best reflects where your personal views fall.
Base : Japan (N=500)
Source: Q26a. Which one do you think is helping the most?
Base : Japan (N=500)
Source: http://www.jfc.go.jp/

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PROTEIN LANDSCAPE, CHANNEL & ROLE OF COO

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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/Premium 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*

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.

In Japan, this is even more pronounced. Beef is premium, with a distinct profile. Chicken and pork largely offer the everyday alternative. Perceptions on the whole, remain stable over recent years.

The Superior, delicious, available option

Beef

- Is my/my family's favourite meat
- Is the most superior meat
- I am willing to pay a bit more
- Tastes Delicious
- The meat is usually tender

- Is easy and convenient to purchase
- Is easy and convenient to prepare

What's changed this year?

Beef has improved sustainable perceptions in recent years But has got weaker on versatility and being part of a healthy diet.

The affordable, convenient, versatile option

Chicken & Pork

- Cheaper
- Is easy and convenient to prepare
- Is easy and convenient to purchase
- Can be used in many different meals
- Guaranteed safe to eat
- Is an essential part of a healthy diet for growing children

- PORK is fattier, but also tastier

What's changed this year?

Consistent quality standards has got weaker for both

The alternative

- Stand for the same things - Low in fat and high nutrition
- (horse also superior and fresh)

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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.

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In contrast to the spontaneous awareness, penetration and claimed consumption for these proteins remains stable over time.

SPONTANEOUS AWARENESS

	Top of Mind	Total Awareness	'21	'20	'19
Beef	42%	81%▼	87	83	87
Pork	28%	79%▼	85	78	83
Chicken	18%	66%▼	74	69	74
Lamb/Mutton	1%	25%	27	26	36
Goat	0%	0%	1	0	1

Top of Mind

Total Awareness

BOUGHT IN LAST MONTH

		'21	'20	'19
Beef	74%	77	80	79
Pork	90%	91	91	96
Chicken	90%	90	91	93
Lamb	8%	10	11	7
Mutton	0%	0	0	0
Goat	1%	1	1	1
Horse	3%	3	2	3

AVERAGE SERVES LAST 7 DAYS

		'21	'20	'19
Beef	0.9	0.9	1	1
Pork	2.1	2	2.2	2.2
Chicken	1.8	1.8	1.9	2
Lamb	0.2	0.2	0.1	0.1
Mutton	0	0	0	0
Goat	0.1	0.1	0	0.1
Horse	0.1	0.1	0.1	0.1

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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=800), '21 (n=804), '20 (n=800)

▲▼ *Sig. different at 95%*

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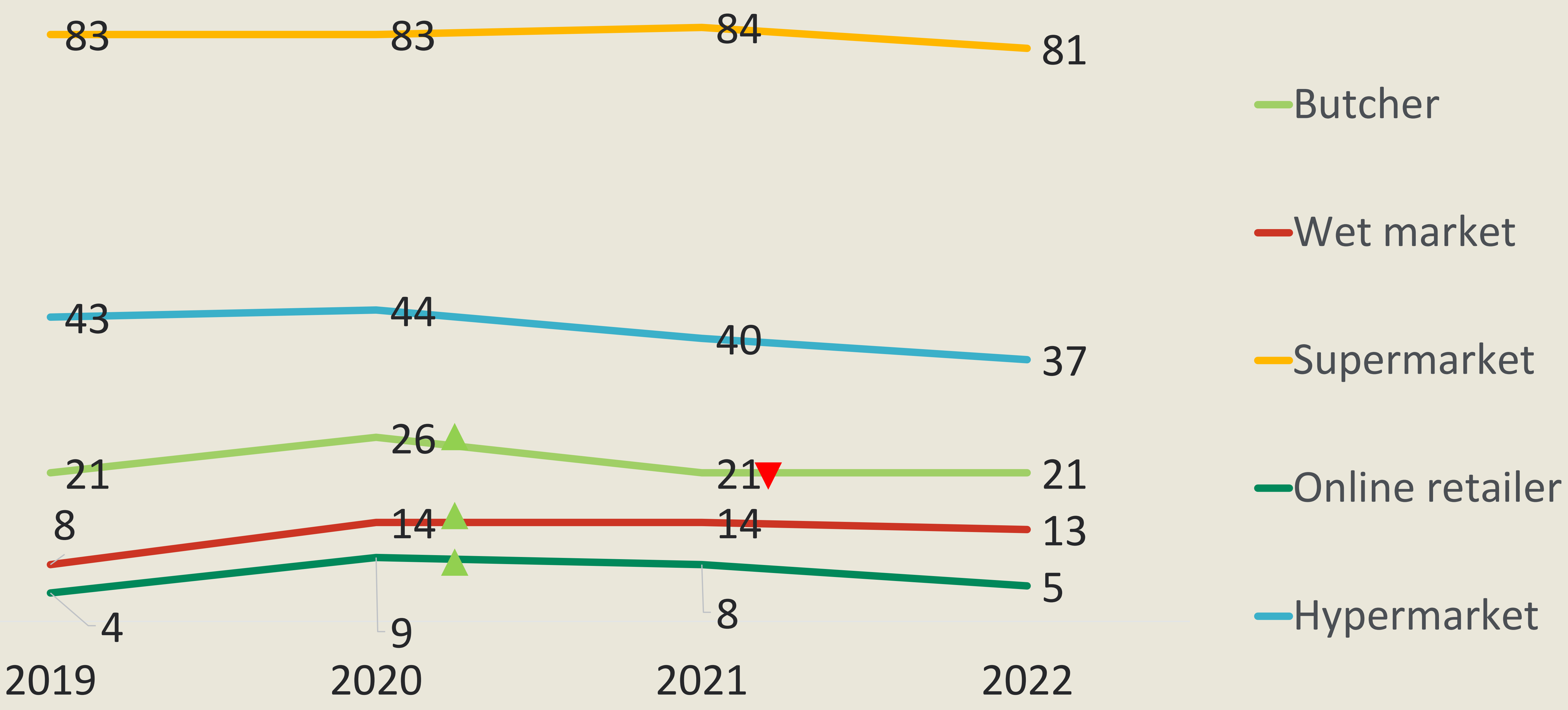
Supermarket remains, by some way, the channel where Japanese consumers buy beef - with gains for online during Covid somewhat eroded, while hypermarkets see longer term softening

KEY PURCHASE CHANNELS - BEEF

Once per month or more often



Supermarkets offer variety within a reasonable price range – allowing for convenience

Supermarkets are more for the day-to-day purchases of meat where purchase time is quick and accessible

Family size meat packs that are more affordable than premium butcher prices

Larger ranges of international meats facilitates opportunities for different tastes and flavours

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QR3A. How often have you bought beef from each of these locations in the last six months?
Base: ‘22(n=541), ’21(n=586) ‘20(n= 597), ’19(n=629)

Sig. different at 95%

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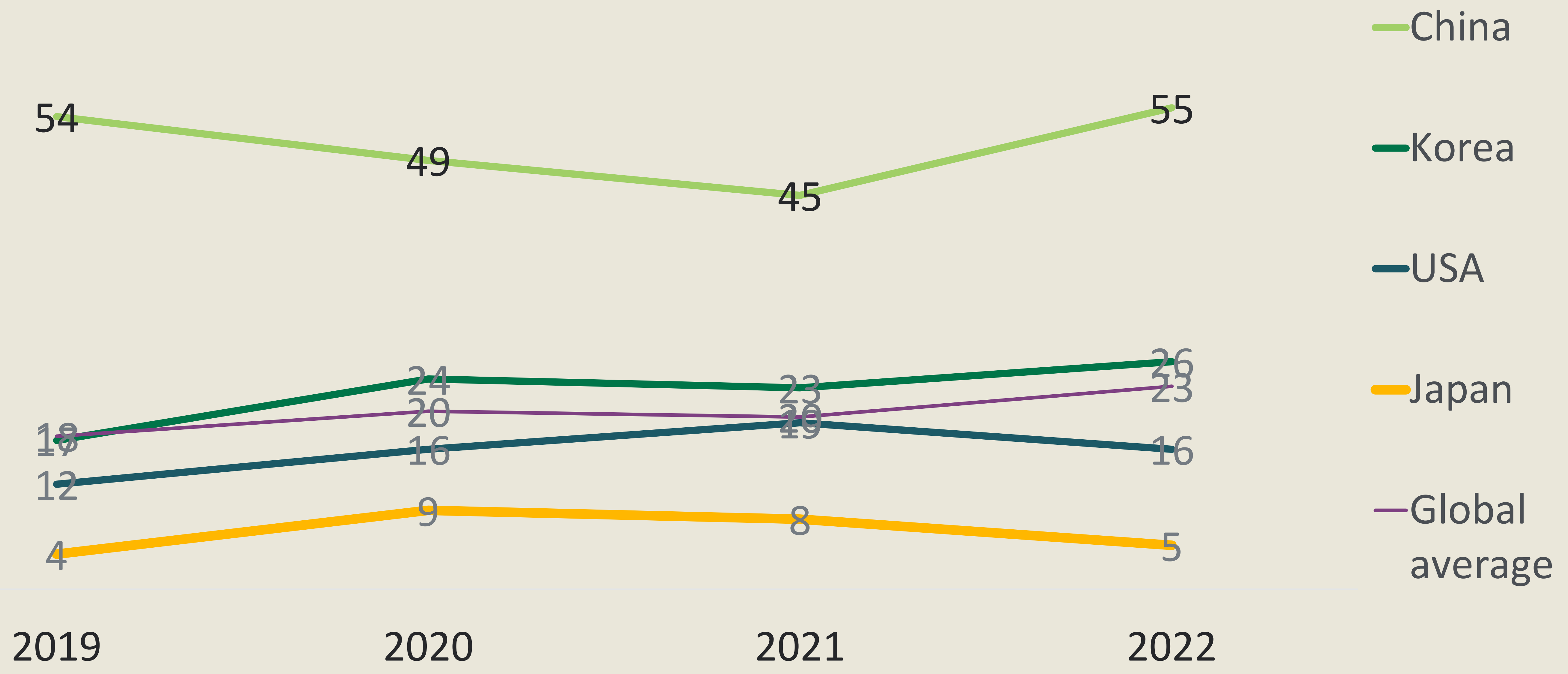
Japan trails other markets for claimed online purchase of beef. While the general trend is increased monthly penetration over the last 3 years, Japan has declined, returning to pre-Covid levels.

BEEF PLACES OF PURCHASE - ONLINE

Once per month or more often (net)



Online Grocery Shopping Trends:

- **89% of respondents focus exclusively on food supermarkets (48.5%) or use food supermarkets in combination (40.5%)**
- Only **4.1%** said they purchased food exclusively from online supermarkets
- **9.5%** said safety/quality concern was a barrier to entry when considering online supermarkets (60.9% said the fact they can't see/touch the actual products was a barrier)

QR3A. How often have you bought beef from each of these locations in the last six months? Base: '22 (n=392) '21(n=396) '20(n= 392) '19(n=396)
Source (right side): https://prtimes.jp/main/html/rd/p/000000052.000027211.html, https://www.jfc.go.jp/n/release/pdf/topics_170308a.pdf

Sig. different at 95%

With the dominance of supermarket channel, it is important that we are setup to win in this context.

Although the True Aussie Beef logo is on the packaging, the overall setup where AU, US and local beefs are displayed closely together makes it harder for consumers to perceive AU beef to be a “premium” brand

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Source: photo taken by Kantar team

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And consumers have told us that their access to product has changed in recent years.

「いつも買い物をしているスーパー（サミットとSEIYU）では、数年前までオーストラリア産の牛肉を売っていたが、いまはありません」（消費者、日本）

COO and animal origin are equally important, with the latter increasing in recent times, reflective of the trend to seeking local.

Global average 2022	55%	31%	30%

Local beef aligns with Japanese food culture and has strong power in the mind of consumers with 'breed branding'

- Food on many occasions is a bonding tool and therefore, a passion for food, meal quality and taste is important
- Local suppliers are sophisticated in communicating the quality of local/ Japanese beef by educating the market on specifics about breed *(e.g. Kuruge, Akage, black, brown etc.)* and parts *(e.g. tail)* and how that links to taste and flavour
- Local beef dial up hyperlocal origins *e.g. Kobe*
- These regions brand Japanese beef locally and in exports by communicating agricultural gastronomy features
- HORECA channel *e.g. communication of supply to known Omakases dial up the presence of Japanese beef in food culture (both locally and internationally)*

IMPLICATION | OPPORTUNITY

- Opportunity to talk to agricultural gastronomy and align with the food-centred culture of Japan
- Opportunity for traceability systems to leverage supplies to well-known HORECA to build premium quality image in consumer channels (if possible)
- Potential opportunity for traceability to support branding of different breeds *e.g. where from, how raised, taste expectations, etc.*

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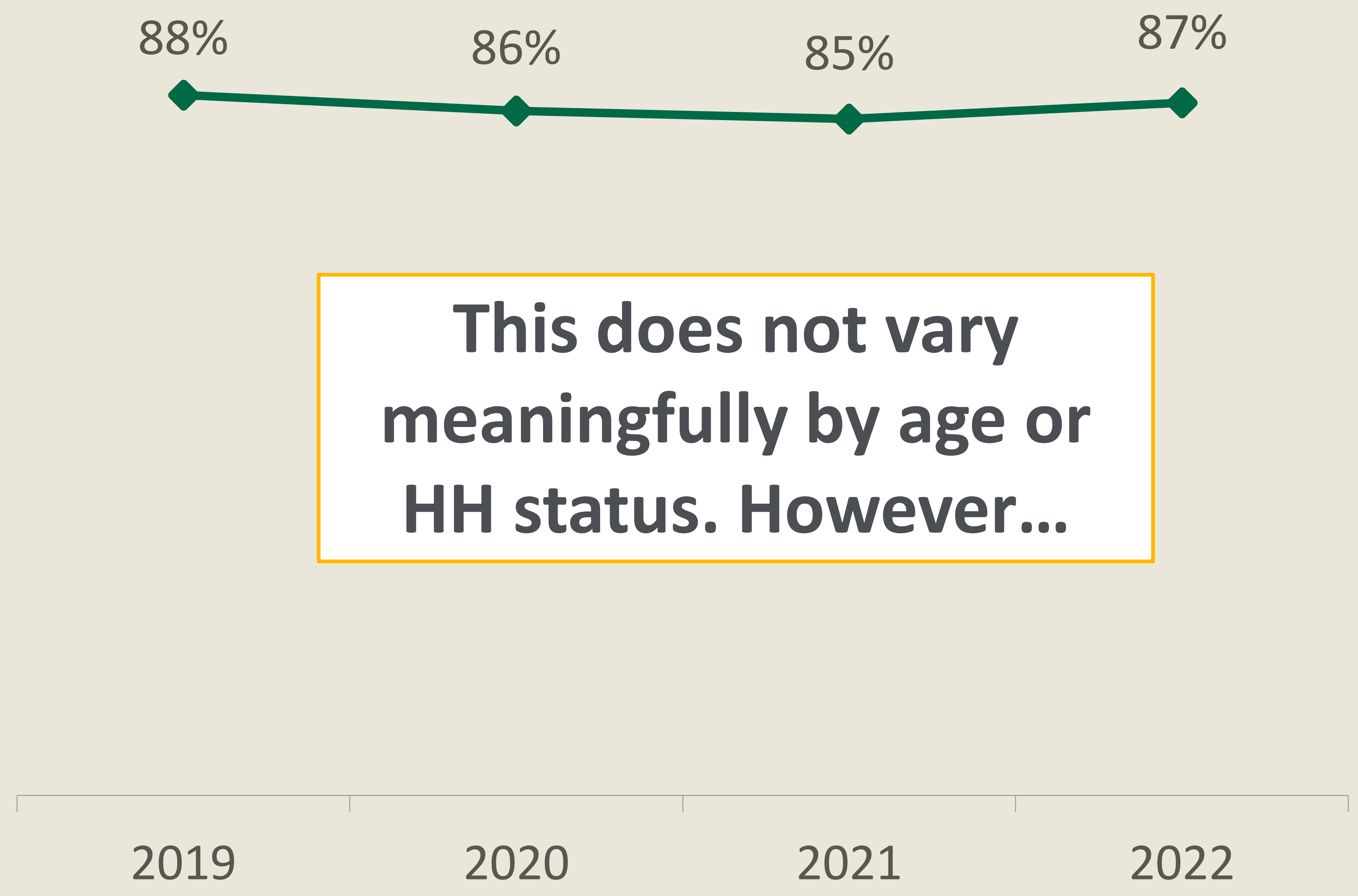
Source: Project Cyclone, Trust and Traceability - Japan report (May 2021)

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=541)

Awareness of the COO of imported beef purchased remains stable with at almost 9 in 10. More buying imported monthly and this group skewing towards having children in HH.

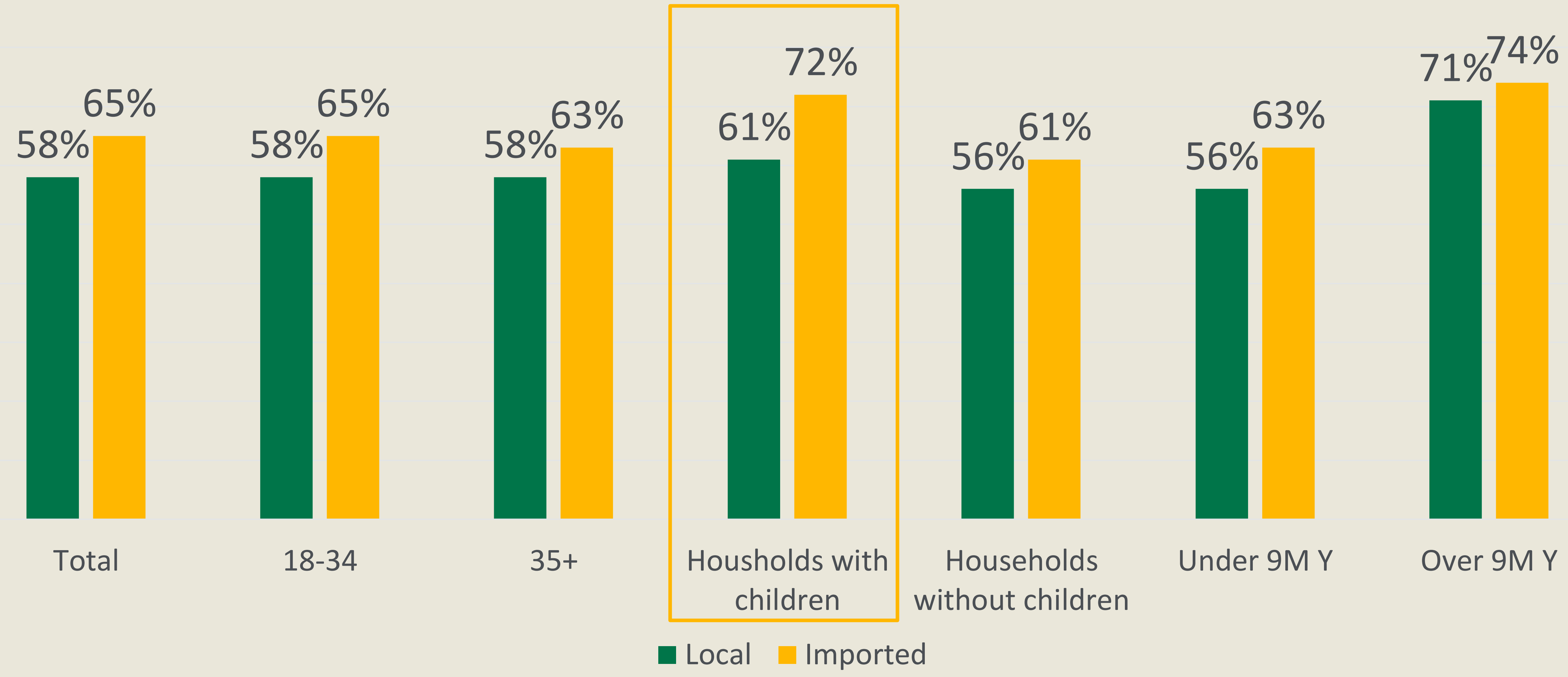
Know Country of Origin?



This does not vary meaningfully by age or HH status. However…

65% claim to be buying imported at least once a month vs 58% buying local beef at least once a month

Buying Monthly or more often



COO BRAND HEALTH, TRUST & PERCEPTIONS

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AU Beef is the only COO to experience a fall in awareness in 2022. The lower funnel for AU Beef has seen a decline, and has fallen behind US Beef.

BRAND HEALTH – BEEF

Brand Funnels

AUSTRALIAN BEEF %

		'21	'20	'19
Spontaneous awareness	65	64	66	72
Total Awareness	94▼	97	97	97
Ever Eaten	89	89	91	93
Eat P12M	71	74	76	79
Eat P3M	47▼	53	58	56
Past Month	34▼	39	44	41
Most Often	23▼	28	32	33

AMERICAN BEEF %

		'21	'20	'19
Spontaneous awareness	63	65	64	65
Total Awareness	95	95	97	96
Ever Eaten	90	89	90	89
Eat P12M	71	71	78	75
Eat P3M	51	55	57	55
Past Month	39	41	45	41
Most Often	27	28	30	26

NEW ZEALAND BEEF %

		'21	'20	'19
Spontaneous awareness	8	9	9	7
Total Awareness	70	71	67	66
Ever Eaten	46	43	44	37
Eat P12M	26	27	28	24
Eat P3M	15	16	16	13
Past Month	10	11	10	8
Most Often	3	2	3	2

CANADIAN BEEF %

		'21	'20	'19
Spontaneous awareness	7	7	6	8
Total Awareness	58	57	55	54
Ever Eaten	37	34	35	32
Eat P12M	21	21	22	22
Eat P3M	13	12	12	11
Past Month	8	9	7	7
Most Often	3	3	2	2

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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=800), '21 (n=804), '20 (n=800), '19 (n=800) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

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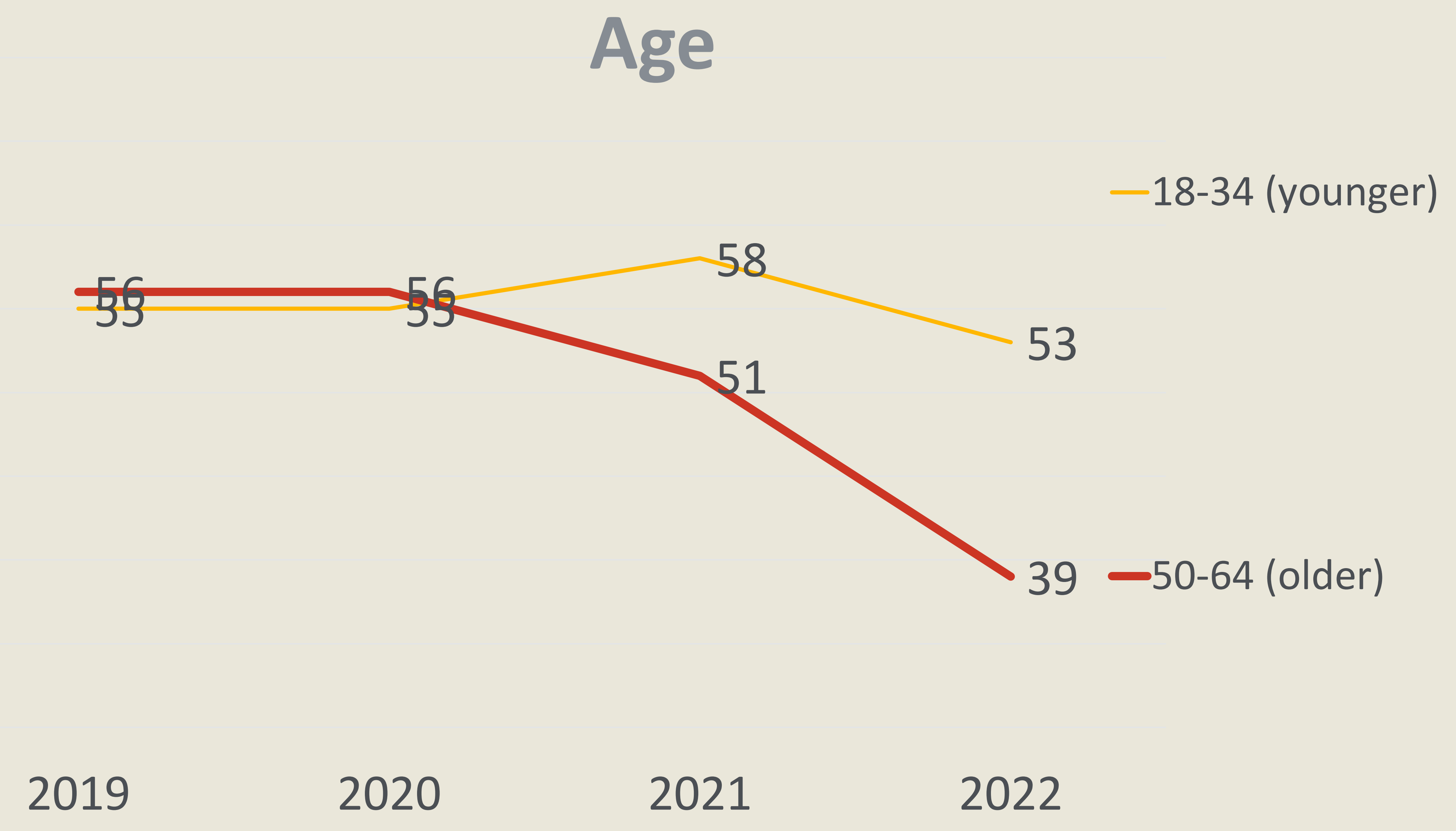
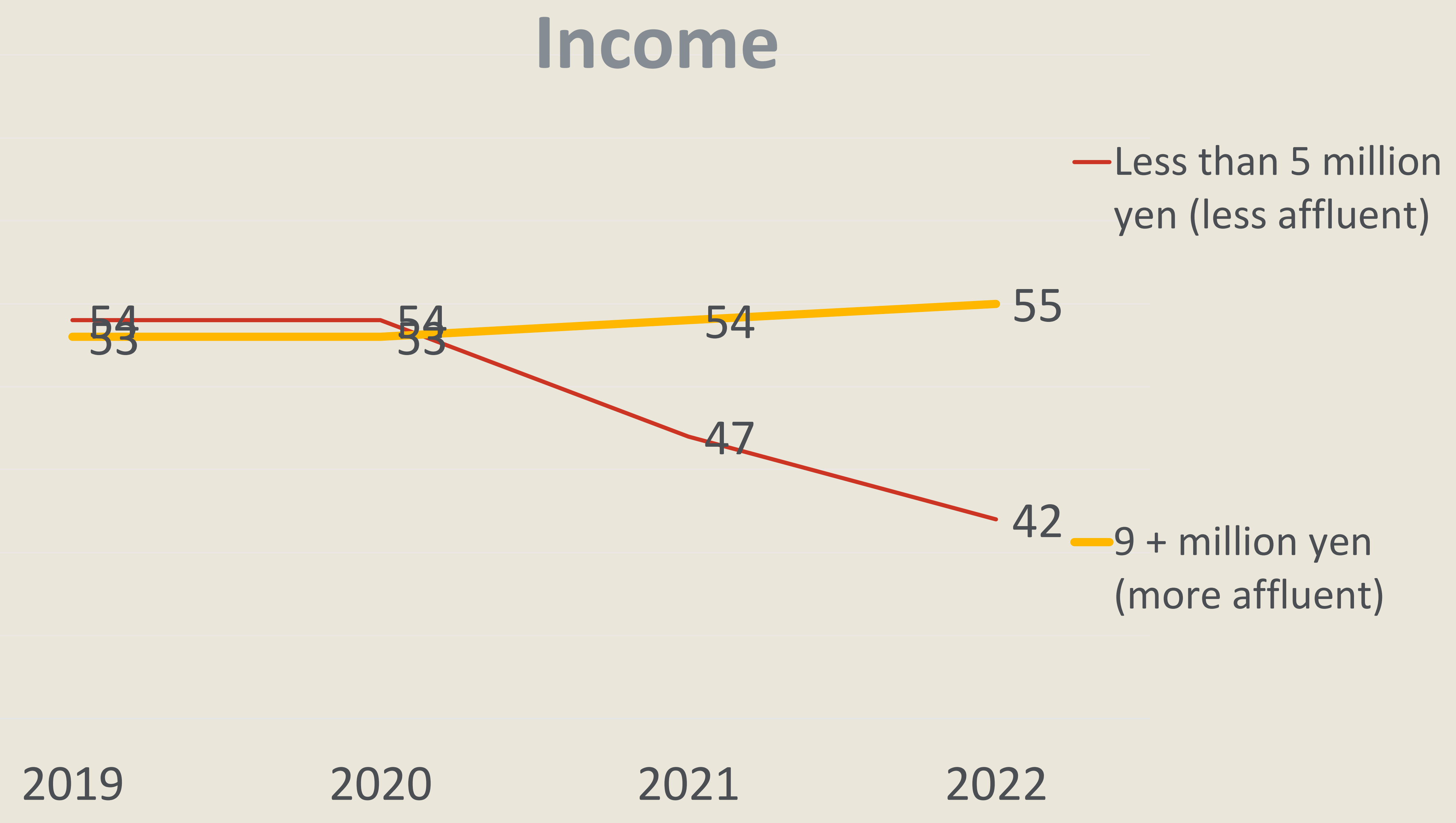
Pre-2021, AU beef had broad relevance, but this has diverged more recently.
Recent consumption for younger, more affluent and HHs with children has remained stable.
We are losing traction with older and less affluent consumers.

Brand Funnels

BRAND HEALTH
Eaten in last 3 months

AUSTRALIAN BEEF
%



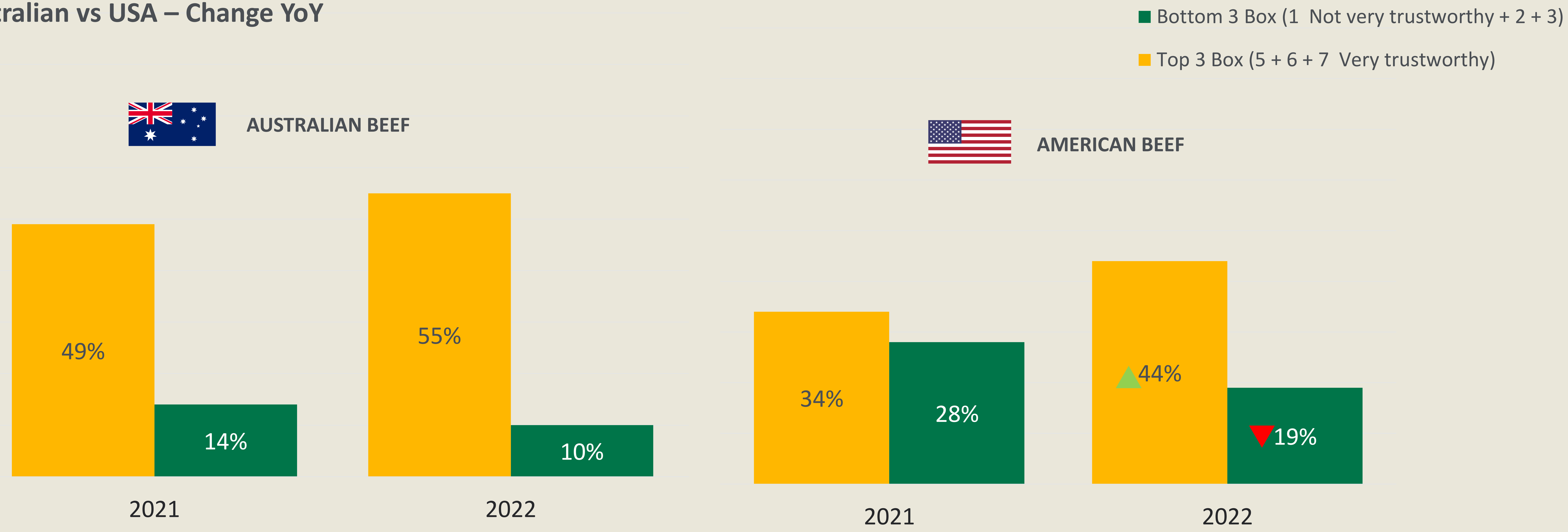


Families with children in HH remains stable over the last 5 years

While AU beef remains most trusted COO, USA has made greater gains in the past 12 months to rebuild some of the trust deficit that has existed since the BSE crisis in the mid-2000s.

Trust & Traceability

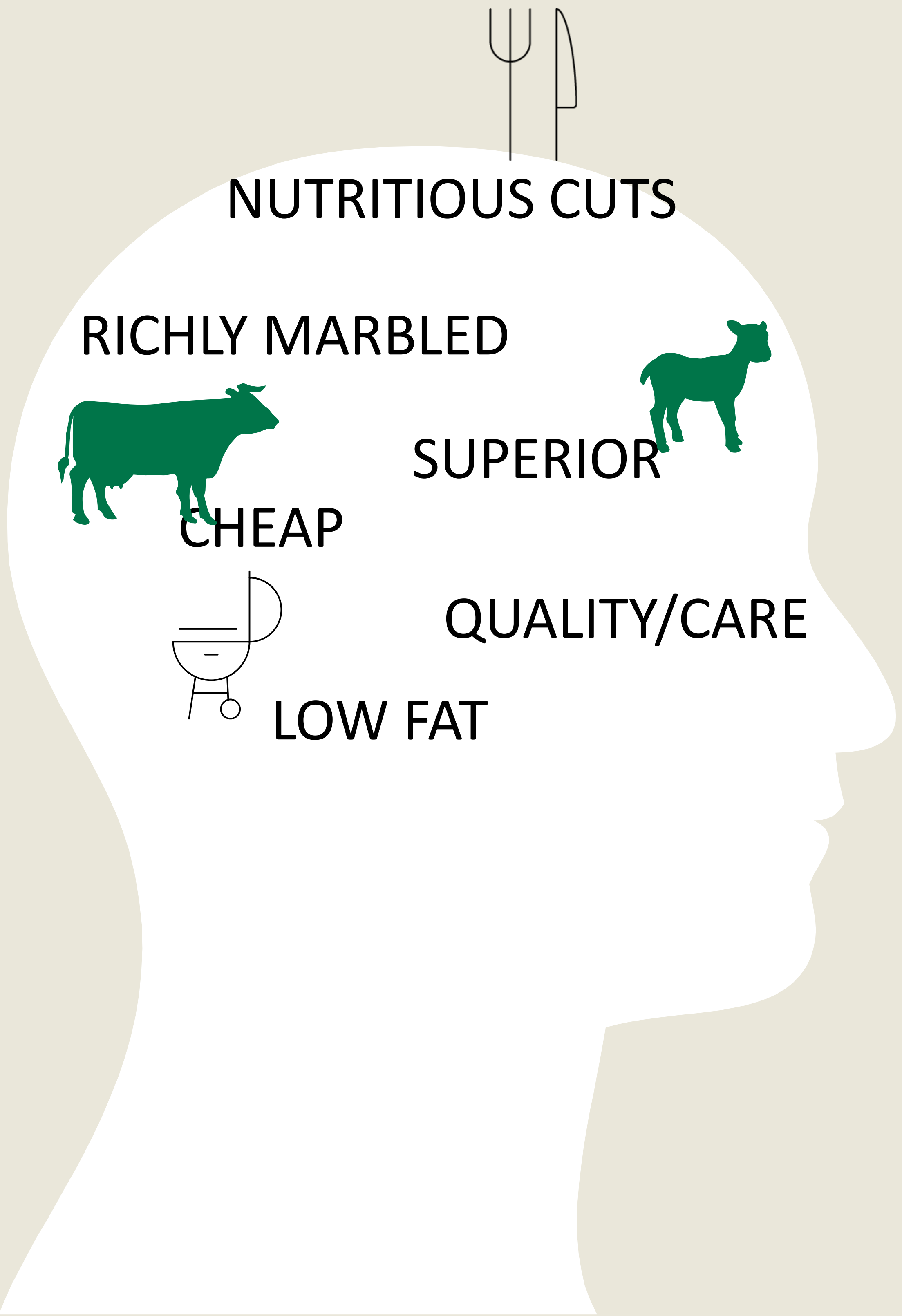
Trustworthy (Top 3 Box/Bottom 3 Box nets)
Australian vs USA – Change YoY



BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Japan (763) UAE (118), USA (858), KSA (134), South Korea (758), China (251), Canada (131), Philippines (412), Vietnam (444), Singapore (177), Qatar (123)

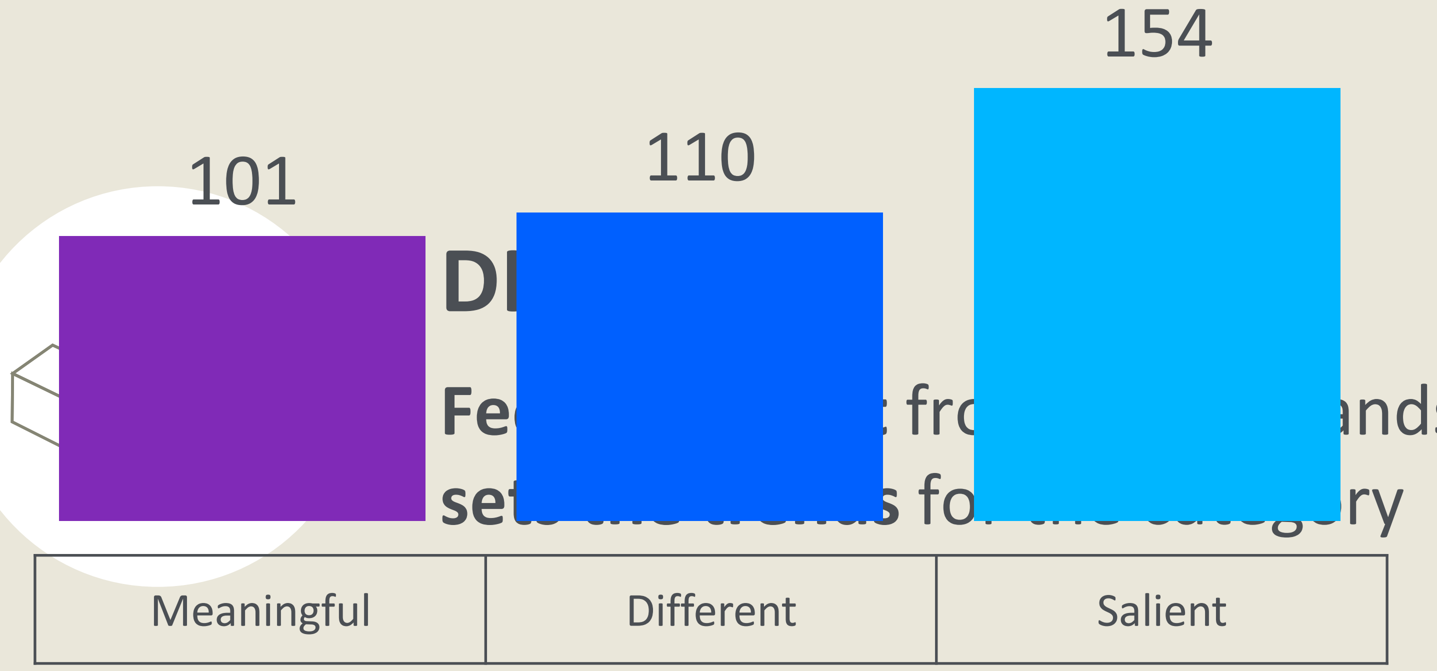
Sig. different at 95%

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



MEANINGFUL

Consumers **feel an affinity** for the brand or **think it meets their needs**



SALIENT

Comes to **mind quickly and readily** when activated by ideas relating to category purchase

POWER is a prediction of the brand's volume share based purely on perception, absent of activation factors.

PREMIUM

A reminder from some of our global qual: imported meats are more accessible everyday – and we are seeking that sweet spot as the more premium offer within these more affordable options

Consumer Qual

In Japan imported meats are considered more everyday and accessible than premium Japanese cuts

Japanese red meat is considered the most premium. All others are secondary

Wagyu and high quality Japanese red meats are cost prohibitive

Harder to find and unlikely to have competitive prices

Suitable for traditional or formal meals

Typically consumed in lower quantities

Imported red meat fills the gap – enabling quality consumption at more reasonable prices

Imported meats deliver a quality experience, but at a more reasonable cost

Appropriate for more casual dining and less traditional meals

More accessible and competitive in supermarkets

Accessibility to higher volumes makes it simple when cooking for larger groups

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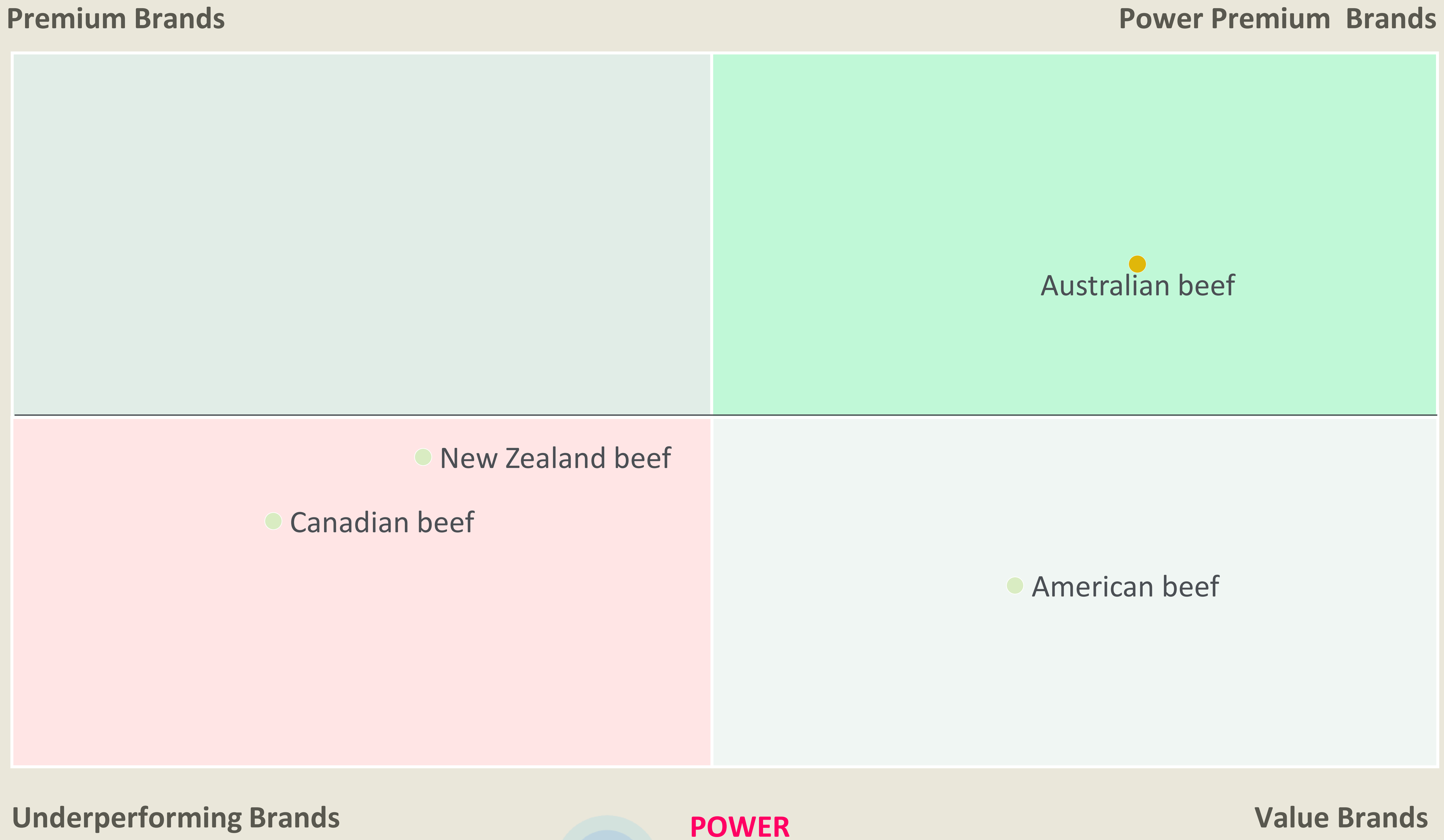
AU Beef maintains its Power/Premium positioning vs imported competitors, this has remained consistent over the last 5 years.

Brand Equity



PREMIUM/VALUE

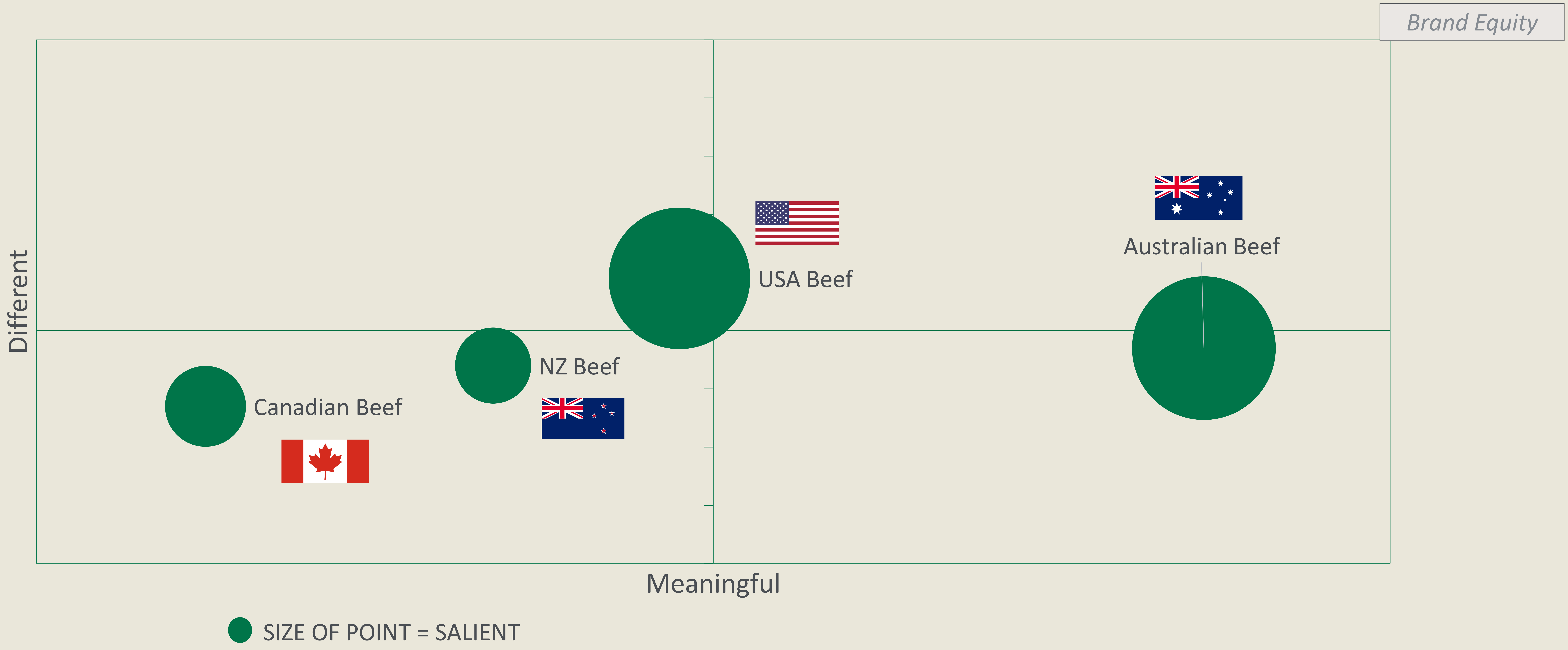
Are they willing to pay more for you?

POWER

Are consumers more likely to choose you?

WHAT NEXT FOR AUSTRALIAN BEEF IN JAPAN?

AU remains the strongest brand, as both the most meaningful and salient. But has lost Power in the last year to competitors. USA has grown at AU expense, building meaningful difference.



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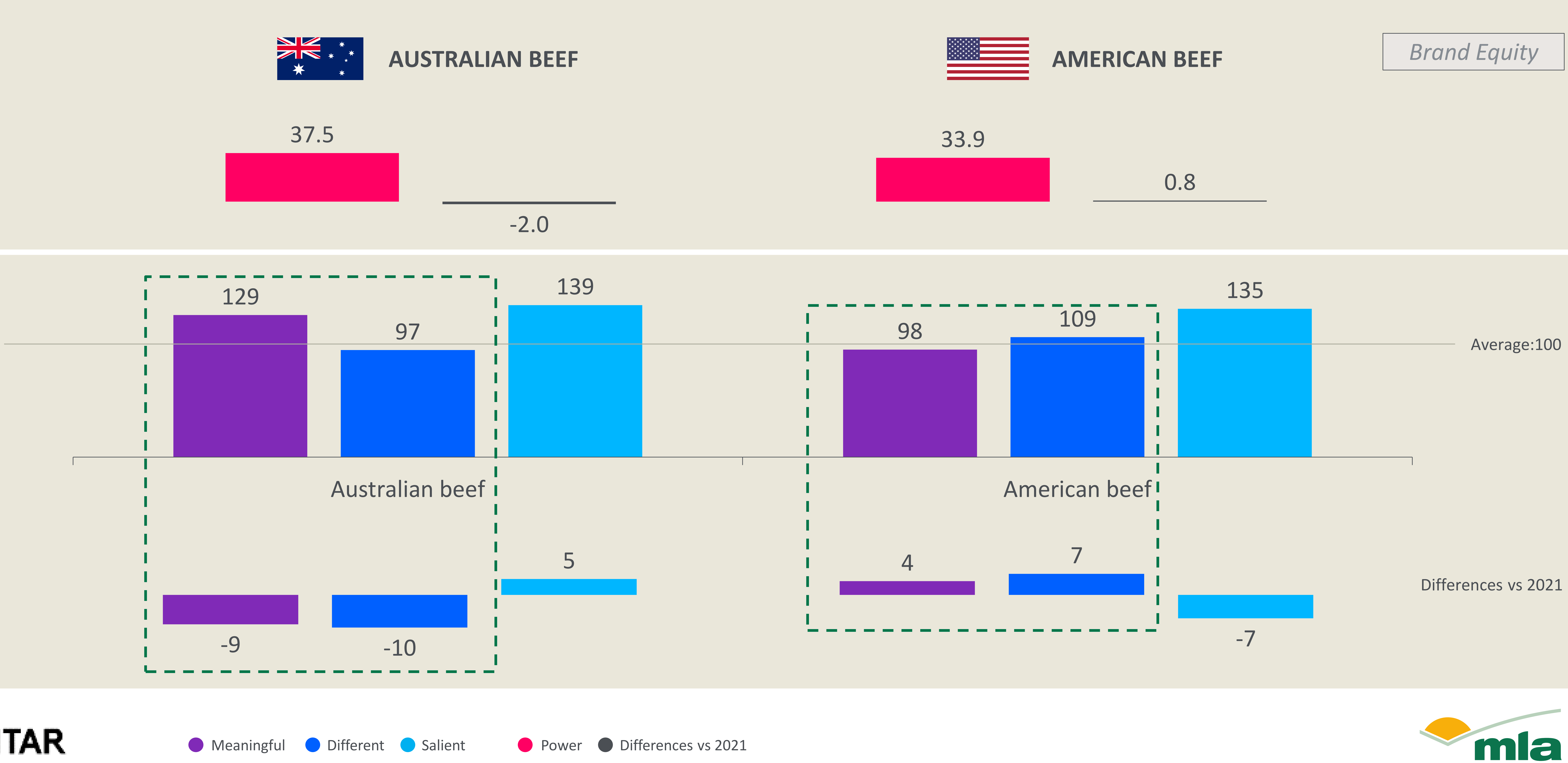
But in the last year, USA has grown at AU expense, building meaningful difference.



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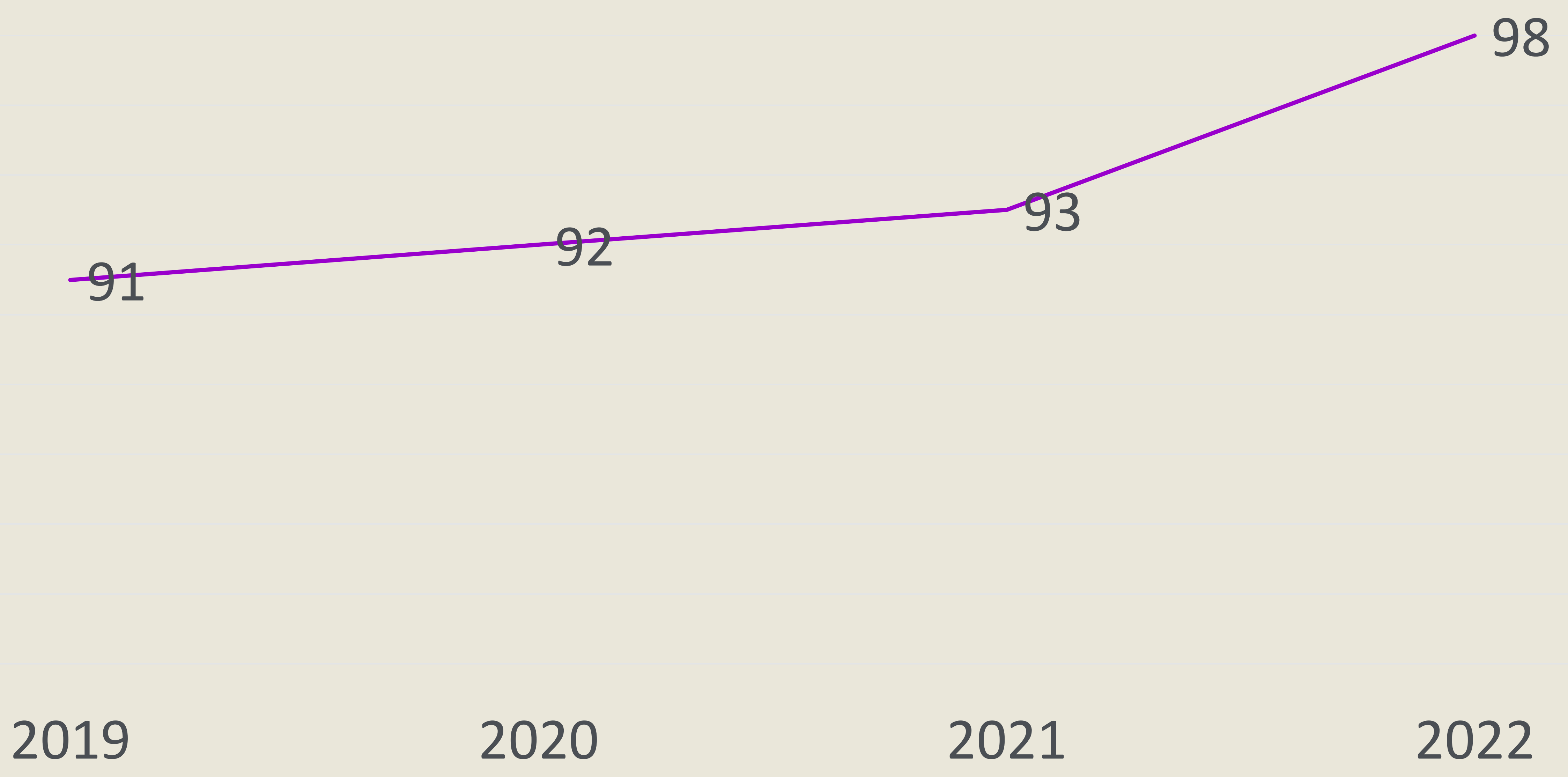
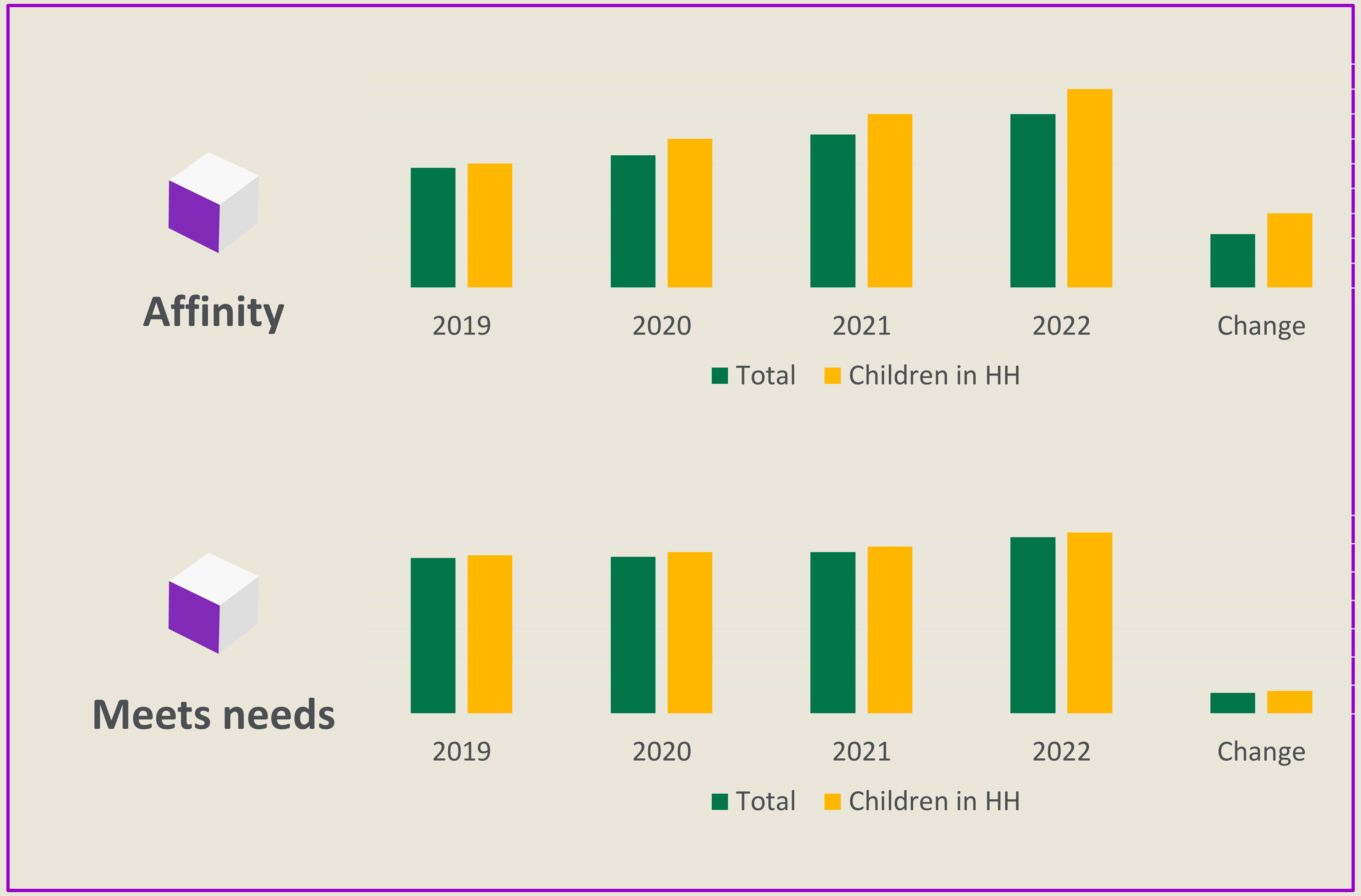
USA product has improved its brand Meaning (i.e. its relevance to Japanese consumers) consistently over the last 4 years - in particular amongst households with children

Brand Equity

USA Beef –
Meaning Change over time



Increase in USA brand meaning is being driven by families (mean scores)

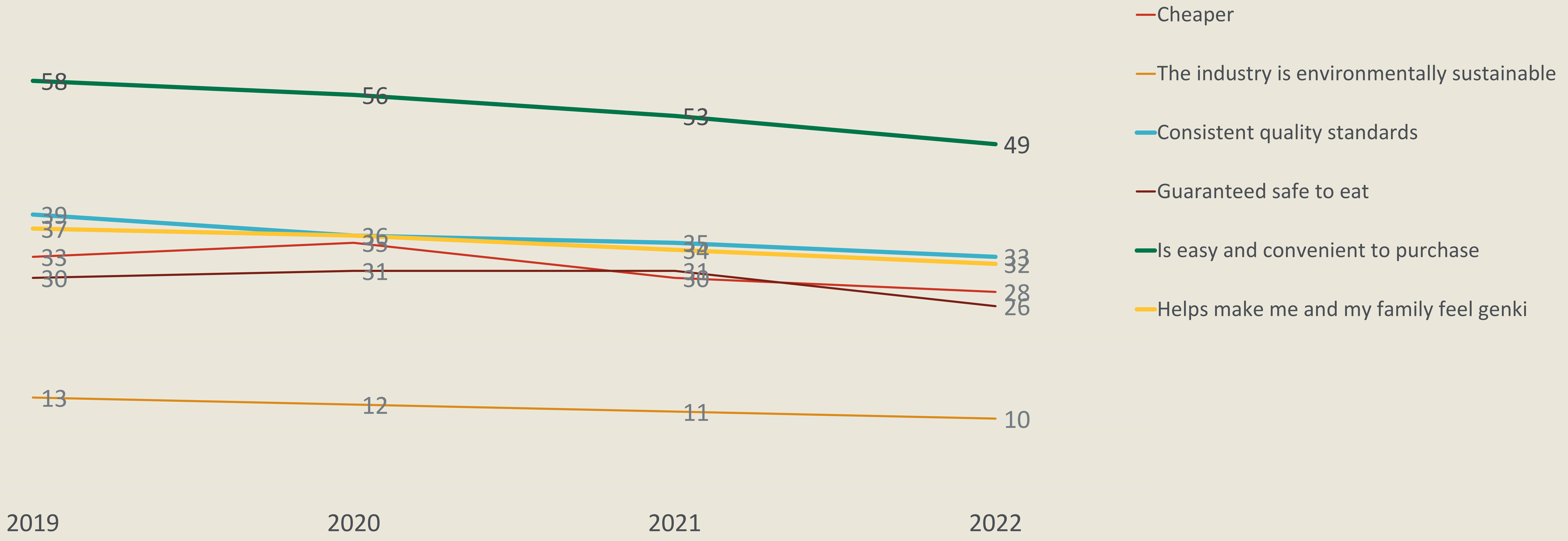


All increasing, but faster acceleration for families (HH w/children), 50+ and middle income - Big jump in the past 12 months, particularly in the last 12 months.

There are some particular associations that have gradually weakened for AU beef which reflect the changing context: Access to product, concerns around health and safety, and quality perceptions

Brand Perceptions

Brand associations for Australian product with largest declines over the last 5 years

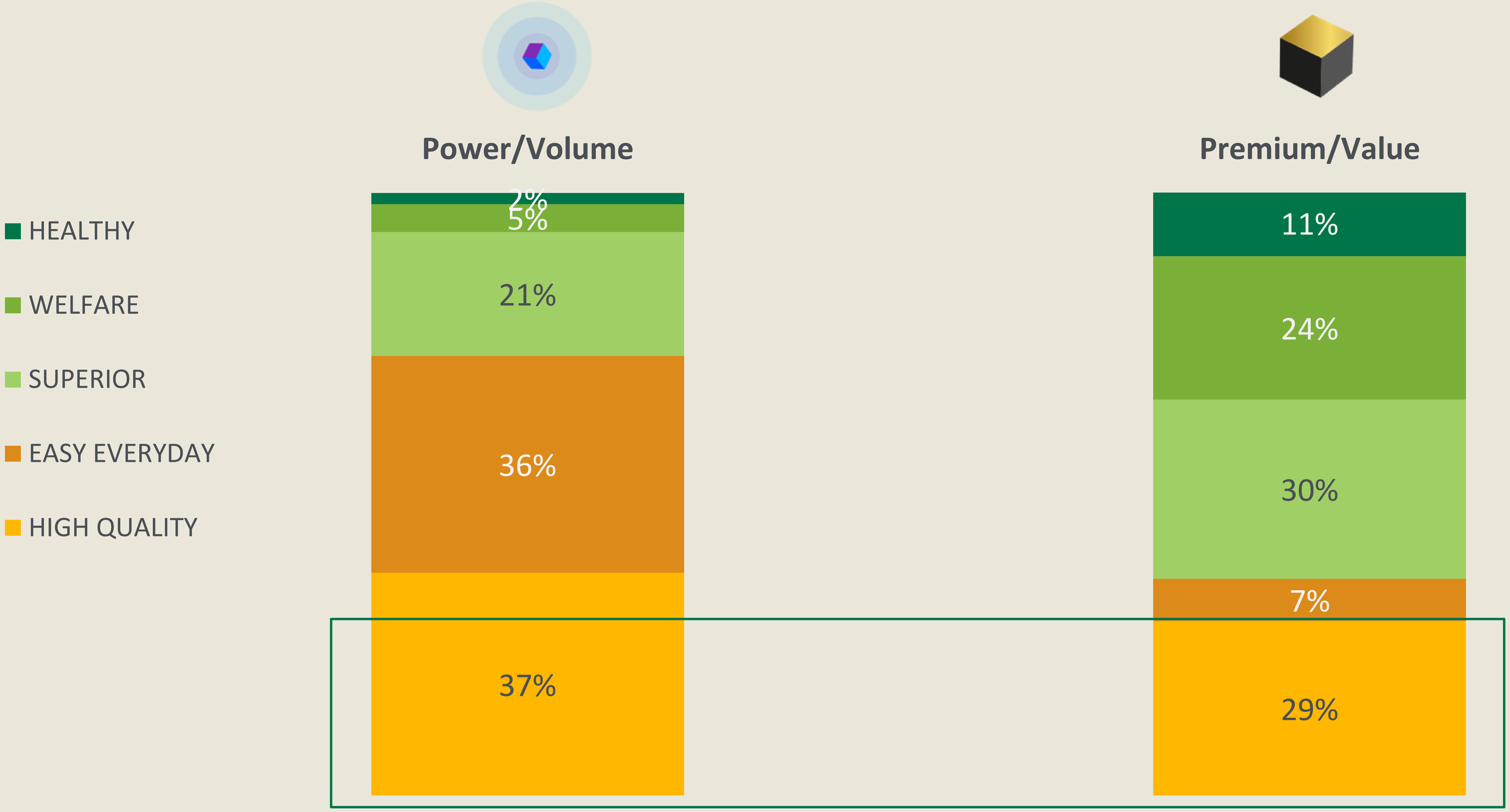


Base: ’21 (n=400), ‘20 (n= 399)
QBBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn’t matter if you don’t buy any of them - it’s your impressions we’d like.

Sig. different at 95%

Quality beef is an important driver of both volume and value perceptions in Japan, while everyday ease drives volume rather than value.

Brand Equity



US beef remains the everyday option, while AU beef has a less defined profile, but is better known than competitors for consistent quality, but we know this is weakening.

DRIVERS OF POWER
(ranked top to bottom)

		AUSTRALIAN BEEF	AMERICAN BEEF	NEW ZEALAND BEEF	CANADIAN BEEF
High Quality (37%)	Consistent quality standards	4	-1	-1	0
	Is my/my family's favourite beef	5	5	-4	-2
	Guaranteed safe to eat	1	-7	3	2
Easy Everyday (36%)	Cheaper	-1	13	-5	-2
	Is easy and convenient to purchase	7	17	-9	-7
	Offers a variety of cuts that suit the meals I make	-2	7	-3	0
Superior (21%)	The meat is usually tender	1	-2	1	0
	The fat is nicely marbled	-3	2	0	0
	Is the most superior beef	-2	0	2	0
	Helps make me and my family feel genki	0	1	-1	0
Welfare (5%)	The industry is environmentally sustainable	0	-3	2	1
	Fresh	-2	-2	1	2
	The animal is well-cared for	-1	-3	3	0
Healthy (2%)	Low in fat	1	-3	1	0
	More nutritious	0	-2	1	1

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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=800). *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.*

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

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We are currently communicating the Genki benefit of our product, but we need to reinforce this with proof-points

https://www.aussiebeef.jp/cp/genki2022/

- The nutritional benefits/qualities behind “Eating Aussi Beef supports health & genki” are not present on the campaign landing page. This info however is in the press release and the “healthy” page of the campaign website, but there is no direct way to access that page

- There is need to reinforce the benefits/qualities in a more visible way

In the context of decreasing availability we want to leverage category entry points to ensure we are top of mind and mentally available for consumers

Category entry points

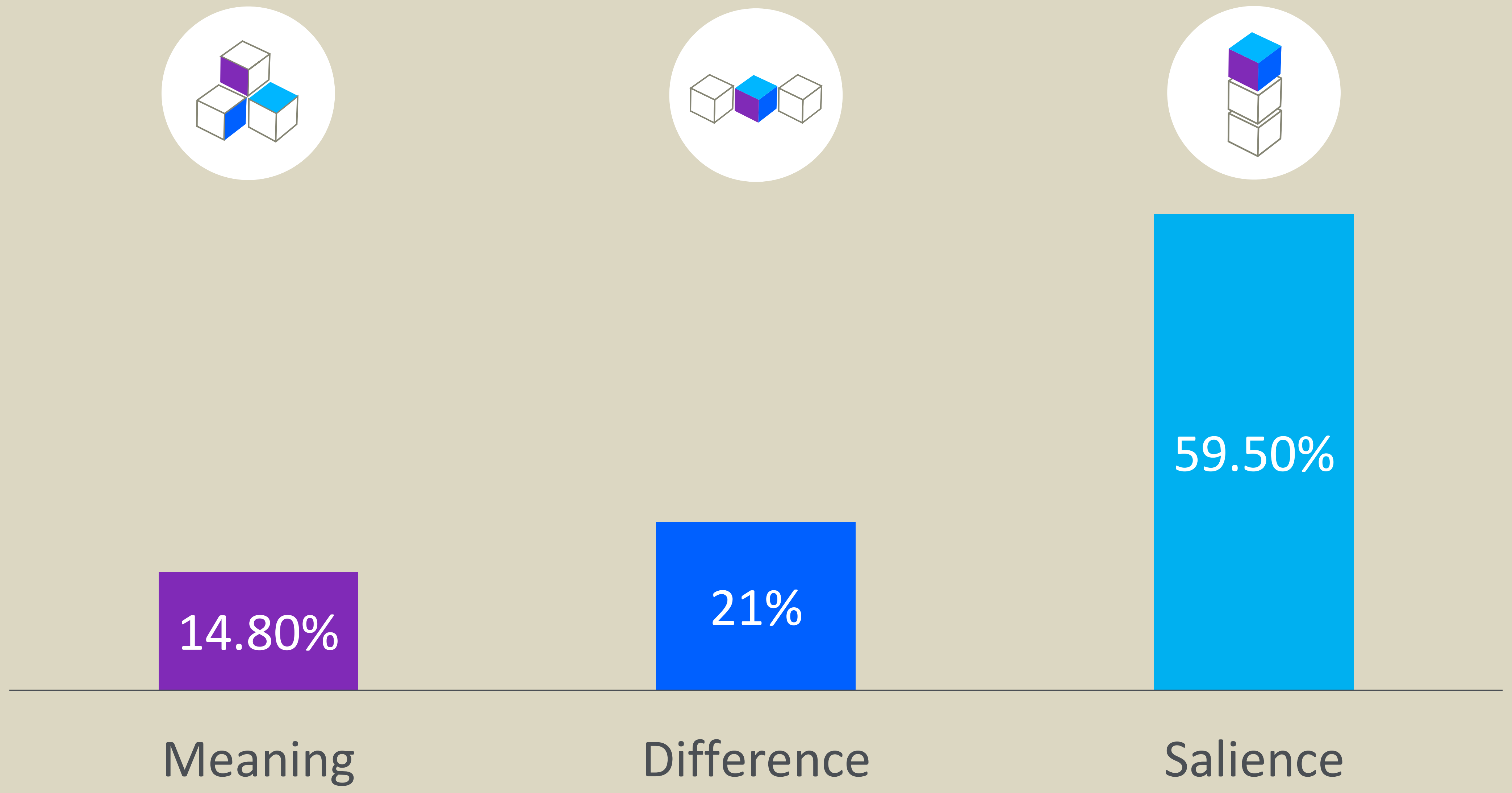
Price

Availability

Occasions

= **Easy Everyday** →

Contributions of Easy Everyday to COO Brand Equity



Strength in the category entry points explain around two thirds of brand salience

We know from our discussions with trade and consumers in market that Australia is seen has employing clean, sustainable rearing practices that reinforce perceptions of quality and ladder to premium.

Consumer Qual

In Japan, it's all about building a renowned reputation in both safety and consistent quality

Uncompromised safety at the highest standards gives AU beef the right to play in a premium market

Differentiate AU's integrity system and its uniqueness, while working in harmony with Japan's system

Communicate uncompromised safety in relation to AU history of disease control, cleanliness and hygiene

Meet high standards beyond local regulations

Help build the reputation of packers in the industry and connect them with suppliers

Quality that leads to superior taste and meal outcomes differentiates AU beef

Own the clean eating space through natural, climate, free from claims

Elevate clean eating with taste credentials – talk food culture and agri-gastronomy

Potential for sustainability to enhance clean eating benefits

Opportunity for breed branding by linking region, climate, feed, etc. to breed and communicating different flavour and sensory benefits

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With the hygiene factors covered, Integrity Systems can reinforce the associations that differentiate Australian beef and command a premium

Showcase the superiority, versatility of AU product range

Market Truth: Australian product is seen as functionally superior in most instances as clean and better for you but lacks taste credentials

Comms action: AU systems support producers in growing and producing the best of what they need and producing superior quality products that are both better for my health deliver to taste expectations

This is a differentiator vs the competition

Audience: Trade, Packers, Retail, Consumers

Highlight AU's clean, responsible rearing and production

Market truth: Associations with responsible farming practices and clean rearing are a unique asset to AU COO, especially vs the US

Comms action: AU integrity systems allow producers to pursue responsible farming practices, minimising use of 'enhancements' to ensure product cleanliness safety/quality

Audience: Trade, Packers, Retail, Consumers

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We need to maintain our accessible premium positioning by re-establishing our differentiated quality through our consistency with cleaner rearing processes, and improve accessibility to AU Beef product

1. CONSISTENT QUALITY

Reinforcing our Quality perceptions to justify premium

2. EASE OF ACCESS

Ensuring we are accessible or continue to be perceived as accessible, by building salience through association with category entry points

3. SAFETY & SUSTAINABLE PRACTICE

Reinforce the more sustainable practices of Australian production which reinforce the healthier, and quality credentials

Deliver on the Genki promise

FINAL THOUGHTS

Final thoughts & recommendations

Changing context has accentuated beef's challenges

Changing market context due to Covid has highlighted traditional weaknesses of beef: Health, Affordability, Sustainability (most for families).

More focus on being clear on our points of difference to justify our premium, in particular to families who are seeking value

Value

Families are our target, justifying value in AU beef for them is key

Imported is more often purchased by families and the accessible premium offered by imported is a more competitive space with USA improving

Protect traditional channel, Supermarket in particular, to make it easy for consumers to find and choose AU product

Accessibility & Availability

Ensure we are accessible for Japanese consumers to combat USA product

Physical and mental availability is key to ensuring we are chosen, and owning category entry points will help us to do so, in particular in driving Salience of COO product

Promote accessibility to maintain our Salience in the context of a more challenging economic and consumer conditions

Value **Accessibility**

Leverage our process as a differentiating asset to reinforce quality

Quality is key in reinforcing our value perceptions (not cheap, but worth what you pay, 'accessible premium' position) and our process can be leveraged as a reason to believe for quality claims.

Ensure we communicate the clean and consistent processes for rearing that reinforce quality and healthier

Health

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Meat & Livestock Australia Limited | ABN 39 081 678 364 | Level 1, 40 Mount Street, North Sydney NSW 2060 Postal address: Locked Bag 991, North Sydney NSW 2059 | Ph +61 2 9463 9333 | Fax +61 2 9463 9393 | mla.com.au

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