

July 2022

Global Tracker: KSA – *Presentation Deck*

Brought to you by your Kantar Team:
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& Carolina Ferrando

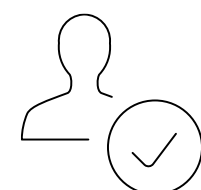


INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.



2022 Study Details:



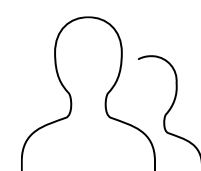
8,300 interviews



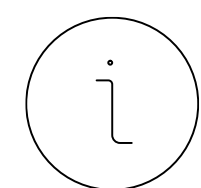
11 Markets (See right)



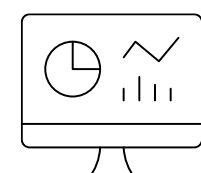
20-minute online survey
(supported by interviewer in MENA)



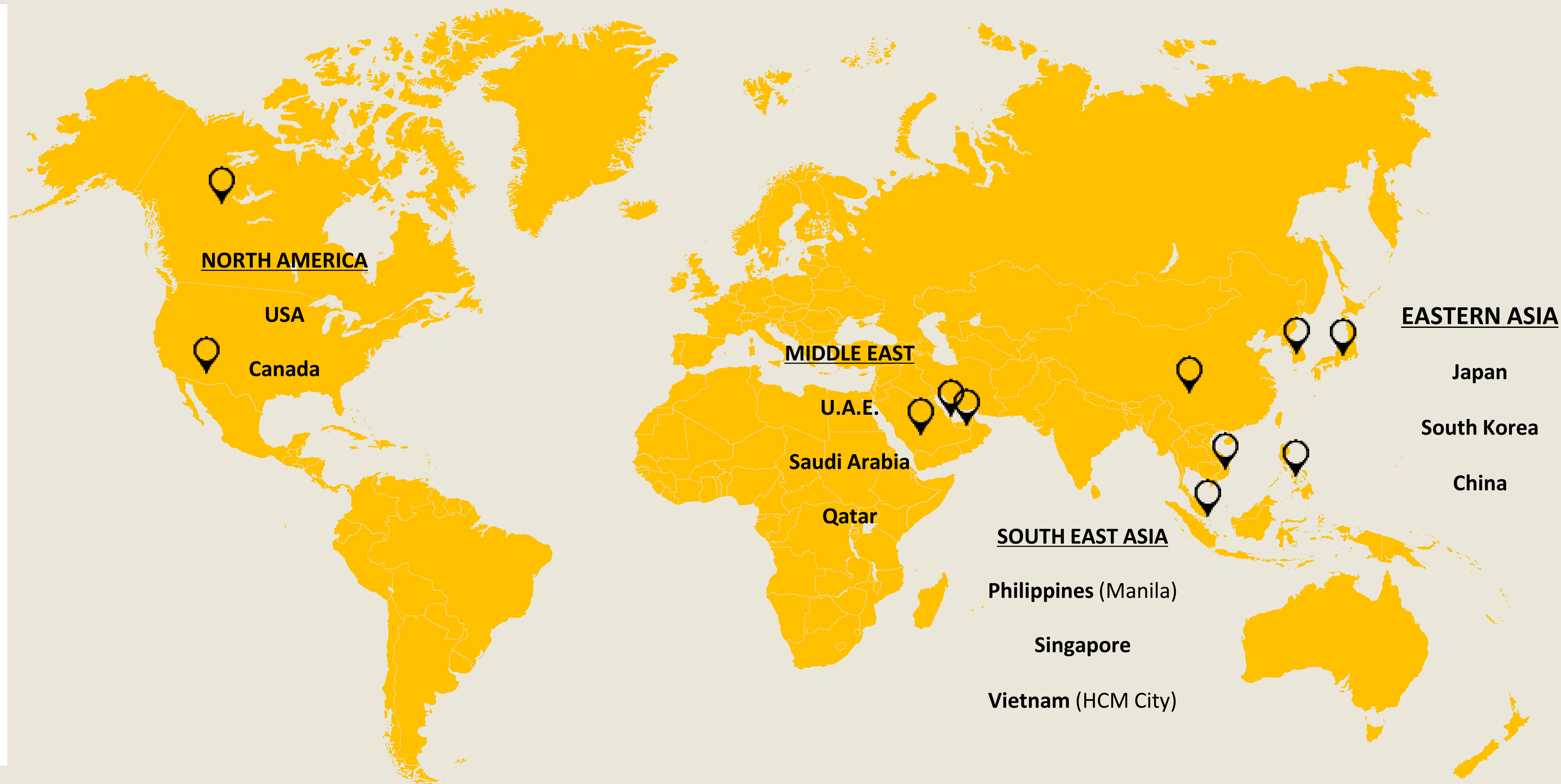
Consumers aged 18-64
Grocery buyers, meal planners
Affluent households (skew)
Selected based on potential
openness and ability to buy AU
Beef and/or Lamb
(Not representative of total market)



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

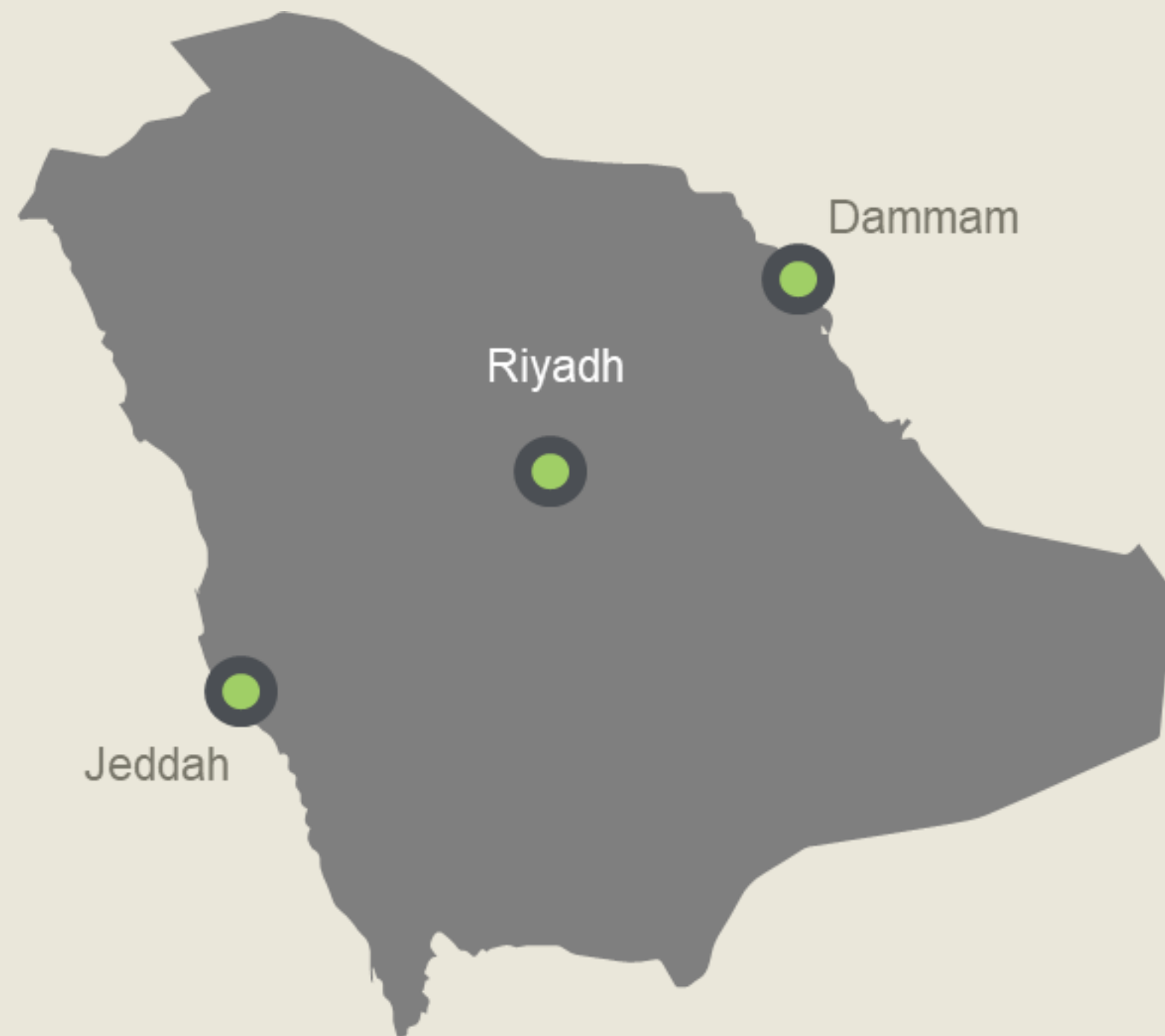


Conducted annually, this study
collects historical data allowing the
tracking of trends overtime



KSA sample – deliberate skew (not Nationally Representative)

Fieldwork completed end of March - just prior to Ramadan 2022 (April).



Sample n=500 consumers

DEMOGRAPHICS		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	56%	50%
	Female	44%	50%
Age	18-34	-	49%
	35-49	-	42%
	50-64	-	9%
Cities	Dammam	4%	32%
	Riyadh	22%	37%
	Jeddah	14%	31%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	99%
Children	Households with Children	-	84%
Income	Under 94K - 241K SAR	-	69%
	241K + SAR	-	31%
Religion	Islam	93%	100%

Flow of the presentation today



MACRO-MARKET CONTEXT



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.



Beef country of origin brand health, trust & perceptions

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

How does this flow through to brand equity and Power.



Lamb country of origin brand health, trust & perceptions

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

How does this flow through to brand equity and Power.



Final Thoughts & Discussion

What levers can we pull and what should we continue to communicate to maintain our strong position in the KSA market

MACRO MARKET CONTEXT



Meat an integral part of Arab consumers. COVID and recent supply chain challenges impacting consumers considerations in the ME region.



Meat – integral part

Meat plays a key role in meal times and specific occasions. The importance of the meal occasion defines the style and quality of meat chosen. Local beef dominate the category, with some presence of imported meat in KSA. Origin, cost and texture drive premium cues.



Recent supply chain challenges

Supply chain issues in the region resulting in supply shortages and at the same time leading to high inflationary pressures on consumers.



Covid

Covid response of Saudi consumers has been to refocus on health & well-being, and re-evaluate their brand choices. Additionally there has been a significant shift in purchase behaviour and preference for Online platforms.



Connect

Like in the UAE, opportunity to build a strong emotional connect with the consumer and being an integral part of their dinner table.



Accessibility & Price

Supply chain challenges mean physical availability is critical along with ensuring the 'right' price.



Health

Consumers finding ways to better manage their mental and physical health through diet, focusing on safe and hygienic products, organic, no hormones, gluten free etc..



Omni-channel

Presence in both physical and Online channels is a must to ensure visibility and engaging with the consumers.

High meat consumption amongst Arabs is reflected in our recent qualitative studies in the region (conducted in the UAE) – with meat seen to have a social, cultural and religious significance which could be leveraged.



UAE meals are **meat heavy** and **premium quality** red meat is a signifier of **wealth** and **nutrition**.

Something traditionally unaffordable for 'common' people.



Often the **hero** in indulgent, **luxurious** meals – where red meat is a **central** part of large **entertainment** occasions.



For many, a main **source of protein** and a major part of everyday diet.



Livestock/red meat plays a **key role in Islamic religious seasons**.

The donation of red meat from rich to poor during religious events is seen as giving those less fortunate much needed nutrients to survive.

The Central Question

How can Australian meat clearly position in the Saudi market and establish itself as an Accessible Premium product and justify our premium compared to competing imported COOs?

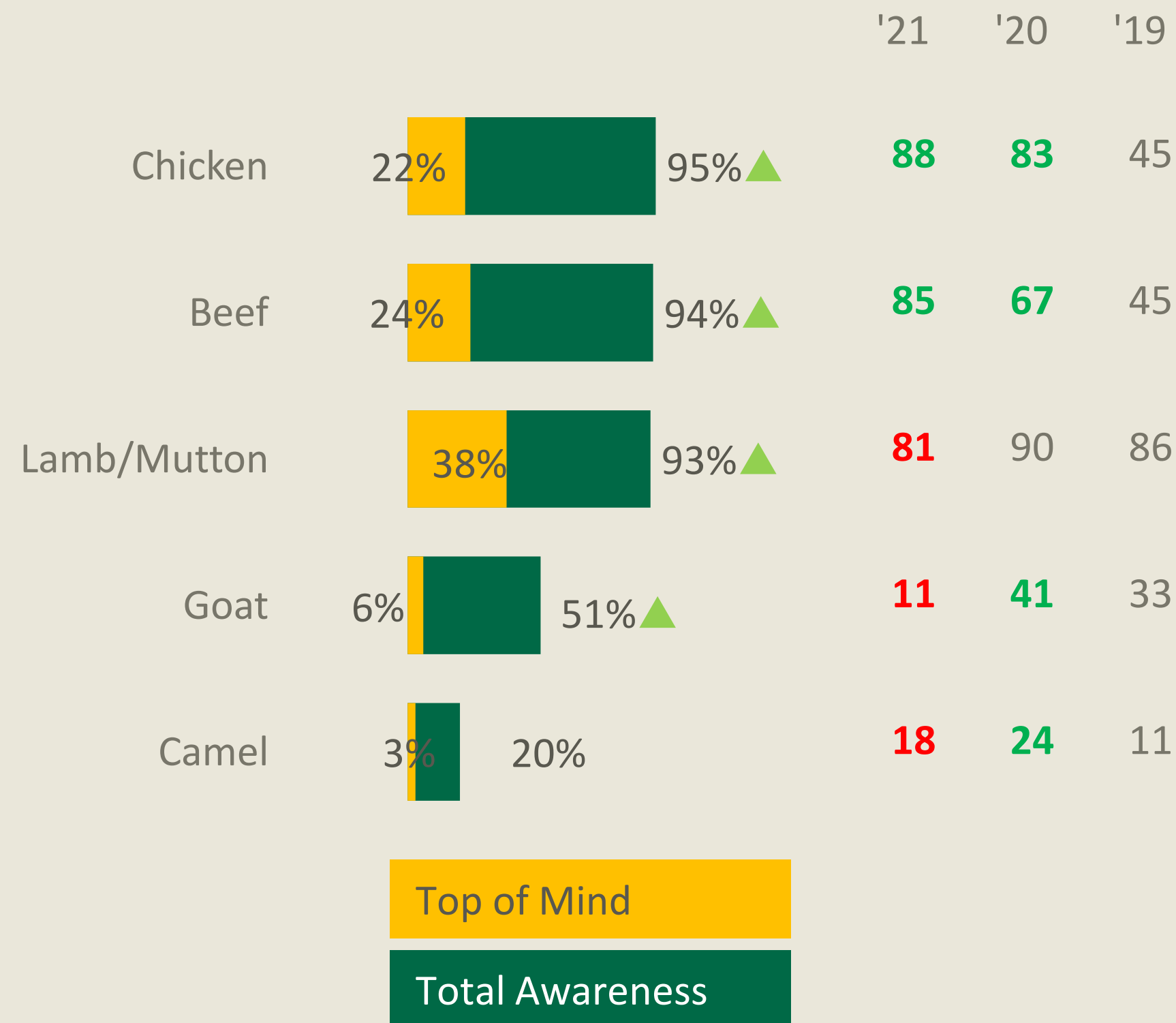


PROTEIN LANDSCAPE

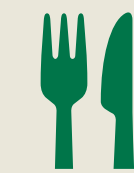
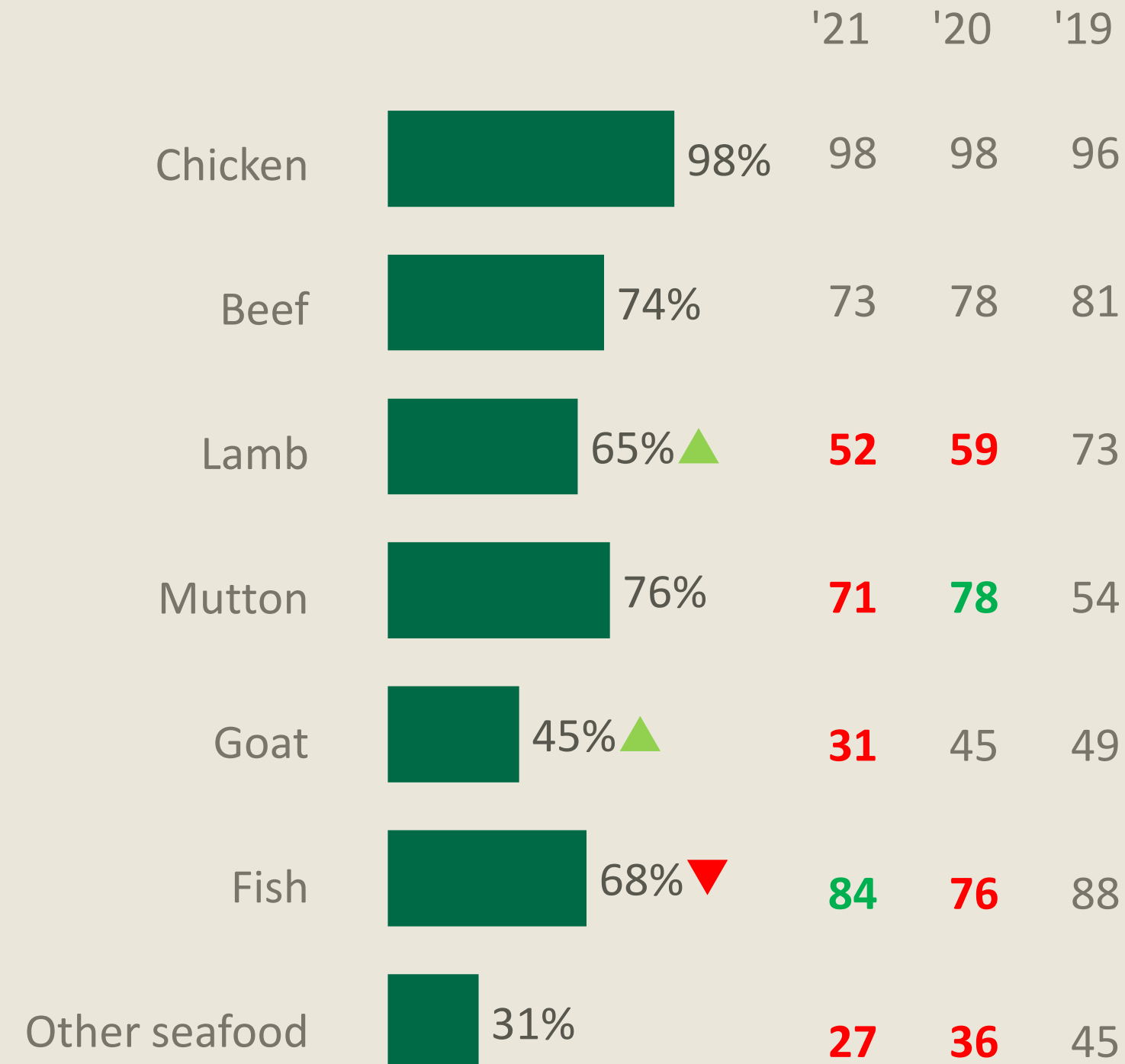
Chicken remains dominant with high consumption and serves, followed by Beef and Mutton. Increase in consumption of Lamb/Goat observed, post a dip in 2021.



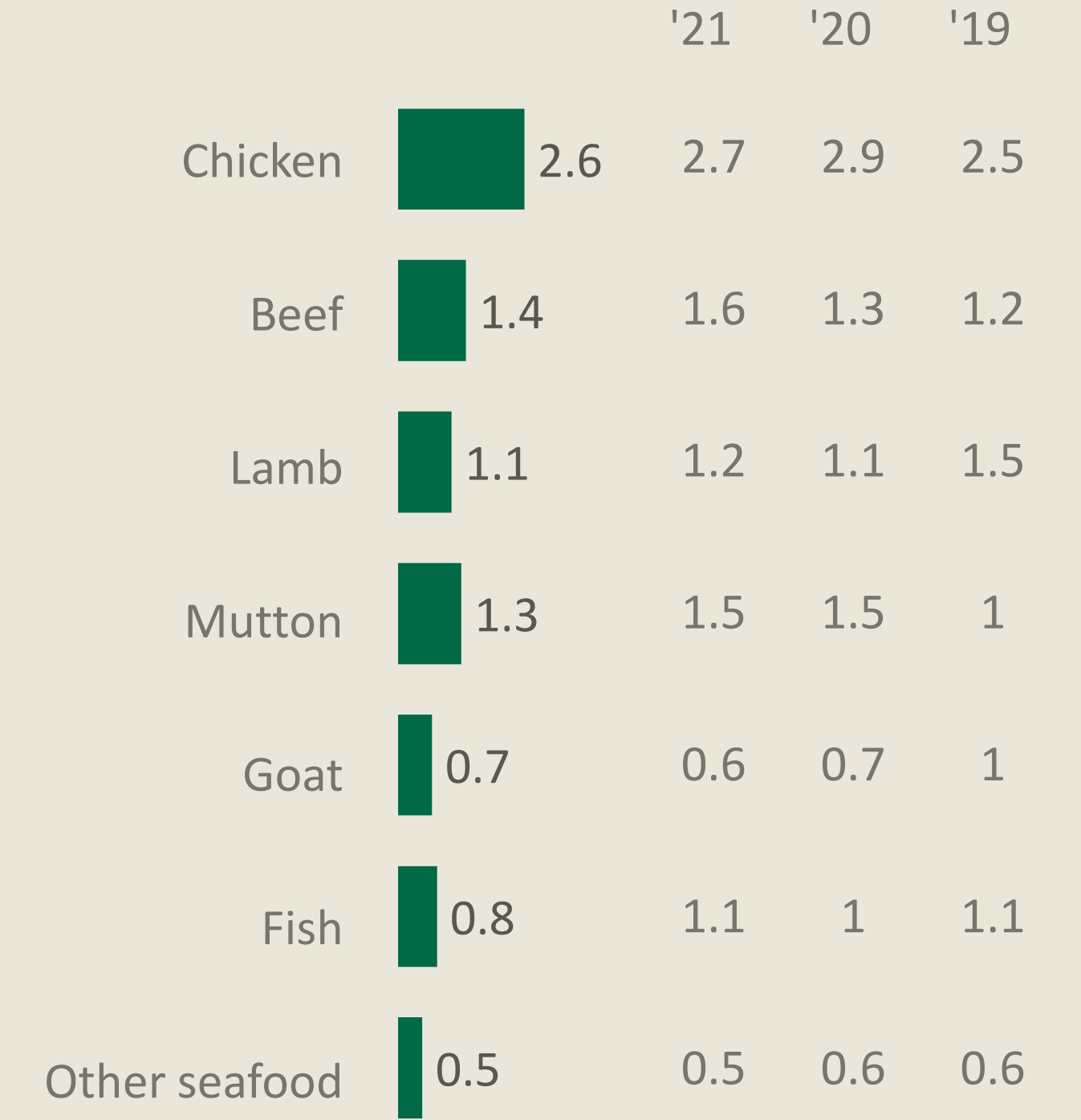
SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS



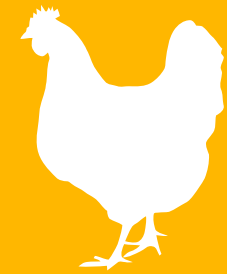
A reminder, we know that there are some consistent themes of what the proteins stand for across all of our markets. Beef is the Superior protein.



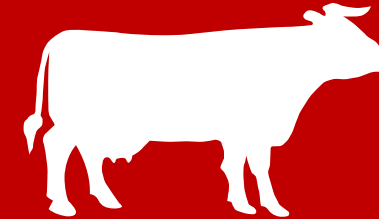
THE STAPLE



- 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)*



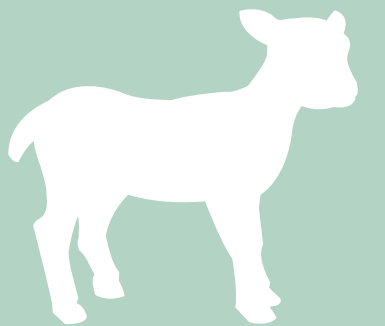
THE SUPERIOR



- 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 Superior*



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



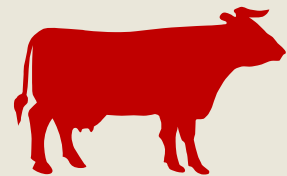
THE HEALTHY ALTERNATIVE

- 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*



In KSA, red meat is seen as well-cared for – with Sheepmeat playing the Superior role. It is fatty and expensive, but consumers are willing to pay more for Lamb which is tender. Chicken is ‘everyday’ and fish is healthy.

Well-cared for



Beef

Strengths

- Is well-cared for

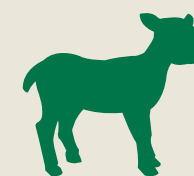
Weaknesses

- Not an essential part of a healthy diet for growing children (vs other meats)

What’s changed this year?

Softened on favourite
(stronger in UAE/Qatar)

Prime / Superior



Lamb

Strengths

- Is well-cared for
- **Tender**
- **Willing to pay more for**
- Fatty
- Expensive

More clearly defined
than in Qatar



Mutton

Strengths

- Is the **most superior** meat
- Is well-cared for
- Fatty
- Expensive

Seen as superior across
KSA, UAE and Qatar

Affordable, convenient



Chicken

Strengths

- Cheaper
- Easy and convenient to prepare and purchase

Weaknesses

- Not superior
- Not willing to pay more for
- Not nutritious
- Not well-cared for

What’s changed this year?

Improved weakness on favourite to neutral, improved easy to prepare

Low fat, nutritious, healthy



Fish

Strengths

- Nutritious
- Low fat
- Essential part of a healthy diet for growing children

Weaknesses

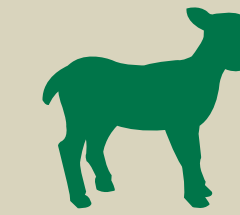
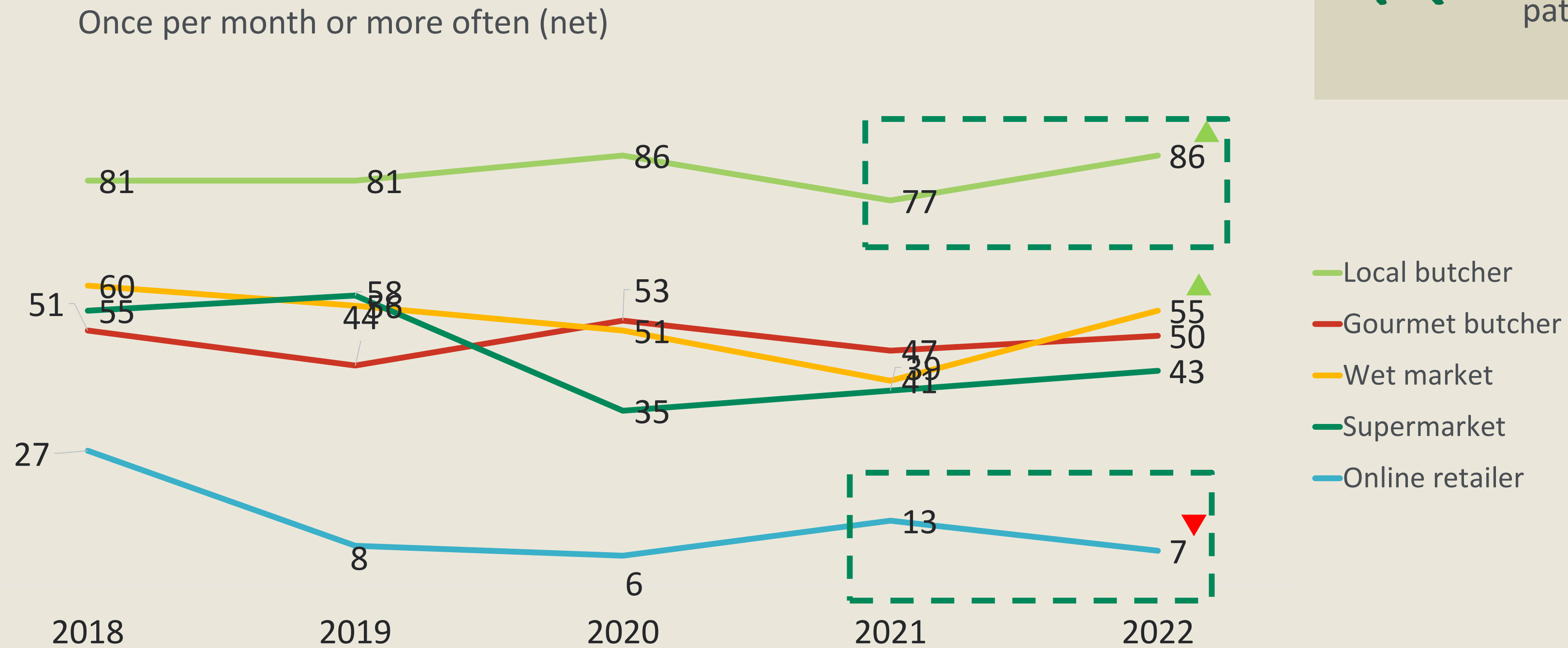
- Well-cared for
- Not willing to pay more for

Consistent for MENA

Monthly channel penetration for beef purchase has trend back to similar levels to 2020. Local Butcher remains the key channel for both beef and lamb purchase.

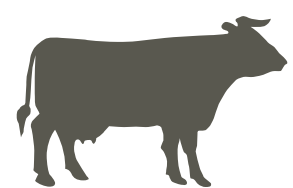


BEEF MONTHLY PLACES OF PURCHASE



Lamb monthly places of purchase follow similar pattern and sizes as beef.

BEEF COO, BRAND HEALTH & PERCEPTIONS

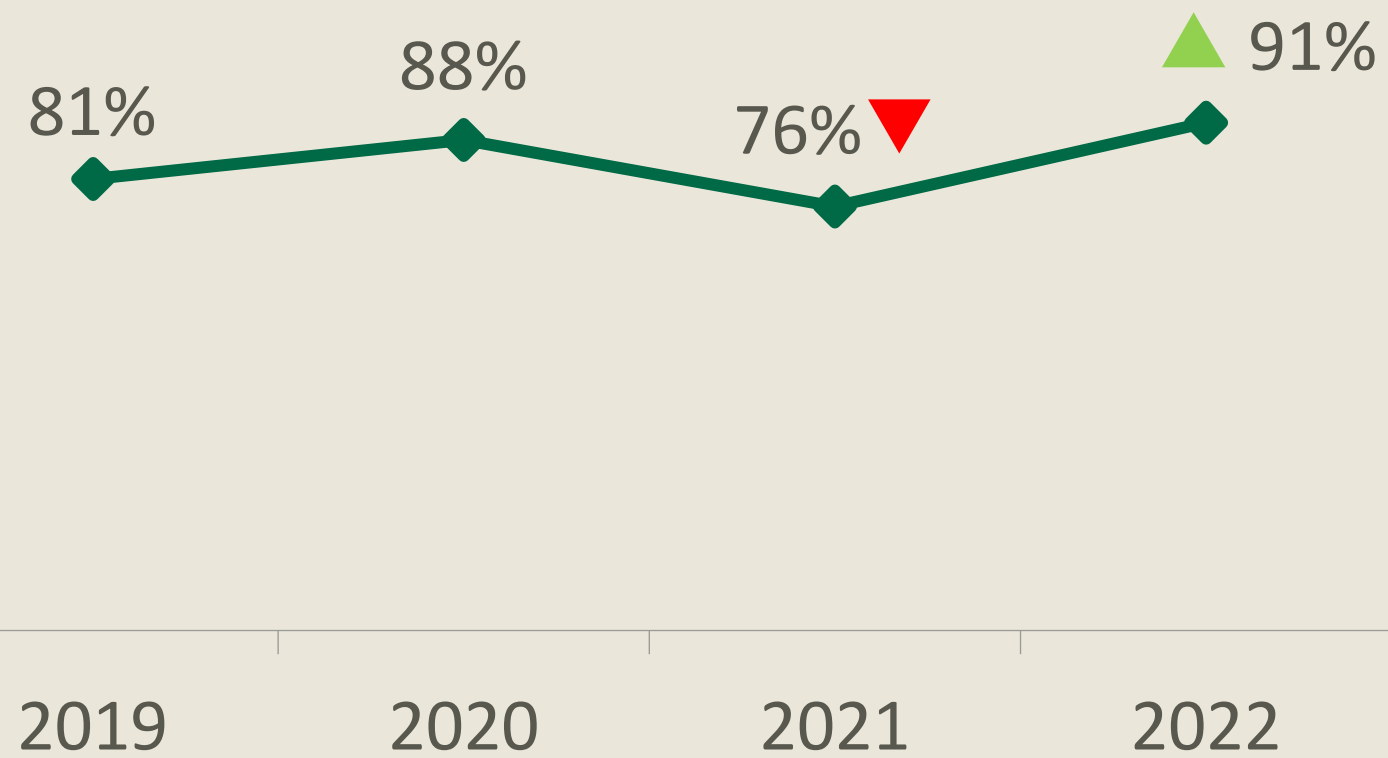


All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.

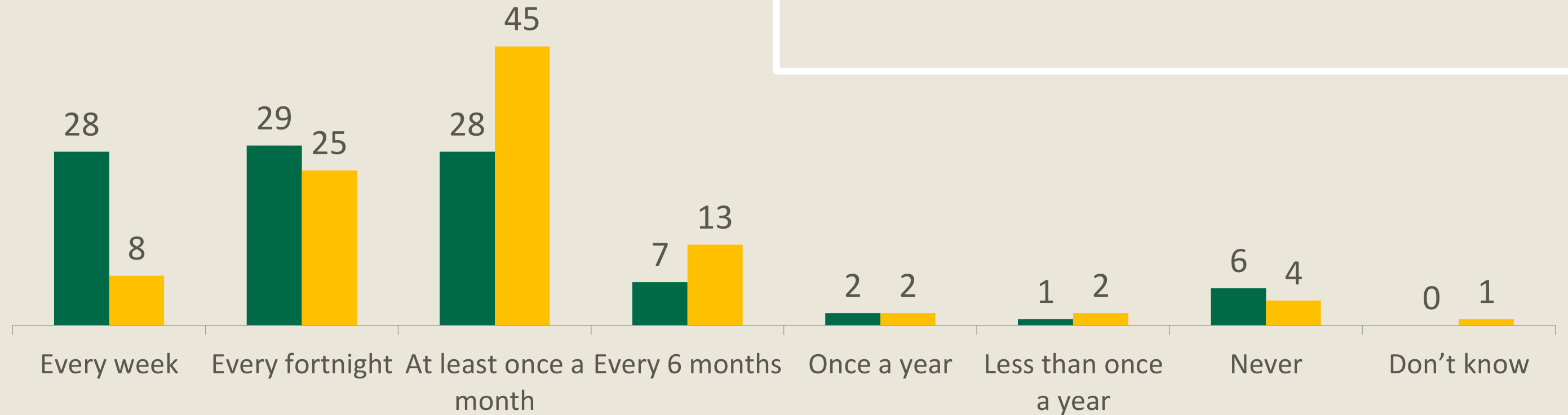
A slight increase in the claimed monthly purchase of local beef, while claimed monthly purchase of imports remains stable year to year.



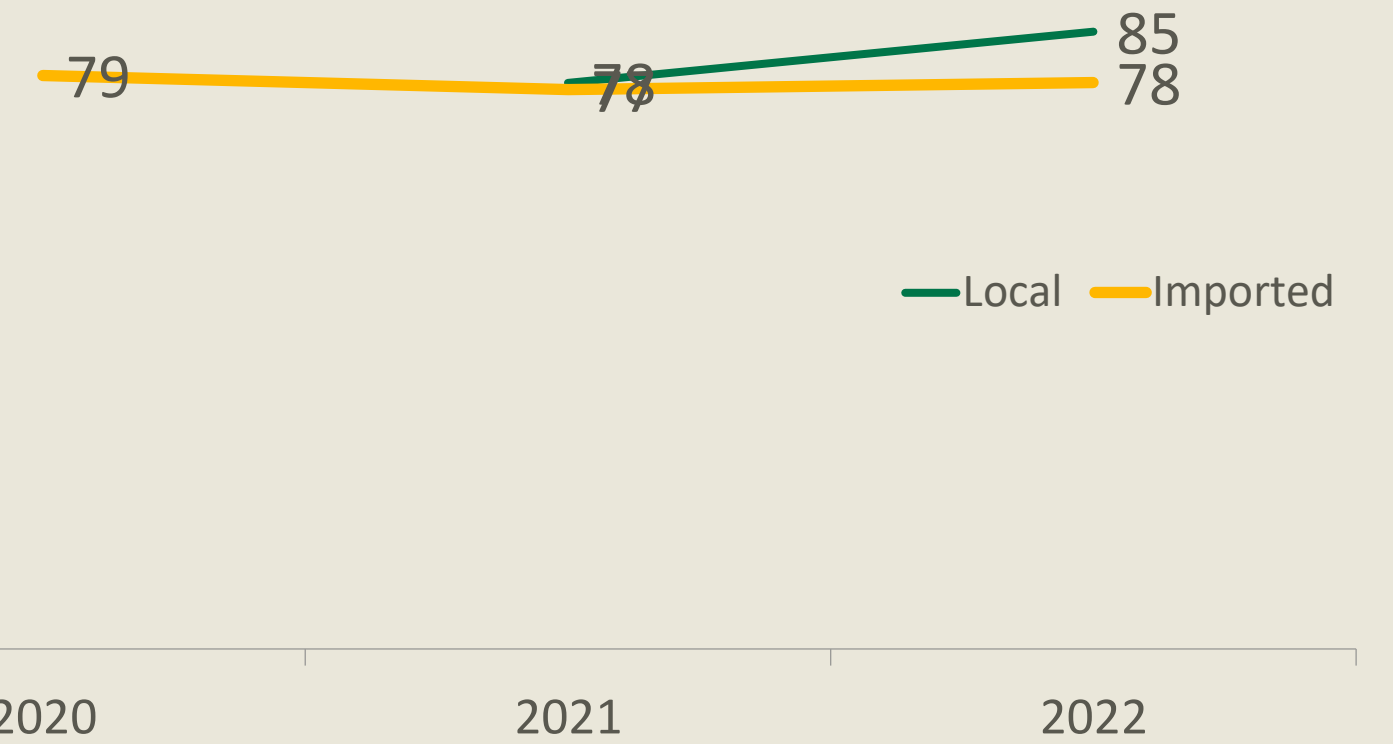
Know Country of Origin?



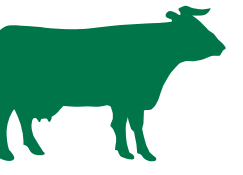
FREQUENCY OF BUYING LOCAL AND IMPORTED BEEF



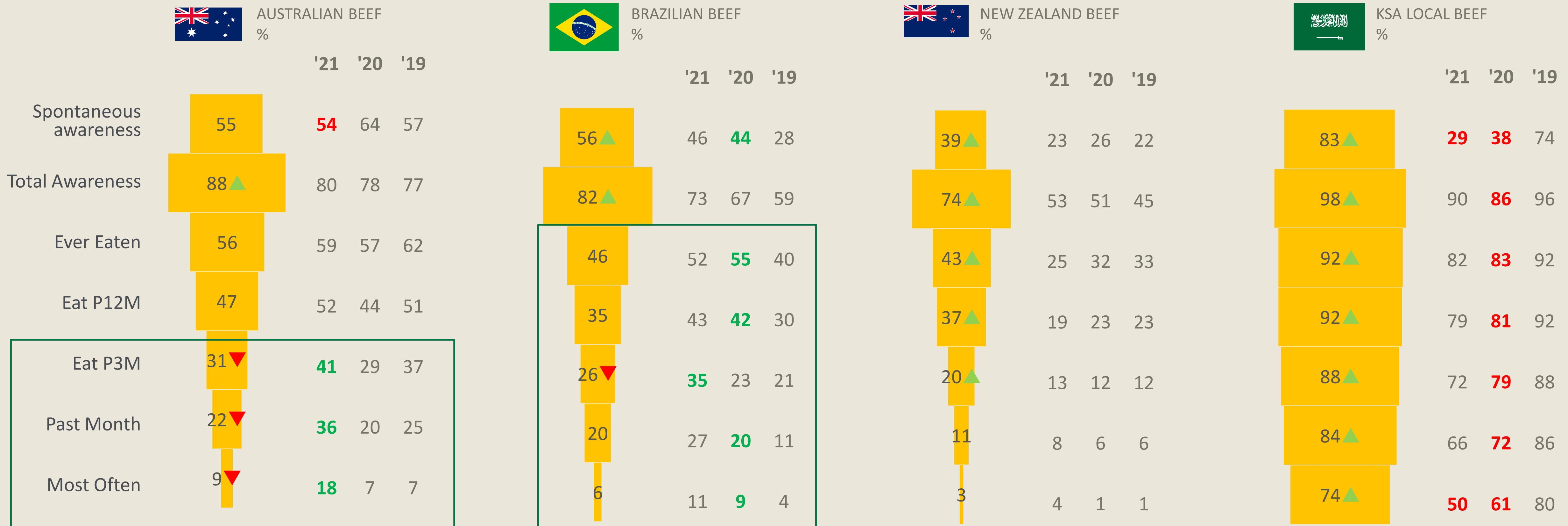
Monthly purchase (trended)



Local beef appears to have grown significantly this year, from awareness to preference. In contrast, AU and Brazil sees a dip at the lower funnel. NZ beef sees some uplift in awareness and usage.



BRAND HEALTH – BEEF



For the largest imported players, AU and Brazil, the downturns in claimed consumption appear to have come from Jeddah and Dammam, while Riyadh has grown. Is this reflective of the supply over the last 6 months?



BRAND HEALTH – BEEF Change 2021 vs 2022



Australian Beef



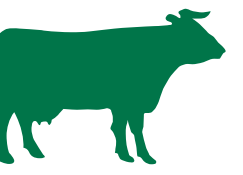
Brazilian Beef

	Riyadh	Jeddah	Dammam
Spontaneous awareness	24%	12%	-48%
Total Awareness	9%	3%	16%
Ever Eaten	14%	7%	-50%
Eat P12M	15%	-6%	-39%
Eat P3M	16%	-15%	-42%
Past Month	7%	-15%	-40%
Most Often	-3%	-4%	-23%

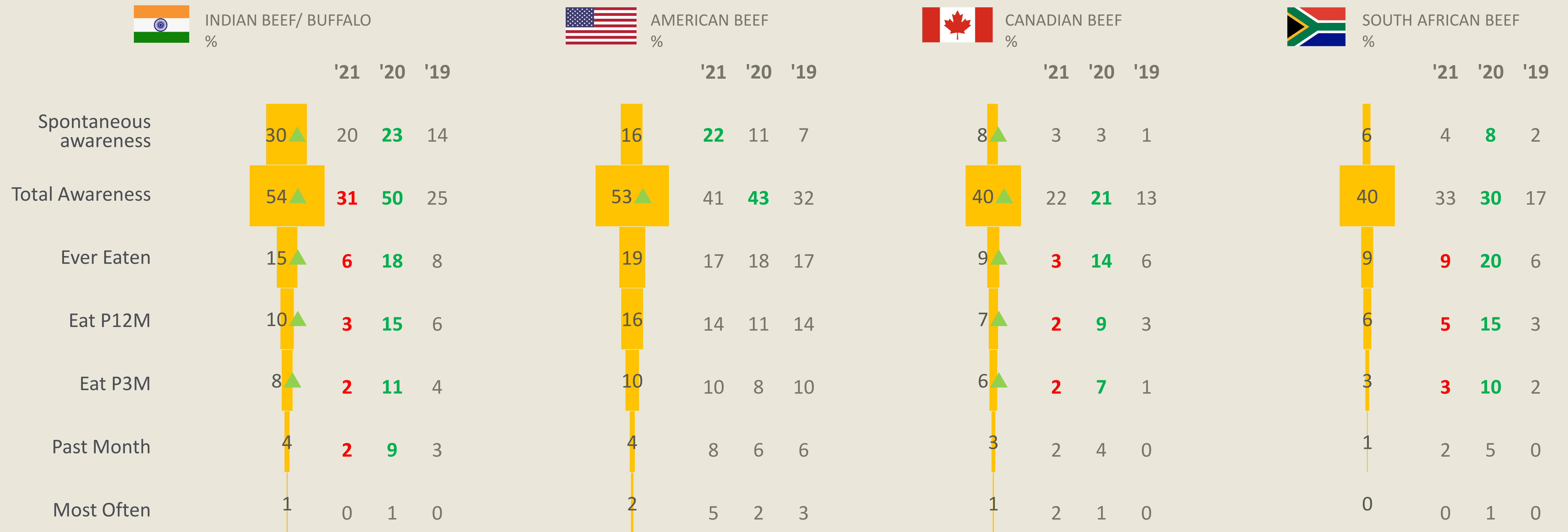
	Riyadh	Jeddah	Dammam
Spontaneous awareness	18%	0%	20%
Total Awareness	17%	-5%	27%
Ever Eaten	15%	-4%	-37%
Eat P12M	21%	-17%	-34%
Eat P3M	14%	-11%	-36%
Past Month	10%	-7%	-26%
Most Often	3%	-8%	-11%

* R – Riyadh, J – Jeddah, D - Dammam

Smaller COO's have mostly recovered in the top funnel metrics, with Canadian and Indian beef recovering all the way down to P3M consumption.



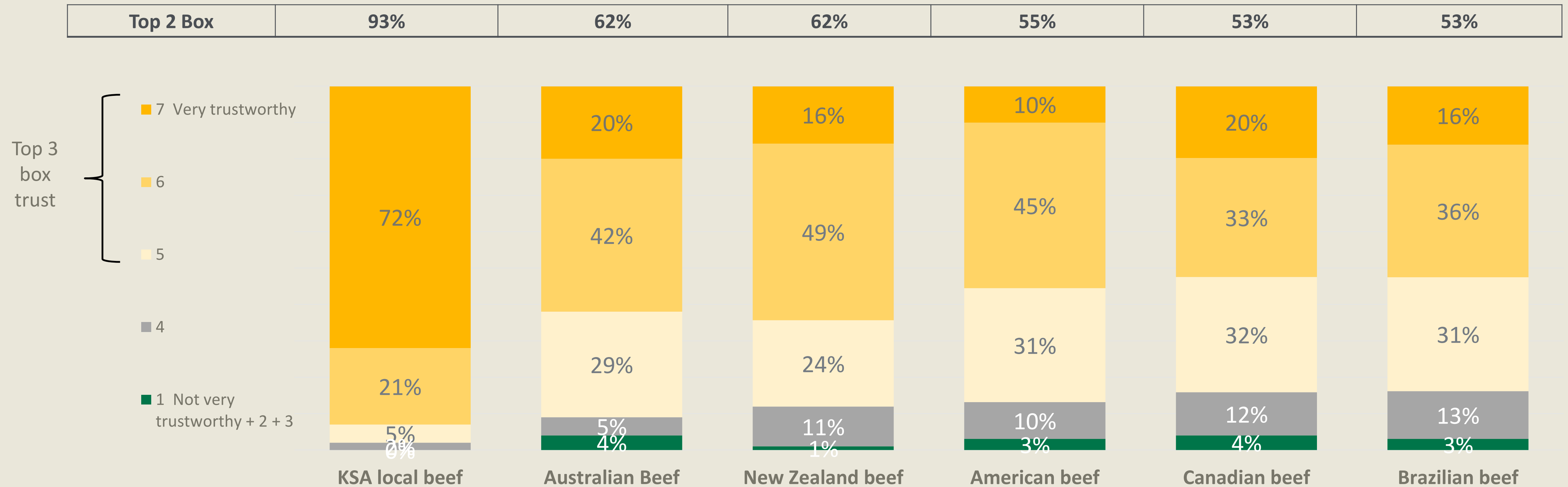
BRAND HEALTH – BEEF



There continues to be a gap in Trust between Local and imported COO. Australian beef is most trusted, in line with NZ. American, Canadian and Brazilian cluster slightly behind AU/NZ.



Trustworthy – COO Beef



We are the most trusted imported product, and have established awareness, but have lost some ground this year. So what do we need to do to grow?

There are two paths to brand growth.

By increasing the likelihood
that a consumer will buy a brand

We call this Brand
Power

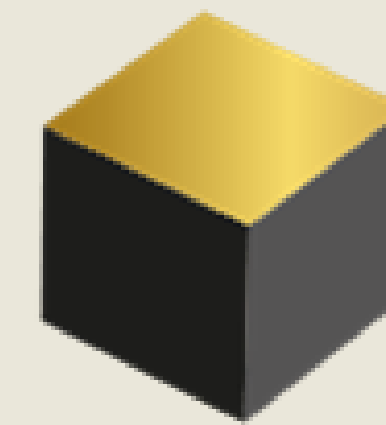


Power

High Power brands capture **5x higher** volume share

By increasing the likelihood
consumers will pay more for a brand

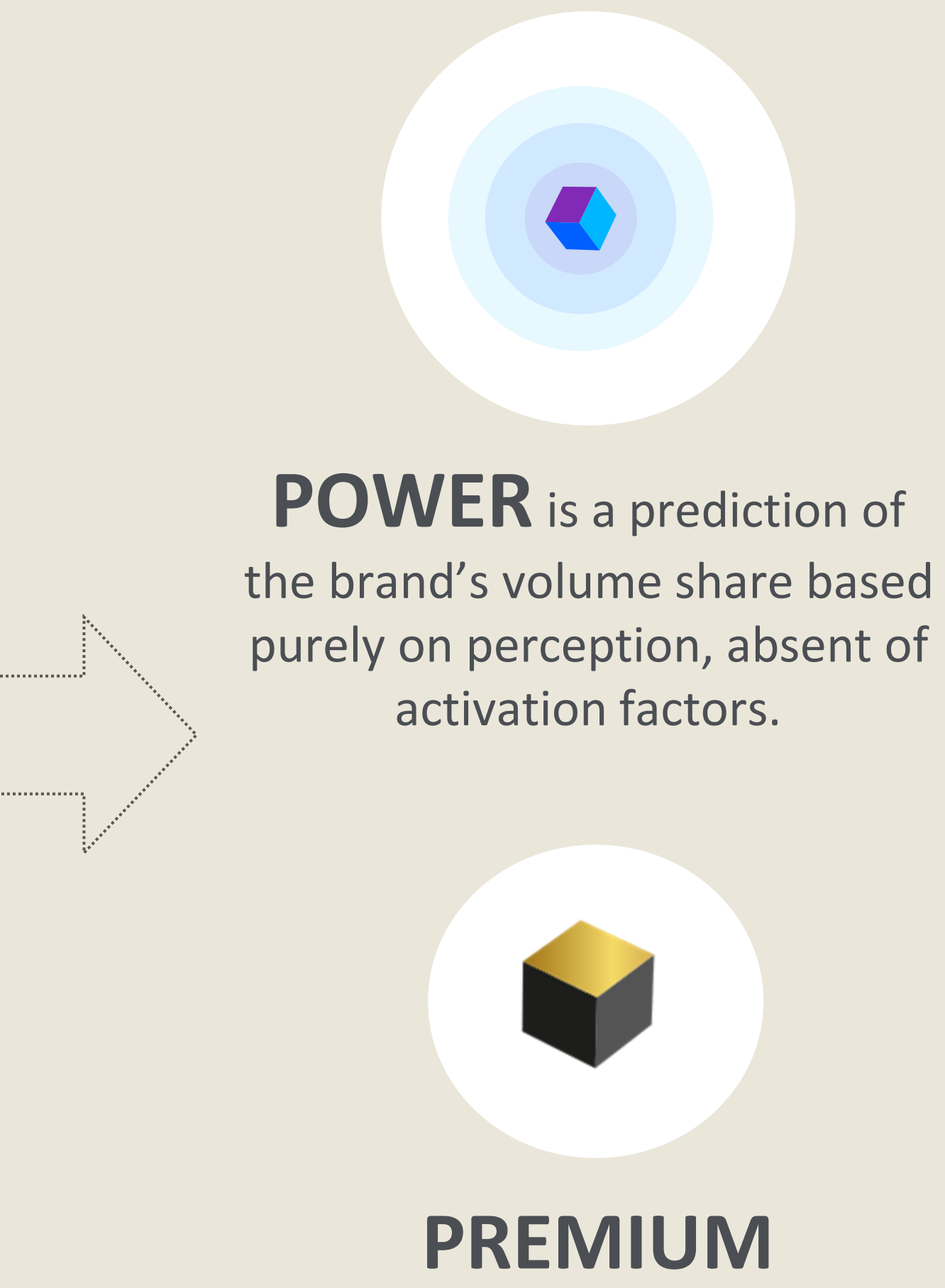
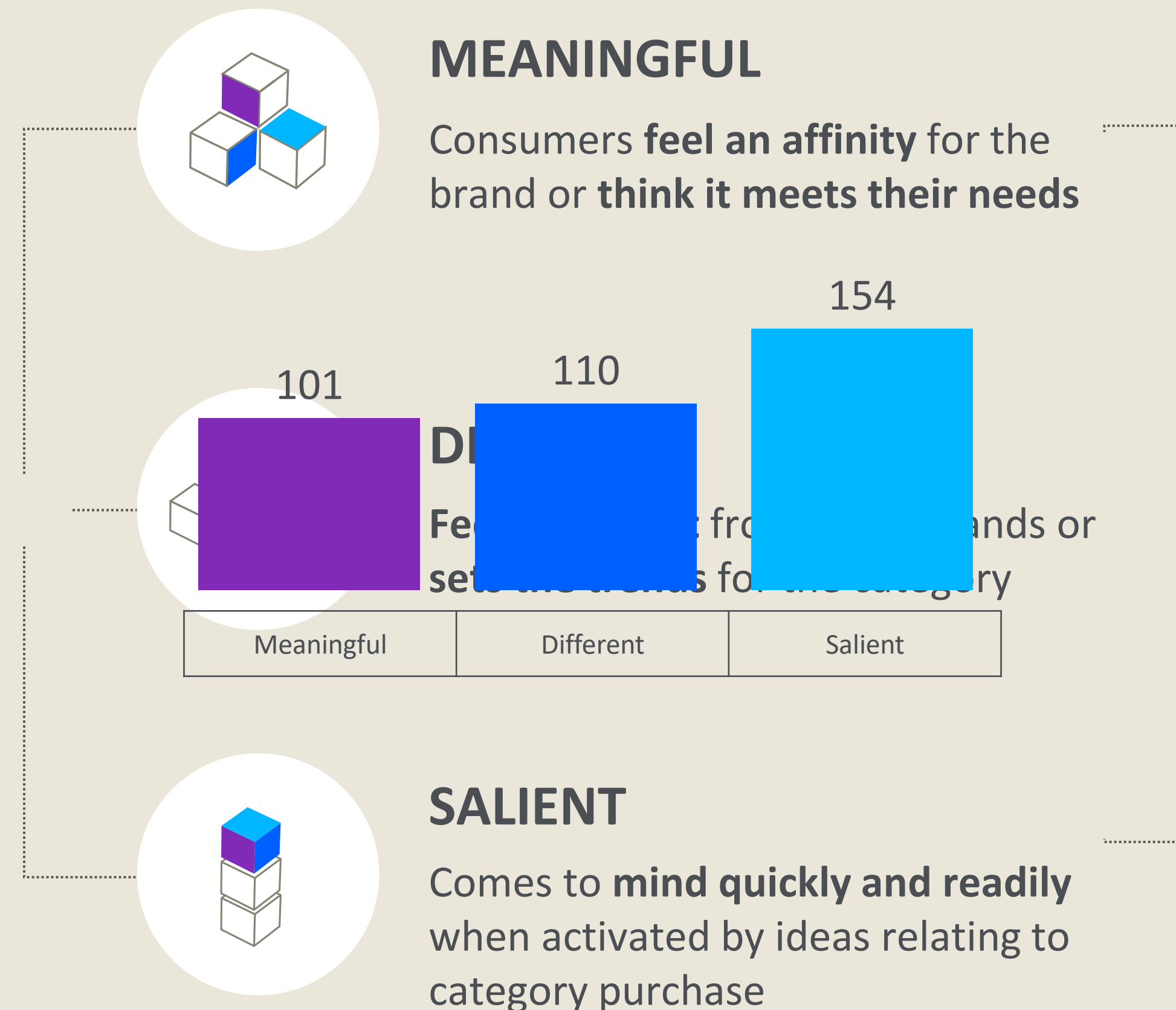
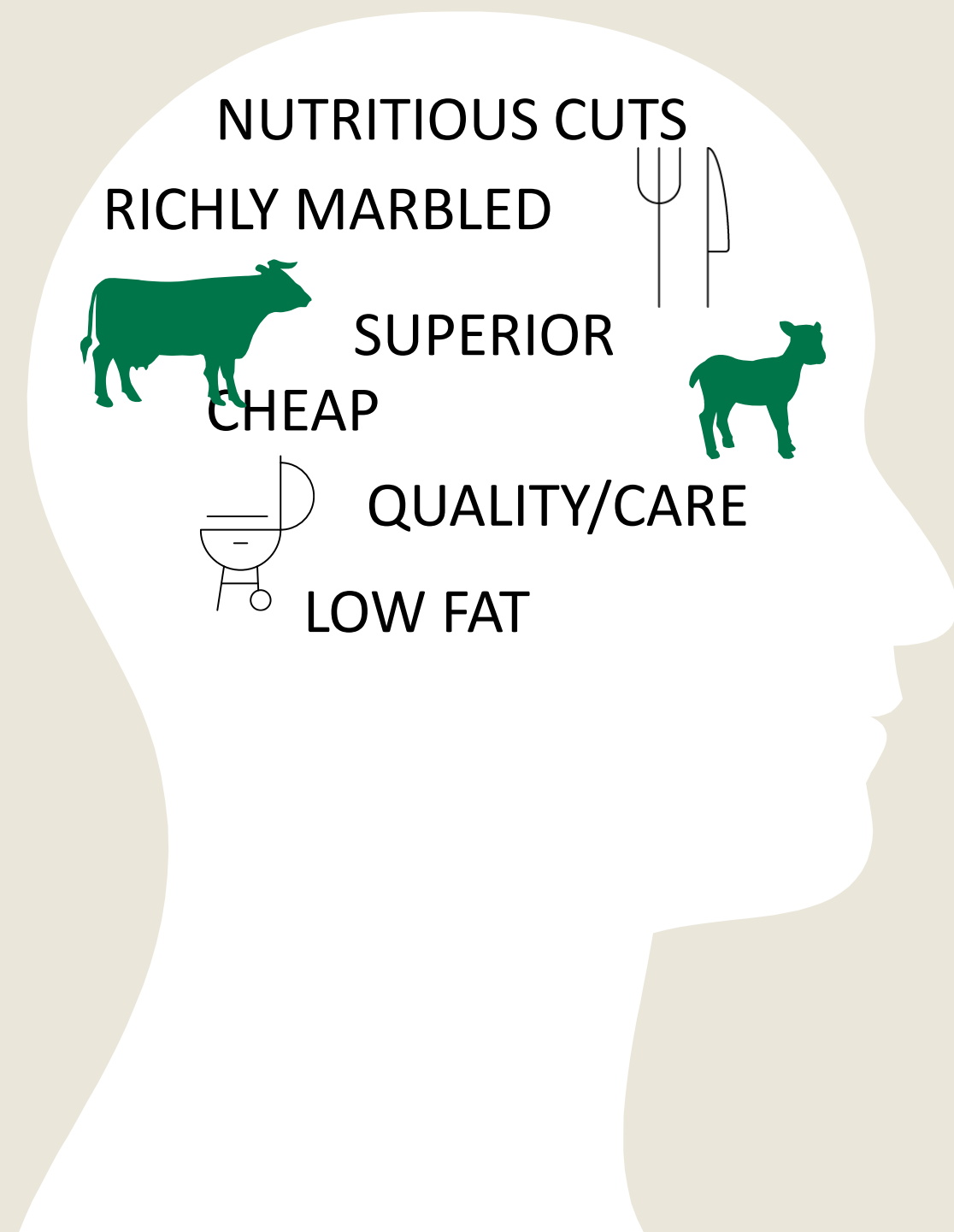
We call this Brand
Premium



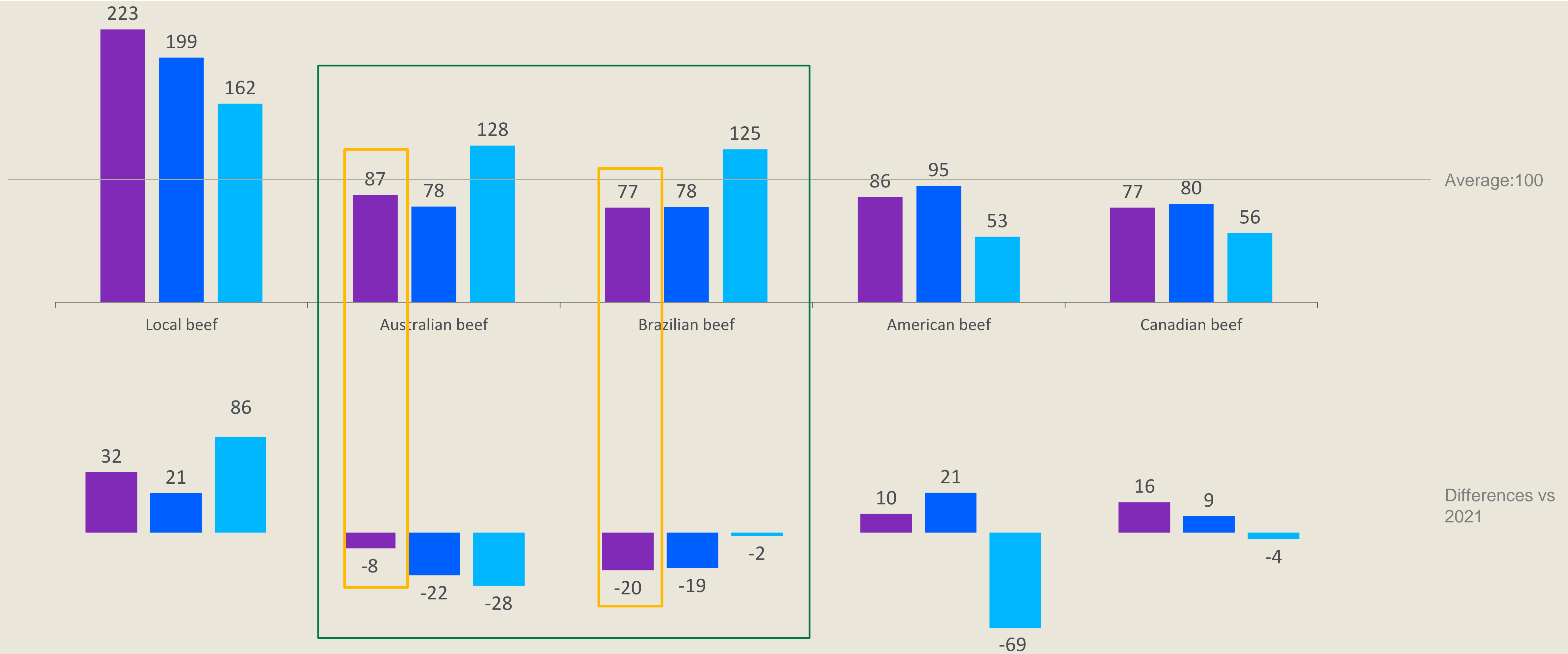
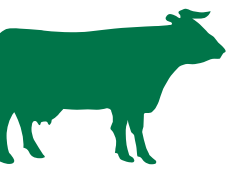
Premium

High Premium brands can charge **25% more** than brands
with a low premium score

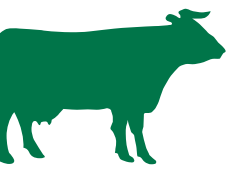
The elements of a successful brand or ensuring you are relevant, build an emotional connection, are differentiated from the crowd and mentally available when it matters.



Australian & Brazilian beef have very similar profiles, high on Salience (coming to mind readily) but continue to be lower on relevance and differentiation and which appear to have weakened this year.

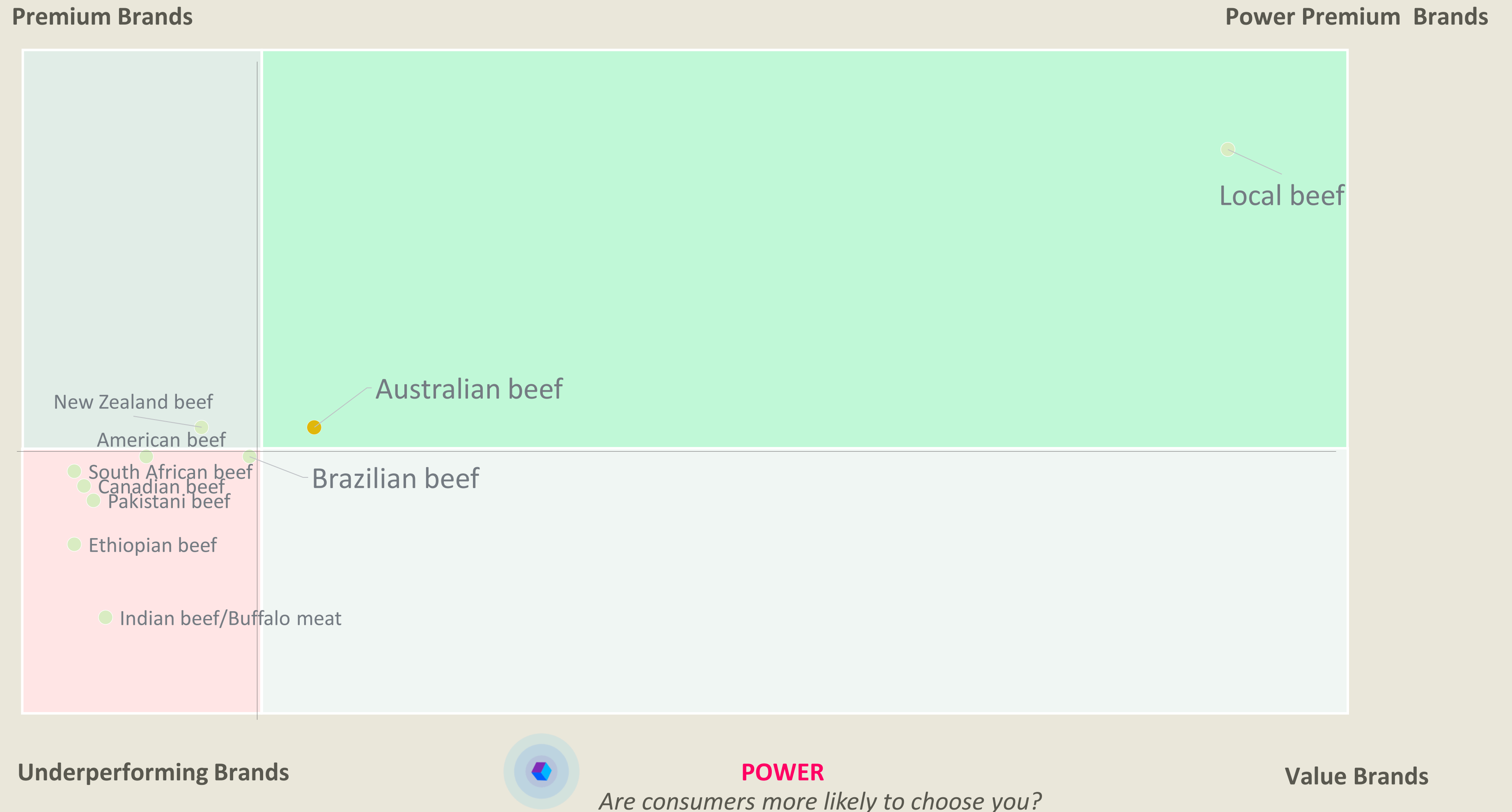


Local beef pulls out even further ahead of the pack, with most COOs having comparatively low power/premium. AU beef is the only COO that is with Local beef but still has to work hard to compete.



PREMIUM/VALUE

Are they willing to pay more for you?



POWER

Are consumers more likely to choose you?

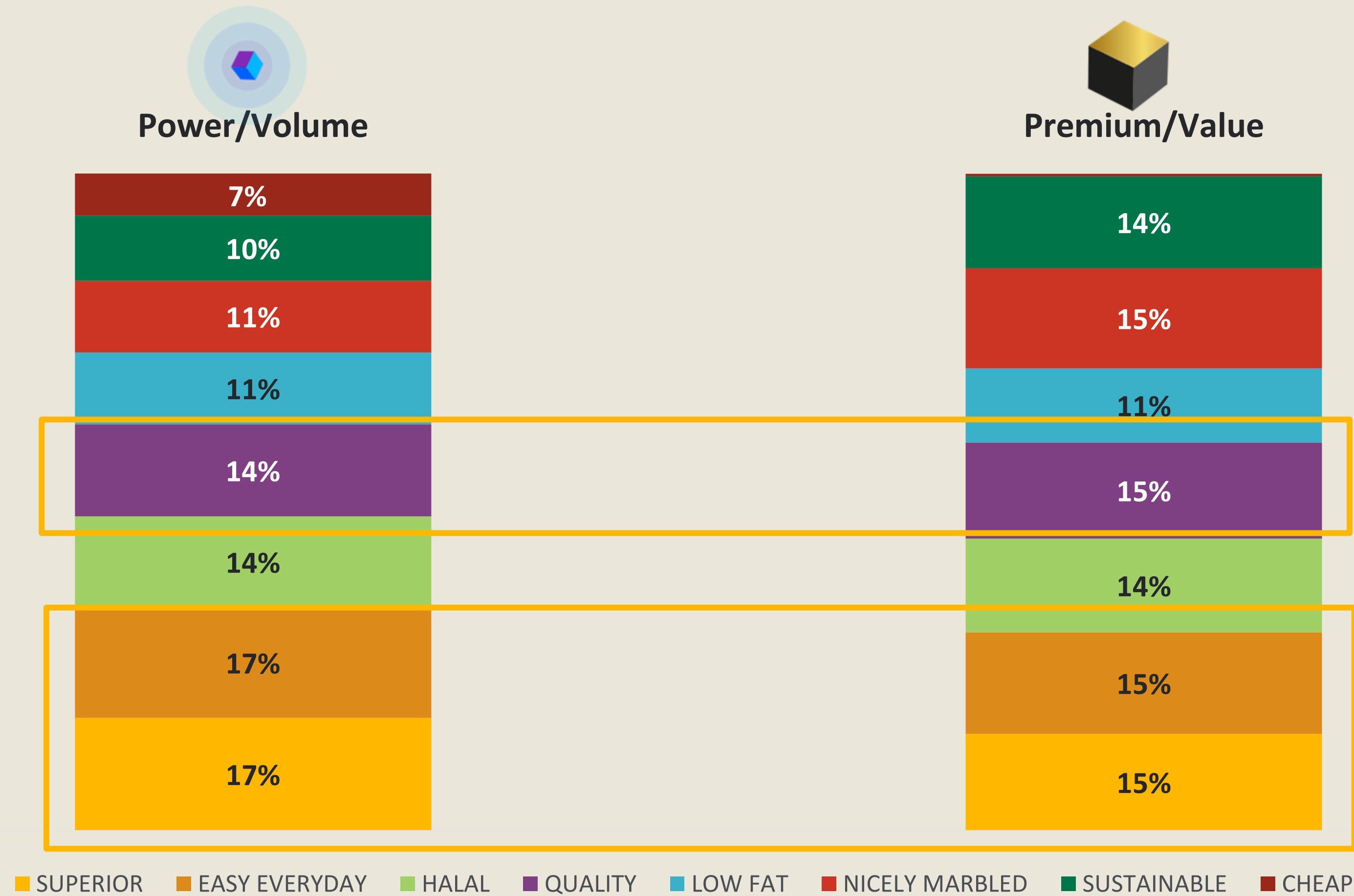
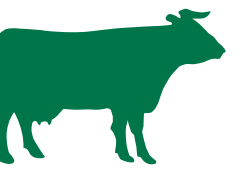
MENA markets show an interesting idiosyncrasy in red-meat brand choice that we rarely see elsewhere...

The attributes that compel a MENA consumer to buy more of a brand, are the same things that make them want to pay more for a brand.

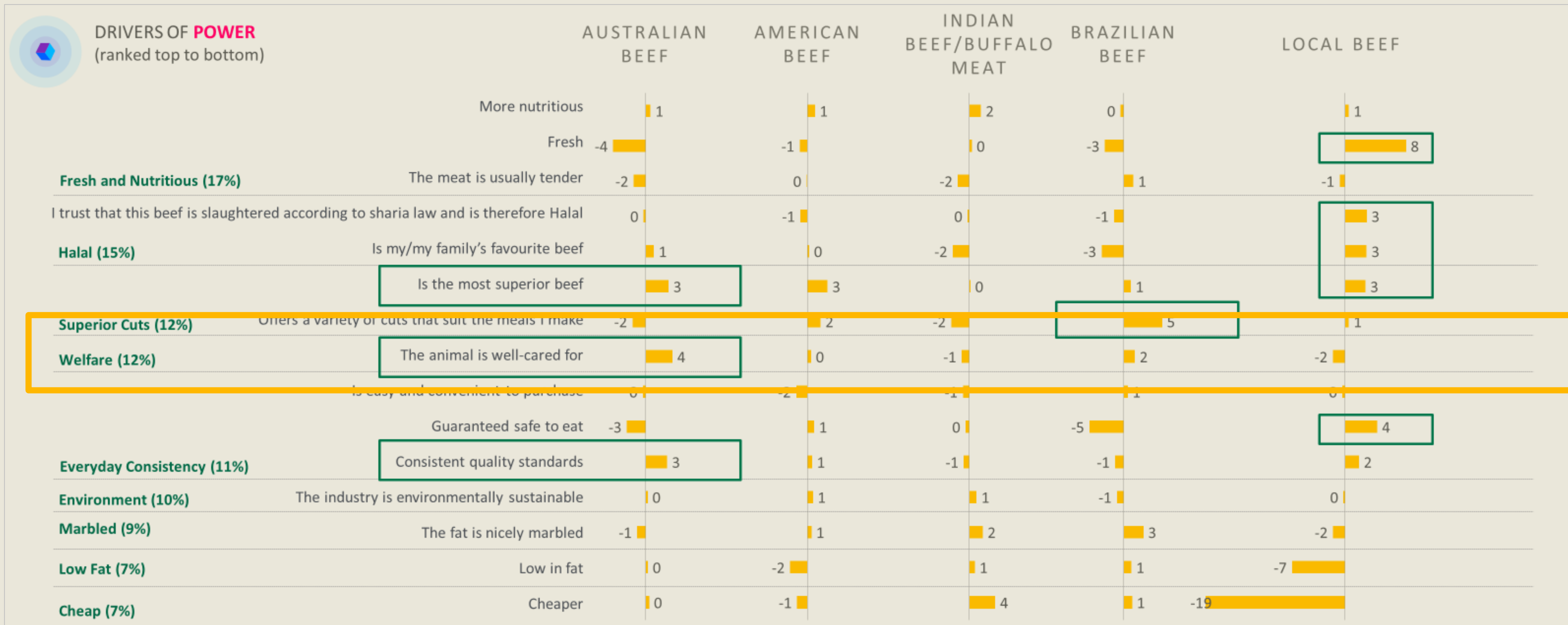
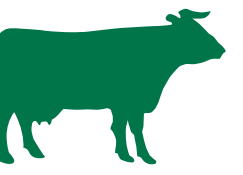
This means that the features of red meat that people evaluate in choosing *what* to buy have the same impact on *volume* as they do on *value*.



Superior product, consistent quality, convenience and Halal are the key drivers of Power and Premium within the category

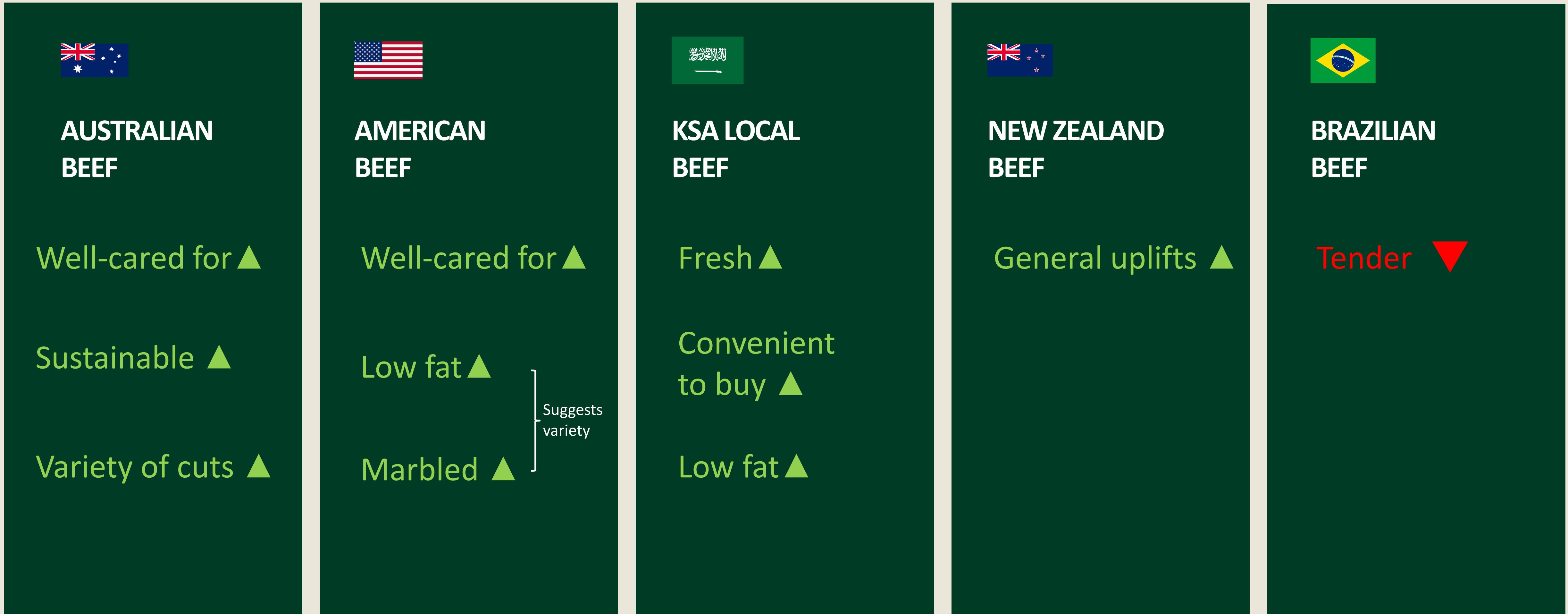
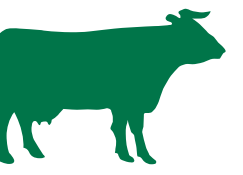


During the 2021 presentation we discussed the opportunities for a clearer, ownable positioning. Talking to the welfare and care taken in the process was not owned and felt like an opportunity.

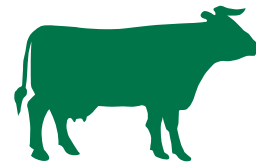


Have we undertaken activity to drive that this year?

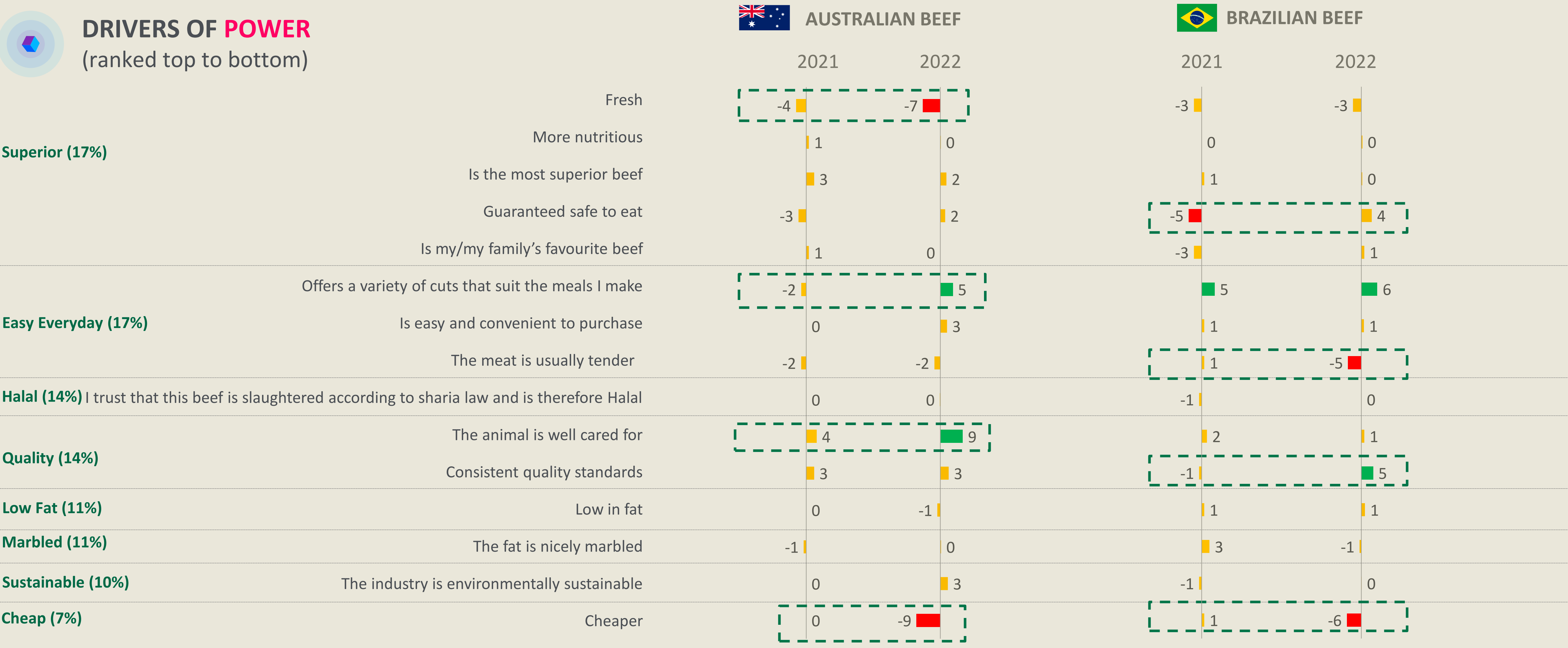
In this dynamic import environment, we have seen a number of shifts in perceptions versus 2021. These impact how consumers see the role of each beef.



Compared with last year both Australian and Brazilian beef have become more defined, with Australian now seen as well cared for (in keeping with other consumer qual) as well as sharing versatile cuts with Brazilian. Consistent quality is stable.

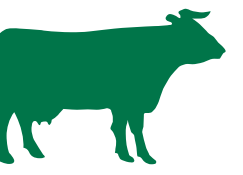


DRIVERS OF POWER (ranked top to bottom)




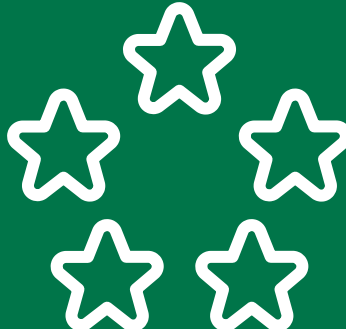
BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=251). 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.

Scope to establish AU Beef on some of the key drivers to grow its Volume and Value, in particular our safety and consistent quality.



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


Associations for AU to communicate

 1. Guaranteed safe to eat	 2. Consistent quality standards
Implicit	More explicit



3. Beef is slaughtered according to sharia

Difficult to achieve when competing vs. a local product



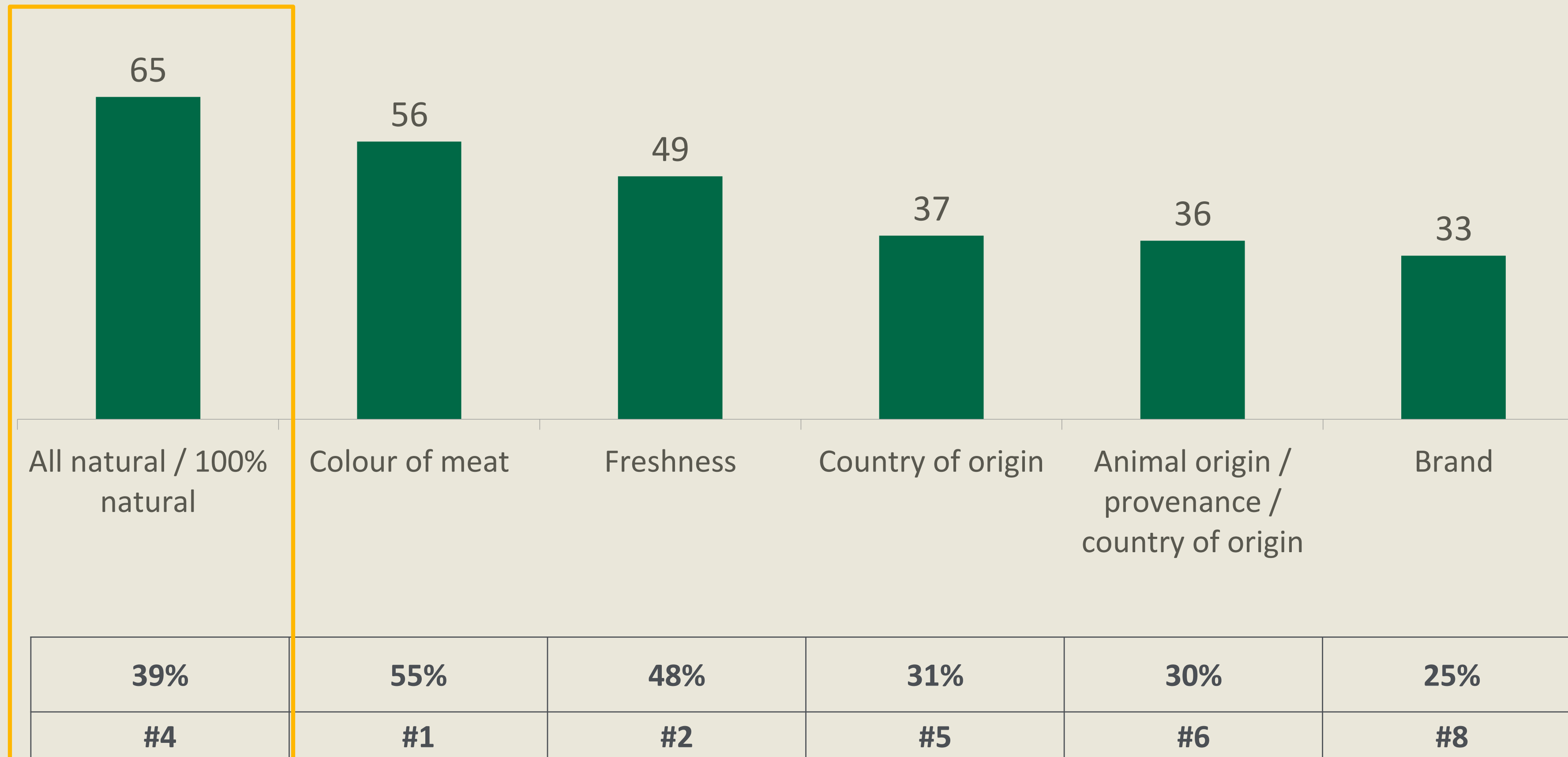
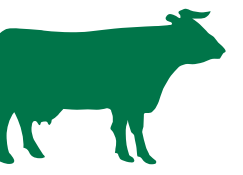
4. Is easy and convenient to purchase



5. Fresh

Difficult to achieve when competing vs. a local product

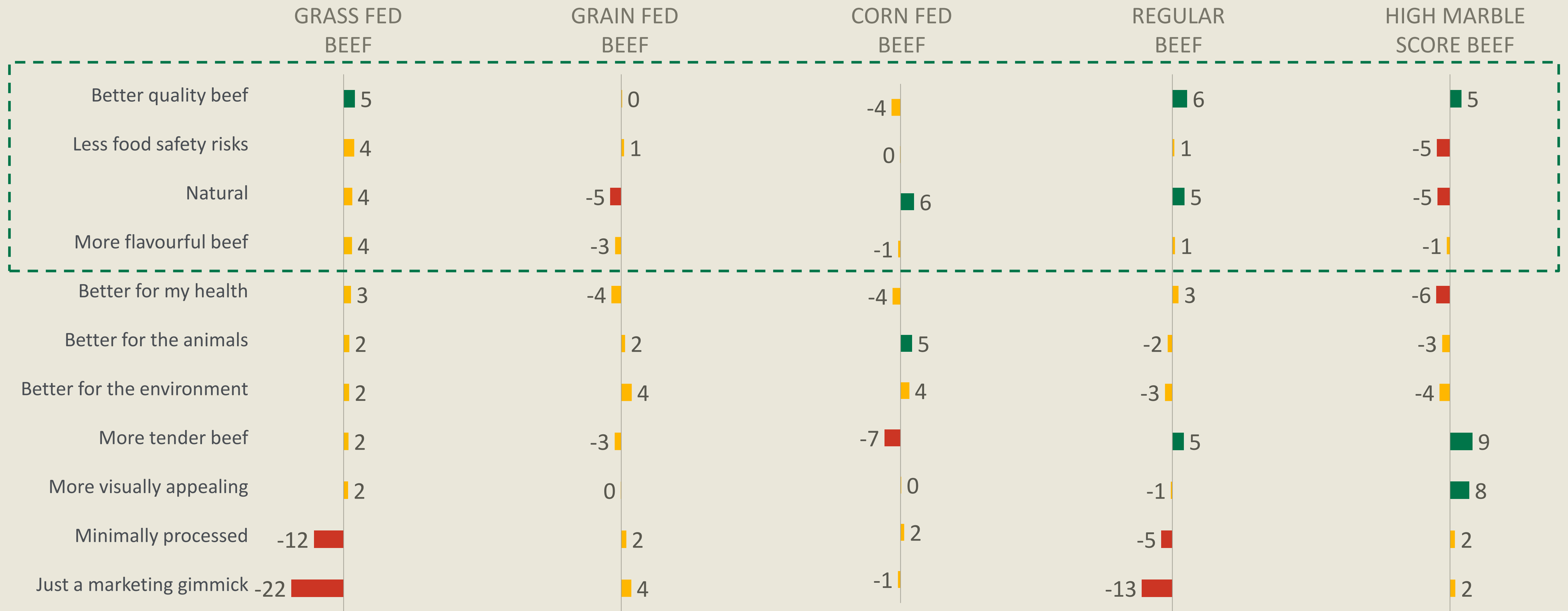
Messaging around naturalness is the most important 'on pack' cue sought out by KSA consumers when purchasing red-meat. This is well-ahead of other markets where meat colour is #1.



Global average
2022

Ranking

And Grass fed is a potential route to communicating not just Naturalness but the other key assets of safer, better quality and flavour.



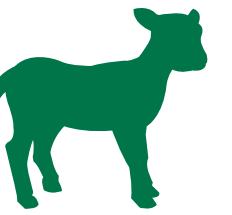
LAMB

BRAND HEALTH & PERCEPTIONS

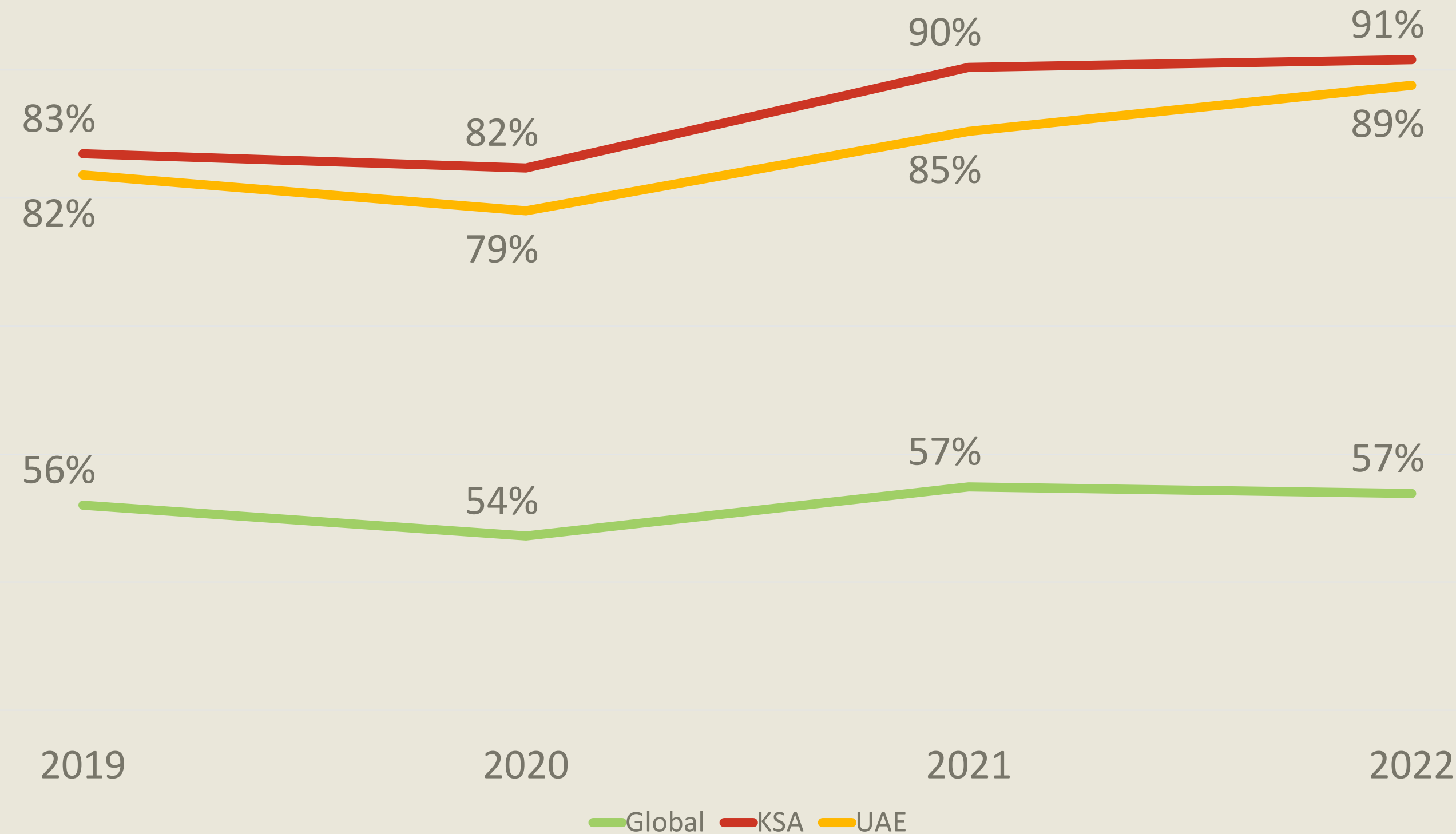


All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.

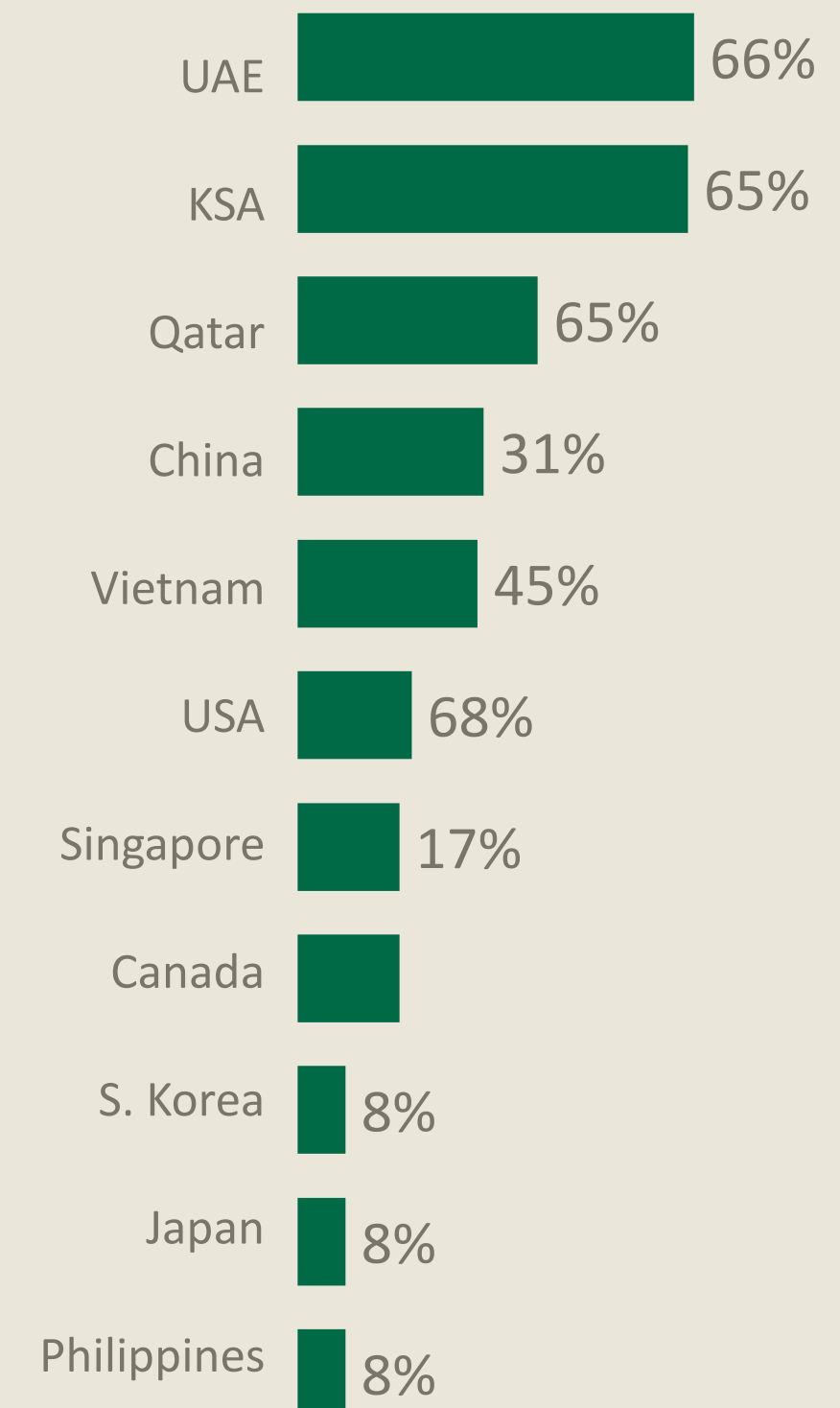
MENA continues to grow it's already high penetration of lamb, now only 1 in 10 imported red meat consumers have never bought lamb in KSA.



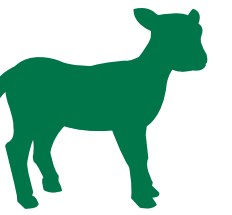
EVER BOUGHT LAMB



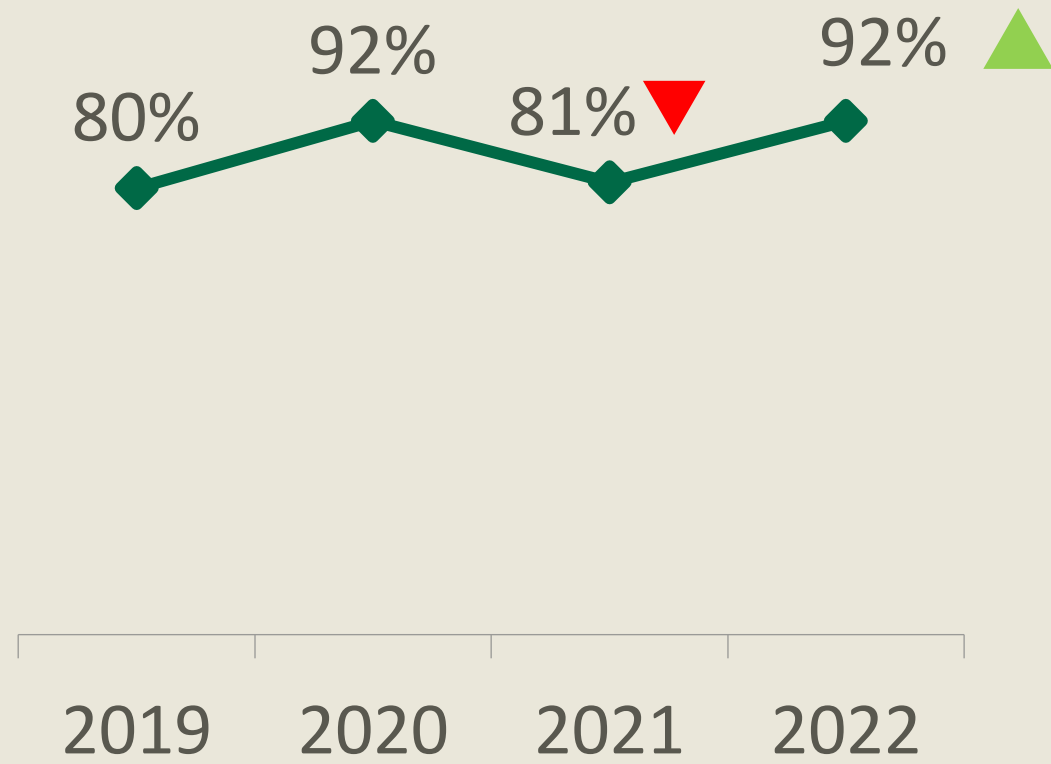
BOUGHT LAMB IN LAST MONTH



As with beef, weekly purchase of lamb also sees a significant increase in 2022 – driven by Locally slaughtered lamb.



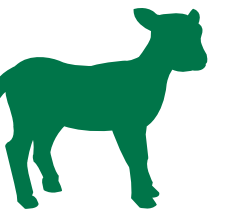
Know Country of Origin?



FREQUENCY OF BUYING
KEY: **SLAUGHTERED LOCALLY** AND **IMPORTED LAMB**

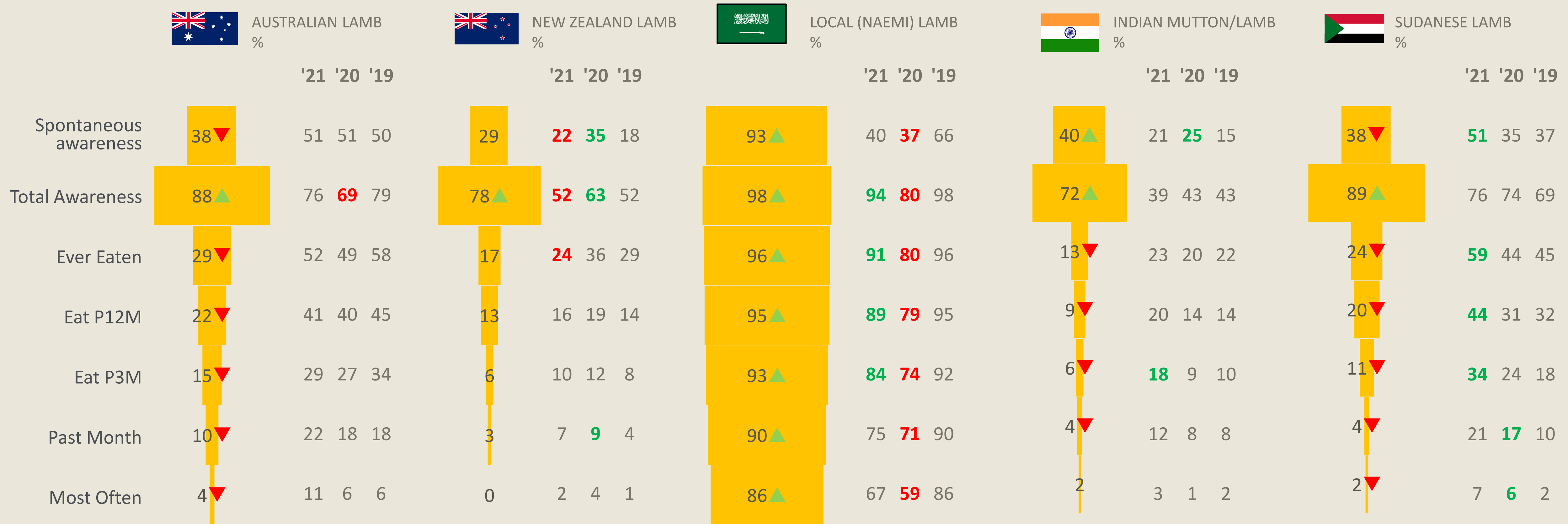


And similar to beef, local lamb continues to grow and dominates the category; while AU, Indian and Sudanese lamb drop to lowest levels of consumption – is this driven by supply chain issue?

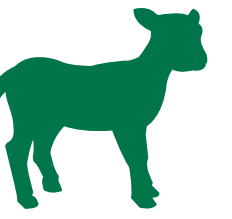


BRAND HEALTH – LAMB

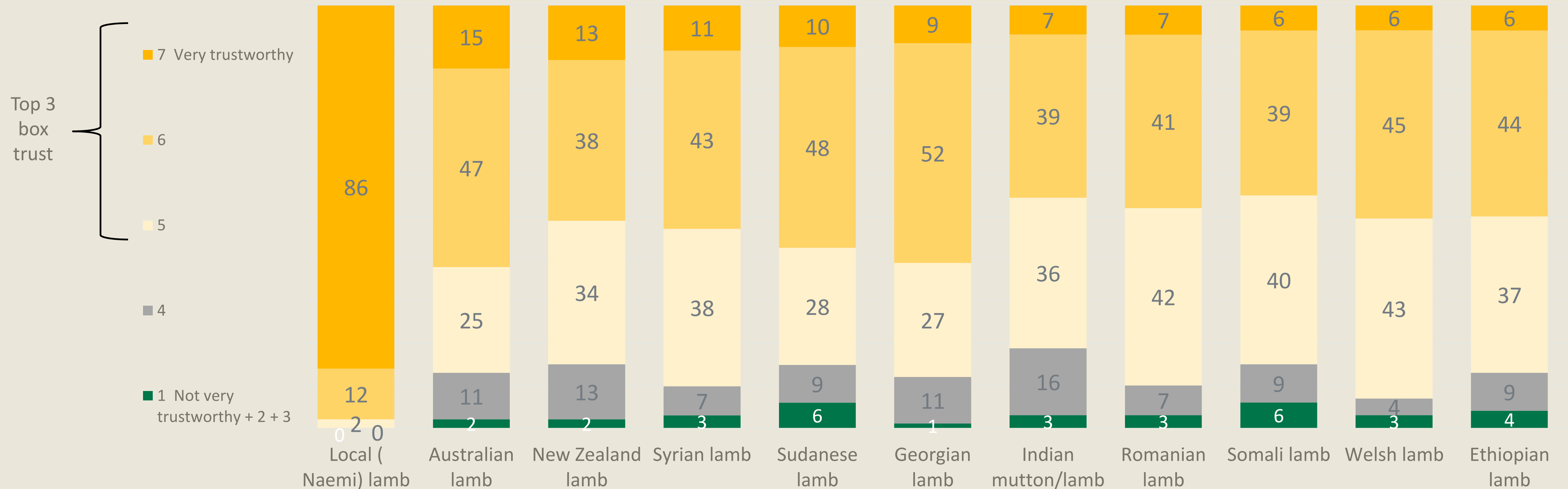
Despite a burst of Russian Lamb in the market, Russia does not come to mind readily as a Lamb COO



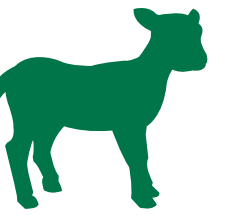
While Australian remains the most trusted imported lamb, it is well behind Local lamb and largely similar to other COOs.



Trustworthy – COO Lamb



Given its dominant presence, Local lamb pulls further away from other COO's; AU & Sudanese Lamb weaken vs. 2021 and seen to be underperforming as the other COOs.

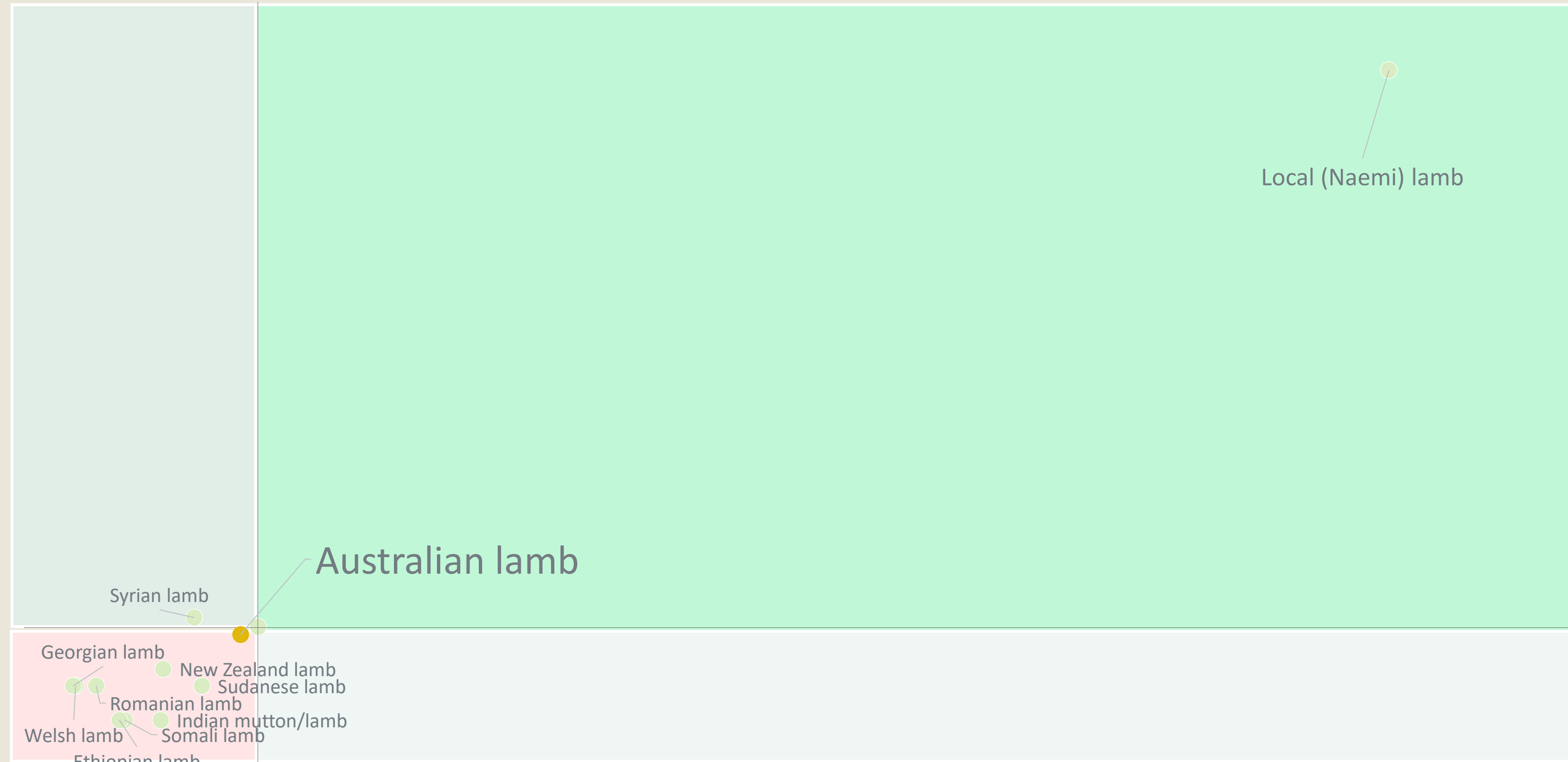


PREMIUM/VALUE

Are they willing to pay more for you?

Premium Brands

Power Premium Brands



Underperforming Brands

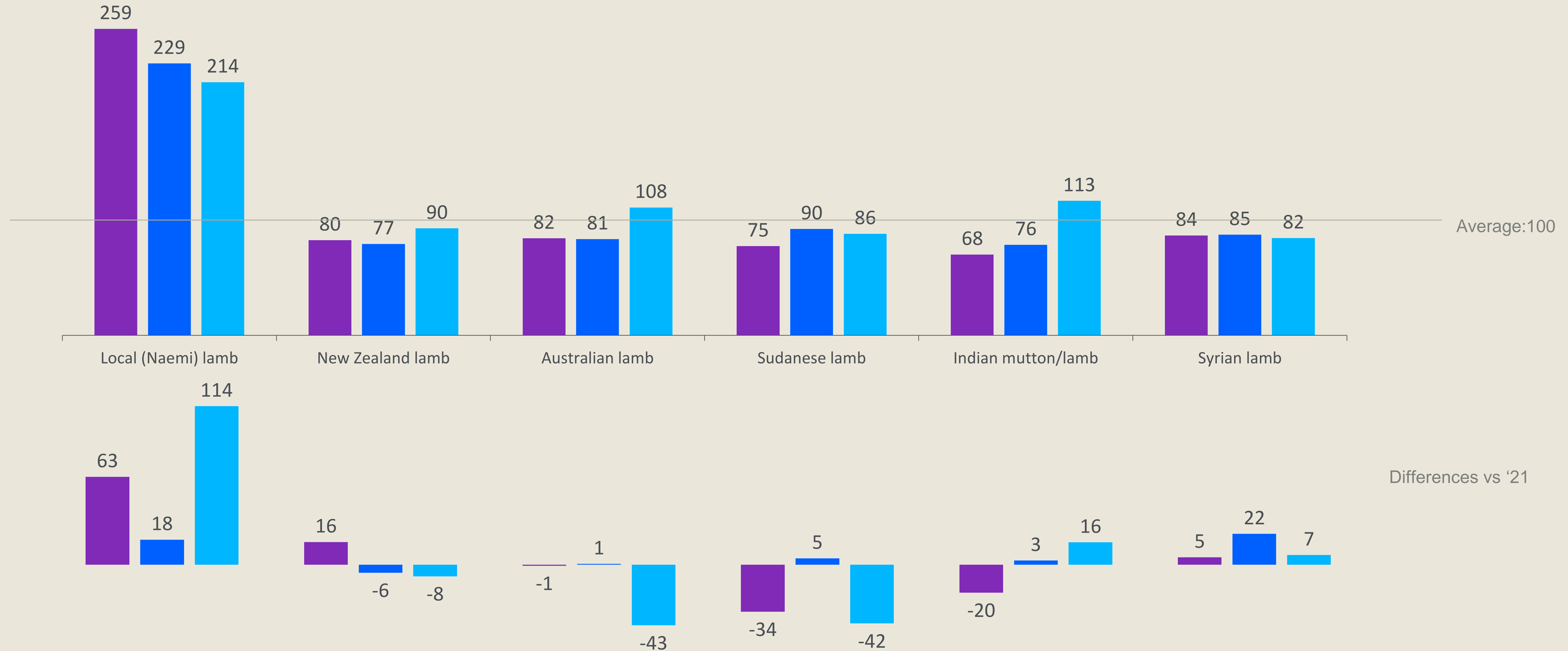
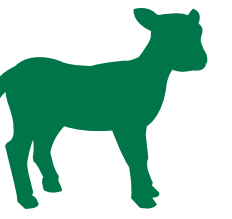


POWER

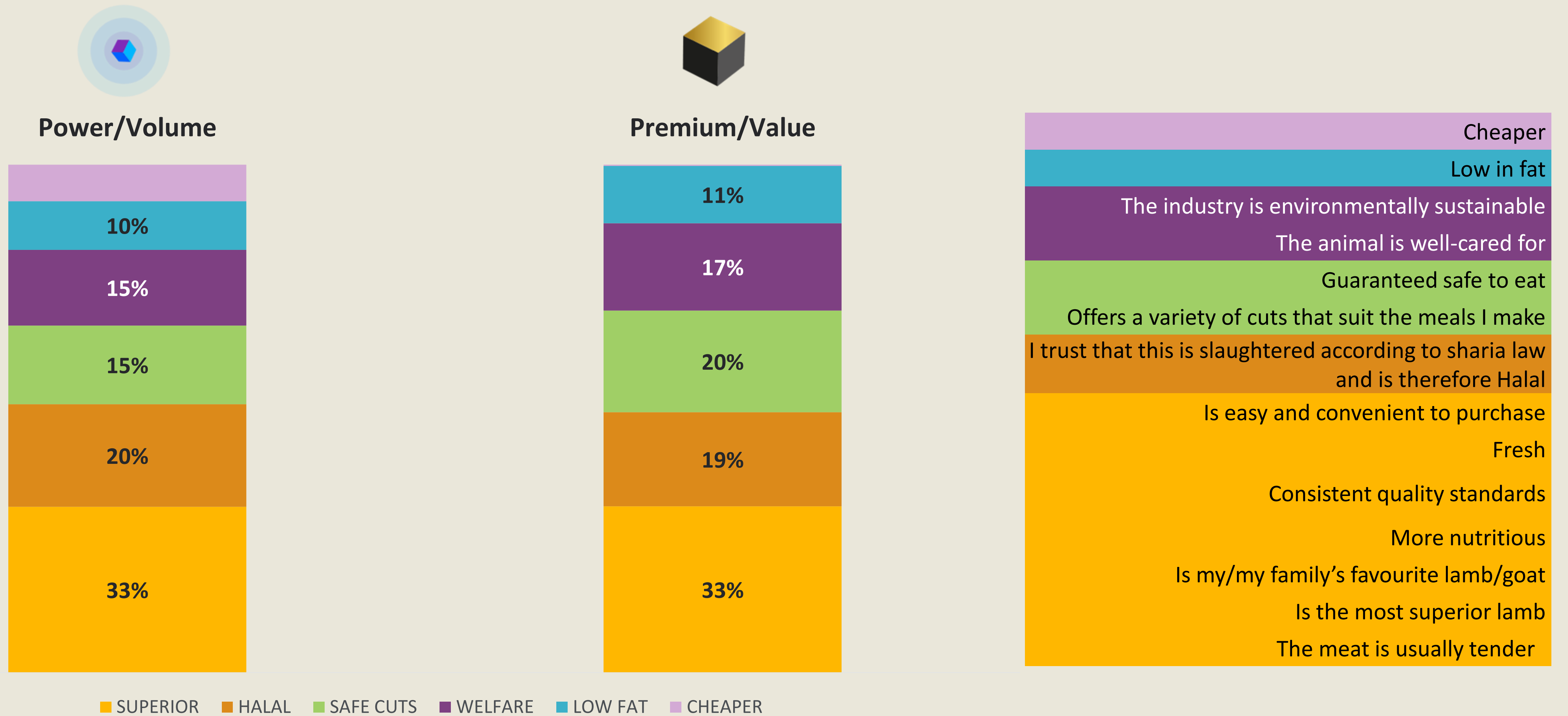
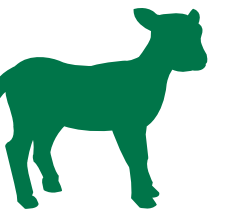
Are consumers more likely to choose you?

Value Brands

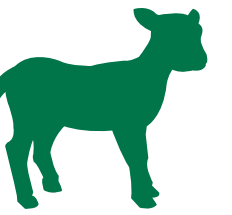
Local Lamb continues to strengthen and is well ahead the imported COOs; Smaller COOs seen to be establishing their equity, while the relatively bigger players, AU, Indian and Sudanese all weaken.



Similar to Beef, the drivers to volume and value for Lamb are closely aligned; Superior product and safe cuts, coupled with being Halal are the key drivers to build equity.



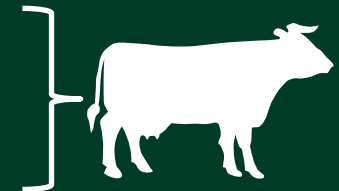
We see some shifts in perceptions versus 2021. These impact how consumers see the role of each Lamb COO.



AUSTRALIAN LAMB

Remains #2 to Local, but sees general weakening of perceptions. Holds onto:

Well-cared for
Sustainable
Nutritious



Grew for
AU Beef



LOCAL (NAEMI) LAMB

Holds steady



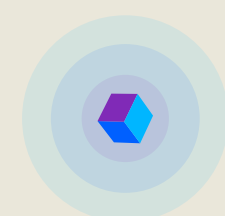
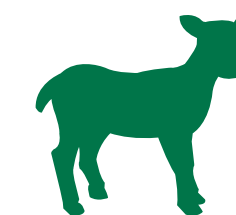
NEW ZEALAND BEEF

Some recovery after a weaker 2021

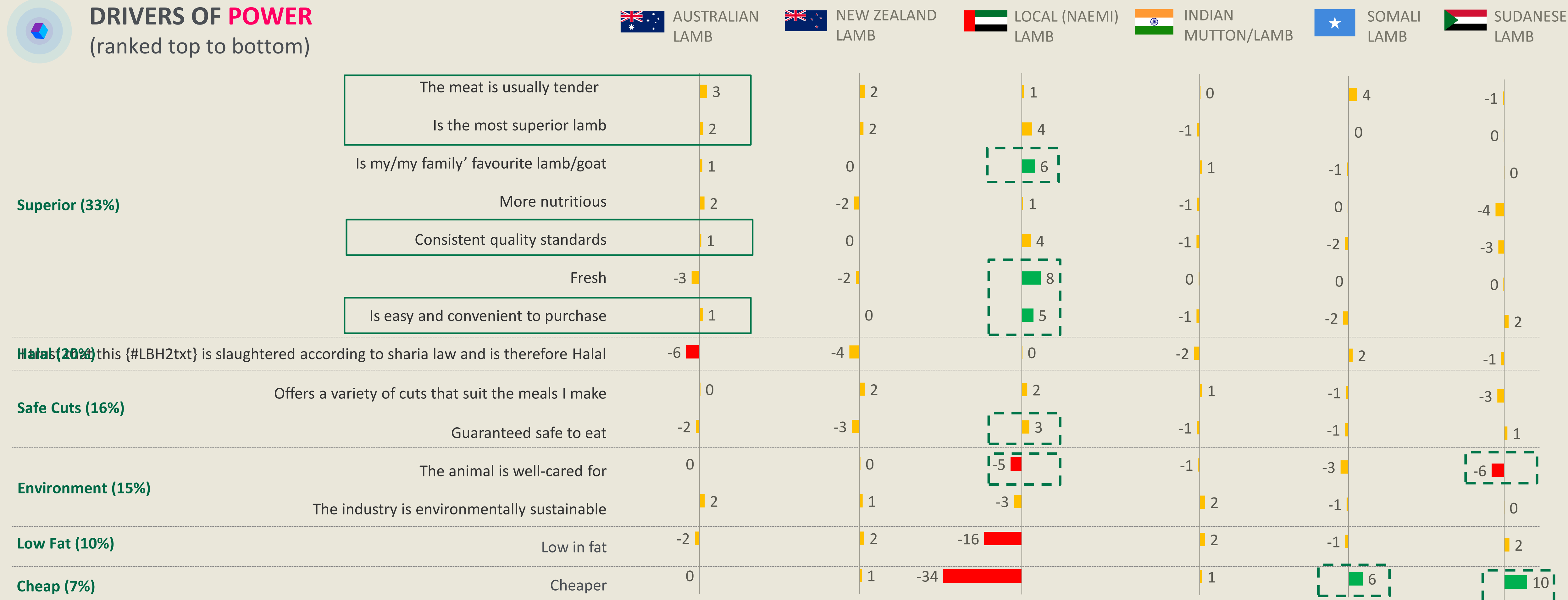
Barring local lamb, most of the other COOs largely undifferentiated.

Australian is seen to be weak on Halal and Freshness cues, and lacking differentiation currently.

Can we build out the superior, tender nutritious perceptions?



DRIVERS OF POWER (ranked top to bottom)



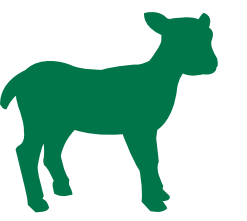
LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to lamb from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=249). 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.

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



Continuing our focus on safety and superior and tender meat along with consistent quality expected to help drive overall equity.



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

Associations for AU to communicate



1. Trust that this lamb is slaughtered according to sharia law



2. Is my/my family's favourite lamb/goat



3. Fresh



4. Consistent quality standards



5. Is easy and convenient to purchase

Implicit

Difficult to achieve when competing vs. a local product

Difficult to achieve when competing vs. a local product

More explicit

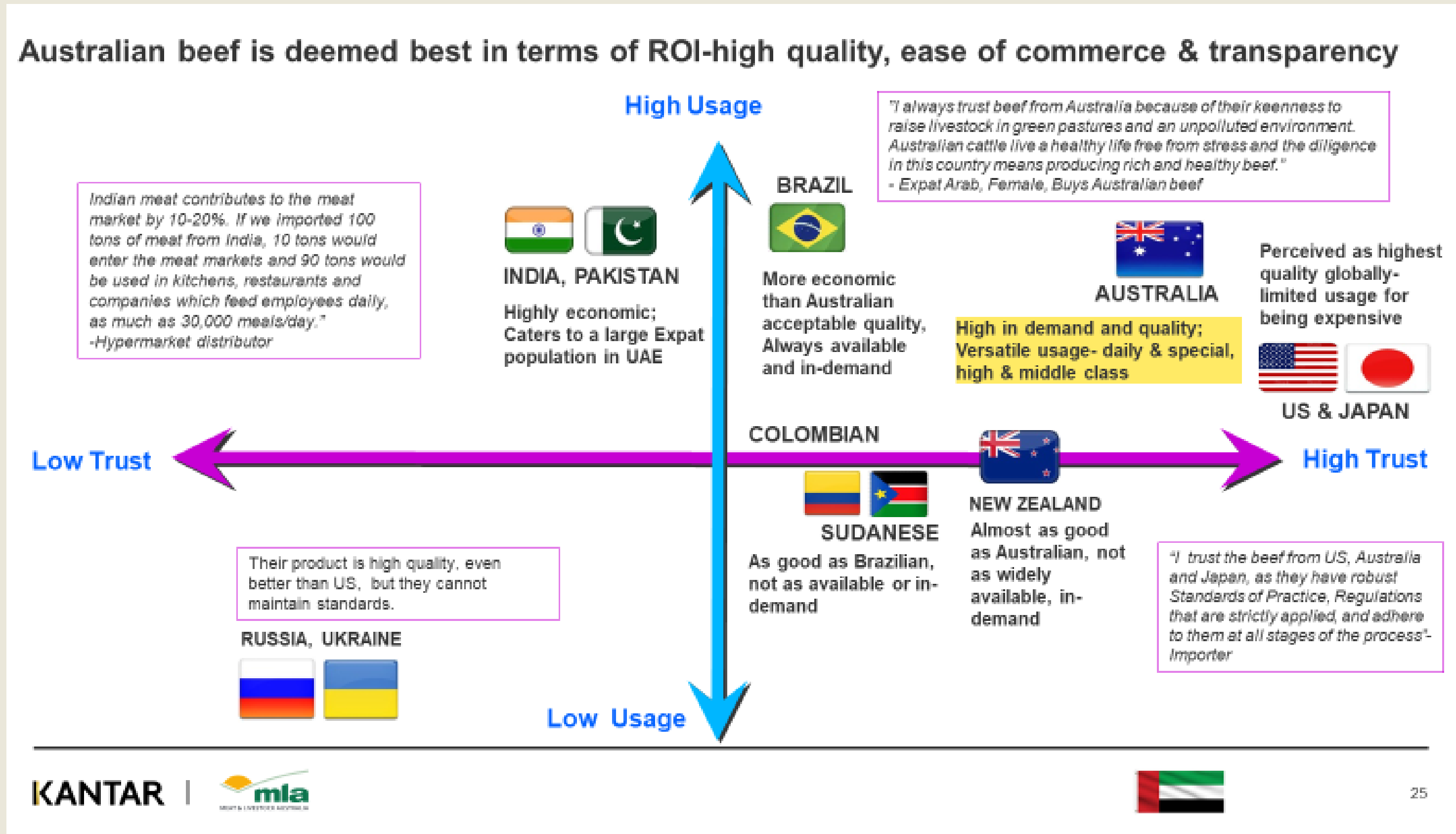
through supply

Superior + Tender (implicit in experience)

WHAT NEXT FOR AU BEEF AND LAMB IN KSA?



We saw in the qual in MENA that AU marries Trust with usage/volume, sitting in a sweet spot of offering volume while still being trusted – top right is where you want to be.



"I always trust Beef from Australia because of their keenness to raise livestock in green pastures and an unpolluted environment. Australian cattle live a healthy life, free from stress and the diligence of this country in producing rich, healthy beef."

Expat Arab, Female, UAE

We saw last year that there are some features that we can communicate to underpin trust in Australian and reinforce quality perceptions.

Japan	Korea	Vietnam	Thailand	Malaysia	Indonesia	China	UAE	KSA
Tastes great	High Quality Beef/Lamb	Tastes great	Is grown with the highest standards at every step	Has consistent quality standards	Has transparency in all steps of production	Tastes great	Tastes great	Comes from the perfect place to produce beef
Has consistent quality standards	Better for my health	Has transparency in all steps of production	Does not use antibiotics or hormones when grown/produced	Has transparency in all steps of production	Can be clearly traced to its origin	Has transparency in all steps of production	Better for my health	Tastes great
High Quality Beef/Lamb	Comes from the perfect place to produce beef	Better for my health	Is processed to the highest standards	Comes from the perfect place to produce beef	Has consistent quality standards	Is processed to the highest standards	Is processed to the highest standards	High Quality Beef/Lamb
Better for my health	Is grown with the highest standards at every step	Is something I see others eating	Ethically and humanely produced	Can be clearly traced to its origin	Ethically and humanely produced	Is something I see others eating	Has transparency in all steps of production	Can be clearly traced to its origin
Is processed to the highest standards	Has consistent quality standards	Is grown with the highest standards at every step	Has transparency in all steps of production	Is processed to the highest standards	Is grown with the highest standards at every step	High Quality Beef/Lamb	Has consistent quality standards	Has consistent quality standards

Quality

Process

Provenance

Traceability/ Transparency

Health/Taste/ Shelf life

Social

In KSA, the aspirational **‘clean, green, perfect place to raise cattle’** is underpins the Trust.

Taste is a functional proof point that supports the trustworthiness.

This marries up with what we saw in the qualitative research, leveraging clean rearing, and the outcome of great taste to reinforce quality perceptions.

AU advantages in process and product can be leveraged to drive demand, reinforce relationships and enhance halal claims in premium



AU owns 'clean', healthier image

More than any other COO, AU beef is consistently associated with 'clean' farming, and beef that is ethically and humanely produced

Enhanced halal claims: clean eating, clean living



Australian producers deliver to high expectations

Australia has established a reputation for delivering reliably and consistently, and this process allows Australian growers and supply chain to confidently deliver excellent product

Enhanced halal claims: unrivalled standards of cleanliness and hygiene (Japan a potential competitor)



ISC can speak to AU beef assets

Specific aspects of AU beef can help maximise premium perceptions:

- Superior service – responsive, easy to partner with, honour commitments
- Clean-farming, ethical and humane production, free from antibiotics or hormones vs mass factory imagery
- **Enhanced halal claims:** treatment of animals prior to slaughter

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Don't forget the flavour story – it's a key point of differentiation

- Elevating safety and hygiene standards will raise the standards of the category in the market
- The communication of clean living and clean eating will enhance health and better for you perceptions
- Taste will help support COO differentiation and drive repeat purchase
- The secondary reason for halal purchase is its link to tenderness and mouth feel
- It's important for taste and meal outcomes of beef to be communicated through traceability e.g. credentials of stress free, ethical, natural feed, etc.



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While awareness is not universal, for those who are aware of the branding assets we have, do associate them with safety and quality – which drive volume and premium



% of respondents who spontaneously mention:



"It's like 100% Halal. It gives you satisfaction in your mind it is made according to our principles" [F 29 UAE]

Due to strict regulations, Halal is expected with the stamp serving as a reassurance rather than a necessity



Regulations in UAE dictate red meat will be Halal – unless clearly stated

Shoppers have complete confidence meat will be Halal without it needing to be communicated on-pack

On imported meats the label acts as a reassurance and signposts it is imported red meat

"It's like 100% Halal. It gives you satisfaction in your mind it is made according to our principles" [F 29 UAE]

Local meat typically would not have Halal on-pack



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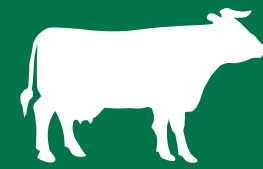


Source: Project Evergreen UAE qual – True Aussie, Jan 2023;

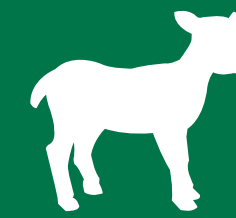
FINAL THOUGHTS & DISCUSSION



As a quick summary of the communication jobs to be done:



1. Reinforce quality and superiority for AU beef, in so doing imply the safety of the product to customers in KSA, where safety is a key driver of both premium and volume.



2. Reinforce quality standards for lamb through messaging, reflect superiority and tenderness.



3. Leverage our clean, safe, rearing environment as reason to believe to support the quality standards, and superior as an outcome of process of producing Australian red-meat

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