July 2022

Global Tracker: **Philippines** – *Presentation Deck*

Brought to you by your Kantar Team:
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& Carolina Ferrando

MEAT & LIVESTOCK AUSTRALIA

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.

2022 Study Details:

8,300 interviews

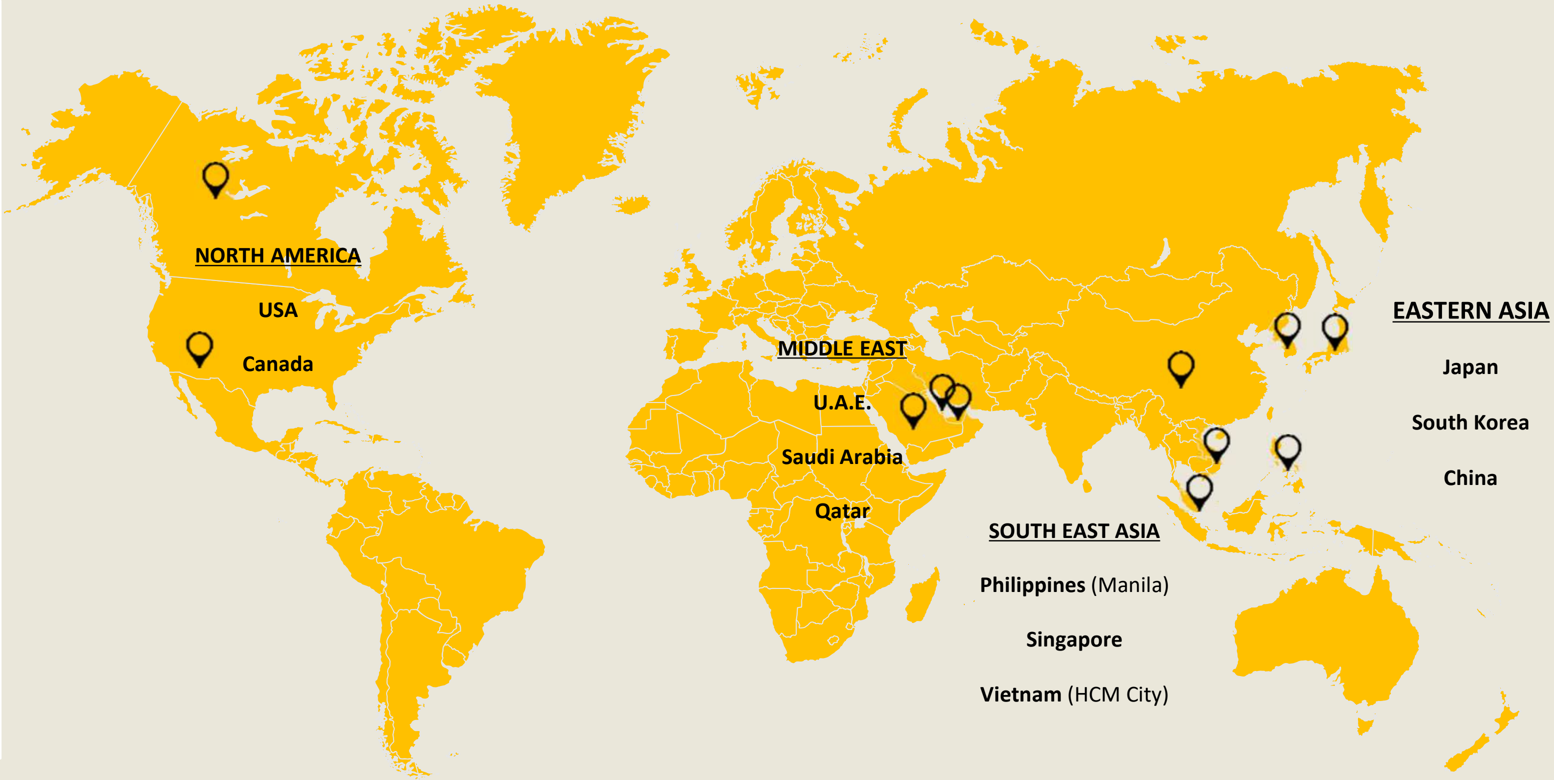
11 Markets *(See right)*

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



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We have conducted the global tracker in 22 markets over the last 8 years, with Philippines returning for the 1st time since major shifts to the study structure/content

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*

Flow of the presentation today

Macro-market context [HIDDEN]

Some important global trends which are relevant context for changing consumer behaviours

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 premium.

What next for AU beef in Philippines

What levers can we pull and what should we continue to communicate to protect and grow a strong position in the Philippines

Final Thoughts & Discussion

Wrapping up with discussion and summary of the key findings

The Central Question

Philippines sample – a deliberate skew (not Nationally Representative)

Sample is made up of 500 consumers

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	0%
	Female	50%	100%
Age	18-34	-	55%
	35-49	-	32%
	50-64	-	13%
Cities	Metro Manila	2%	100%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	93%
Children	Households with Children	-	71%
Annual HH Income	Less than 260K	40%	40%
	260-525K	37%	32%
	525K+	23%	27%

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Country Incidence: 0-14 (32%), 15-24 (19%), 25-54 (37%), 55-64 (6%), 65+ (5%) – population growth rate 1.3%. 2020 population census: ~26.39 million households in the Philippines, reflecting an increase from the previous year's total. In the same year, the average household size in the country was 4.1
https://worldpopulationreview.com/countries/philippines-population

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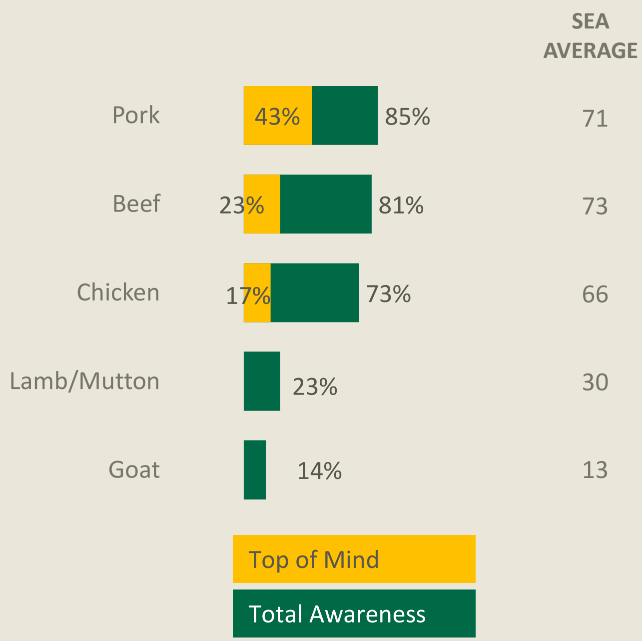
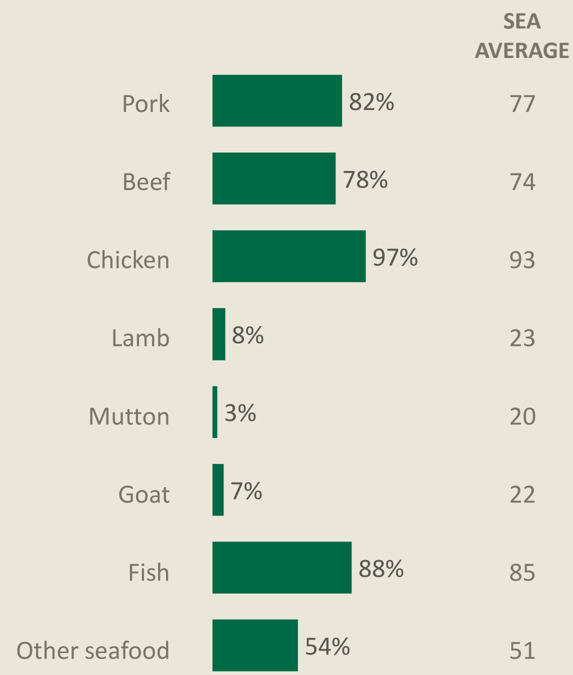
PROTEIN LANDSCAPE

Chicken, Fish, Pork and Beef are most popular meats respectively. Goat/Sheepmeat are niche.

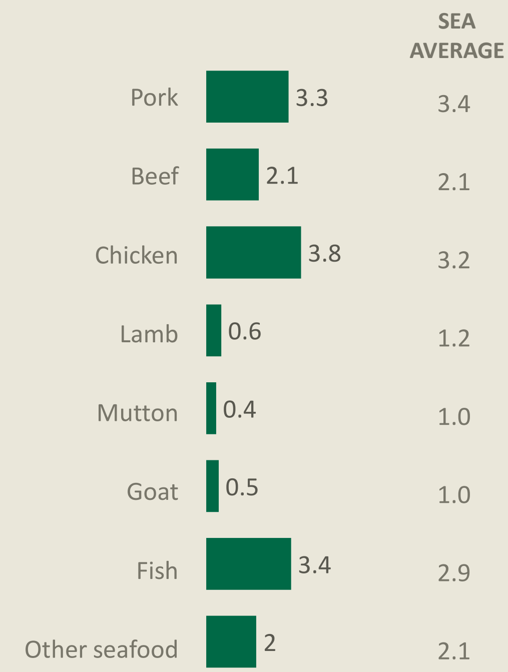
SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS



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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=500)

SEA = Indonesia, Malaysia, Singapore, Vietnam and Thailand (Pork exc. Indonesia/Malaysia)

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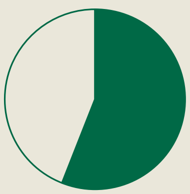
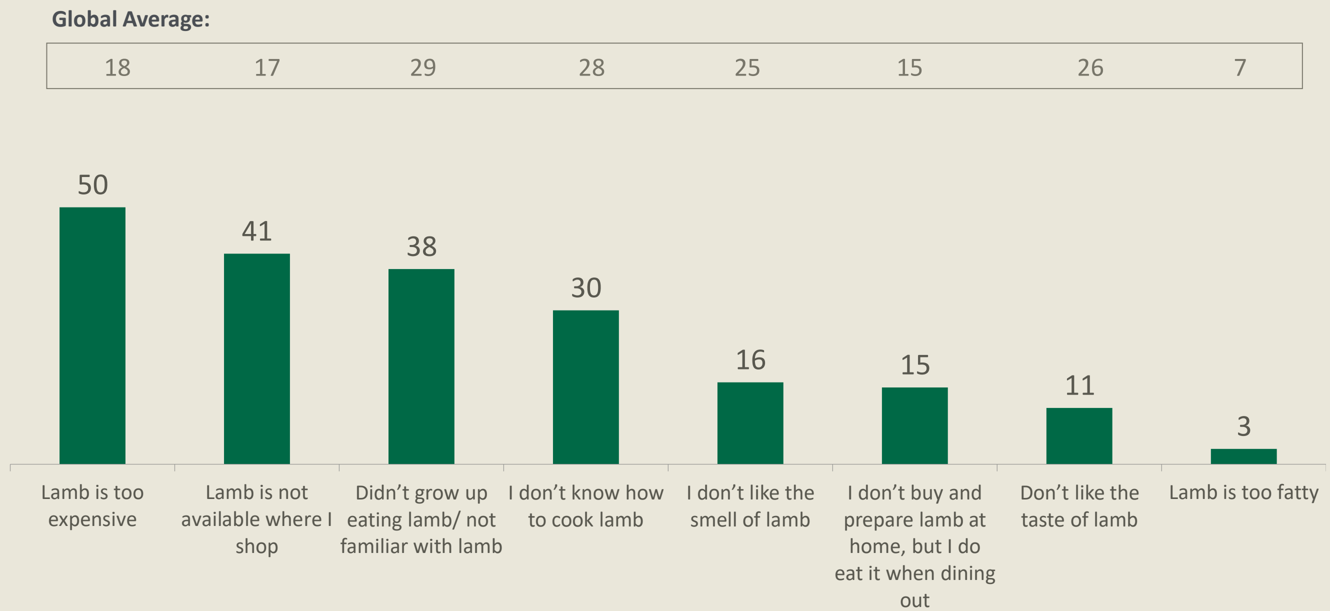
More than half have never tried Lamb before, impacted by strong in-market factors of price, availability followed by unfamiliarity.



56%

Of the sample have never bought lamb

Those who **have** bought lamb are more likely to be **younger**, **higher income** or **have children**.



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CH6. Do you ever buy lamb? Base: (n=500) (Never bought lamb rebased to total sample)
QCH6a. Why do you not buy lamb? Base: '22 (n=282)

Sig. different at 95%

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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' protein.

THE STAPLE

- Cheap (cost less) 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, great taste, superior
- 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 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*

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.

Proteins play different roles in consumers life. Chicken, Pork and Fish give everyday volume and variety. Beef is more special, quality, tender and tasty so consumers are willing to pay more for it.

PREMIUM		STAPLES	
Tasty, premium	Superior, unfamiliar	Easy, versatile, affordable	Fresh, easy, low fat
Beef	**Sheep/Goat meat**	**Chicken & Pork**	**Fish & Seafood**
Strengths • Delicious • Tender • Well-cared for • Consistent quality • Favourite • Superior • Willing to pay a bit more	**Strengths** • Well-cared for • Low fat • Lamb: tender, nutritious, consistent quality, superior, willing to pay more for • Goat: Sustainable, safe	**Strengths** • Cheap • Versatile • Easy to prepare and purchase • Favourite • C: Essential healthy kids' diet • P: Tender	**Strengths** • Fresh • Cheap • Nutritious • Low fat • Easy/convenient to prepare and purchase • Essential healthy kids' diet
Weaknesses • Not fresh • Not cheap • Not sustainable • Not Easy/convenient to prepare or purchase • Essential for healthy kids' diet	**Weaknesses** • Not easy / convenient to purchase • Lamb: Not versatile, easy/convenient to prepare, essential for healthy kids' diets, favourite	**Weaknesses** • Not fresh, safe • Not nutritious • Not well-cared for • Not low fat • Not superior • Not worth paying more for • C: Not consistent, delicious • P: Not healthy kids' diet	**Weaknesses** • Not well-cared for • Not consistent quality • Not delicious • Not tender • Not versatile • Not favourite • Not superior, willing to pay

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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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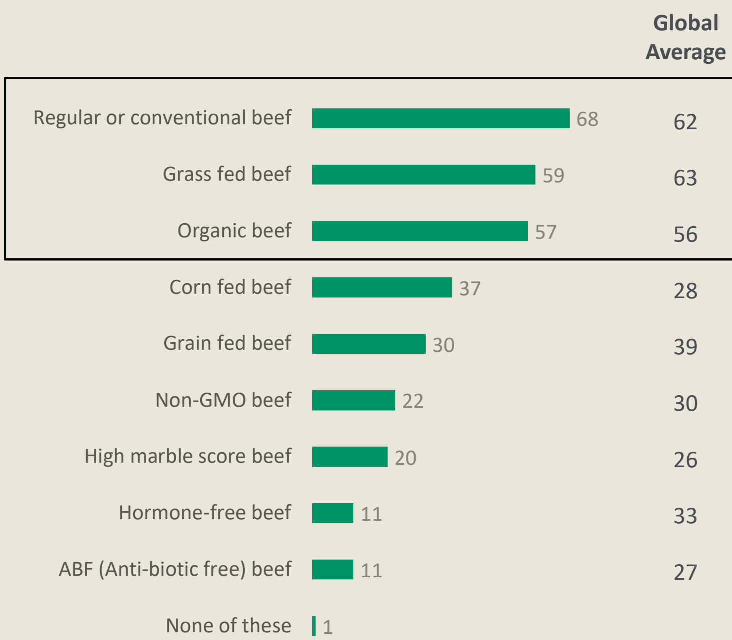
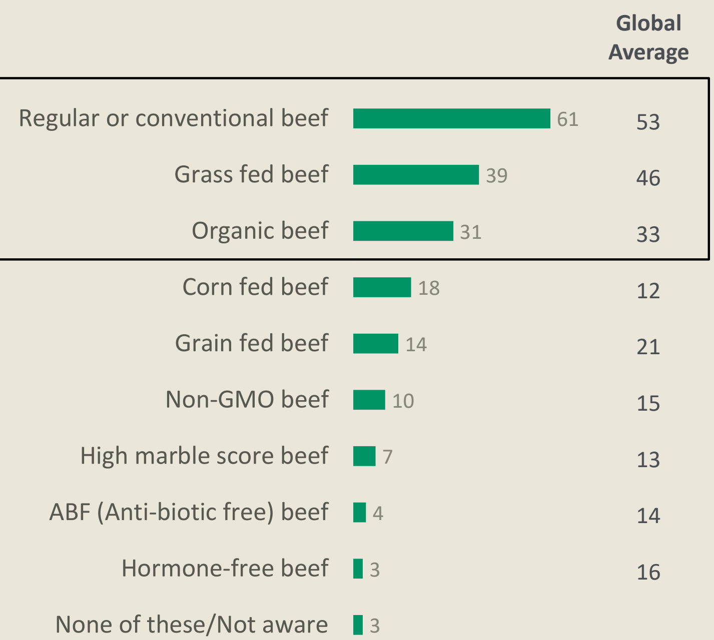
Filipino consumers buy Regular beef most, followed by Grass and Organic, similar to Global levels. Awareness of other claims e.g. GMO, Hormone and AB free are less prevalent, as is highly marbled.

AWARENESS OF TYPES OF BEEF (%)



BEEF BOUGHT IN THE PAST (%)



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QGF1. Which of the following types of beef are you aware of?
QGF2. And which types of beef have you bought in the past? (rebased to QGF1)
Base '22 (n=500)

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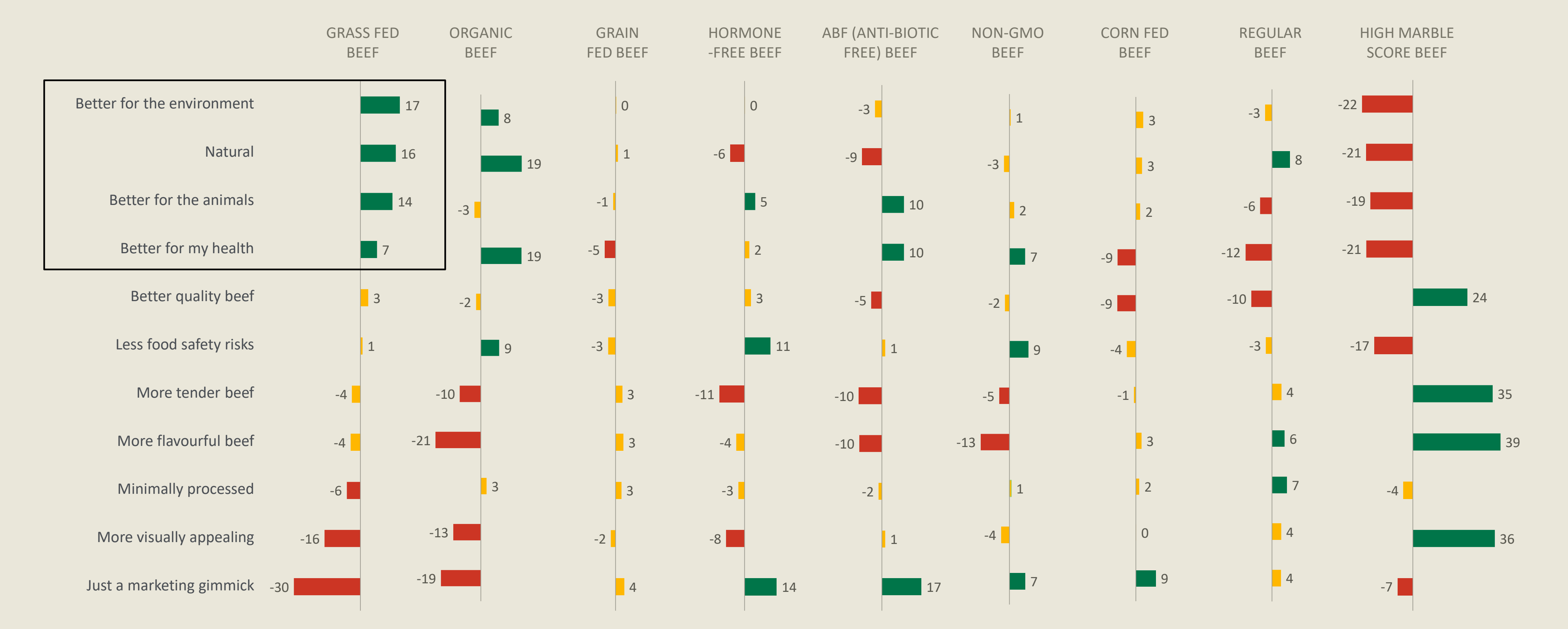
GF is seen as 'Better' (for environment, health and animals) and is associated with Naturalness which is important to Filipino consumers. As such, Australia's GF Beef credentials are relevant to communicate.



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+5 or more = relative category strength

-5 or less = relative category weakness.

GF5. Which of the following things do you associate with each type of beef below? Base: Grass fed beef (n=296), Grain fed beef (n=151), Organic beef (n=286), Hormone-free beef (n=56), ABF beef (n=53), Non-GMO beef (n=110), Cornfed beef (n=183), Regular or conventional beef (n=342), High marble beef (n=98)

Note: Beef types in-market are not always exclusive (can carry multiple claims).

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Compared to other markets, naturalness and price are a greater focus for Filipino consumers.
Can AU leverage its grass-fed processes and (where possible) organic claims which consumers see as natural?

GLOBAL AVERAGE	USA	CANADA	CHINA	SOUTH KOREA	JAPAN	SINGAPORE	PHILIPPINES	VIETNAM
Meat Colour 55%	Meat Colour 56%	Meat Colour 61%	Freshness 55%	Freshness 55%	Meat Colour 65%	Meat Colour 56%	**Meat Colour 66%**	Meat Colour 52%
Freshness 48%	Date packed 53%	Date packed 57%	Meat Colour 46%	Meat Colour 52%	Country of origin 47%	Date packed 50%	**Natural 65%**	Natural 51%
Date packed 46%	Freshness 46%	Freshness 46%	Natural 45%	Animal origin / provenance / 51%	Animal origin / provenance / 44%	Freshness 49%	**Freshness 61%**	Freshness 47%
Natural 39%	Natural 46%	Price per kg 39%	Date packed 44%	Country of origin 47%	Date packed 43%	Country of origin 45%	**Date packed 60%**	Country of origin 45%
Country of origin 31%	Use by date 32%	Price per pack 33%	Animal origin / provenance / 41%	Price per kg 45%	Use by date 43%	Natural 37%	**Price per kg 38%**	Date packed 44%

Themes: Colour, Freshness, Natural, Country of Origin / Provenance, Price, Other

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(PACK1) 6 things you look for (on the pack, on the shelf etc.) when buying beef?
USA (1393), KSA (241), UAE (243), China (392), Korea (649), Japan (541), Qatar (251), Singapore (211), Philippines (323), Vietnam (271), Canada (284)

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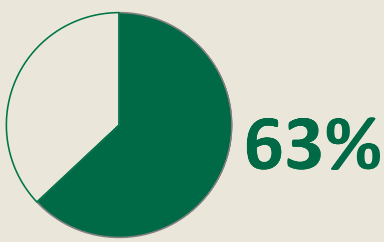
BEEF COUNTRY OF ORIGIN & TRUST

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

6 in 10 claim to know their Beef's COO; less than we see globally (8 in 10).
¾ buy imported beef at least monthly, but more frequent purchase skews to local.

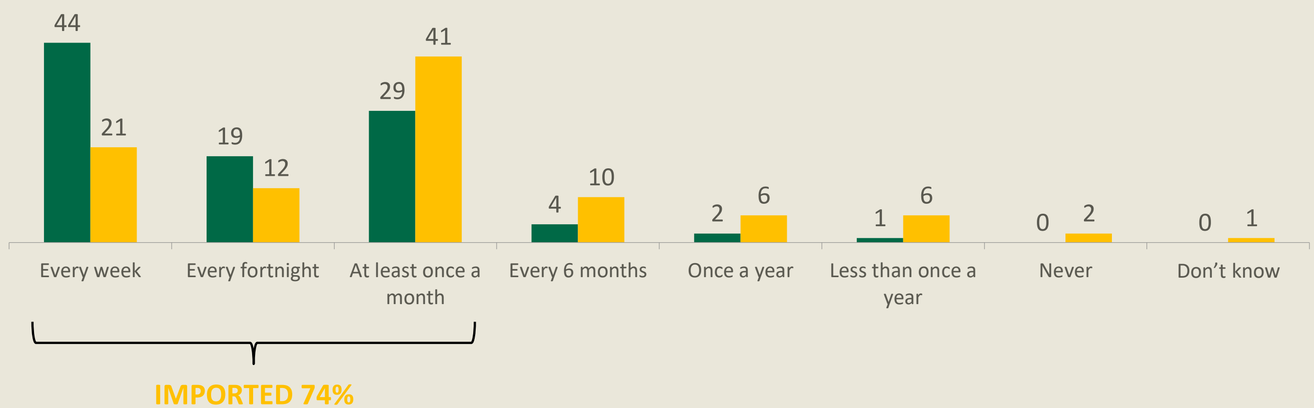
Know Country of Origin?

Global Average: 84%



Highest for:
35-49s, higher income, more frequent buyers

FREQUENCY OF BUYING LOCAL AND IMPORTED BEEF



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(GF3B) Do you know the country of origin of the beef you buy? (n=500)
(CH4) How often do you buy imported beef? (n=500)
(CH4LOC) How often do you buy local beef? (n=500)

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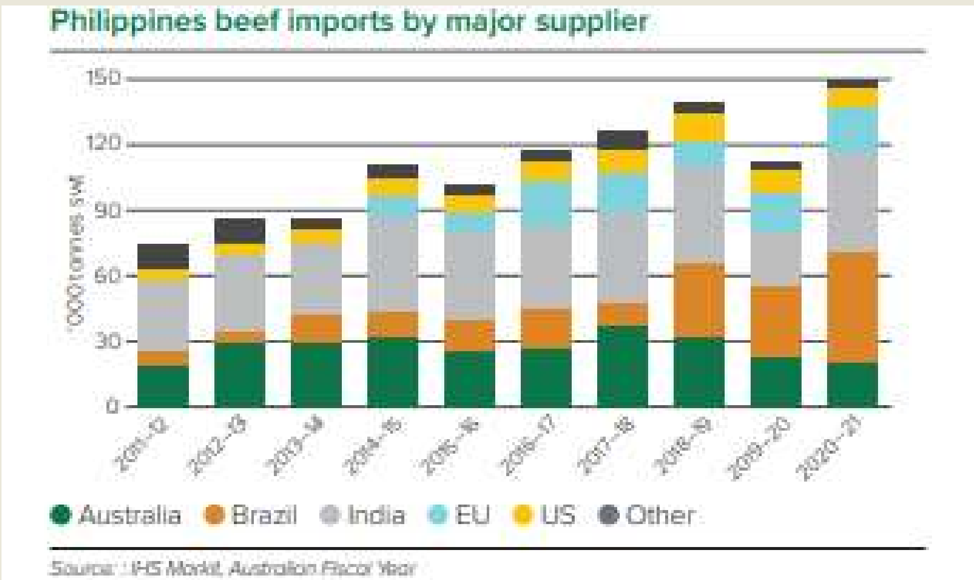
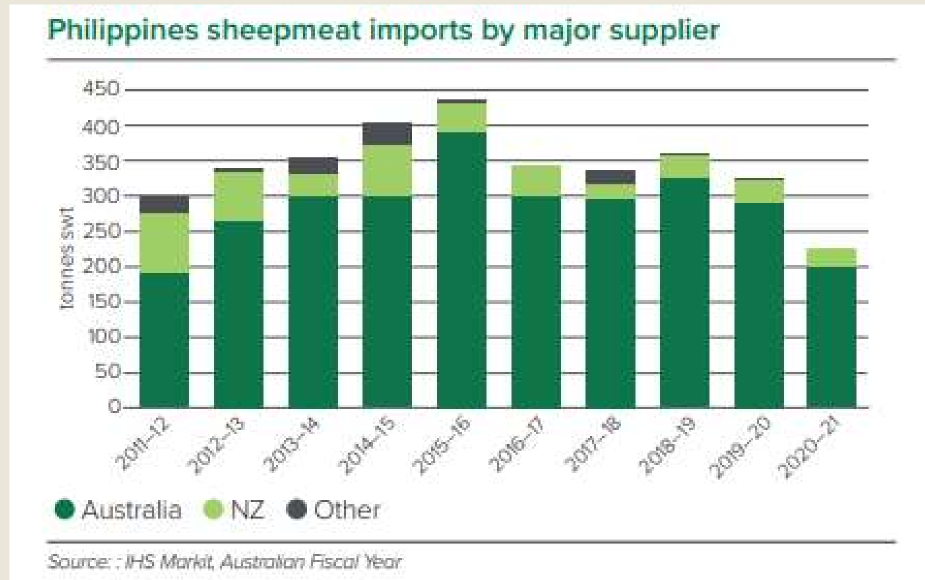
Volume of imported Beef is growing in the Philippines, boosted by the EU entering in 14-15. Brazil and India provide the largest volume. Brazil grows overtime while AUS shrinks since 17-18.

MLA market snapshot – Philippines Beef Imports
(2022)



https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/november-2021/2021-philippines-market-snapshot-red-meat_111121_distribution.pdf

MLA Philippines Sheepmeat Imports
(Market Snapshot 2022)



https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/november-2021/2021-philippines-market-snapshot-red-meat_111121_distribution.pdf

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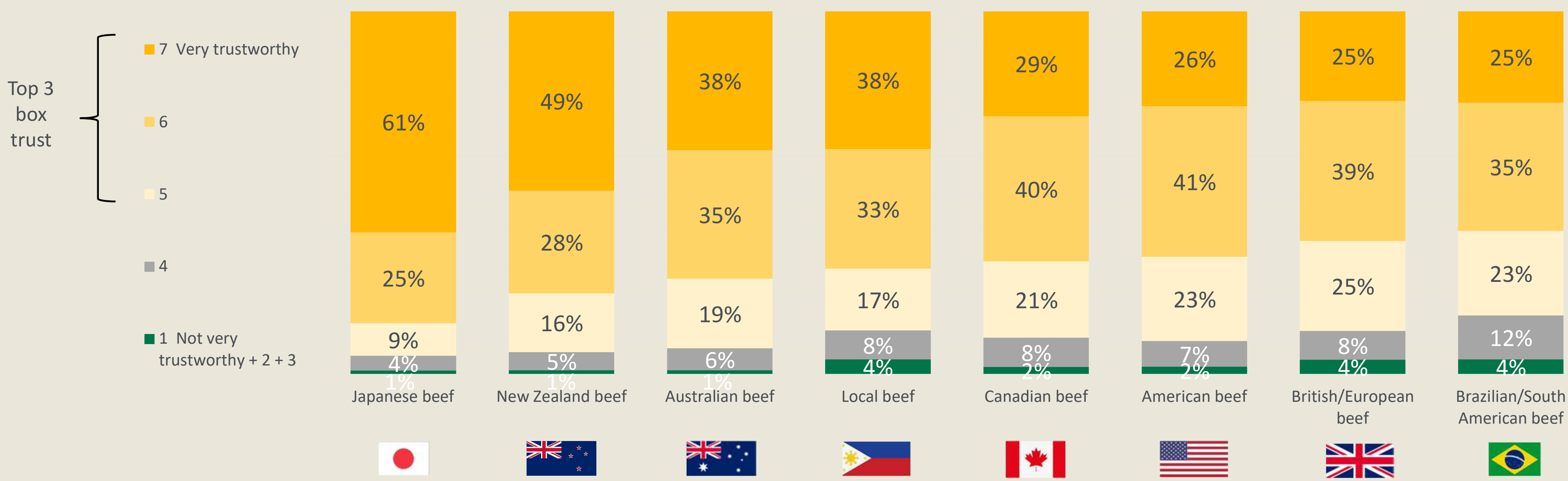
Japanese beef is the most trusted COO, followed by NZ.
AU Beef is close behind, with similar trust levels of 'local' beef.

Trustworthy - COO BEEF

Top 2 Box	86%	77%	73%	71%	69%	67%	64%	60%



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BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Local beef (479) Australian beef (399), American beef (412), New Zealand beef (407), Japanese beef (322), Canadian beef (247), Brazilian/South American beef (212), British/European beef (190)

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COOs derive trust from perceptions related to country, processes and traceability, popularity and functional attributes. NZ epitomises the 'perfect place' for producing beef in Filipino minds.

Japan - Process

Processed under the highest standards
High quality beef
Comes from the perfect place to produce beef
Has a long, stable shelf life

NZ – Perfect Place

Comes from the perfect place to produce beef
High quality beef
I see others buying/ eating

Australia - Quality

Comes from the perfect place to produce beef
(less vs NZ)
Has consistent quality standards

Phil – Popular, Local

Is something I see others buying/ eating
Can be clearly traced back to its origin

USA – Popular, Tasty

I see others buying/eating
Tastes great
Antibiotics / hormones free
Ethically/humanely produced

Canada – unfamiliar

I see others buying / eating

British / Europe – Traceable

Traceability in all steps of production process
Grown with highest standards at every step

Brazil / S. America

Building:
Has consistent quality standards
Has traceability in all the steps of the production process

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Key defining strengths and weaknesses shown, see hidden slide for full list/detail

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Local Beef dominates claimed consumption, with ¾ having it most often (in line past month purchase). US, AU and NZ consumption are on par - despite varying actual volume.

	LOCAL BEEF %	AMERICAN BEEF %	AUSTRALIAN BEEF %	NEW ZEALAND BEEF %	JAPANESE BEEF %	CANADIAN BEEF %	BRAZILIAN/ SOUTH AMERICAN %	BRITISH/EUROPEAN BEEF %
Spontaneous awareness	35	53	47	34	24	10	18	4
Total Awareness	96	82	80	81	64	49	42	38
Ever Eaten	93	59	48	43	42	20	18	14
Eat P12M	90	41	31	28	30	12	12	8
Eat P3M	85	25	20	18	18	7	7	5
Past Month	81	18	15	13	12	5	5	4
Most Often	73	4	4	5	2	0	1	0

If limited in volume, this is likely 'adjacencies' driven (large dairy imports)

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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=500) – Bought beef in past month or ever buy beef

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Imported Beef skews to households with higher income and kids, but there may be an opportunity to secure future buyers (18-34s) where US (and Japan) Beef are stronger.

Claimed consumption is higher for…

18-34s

35-49s

Higher income

Households with children

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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=500) – Bought beef in past month or ever buy beef
Higher income refers to an annual HH income of 525K pesos or more

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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 **5× higher** volume share

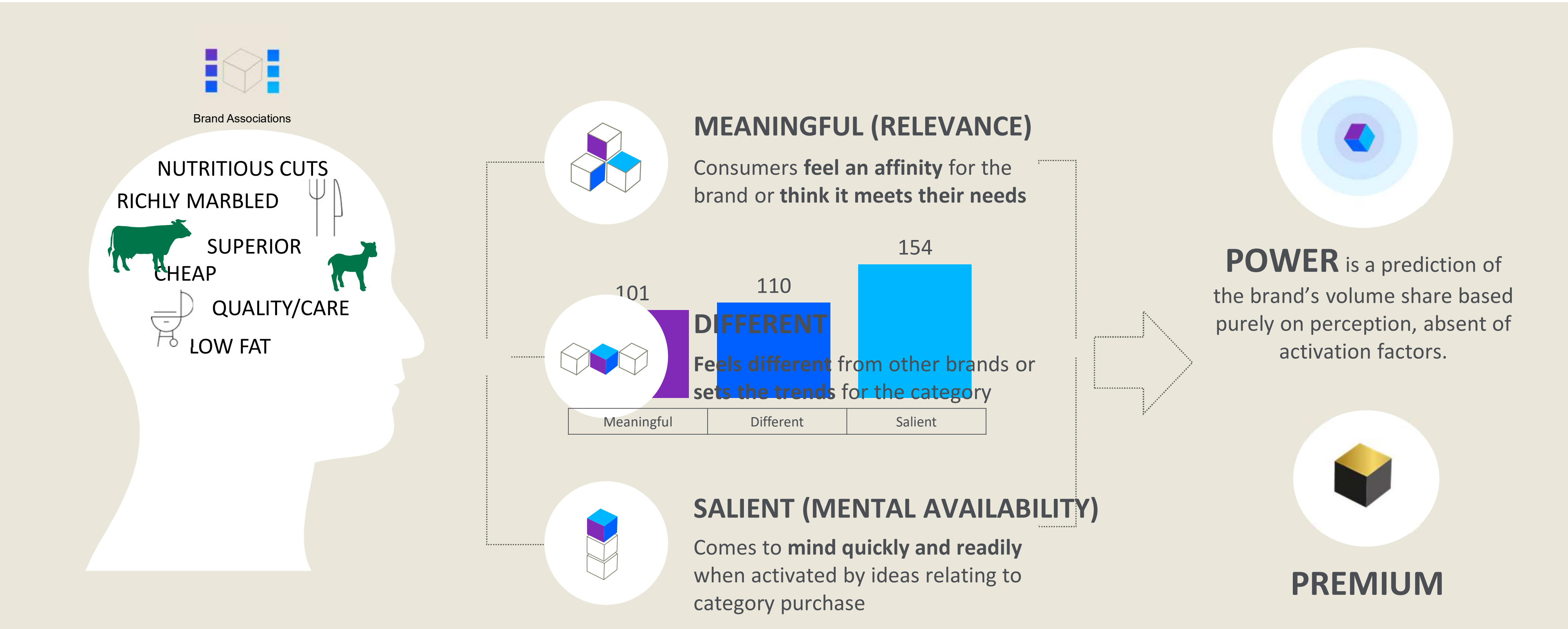
By increasing the likelihood
consumers will pay for a brand

We call this Brand
Premium

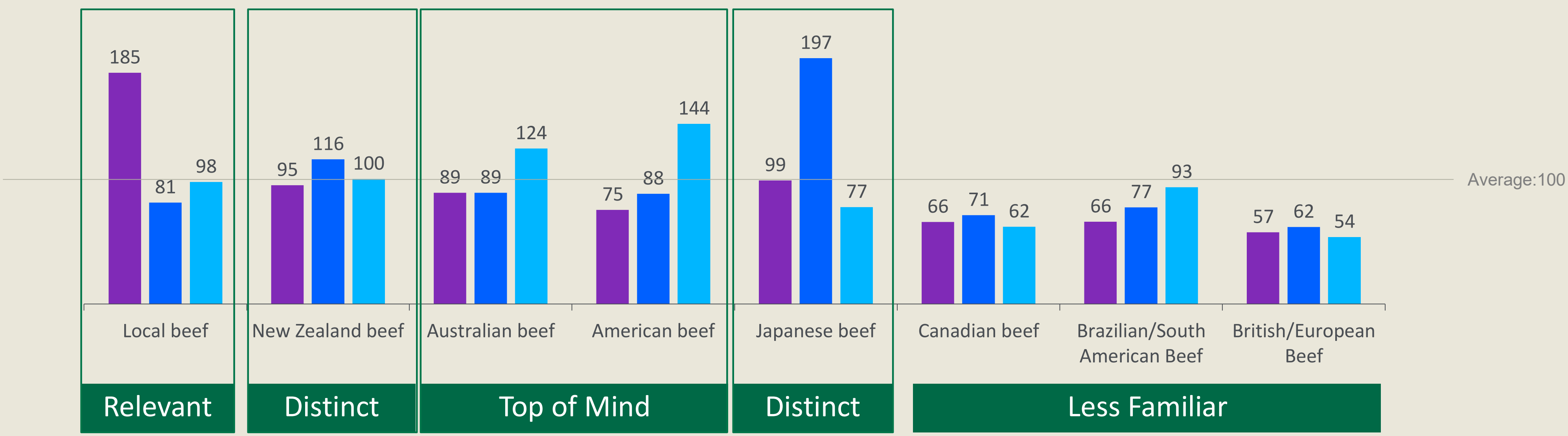
Premium

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.



Local is seen as relevant while NZ and Japan are distinct and differentiated in Filipino consumers minds, whereas AU and US beef come to mind readily.



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Meaningful Different Salient

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Local is positioned for volume, while Japan is niche/Premium.
NZ’s distinct benefits, anchored in perception of being from the perfect place for high quality beef, drive willingness to pay. AU and US battle as the Accessible Premium options.

Perceptions	Concepts	Meaning (Relevance)	Difference	Drive: Volume	Premium
Cheaper Is easy and convenient to purchase Is my/my family’s favourite beef Fresh	EASY EVERYDAY	**36%**	-7%	30%	-11%
The fat is nicely marbled Is the most superior beef Consistent quality standards The meat is usually tender	SUPERIOR QUALITY	17%	**42%**	19%	38%
Guaranteed safe to eat	SAFE	16%	18%	17%	18%
Offers a variety of cuts that suit the meals I make	VARIETY OF CUTS	12%	4%	13%	4%
The animal is well-cared for The industry is environmentally sustainable	WELFARE / ENVIRONMENT	9%	10%	12%	11%
Low in fat More nutritious	HEALTHY	10%	19%	9%	19%
				As measured by Power	*As measured by Premium*

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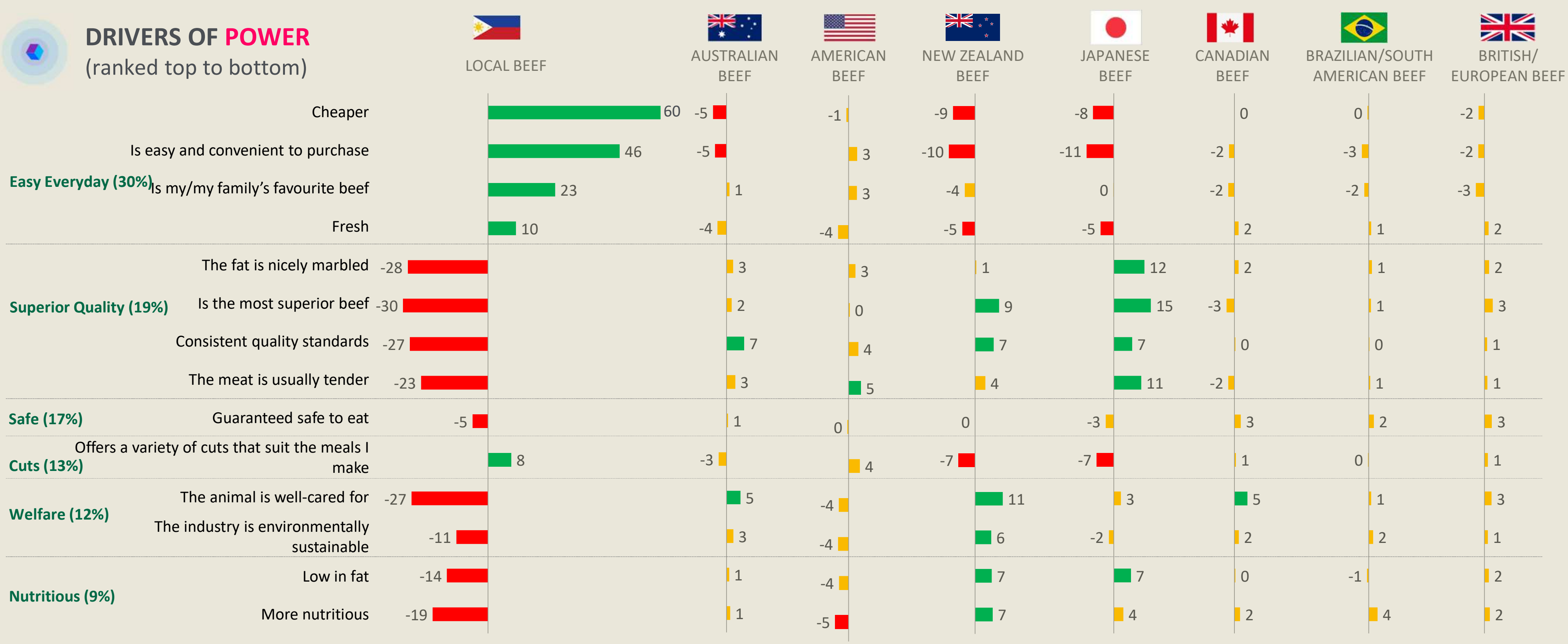
Local Beef's volume is driven by owning ease/convenience (easier to buy, variety, cheaper). Imports play to a different space. AU, JP and NZ beef are harder to buy (price, availability). AU is well cared and consistent, US is fat and tender, NZ provides 'Goodness', JP is superior.



+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=xxx). *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.*
Base: '22 (n=500)

These different perceptions see the COOs fit different roles.

Everyday

Local

Cheap
Easy to buy
Fresh
Variety of cuts
Favourite

Not as superior, safe, consistent in quality, marbled, tender, nutritious, low fat, well cared for or environmentally sustainable

Typical for 'local'

Premium

Australia
Consistent quality
Welfare
Not cheap or easy to buy

USA
Tender
Not nutritious

New Zealand
Welfare, Environment
Low Fat, Nutritious, Superior
Not easy to buy. Not fresh or variety of cuts. Not cheap.

Super Premium

Japan

Marbled
Tender
Consistent Quality
Superior

Not cheap, easy, variety or fresh

Typical for Japan

Undifferentiated

Canada
Welfare

Brazil / South American

tish / European

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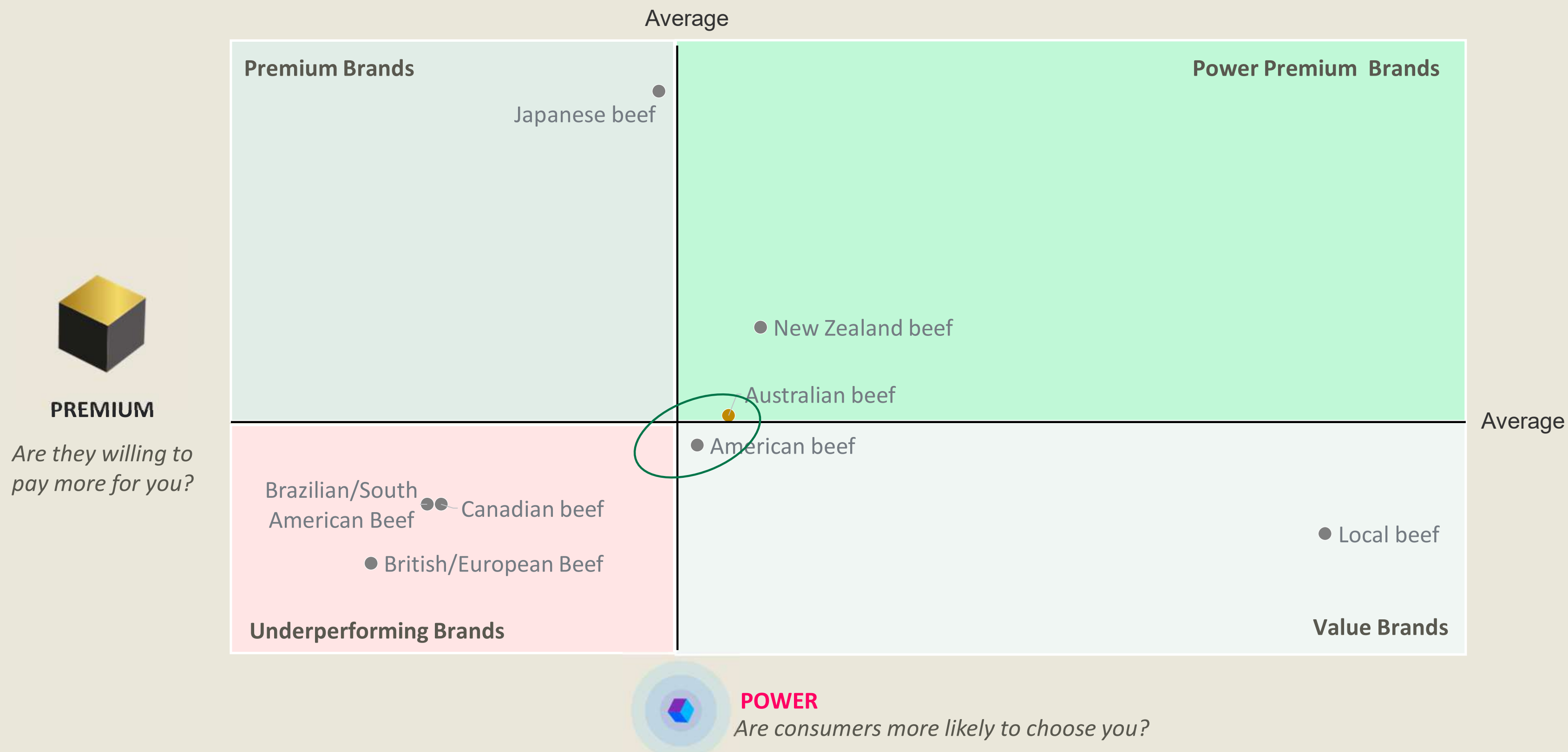
These differences in profile are reflected in COOs equity - Japanese beef super premium, NZ and AU beef both premium volume but NZ sitting apart from AU which more closely aligns with US.



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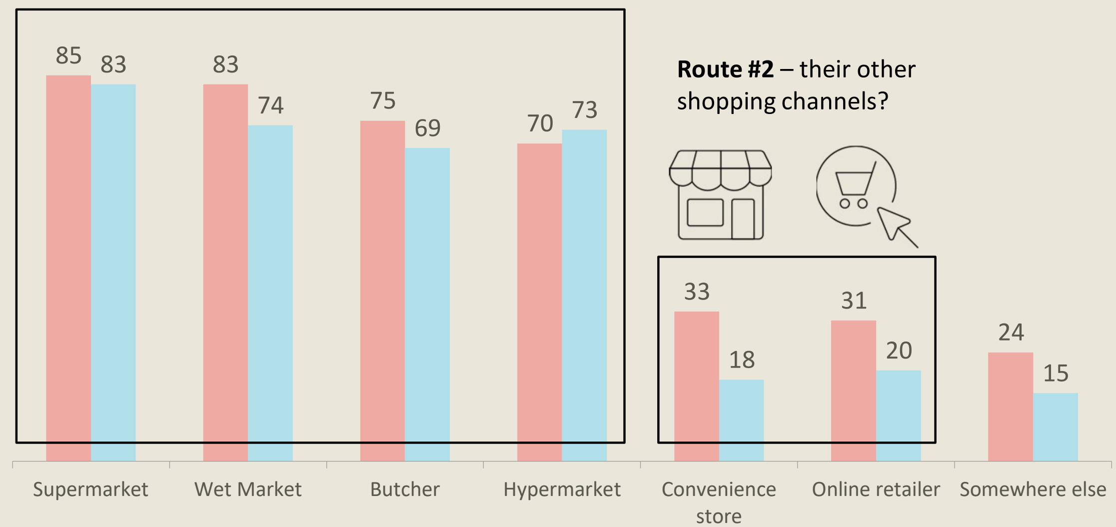
There's an opportunity to make AU Beef more easy/convenient to purchase for 18-34s (the cohort driving our weakness, who more likely to eat US).

Australian Beef "Is easy and convenient to purchase"

18-34s Relative Weakness

35-49s Neutral

Route #1: Are we in the right stores for 18-34s?
Where is US stocked?
And are we presenting in the right way for them in these key locations?



Channel: *Monthly (or more frequent) purchase of Beef…*

Protecting AU's consistent quality strength (through experience/comms) remains relevant for justifying premium - but there's an opportunity with safe to drive volume and premium, and improve ease for 18-34s.

Top 5 Associations to Grow Volume/Power:
(Ordered based on impact on building equity*)

- 1. Cheaper
- 3. Fresh
- 5. Offers a variety of cuts
- Association to build - implicit: 2. Guaranteed safe to eat
- Improve for 18-34s: 4. Easy and convenient to buy

Top 5 Associations to Grow Premium:
(Ordered based on impact on building equity*)

- 3. Meat is usually tender
- 4. Fat is nicely marbled
- 5. More nutritious
- Protect association - explicit: 1. Consistent quality standards
- Association to build - implicit: 2. Guaranteed safe to eat

→ Leveraging our grass-fed process can help us deliver 'naturalness' which Filipino's seek
→ Driving an antipodean perception may benefit AU, to closer leverage NZ's strong perceptions

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- Associations for AU to communicate
- Difficult to achieve for imported product
- Less impactful associations for AU – currently owned by others

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What should we communicate?

1. Protect our consistent quality perceptions and reinforce the safety of Australian product

2. Communicate grass-fed process to deliver ‘naturalness’ which Filipinos seek.
Driving an antipodean perception may benefit AU, to closer leverage NZ’s strong perceptions

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

FINAL THOUGHTS & DISCUSSION

Recapping what we have seen today

Beef plays a role of superior, tasty, premium protein. While it has high penetration, chicken pork and fish all also prevalent in most HH.

Natural is important in decision-making at shelf and Filipino consumers see grass fed beef as delivering to this promise - as well as being better for you.

Different demographic groups have built a different relationship with USA beef vs AU beef. The younger cohort appears to be choosing USA more frequently

There are channel differences that can present opportunity with younger cohort, but getting availability right in core channels is key.

New Zealand and Japanese have established a difference in Trust, and it is not about experience. This is reflected in the different perceptions that consumers hold of them.

AU is a trusted beef, so has the right to pursue a safety positioning.
Trust is built on quality and perceptions of the 'place' it comes from.

Safety and consistent quality drive volume and premium and safe is currently unowned

AU beef's opportunity is to grow and consolidate the perceptions of quality and safety of our product to own the accessible premium space.

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