July 2022

Global Tracker: **Qatar**
Presentation deck

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MEAT & LIVESTOCK AUSTRALIA

Flow of the presentation today

RECAP: 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 buying behaviours.

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.

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.

Final Thoughts & Discussion

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

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.

2022 Study Details:

8,300 interviews

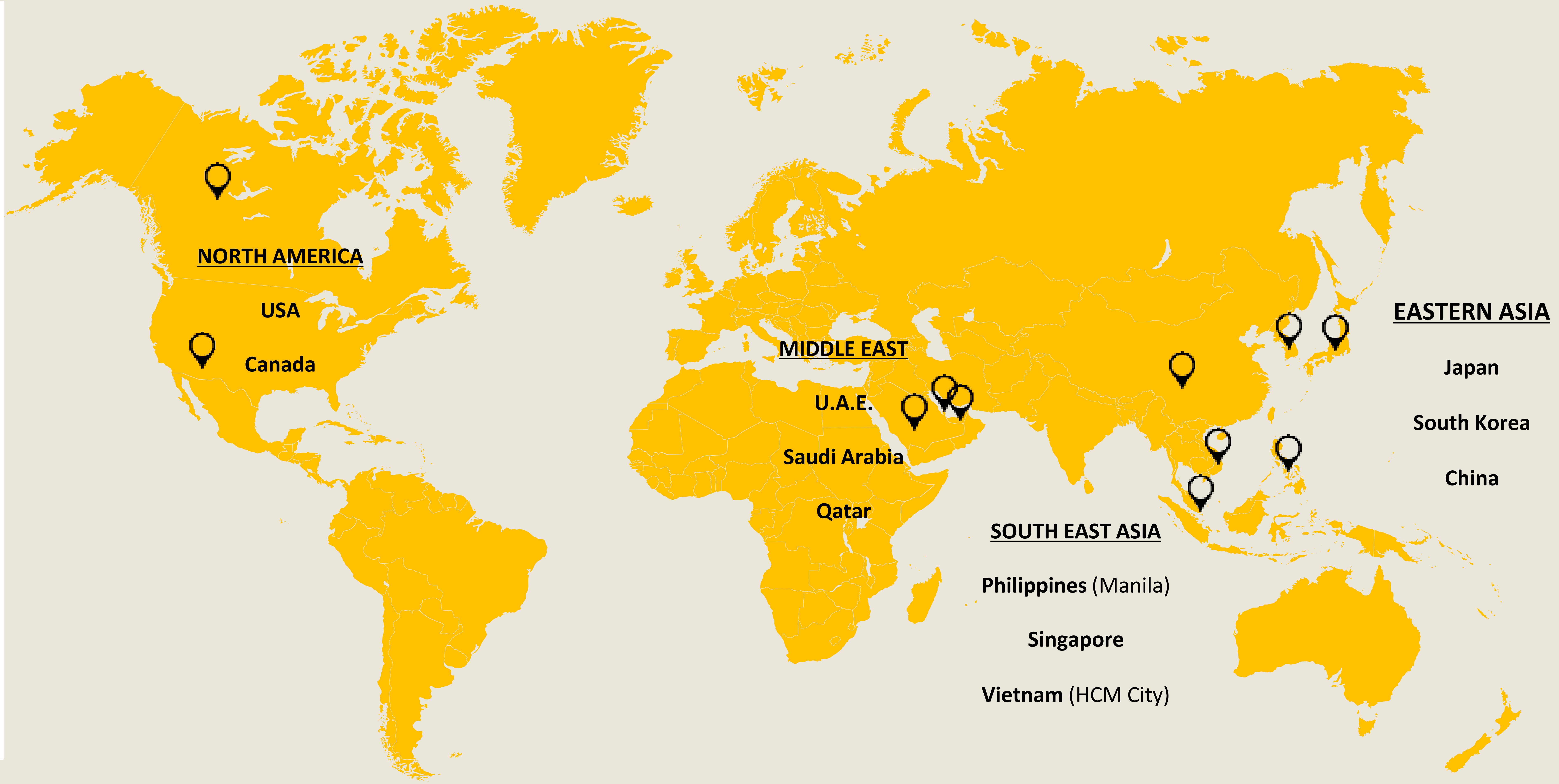
11 Markets *(See right)*

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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Qatar sample – a deliberate skew (not Nationally Representative) Fieldwork completed late March, prior to Ramadan (April) 2022.

Sample n=500 consumers

DEMOGRAPHICS		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	76%	77%
	Female	24%	23%
Age	18-34	-	53%
	35-49	-	39%
	50-64	-	8%
Cities	Doha	82%	100%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	100%
Children	Households with Children	-	81%
HH Annual Income	48,000 QAR or under	-	5%
	48,001 QAR -180,000 QAR	-	45%
	180,001 QAR or more	-	50%
Religion	Islam	68%	98%

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0-14 (13%), 15-24 (12%), 25-54 (71%), 55-64 (4%), 65+ (1%) – *World factbook*

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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 and imported beef share presence. 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 Qatari consumers has been to refocus on health & well-being, and re-evaluate their brand choices. Additionally there has been a significant shifts in purchase behaviours including for Online platforms.

Connect

As in UAE and KSA, there's opportunity to build a stronger emotional connect with the consumer and be 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..

Changing Channel

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

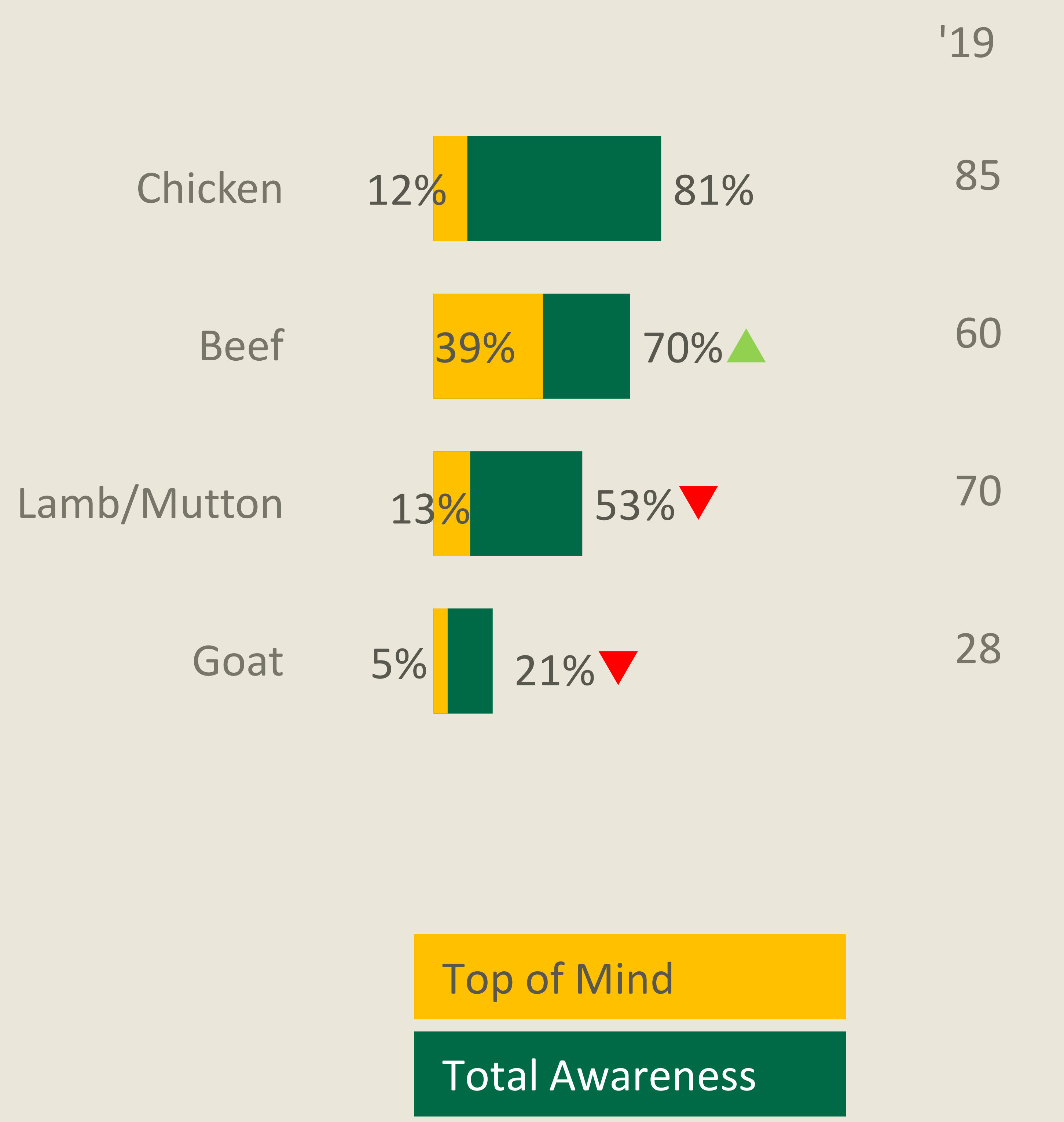
The Central Question

How can Australian meat strengthen its overall position in Qatar and establish itself as an Accessible Premium product?

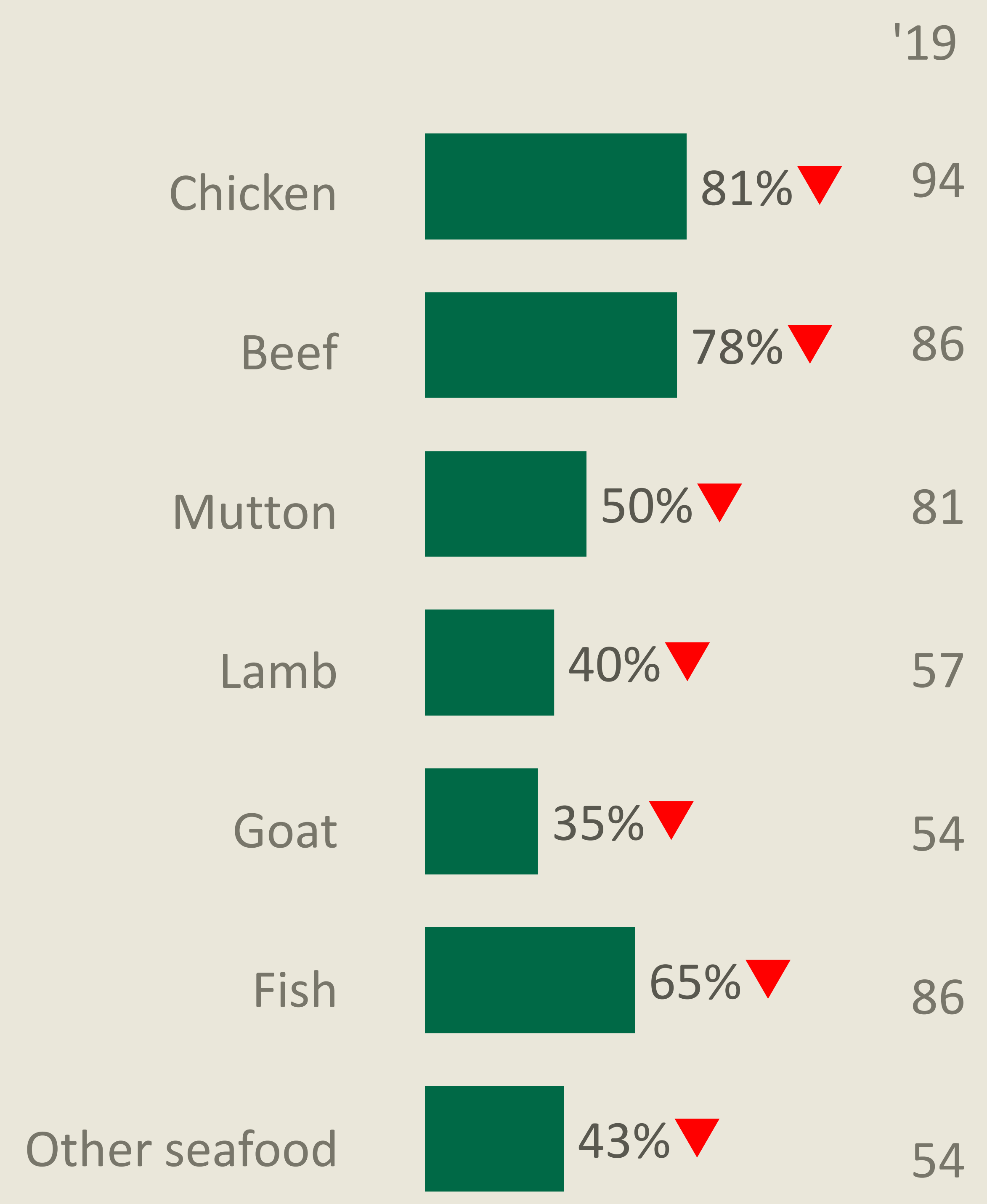
PROTEIN LANDSCAPE

Chicken and beef remain the most consumed meat in Qatar. While claimed purchase sees dip across meat types, frequency of serves has increased across the board.

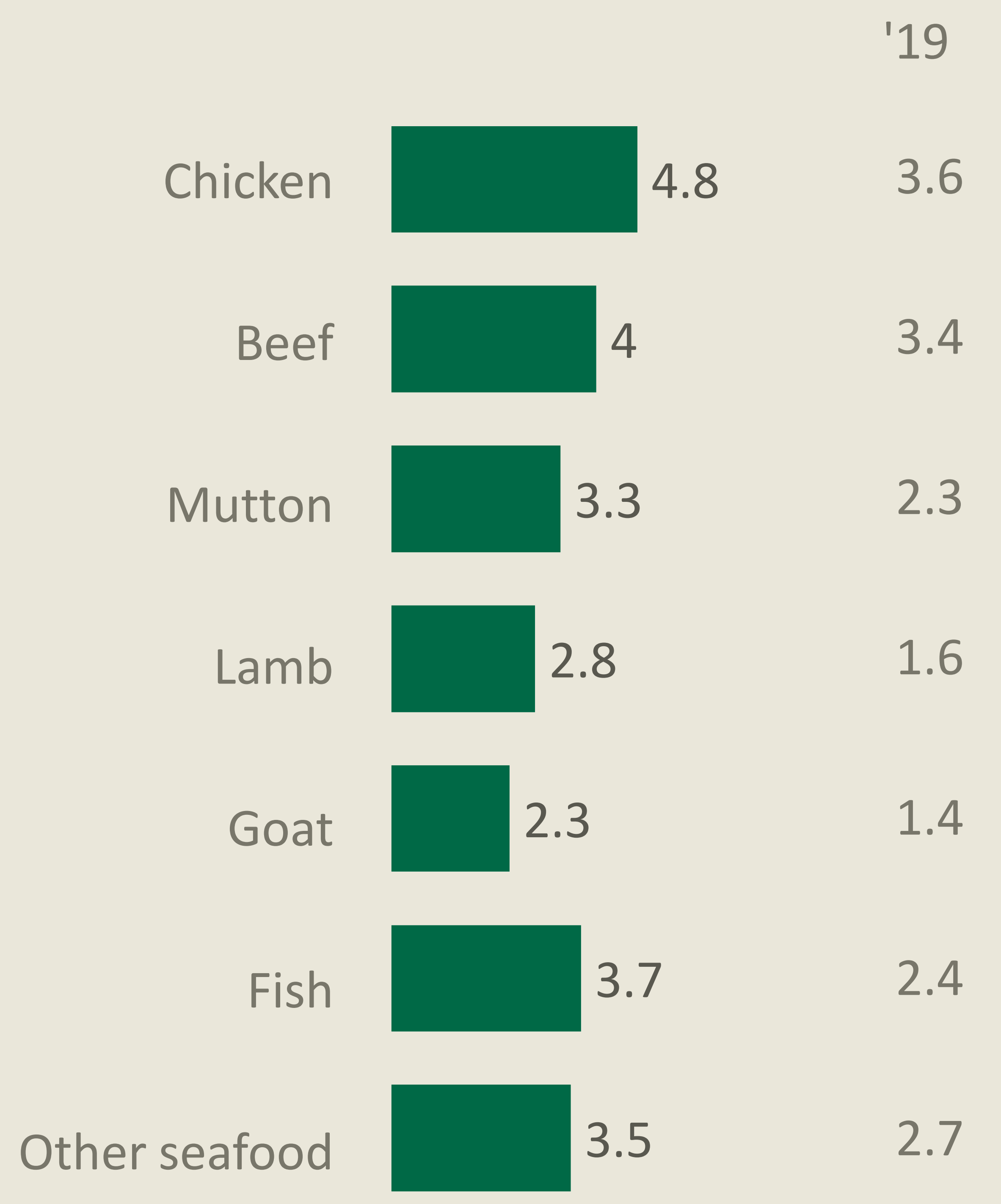
SPONTANEOUS AWARENESS



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), '19 (n=382)

Sig. different at 95%

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While beef, chicken and fish have similar levels of past month purchase, we see that Sheepmeat/Goat plays a greater role in the lives of local Qataris compared to Expat Arabs

	Expat Arabs	Qatari	Total
Chicken	86%	78%	81%
Beef	84%	75%	78%
Fish	64%	65%	65%
Other seafood	36%	46%	43%
Mutton	**40% ↓**	**55% ↑**	50%
Lamb	**29% ↓**	**45% ↑**	40%
Goat	**26% ↓**	**39% ↑**	35%

Average	Expat Arabs	Qatari	Total
Beef	4.2	3.9	4.0
Chicken	4.9	4.8	4.8
Fish	3.5	3.8	3.7
Other seafood	3.5	3.6	3.5
Lamb	**2.3 ↓**	**3.1 ↑**	2.8
Mutton	**2.5 ↓**	**3.7 ↑**	3.3
Goat	**1.7 ↓**	**2.6 ↑**	2.3

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*

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 Qatar, red meat is the favourite – with Sheepmeat playing a Superior role, seen as well-cared for. Chicken is 'everyday' and fish is healthy.

Favourite

Beef

Strengths
- My/my family's favourite meat

Weaknesses
- Not cheap

What's changed this year?

Softened on superior, versatile and well-cared for

Prime / Superior

Lamb

Strengths
- Is well-cared for

Less clearly defined than KSA/UAE

Mutton

Strengths
- Most superior
- Fatty

Seen as superior across KSA, UAE and Qatar

Affordable, convenient

Chicken

Strengths
- Cheaper
- Easy and convenient to purchase and prepare

Weaknesses
- Not Superior
- Not Delicious
- Not willing to pay more for

What's changed this year?

Improved weakness on nutrition (now neutral)

Low fat, healthy

Fish

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

Weaknesses
- Well-cared for

Consistent for MENA

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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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From a channel perspective, vs 2019, we've seen a strong shift to channels beyond butchers for the purchase of red meat.

Butchers relatively stable

Super/ Hypermarkets

Growth in **other channels**

Online

Convenience

Wet/Meat markets

Qataris growth on **direct farmers / family**

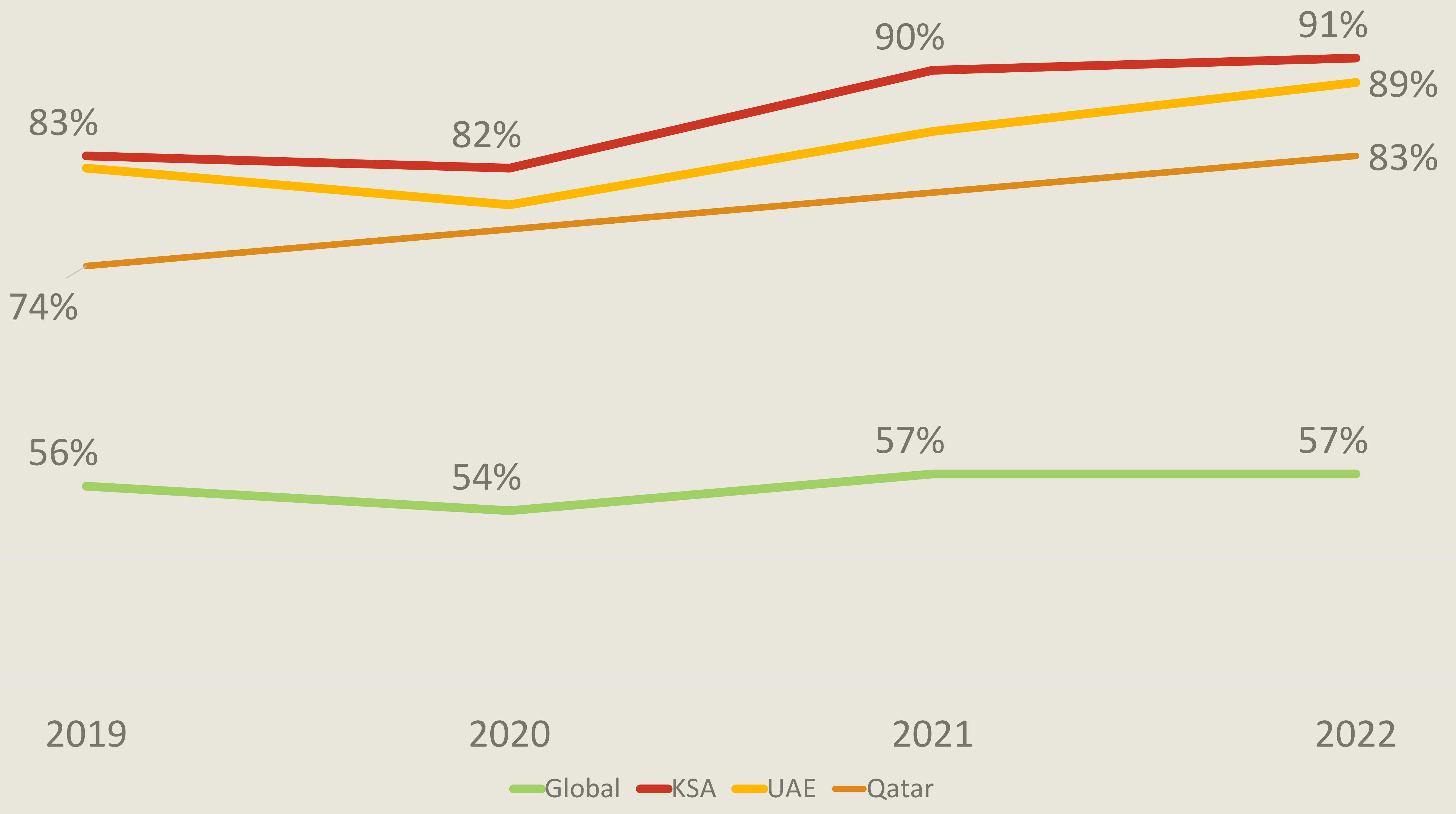
QR3B. How often have you bought lamb from each of these locations in the last six months? Base: '22 (n=248), '19 (n=249)
QR3A. How often have you bought beef from each of these locations in the last six months? Base: '22 (n=251), '19 (n=251)

LAMB COO AWARENESS, BRAND HEALTH & TRUST

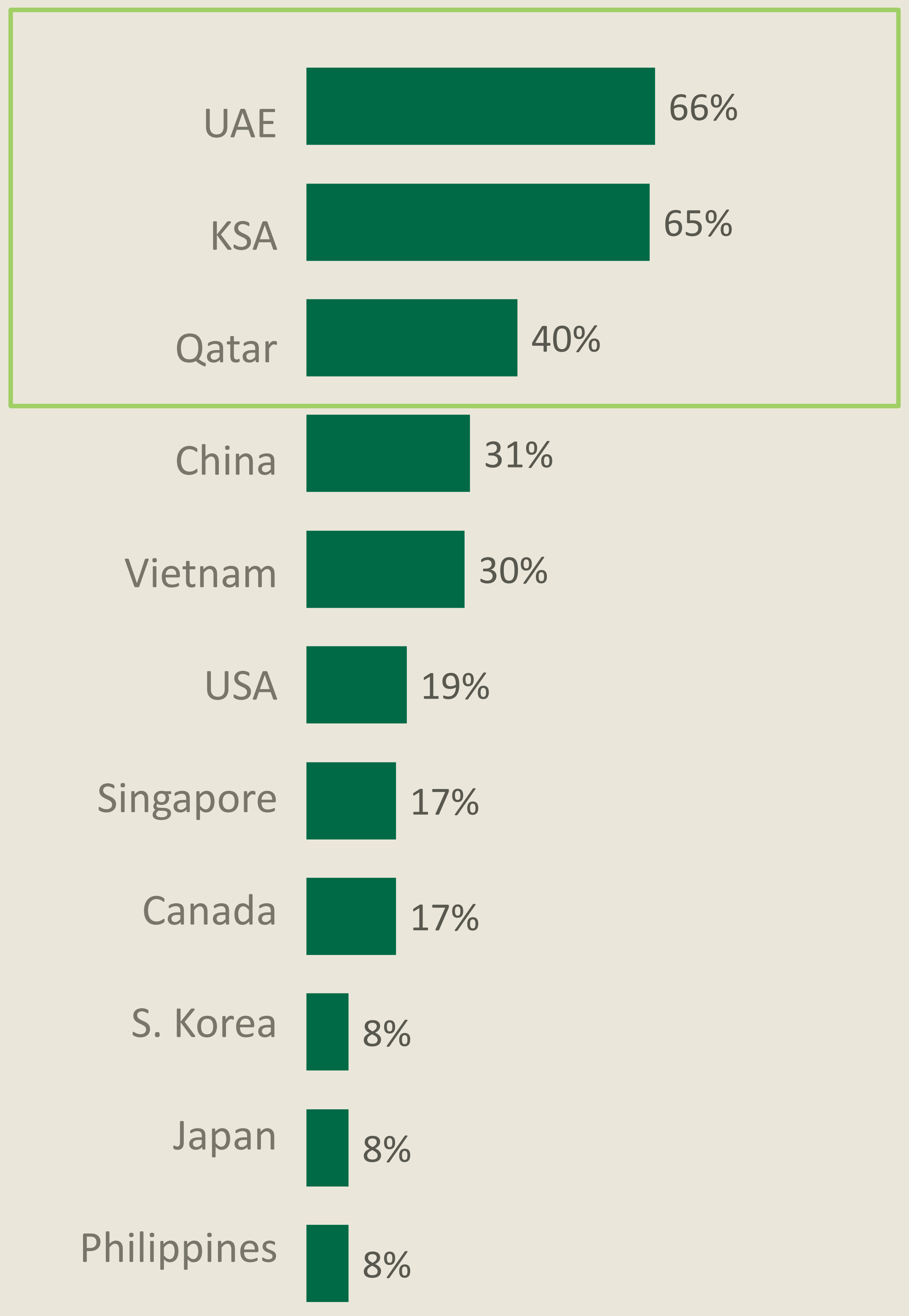
All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.

MENA continues to grow it's already high penetration of lamb, Qatar only slightly behind KSA and UAE with more than 4 in 5 saying they have bought lamb in the past.

EVER BOUGHT LAMB



BOUGHT LAMB IN LAST MONTH



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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=46), '21 (n=49), '20 (n=0)

Sig. different at 95%

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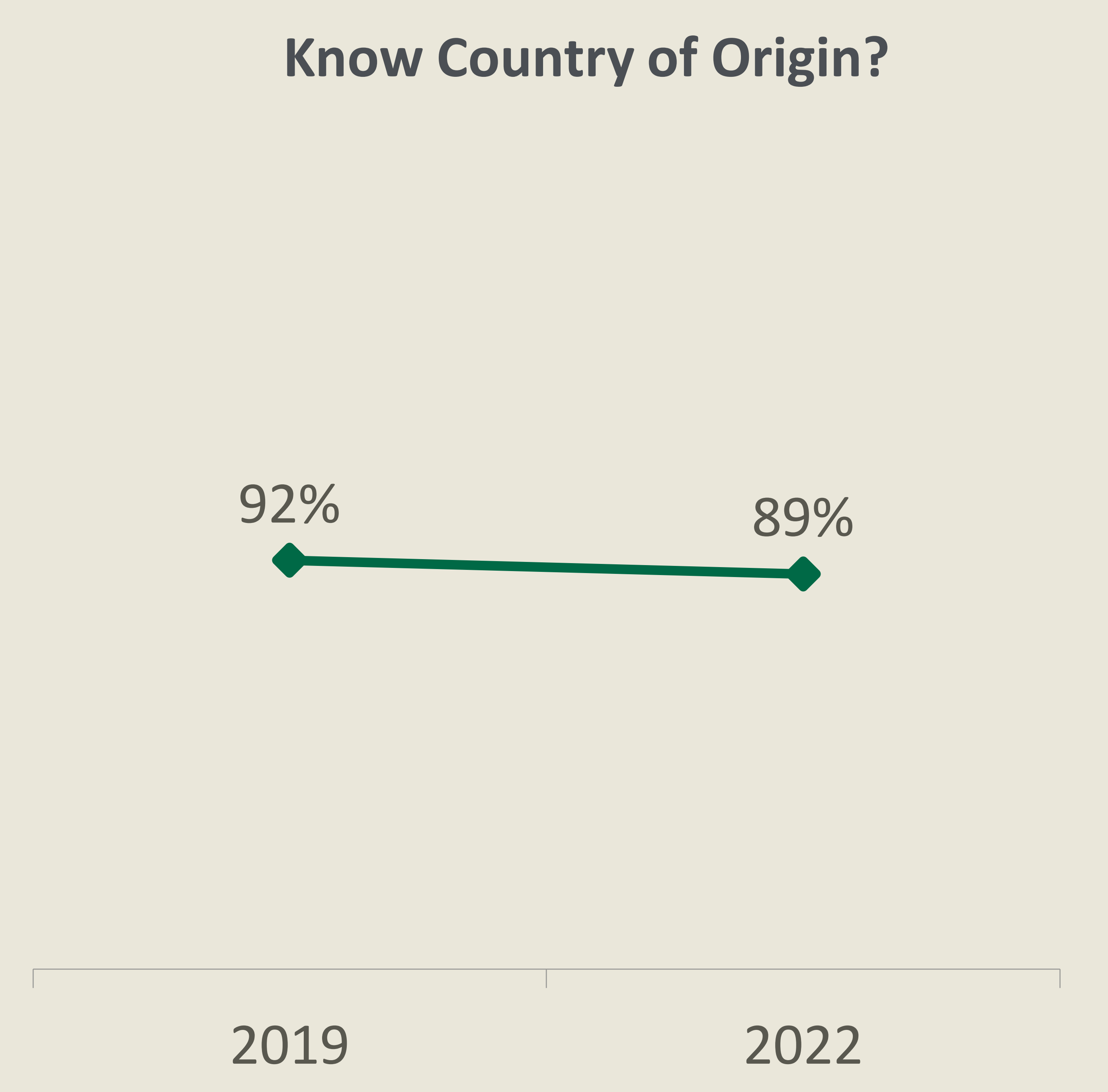
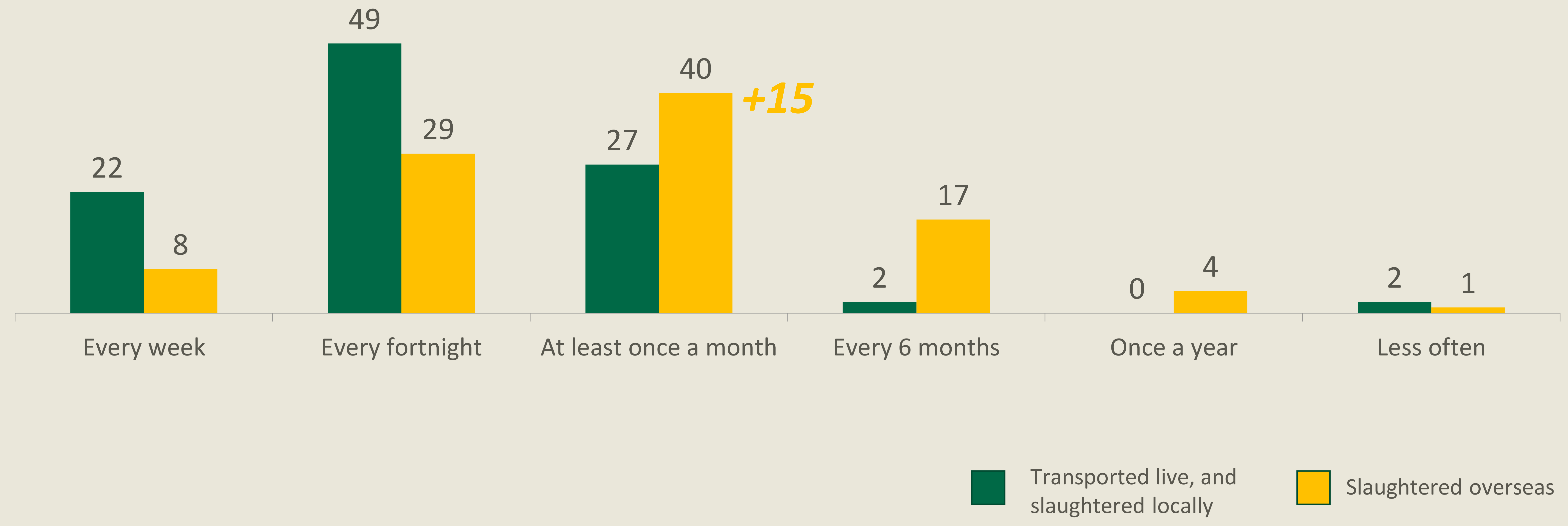
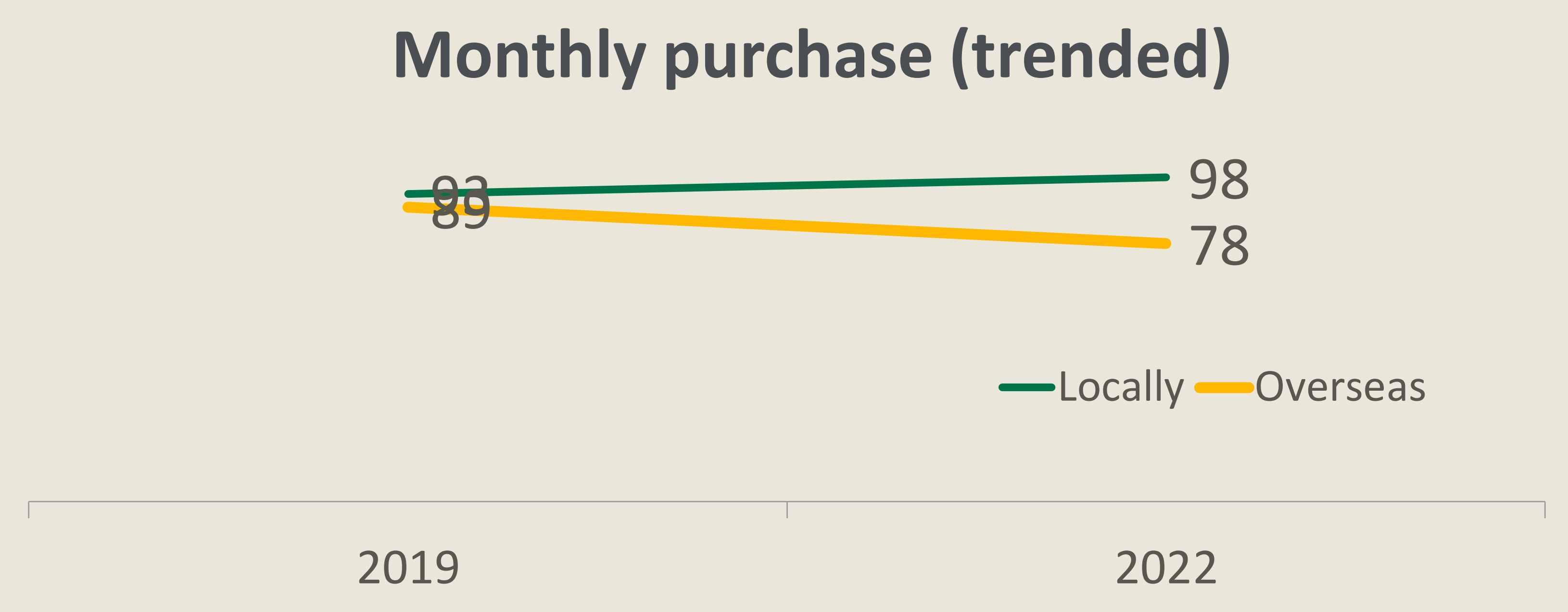
The majority claim to know the COO. Local lamb purchased more often, on a monthly basis by almost all lamb consumers in Qatar. Purchase frequency of imported has softened.







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(LBH1A) Do you know the country of origin of the lamb you buy? Base: (n=417)
(CH7) How often do you buy imported lamb/Halal compliant lamb? Base: (n=417)
(CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: (n=417)

Sig. different at 95%

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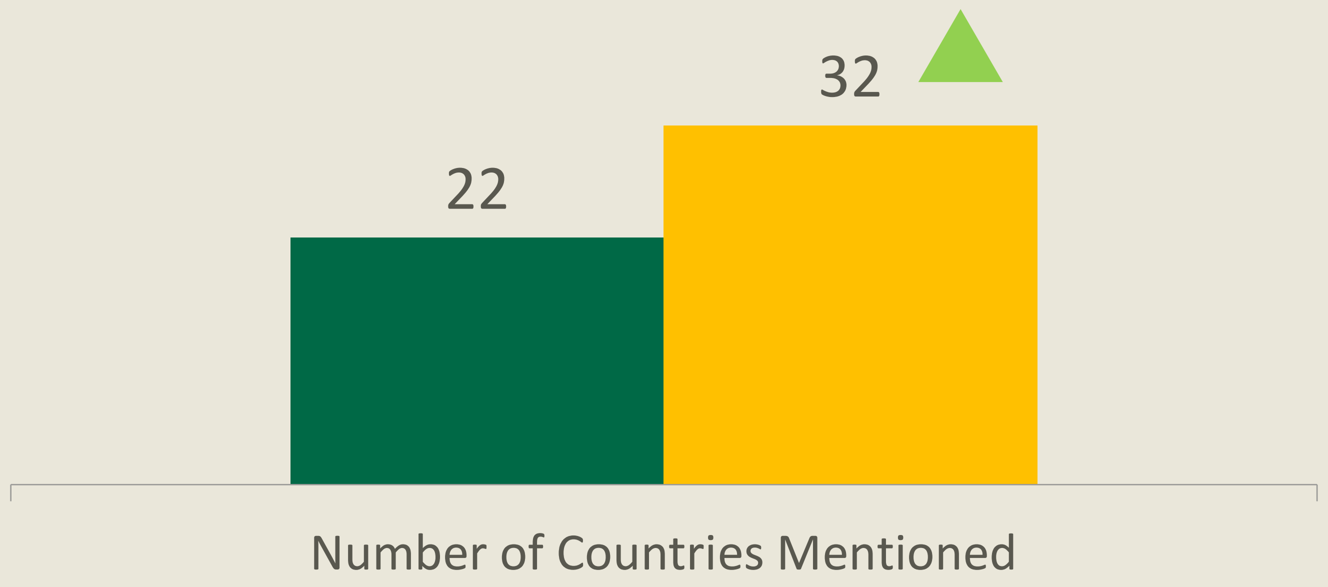
With the removal of subsidies, and the subsequent proliferation of COOs - we've seen consumers spontaneously aware of more COOs vs 2019



Down:

AUSTRALIA
54% ▼

Slightly Weaker:

SYRIA	SUDAN	NEW ZEALAND	GEORGIA	PAKISTAN	INDIA
35%	25%	22%	21%	18%	18%

Up:

AMERICA	BRAZIL	CANADA	SOMALIA
33% ▲	22% ▲	20% ▲	18% ▲

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LBH1. Spontaneous Awareness
Base: '22 (n=234), '19 (n=241)
Mentions of USA and Brazil when prompted for Lamb COOs indicate uncertainty with new COOs seen in the meat space (given US and Brazil export Beef but not Lamb).

▲▼ *Sig. different at 95%*

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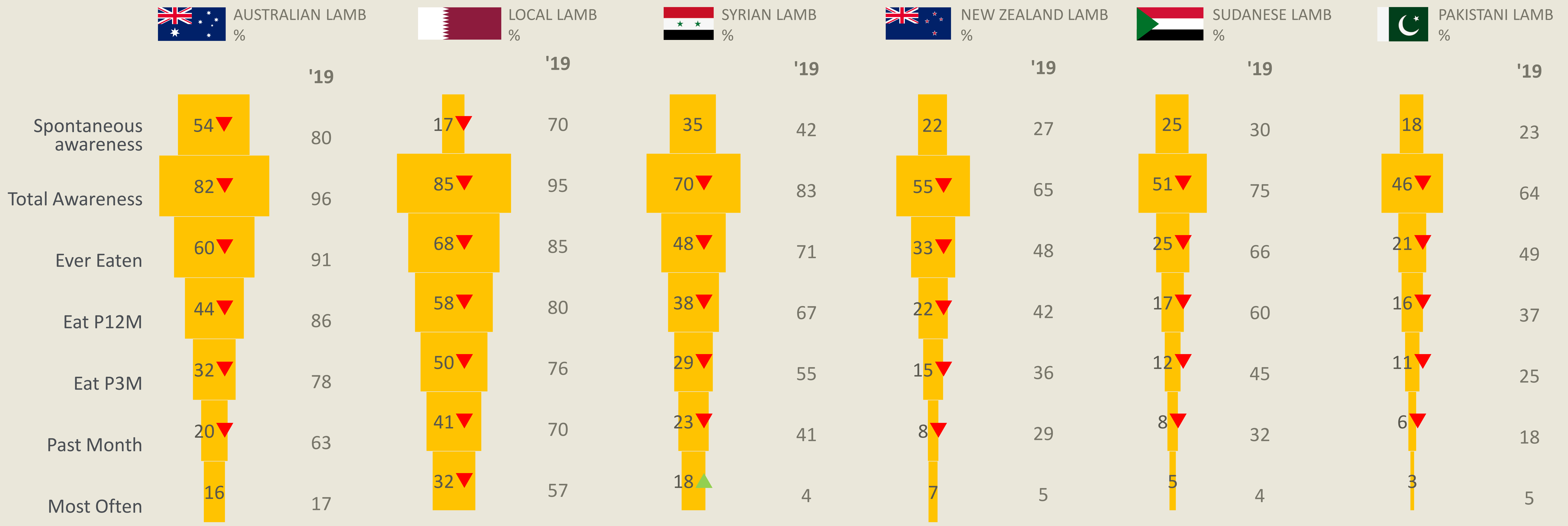
In line with the more fragmented perceptions of the market we see diminishing awareness and claimed usage across the larger COOs and ‘types’ of Lamb.
At the lower end of the funnel (claimed, current consumption) AU and Syrian Lamb are on par.

BRAND HEALTH – LAMB



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LBH1. Spontaneous Awareness, LBH2. Prompted Awareness, LBH3. Ever Eaten, LBH4. Eaten last year, LBH5. Eaten in the last 3 months, LBH6. Eaten last month, LBH8. Most often
Base: ‘22 (n=234), '19 (n=241) – Bought lamb in past month or ever buy lamb

Sig. different at 95%

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In contrast to the more established types of lamb, Georgian, Romanian and Somali lamb have seen an increase in awareness flowing through to claimed consumption.

BRAND HEALTH – LAMB

	GEORGIAN LAMB %	'19	SOMALI LAMB %	'19	INDIAN MUTTON/LAMB %	'19	ROMANIAN LAMB %	'19
Spontaneous awareness	21	0	17 ▲	1	18	20	6	N/A
Total Awareness	40 ▲	5	39 ▲	24	39 ▼	64	38 ▲	N/A
Ever Eaten	23	0	19 ▲	5	15 ▼	39	17	N/A
Eat P12M	17	0	14 ▲	2	9 ▼	28	13	N/A
Eat P3M	11	0	11 ▲	1	6 ▼	18	9	N/A
Past Month	6	0	7 ▲	1	3 ▼	10	5	N/A
Most Often	3	0	4	0	2 ▼	7	4	N/A

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LBH1. Spontaneous Awareness, LBH2. Prompted Awareness, LBH3. Ever Eaten, LBH4. Eaten last year, LBH5. Eaten in the last 3 months, LBH6. Eaten last month, LBH8. Most often
Base: '22 (n=234), '19 (n=241) – Bought lamb in past month or ever buy lamb

▲▼ *Sig. different at 95%*

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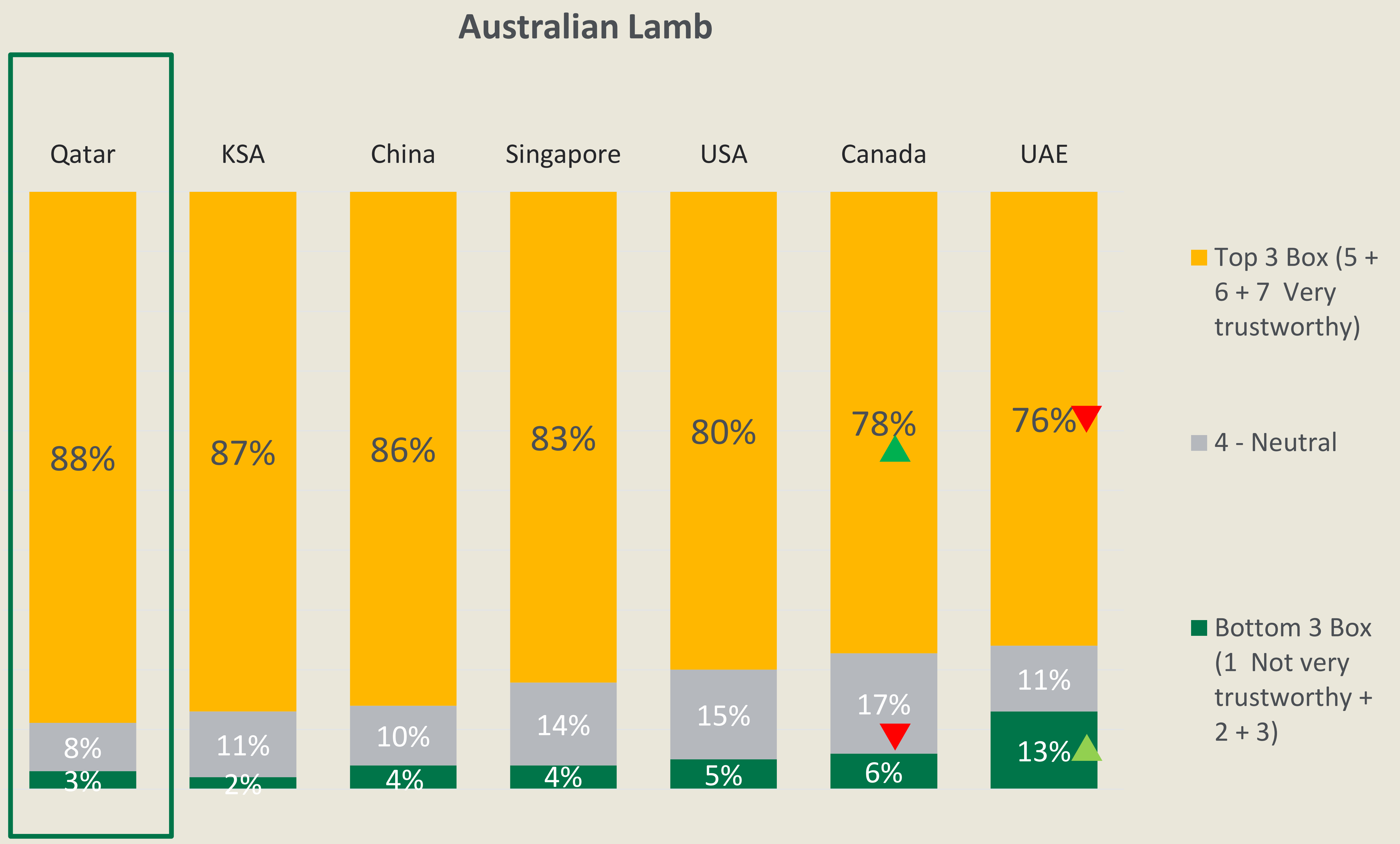
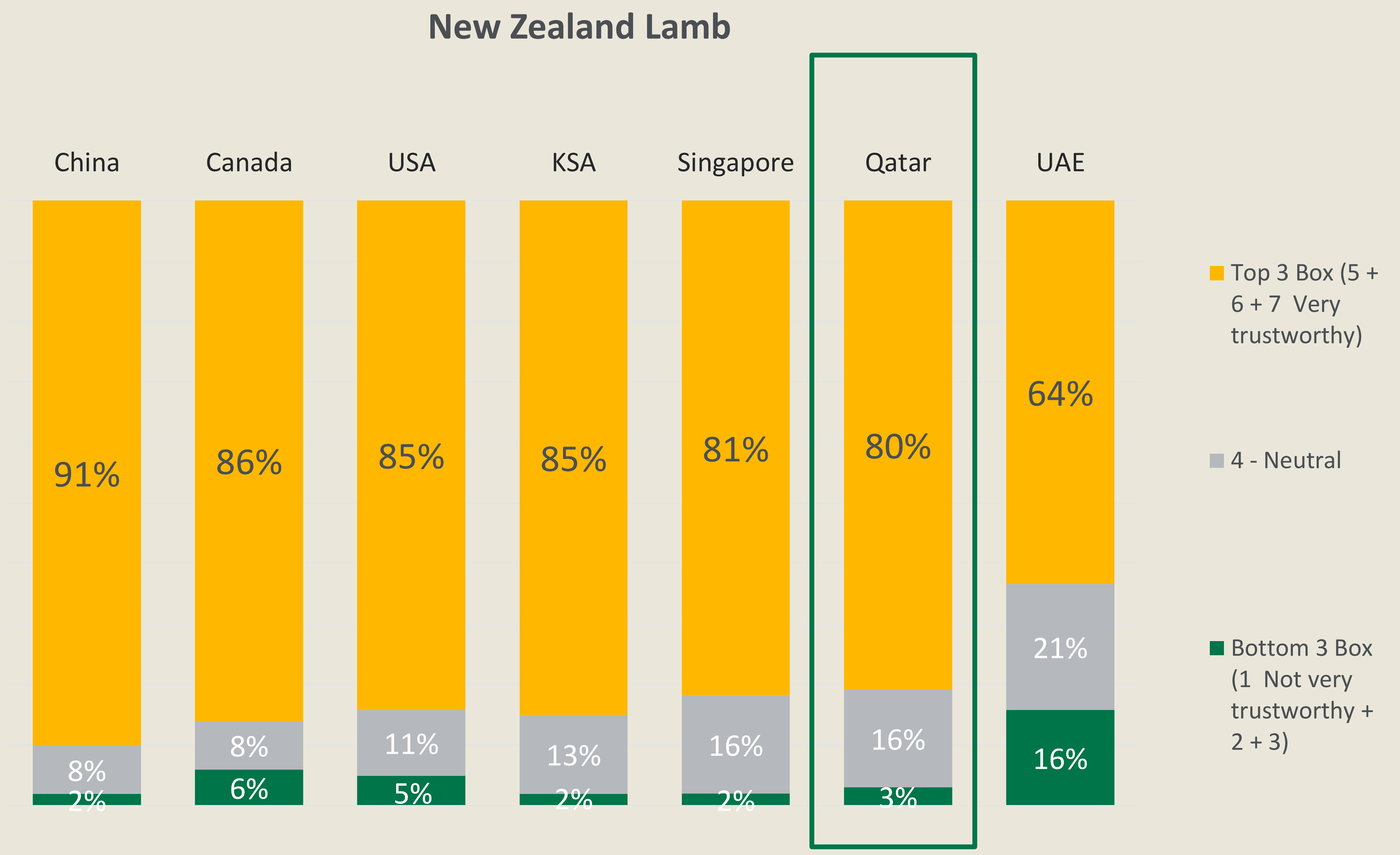
Australian lamb enjoys greater trust in Qatar than any other market (KSA on par). As a point of comparison, NZ lamb trails slightly in the MENA markets, but has established greater Trust elsewhere.

Trustworthy (Top 3 Box/Bottom 3 Box nets) – AU Lamb (All markets)



Trustworthy (Top 3 Box/Bottom 3 Box nets) – NZ Lamb (All markets)



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BTR2L. How trustworthy is the imported beef from these countries – 7 point scale
Base: Japan (-) UAE (210), USA (607), KSA (219), South Korea (-), China (312), Canada (113), Philippines (-), Vietnam (-), Singapore (181), Qatar (191)

Sig. different vs 2021 at 95%

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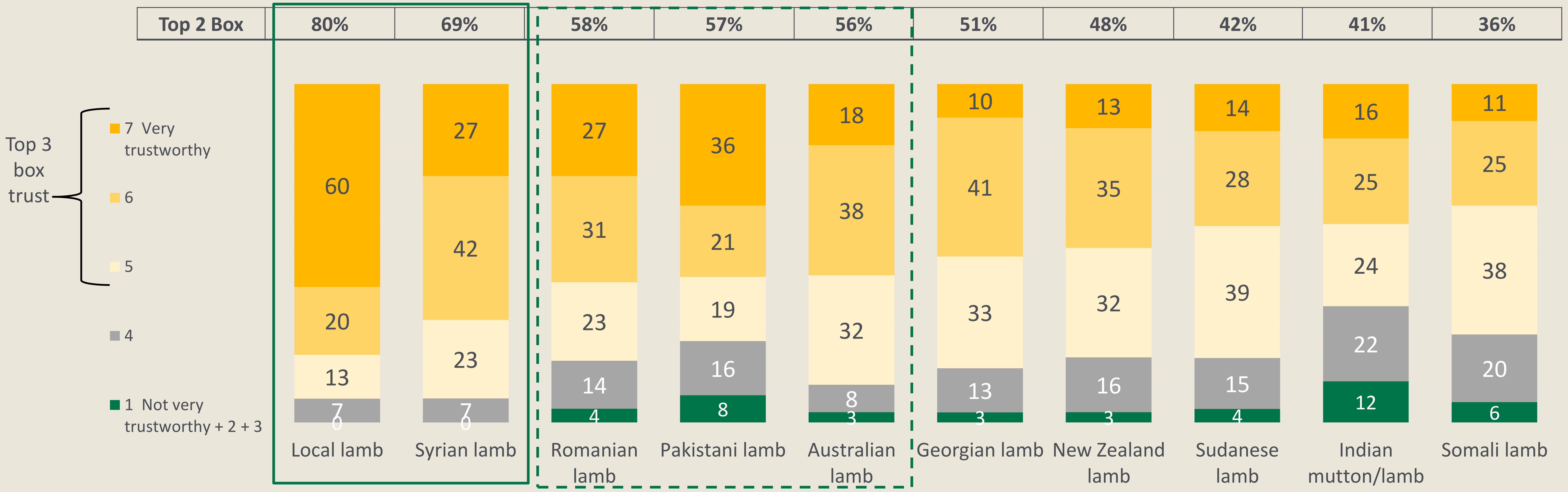
But within the market, it is a more nuanced picture, with Pakistani and Romanian lamb having established similar levels of trust to Australian. Local and Syrian lamb stand apart from the rest.

Trustworthy – COO Lamb

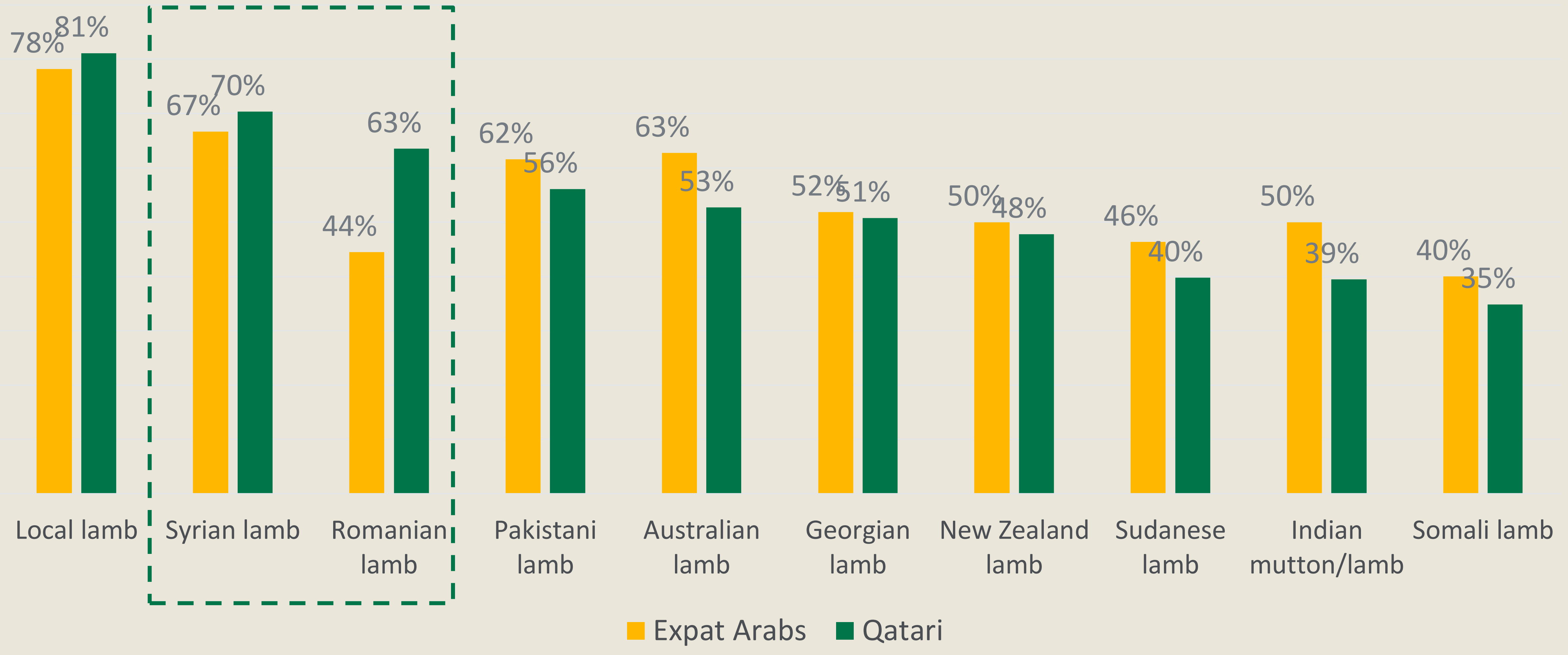


BTR2L. How trustworthy is the imported lamb from these countries
Base: Australian lamb (191) New Zealand lamb (128), Indian mutton/lamb (91), Somali lamb (92), Sudanese lamb (119), Syrian lamb (163), Georgian lamb (94), Romanian lamb (90), Local lamb (199), Pakistani lamb (108)

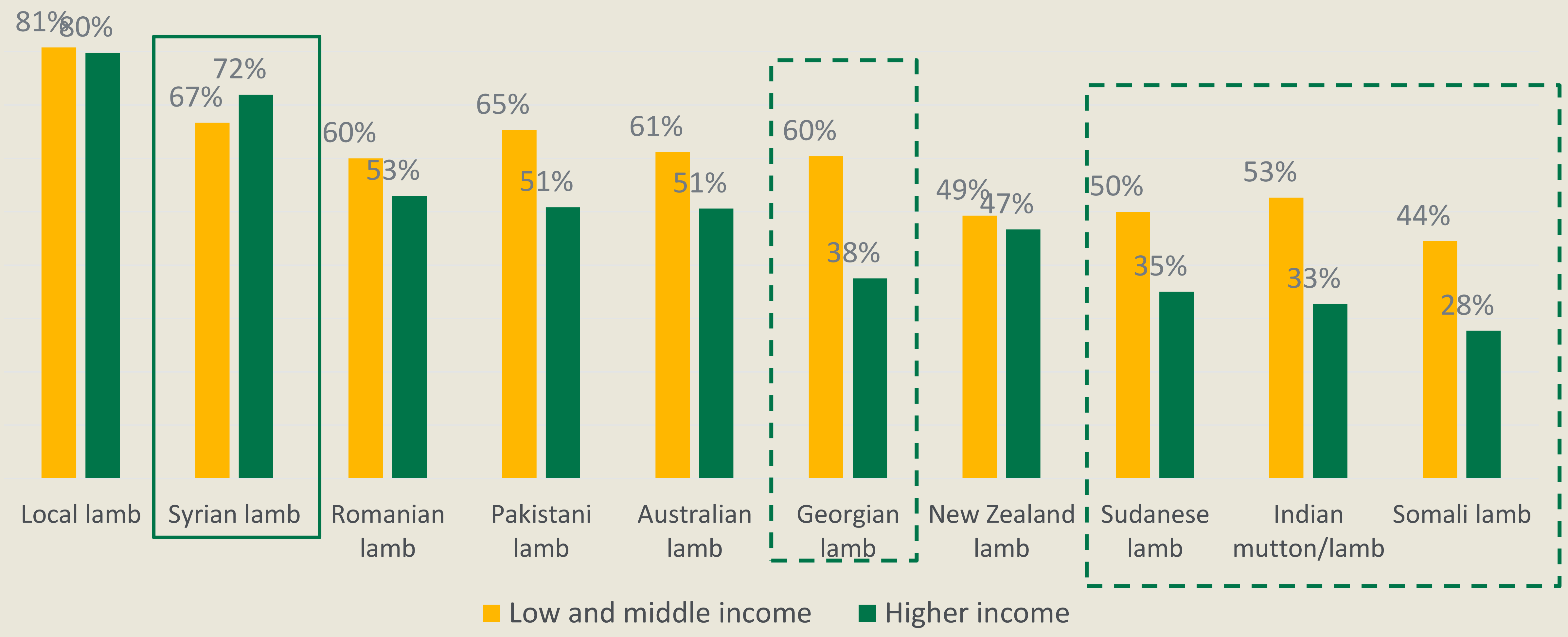
And there are some differences in where trust has been established. Only Syrian has established higher trust amongst high income, Romanian appears to have established more trust with Qataris.

Trustworthy (Top 2 Box)

Nationality



Income



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Low/middle income = '300,000 QAR or more + 180,001 – 299,999 QAR
Higher income = '300,000 QAR or more + 180,001 – 299,999 QAR

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LAMB EQUITY & 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.

We see some shifts in perceptions versus 2019. These impact how consumers see the role of each Lamb COO.

AUSTRALIAN LAMB

Fresh

Cheaper

Easy and convenient to purchase

Halal

LOCAL LAMB

Cheaper

Softens variety of cuts and favourite

Falls on all other associations

NEW ZEALAND BEEF

Cheaper

Fresh

SYRIAN LAMB

Stronger perceptions across all attributes

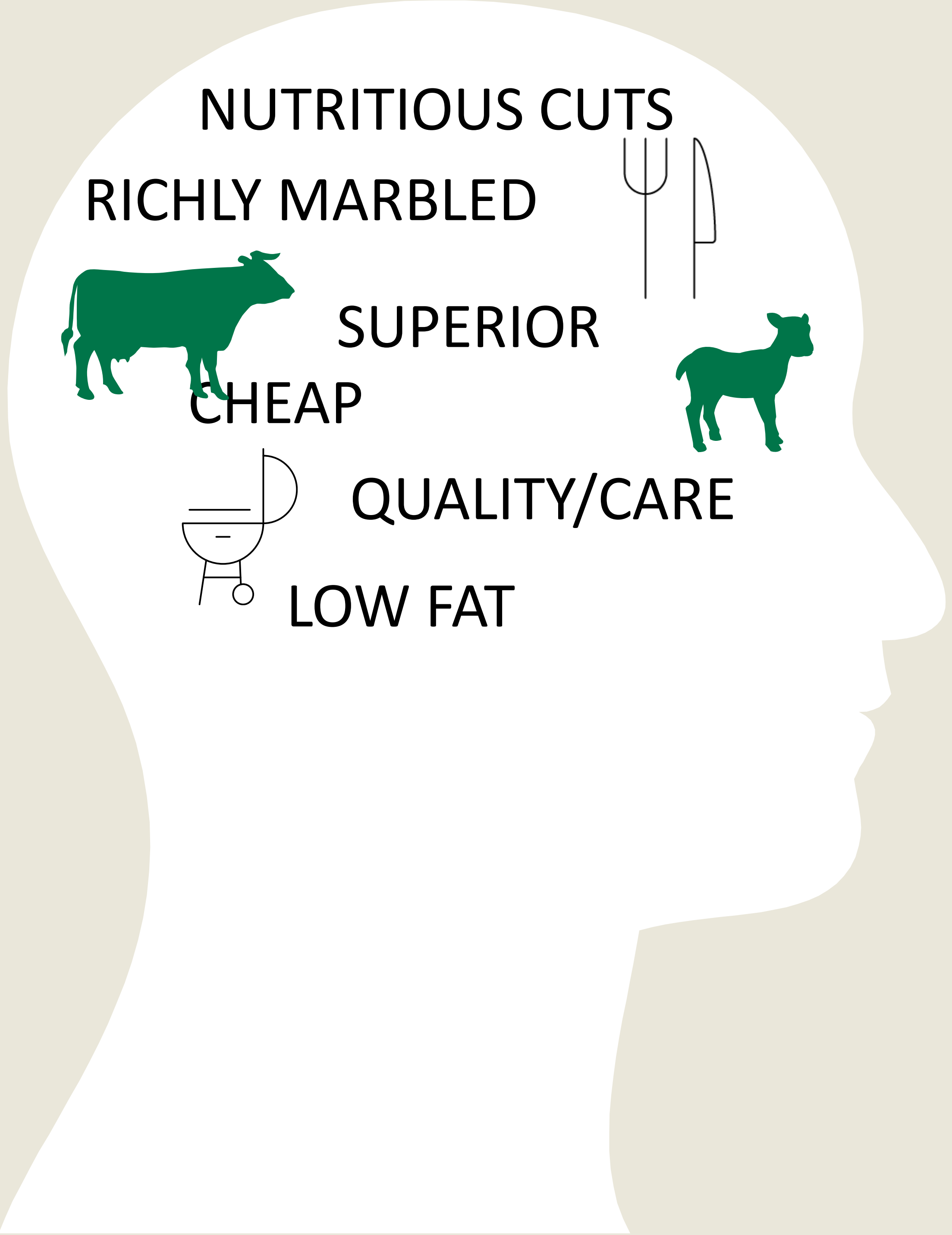
PAKISTANI LAMB

Stronger across most attributes

Base: ‘22 (n=251), '21 (n=249)
QLBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn’t matter if you don’t buy any of them - it’s your impressions we’d like.

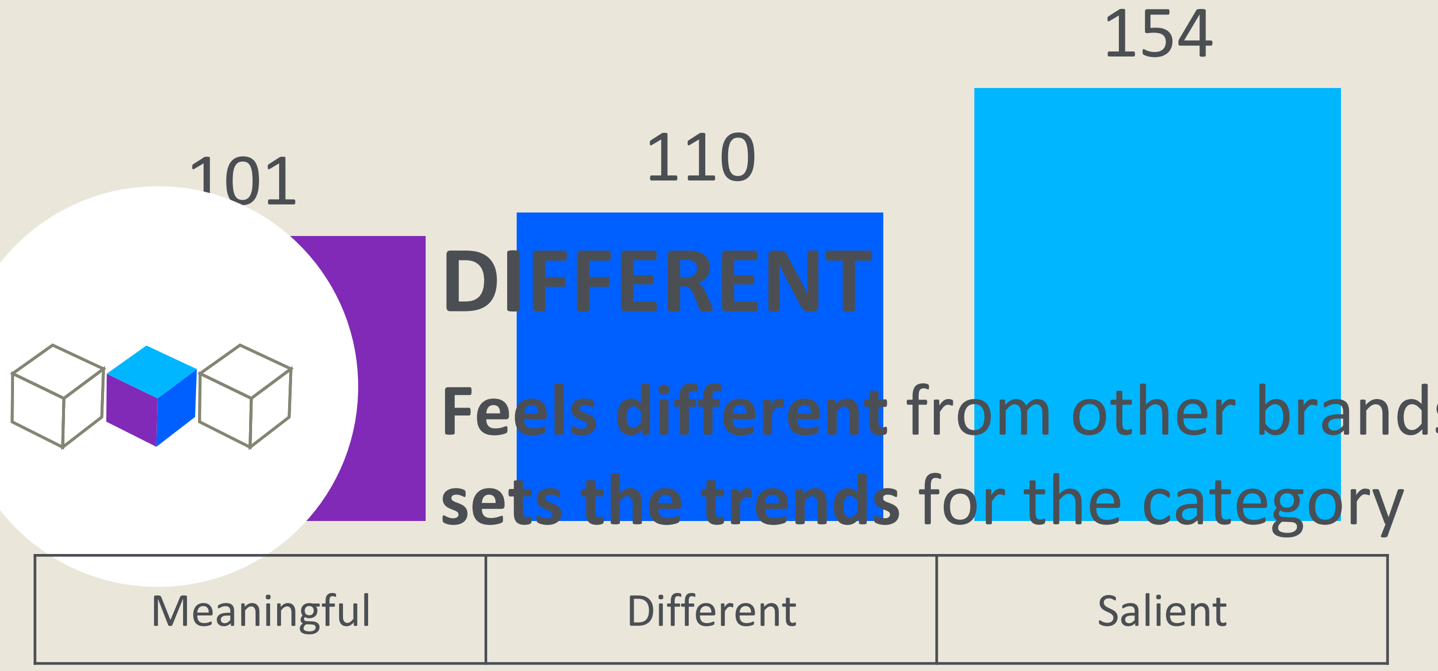
Sig. different at 95%

The 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**



DIFFERENT

Feels different from other brands or **sets the trends** for the category

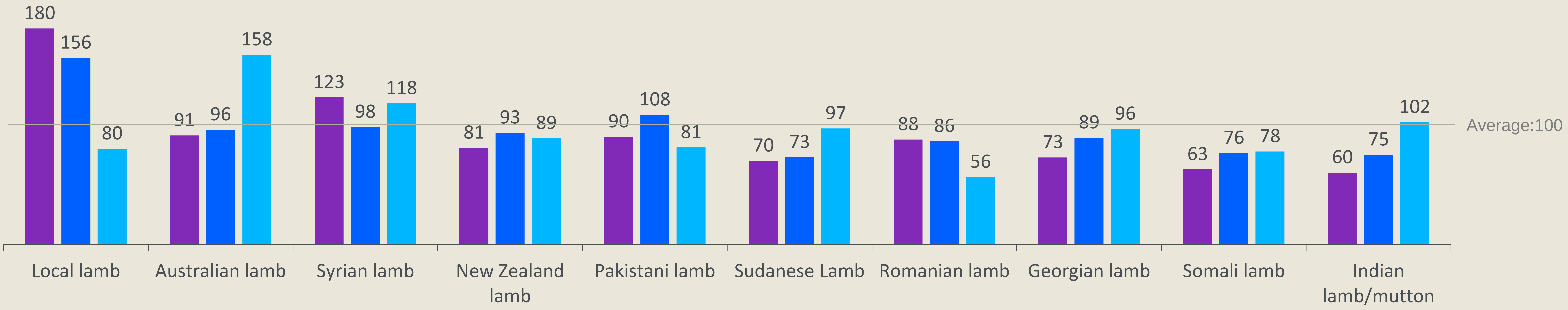
SALIENT

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

Local lamb is seen as relevant and different from the rest. AU lamb strong on visibility. Syrian lamb has good balance across all elements, resulting in its better performance in 2022.



Comparison vs. 2019 not applicable as the brand set has changed

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Meaningful Different Salient

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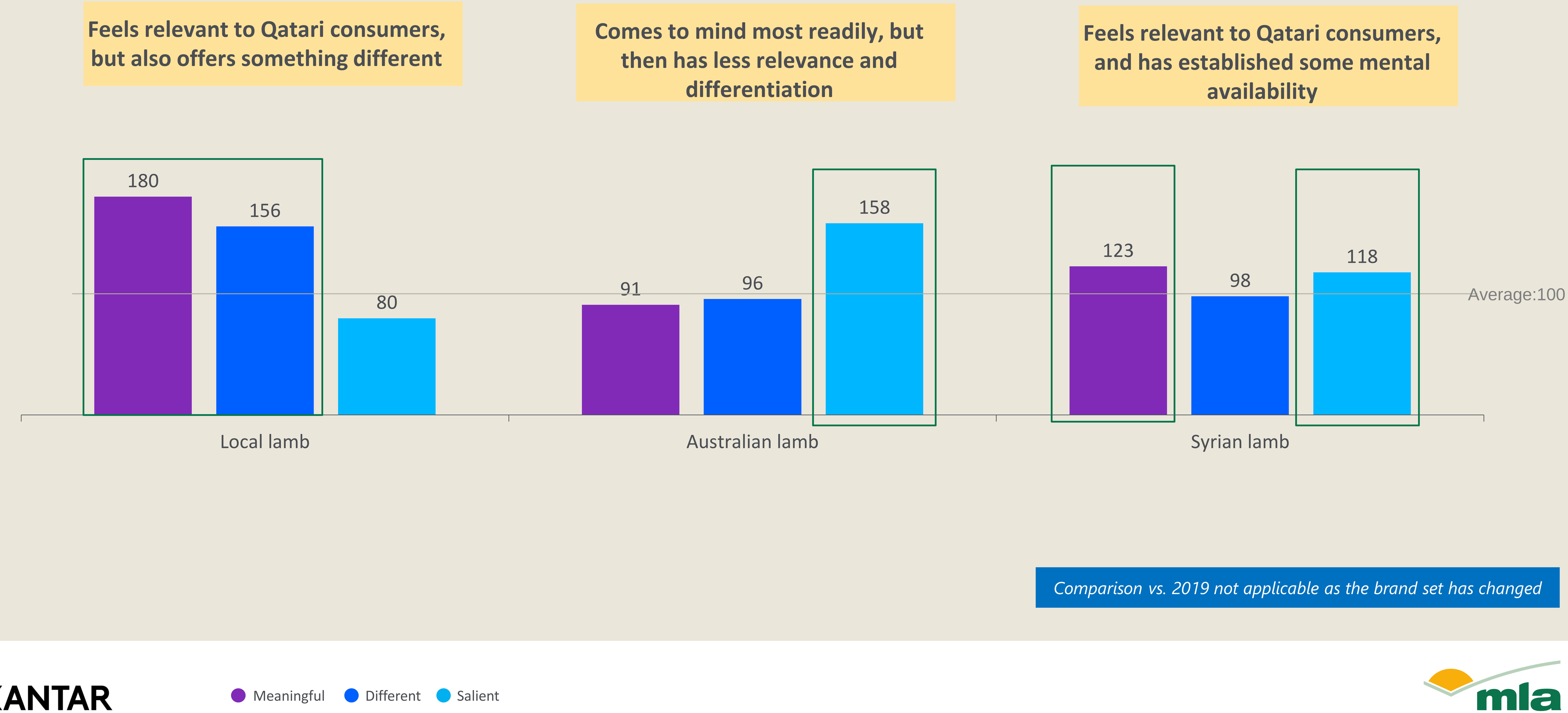
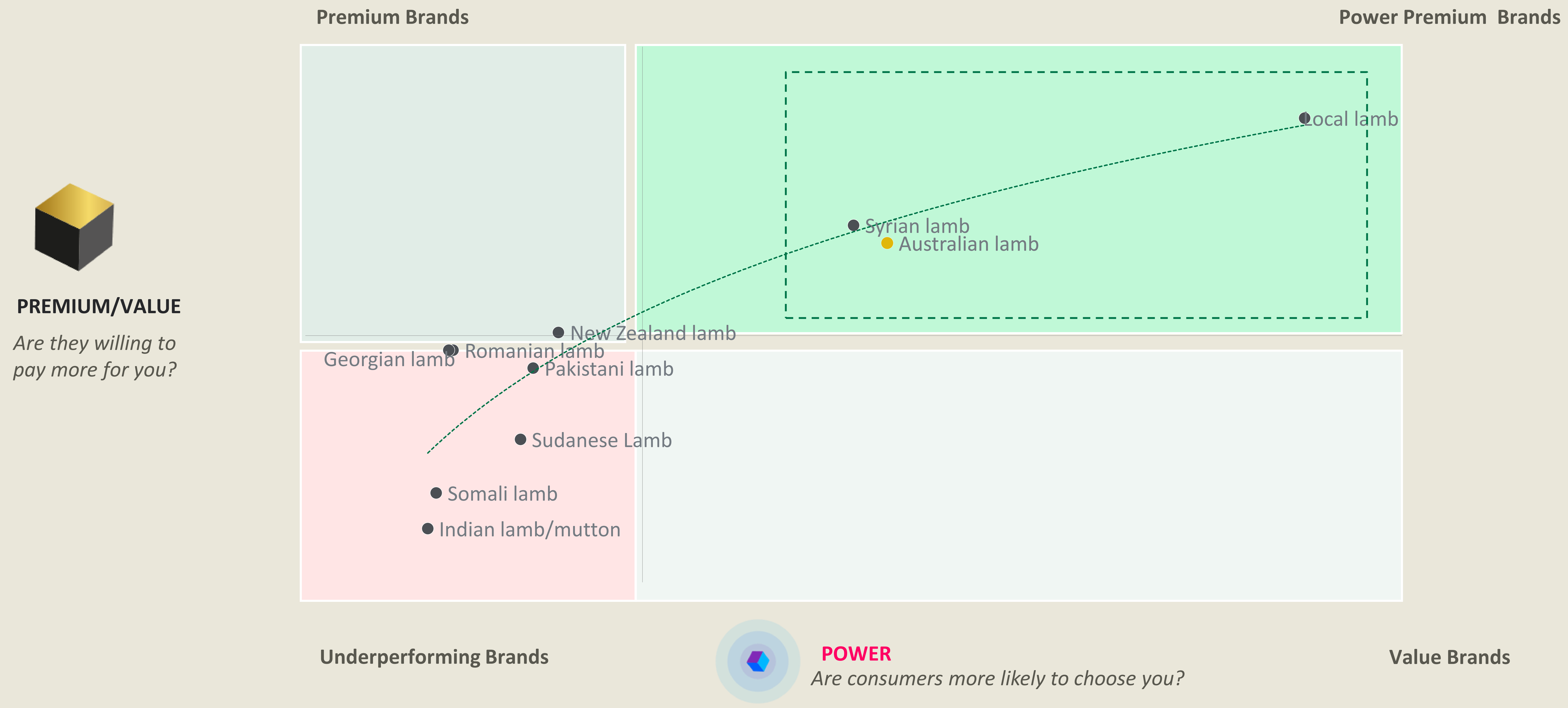
Of the three strongest Lamb types, they have established different elements of equity but own something that supports their position in consumers minds.

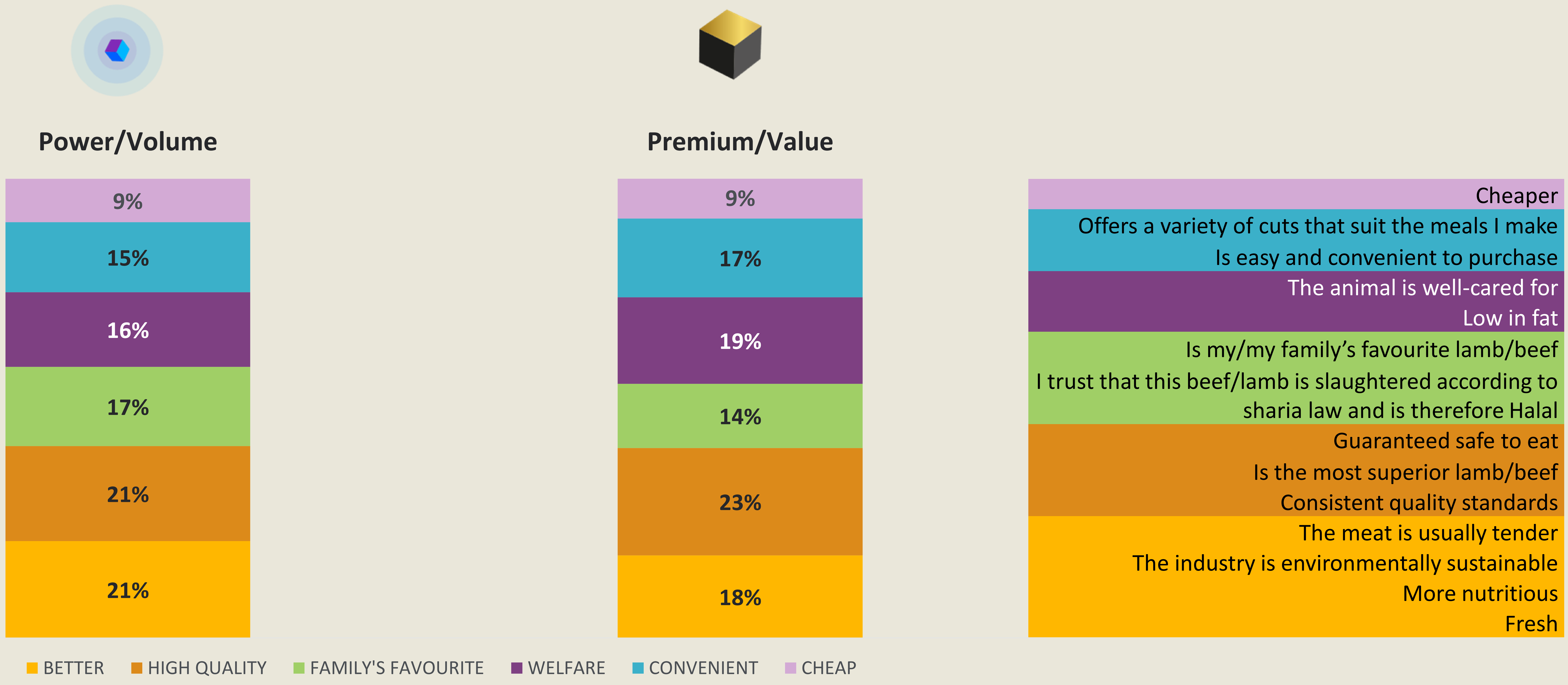


Comparison vs. 2019 not applicable as the brand set has changed

The result is that these three Lamb types/COO sit apart in the minds of consumers in Qatar, both on their likelihood to purchase, and their willingness to pay more.



Similar to other markets in the ME region, overall product goodness and superior quality drives both Volume and Value, but there is a little more differentiation in what supports premium perceptions vs what will drive volume.



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White space on the main drivers of brand equity – better and high quality. Syrian lamb has the most clearly defined profile, strength on halal and unique strength on superior.
Opportunity for AU to build on a platform of consistent quality, as well as the white space on nutritious.

DRIVERS OF POWER
(ranked top to bottom)

		AUSTRALIAN LAMB	NEW ZEALAND LAMB	LOCAL LAMB	PAKISTANI LAMB	SUDANESE LAMB	SYRIAN LAMB
Better (21%)	Fresh	-3	0	1	2	-4	-5
	More nutritious	0	1	-2	-1	-1	3
	The industry is environmentally sustainable	-2	-1	1	2	1	-3
	The meat is usually tender	2	-2	2	-1	2	0
High Quality (21%)	Consistent quality standards	3	2	-1	-2	-4	1
	Is the most superior lamb/beef	1	1	-3	-1	-4	5
	Guaranteed safe to eat	1	0	0	3	-4	3
Family's Favourite (17%)	I trust that this beef/lamb is slaughtered according to sharia law and is therefore Halal	-14	-3	1	7	9	5
	Is my/my family's favourite lamb/beef	6	-2	5	-2	3	0
Welfare (16%)	Low in fat	3	0	-4	-1	2	-5
	The animal is well-cared for	-1	5	0	-3	-3	0
Convenient (15%)	Is easy and convenient to purchase	0	2	5	-2	5	-1
	Offers a variety of cuts that suit the meals I make	1	0	2	-2	-3	2
Cheaper (9%)	Cheaper	3	-4	-8	2	4	-4

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

LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to 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=234)

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Continuing our focus consistent quality and by implication nutritious will support volume and premium perceptions, with the more sustainable processes of AU being a route to building both quality and implied BFY.

Top 5 Individual Associations to Grow - Volume & Value:

(Ordered based on impact on building equity*)

Associations for AU to communicate

1. Fresh

Difficult to achieve for imported product

Build

2. More nutritious

Implicit

3. Slaughtered according to sharia law

Difficult to achieve when competing vs. a local product

Build

4. Consistent quality standards

5. Sustainable = Premium

Safe (implicit)

More explicit

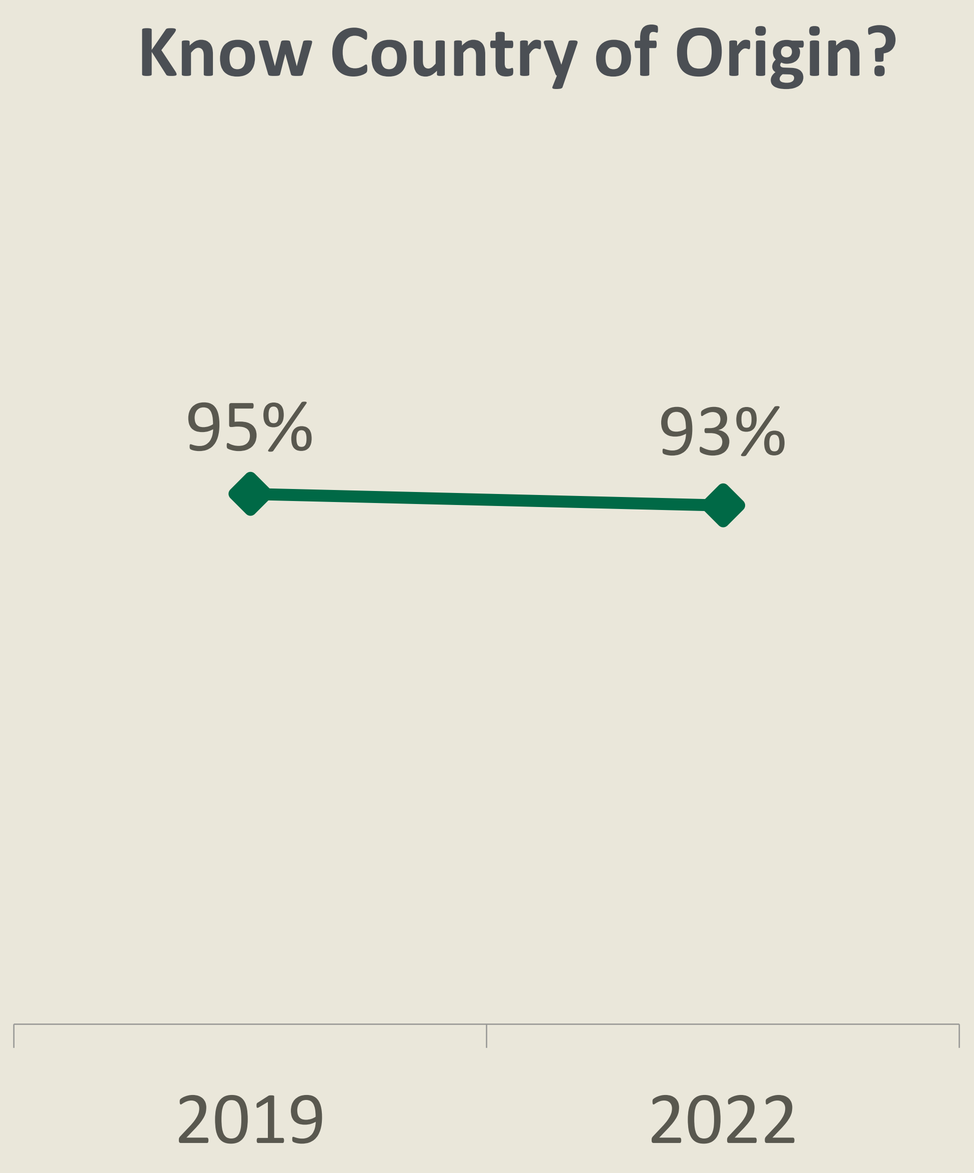
*These associations are simulated in the Meaningfully Different model to ascertain which will drive the greatest growth in Power and Premium

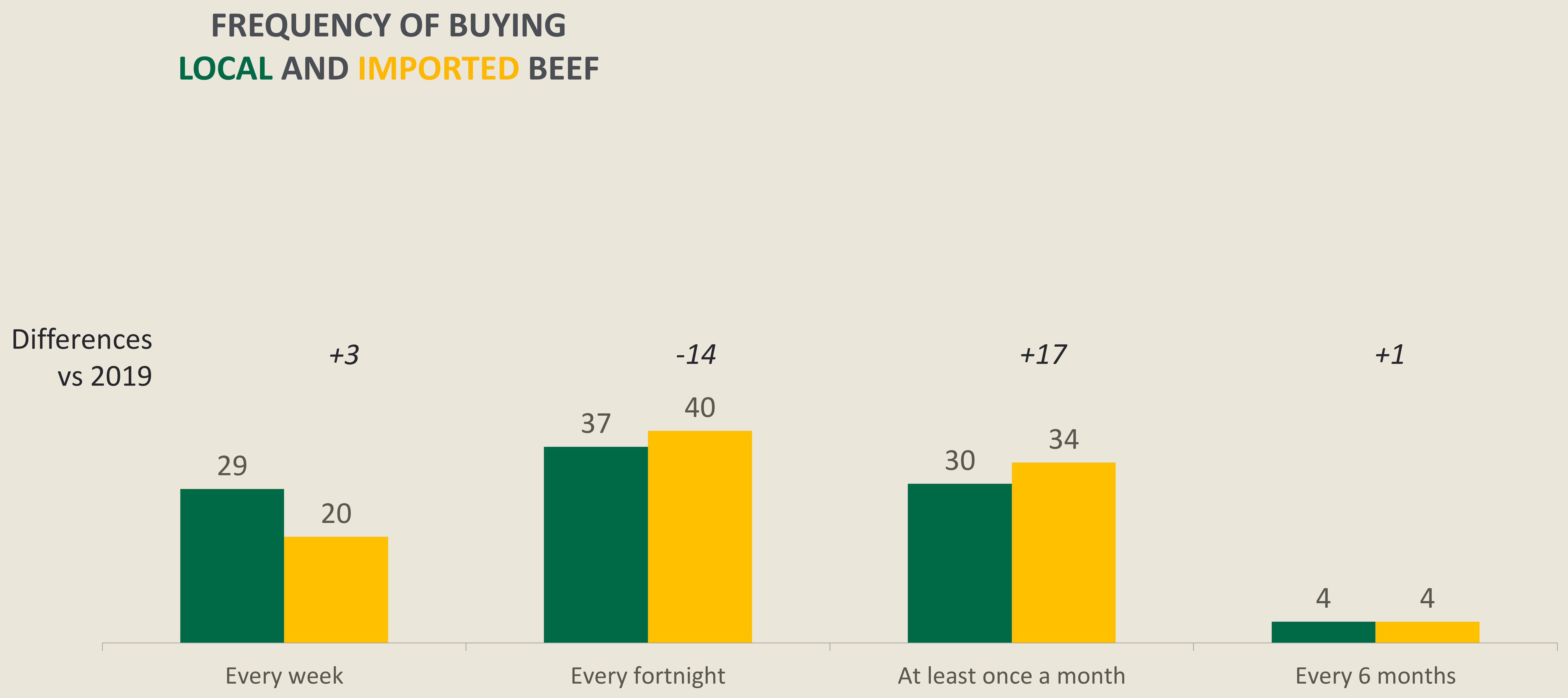
BEEF

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.

As with other ME markets, claimed knowledge of COO is high in Qatar. Claimed purchase of imported beef is somewhat lower and has dropped from fortnightly to a more monthly purchase in 2022.





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(GF3B) Do you know the country of origin of the beef you buy? (n=495)
(CH4) How often do you buy imported beef? (n=495)
(CH4LOC) How often do you buy local beef? (n=495)

Sig. different at 95%

MEAT & LIVESTOCK AUSTRALIA

Local beef remains the dominant player, followed by AU. Both see a softening in brand health; Some growth observed for other Beef COOs – Brazilian, American and Canadian.

BRAND HEALTH – BEEF

	AUSTRALIAN BEEF %	'19	LOCAL BEEF %	'19	BRAZILIAN BEEF %	'19	NEW ZEALAND BEEF %	'19	AMERICAN BEEF %	'19	CANADIAN BEEF %	'19
Spontaneous awareness	56	62	17▼	74	39▲	8	23	18	29▲	3	18▲	4
Total Awareness	77	76	85▼	93	53	46	51▲	42	46▲	33	33▲	10
Ever Eaten	63▼	72	73▼	90	39	35	37	31	29	29	23▲	8
Eat P12M	53▼	67	63▼	85	31	27	24	24	20	27	17▲	6
Eat P3M	39▼	56	52▼	79	24	22	15	20	14	18	14▲	6
Past Month	27▼	42	42▼	71	17	14	12	15	11	8	9	5
Most Often	18	16	35▼	54	12▲	5	9	5	9▲	2	6▲	1

Largely similar across Qataris and Expat Arabs

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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=266), '19 (n=259) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

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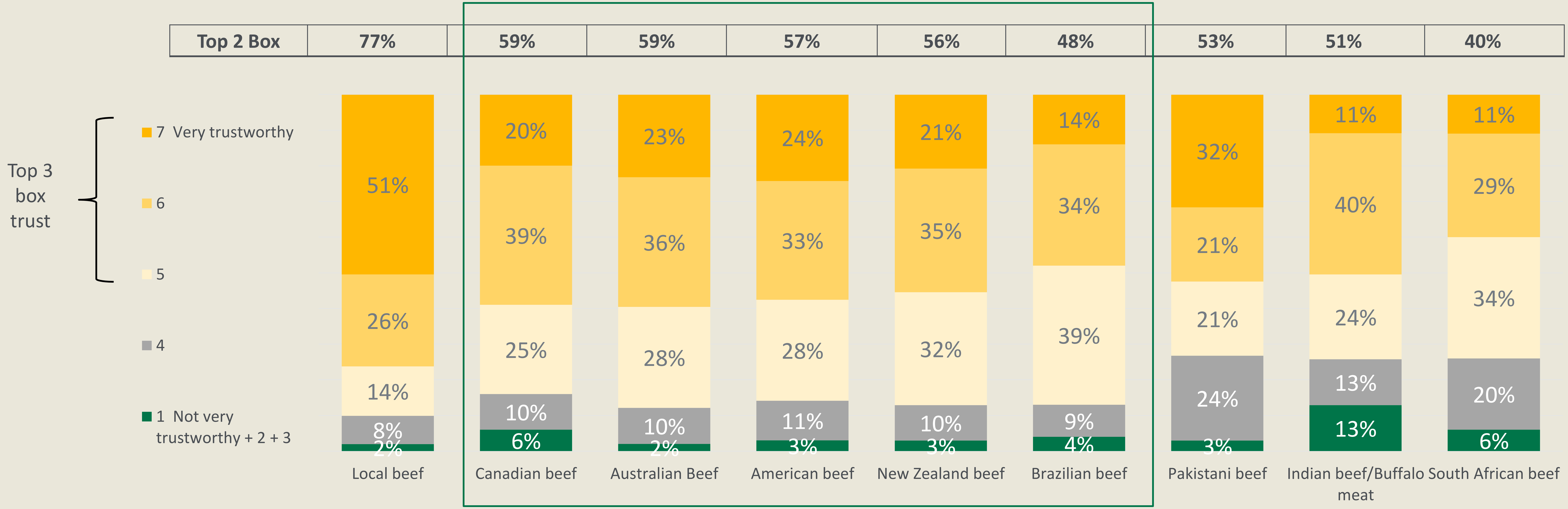
We higher trust in Local beef, reflecting familiarity and the clear role it plays for consumers day-to-day. Imports are roughly on par with each other, with the exception of Brazilian which trails other imports.

Trustworthy - COO BEEF



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BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Australian Beef (204) American beef (123), Indian beef/Buffalo meat (63), New Zealand beef (136), Canadian beef (87), Brazilian beef (141), Local beef (226), South African beef (80), Pakistani beef (102)

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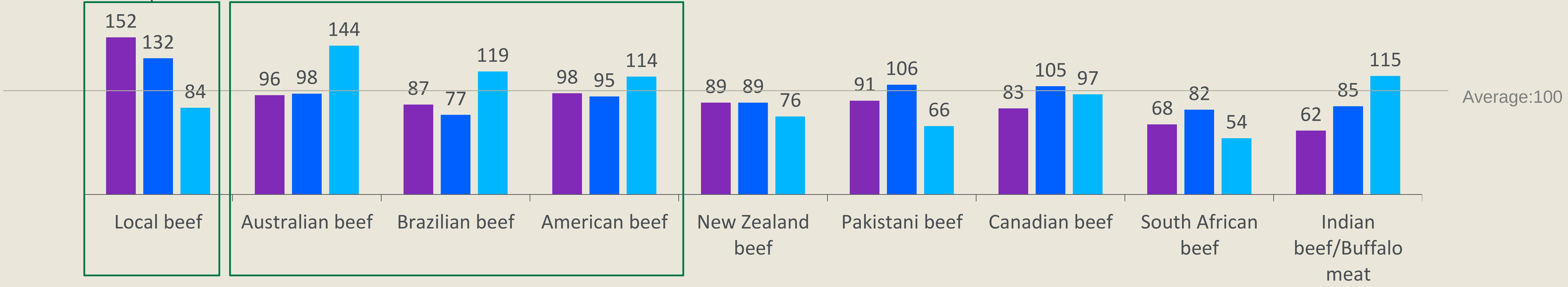
In line with its brand health, local beef has strong brand equity.
Imported beefs (including AU), while well known, are not as strong on relevance and differentiation.

Local Beef has established strong relevance, and a role in Qatari's lives, as well as some obvious difference to other options.



Australian, Brazilian and American show similar profiles, and have established **mental availability** in the market

Comparison vs. 2019 not applicable as the brand set has changed

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Meaningful · Different · Salient

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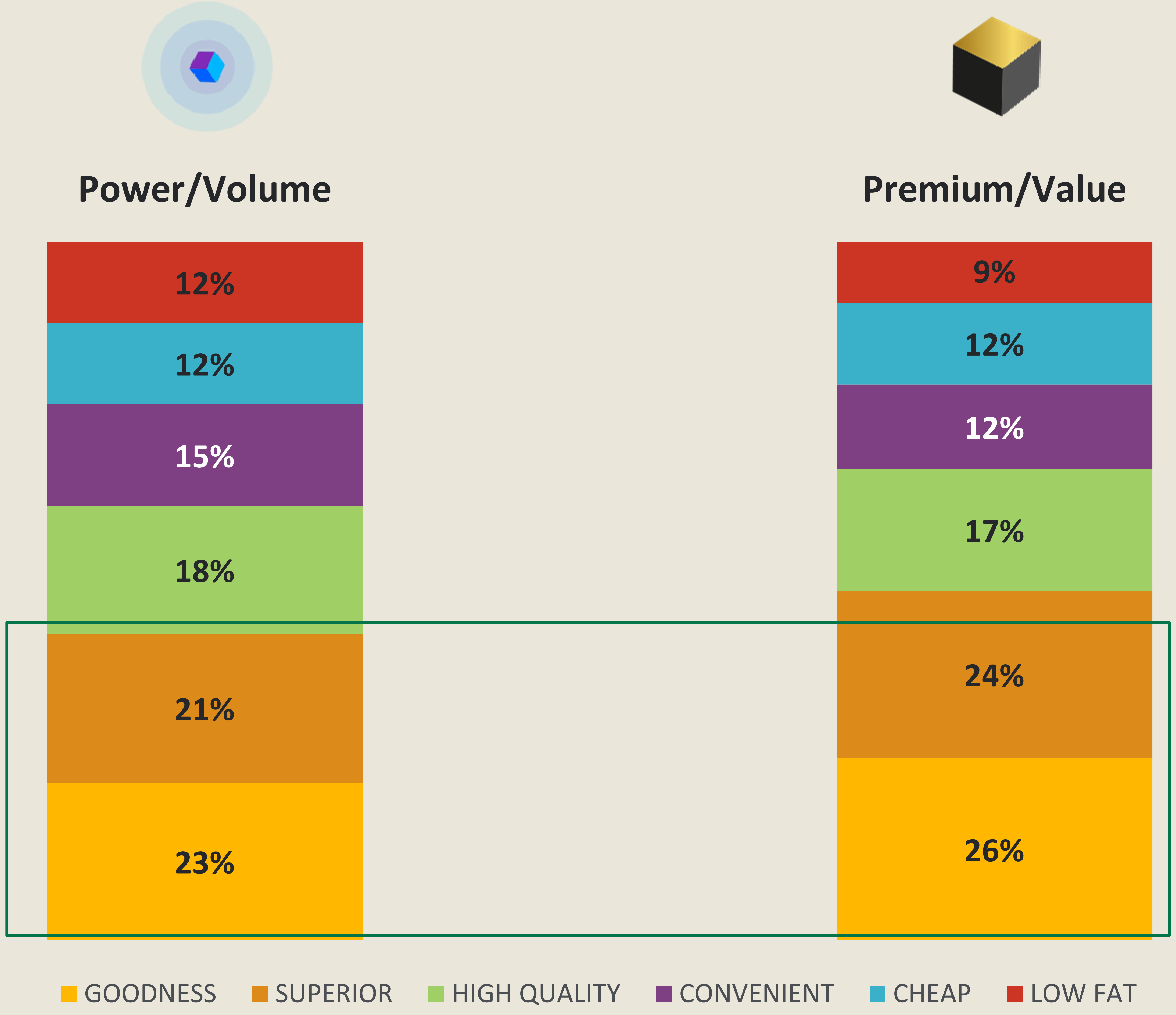
Overall goodness of the product and superior quality are the key drivers for both Volume and Value in Qatar.



Low in fat

Cheaper

Is easy and convenient to purchase

The industry is environmentally sustainable
Consistent quality standards
I trust that this beef/lamb is slaughtered according to sharia law and is therefore Halal
Offers a variety of cuts that suit the meals I make

Is my/my family's favourite lamb/beef
Is the most superior lamb/beef

Guaranteed safe to eat
Fresh
More nutritious
The meat is usually tender
The animal is well-cared for
The fat is nicely marbled

No significant differences in terms of factors driving meaning and differentiation

Currently Australian beef appears less defined than other imported COOs (or Local which owns all ‘expected’ perceptions – fresh/favourite/halal). Superior and Nutritious are white space opportunities. Consistent quality, which is often a focus for AU, currently pulls out for NZ.

DRIVERS OF POWER
(ranked top to bottom)

		LOCAL BEEF	AUSTRALIAN BEEF	AMERICAN BEEF	BRAZILIAN BEEF	NEW ZEALAND BEEF	CANADIAN BEEF
Goodness (23%)	The fat is nicely marbled	-2	-3	5	-5	0	3
	The animal is well-cared for	-5	3	-4	0	0	1
	The meat is usually tender	-5	2	4	3	0	1
	More nutritious	-3	1	0	4	1	1
	Fresh	9	0	-1	0	1	0
	Guaranteed safe to eat	3	1	0	0	1	-3
Superior (21%)	Is the most superior lamb/beef	-4	2	0	2	2	1
	Is my/my family’s favourite lamb/beef	6	-1	-2	1	-6	2
High Quality (18%)	Offers a variety of cuts that suit the meals I make	1	0	2	2	0	1
	I trust that this beef/lamb is slaughtered according to sharia law and is therefore Halal	5	-2	-3	-1	-4	0
	Consistent quality standards	-2	-1	4	-1	6	0
	The industry is environmentally sustainable	-4	-2	1	0	-1	2
Convenient (15%)	Is easy and convenient to purchase	4	2	0	-1	0	-6
Cheap (12%)	Cheaper	-3	-1	-5	-1	-2	3
Low Fat (12%)	Low in fat	-3	-1	1	-2	1	-3

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+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.*

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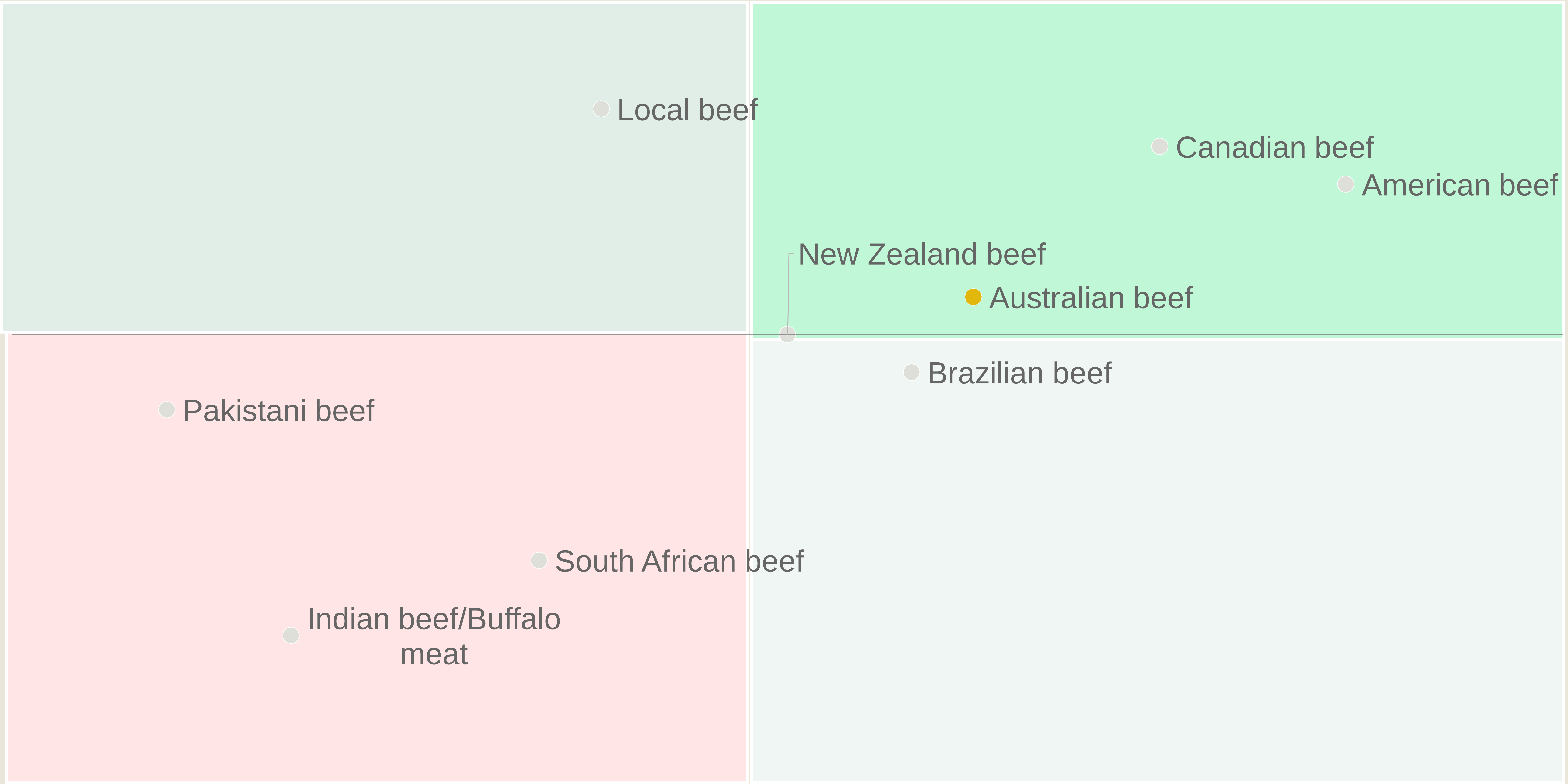
High price perceptions go some way to explaining why North American products are currently perceived as Premium in the Qatar market.

Good Value

Brand equity supports current price, which is below average

Justified Premium

Brand equity supports current price, which is above average



PREMIUM (VALUE)

Are they willing to pay more for you?

Price reliant

Below average price not supported by brand equity

Not worth it

Above average price not supported by brand equity

PERCEIVED PRICE

How much do they think you cost ?

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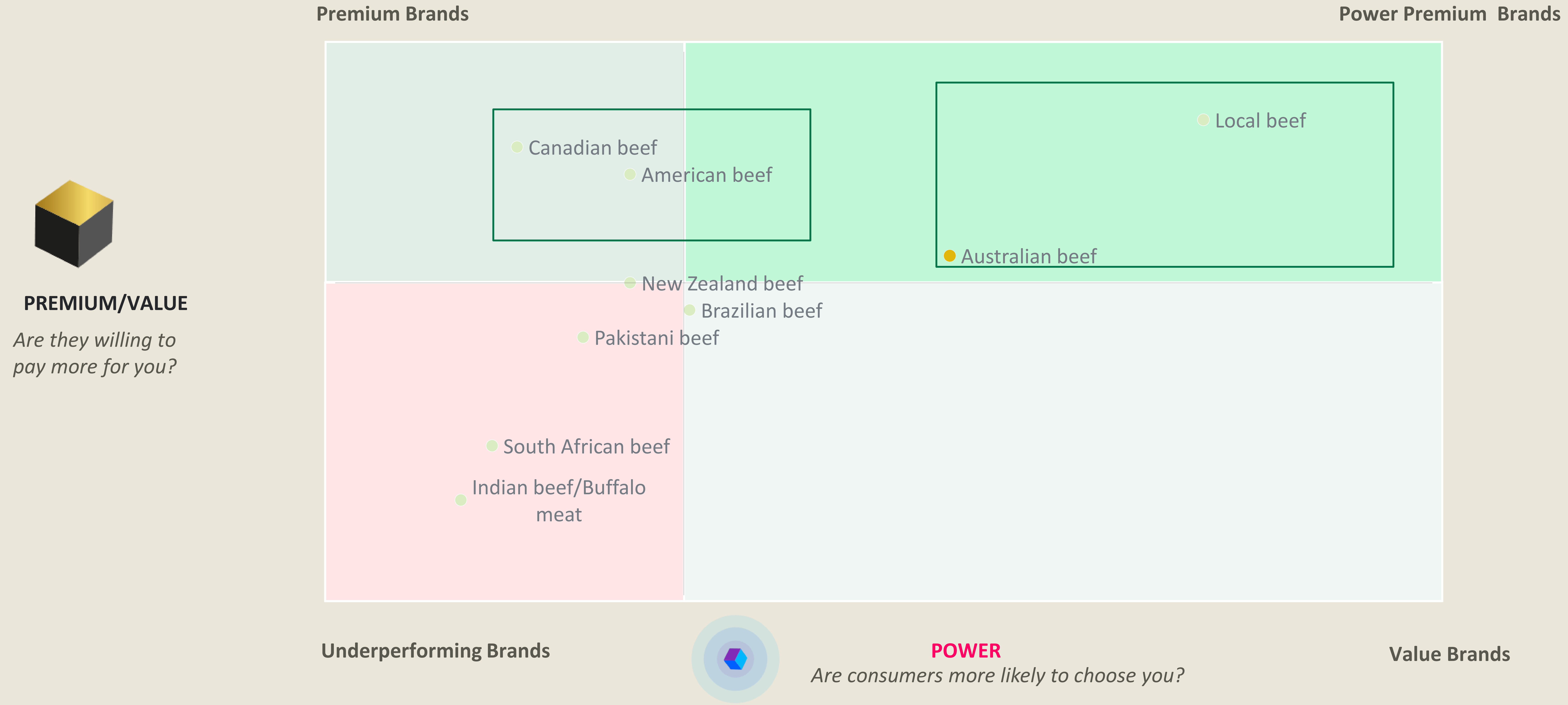
In keeping with what we have seen in other markets, Local beef has strong brand Power and Premium, but Australian a clear #2 in Qatar.



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Our best route to building greater relevance and premium perceptions will come from building perceptions of 'goodness' and hence be considered superior – helping AU grow volume and value.

Top 5 Individual Associations to Grow - Volume & Value:

(Ordered based on impact on building equity*)

Associations for AU to communicate

1.
My family's favourite beef

Difficult to achieve when competing vs. a local product

2.
Easy and convenient to purchase

Through supply

Build

3.
Guaranteed safe to eat

Implicit

4.
Beef is slaughtered according to sharia law

Difficult to achieve when competing vs. a local product

Build

5.
Is the most superior beef (Volume)

More nutritious (Premium)

More explicit

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

WHAT NEXT FOR AU BEEF AND LAMB IN QATAR?

A quick summary of where we should focus to establish a strong position in Qatar

1. Build out consistent quality and nutritious perceptions to reinforce the associated premium perceptions.

2. Build up superior and nutritious which are currently white space, be aware of growing premium perceptions of NA product and NZ owning quality

3. Our clean, safe, rearing environment, as with other MENA markets, can be leveraged as reason to believe for safe, nutritious and higher quality

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