July 2022

Global Tracker: **UAE**
Presentation Deck

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MEAT & LIVESTOCK AUSTRALIA

The flow of the story today

Macro-market context

Understanding the context for the MENA region to set the scene

Protein Landscape, Channel usage

Understanding the role of proteins in market for different nationalities/ethnicities. And their claimed channel behaviours

Coo brand health, trust & perceptions

Understanding current role of imported COO vs. Local product in people's day-to-day lives, the usage of, Trust in and perceptions of AU for Beef and Lamb

What next for AU beef in UAE

Identifying the key benefits that AU COO red meat needs to communicate to compete with Local UAE Beef and Lamb

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.

2022 Study Details:

8,300 interviews

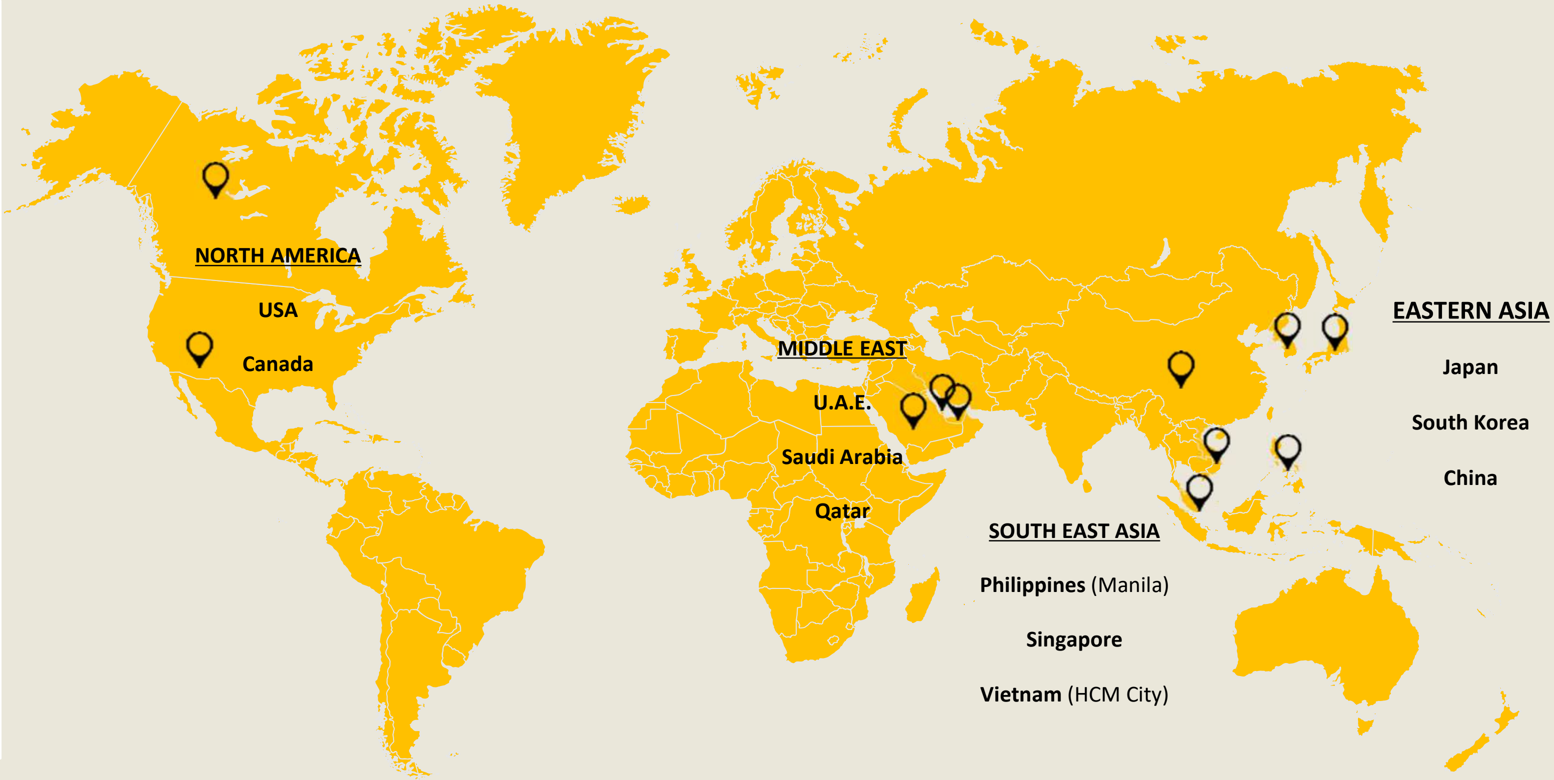
11 Markets *(See right)*

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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UAE 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	70%	45%
	Female	30%	55%
Age	18-34	-	45%
	35-49	-	49%
	50-64	-	5%
Cities	Abu Dhabi	16%	50%
	Dubai	30%	50%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	86%
Children	Households with Children	-	70%
Annual HH Income	241K - 322K AED	-	67%
	322,001 + AED	-	33%
Religion	Islam	76%	77%

 0-14 (14%), 15-24 (8%), 25-54 (68%), 55-64 (8%), 65+ (2%) – *World Factbook*

The 5 broad learnings to be covered today

Overall market landscape

Meat consumption differs across the key ethnicities in UAE.

Opportunities to plan to target and communicate to the diverse groups of consumers in UAE and their different needs for red-meat.

Role of beef

Even though high on consumption, beef has a more varied role across consumer groups.

There is opportunity to build a stronger emotional and rational relevance with consumers in UAE by tapping into these slightly different roles.

AU Brand Perceptions

Both AU beef and lamb see a softening in 2022, both in terms of usage and equity, now 2nd to local beef.

Need to re-establish credentials on superior meat, consistent quality, Justifying premium perceptions and ensuring value maintained.

Jobs to be done

1. Maintain strong position amongst Westerners
2. Build on platform with Expat Arabs.
3. Sheepmeat the more reliable opportunity amongst expat Asians

Channel specific targeting

Availability at the right channels, based on the varied a specific use of channel by different nationalities in the UAE.

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MARKET CONTEXT

Meat an integral part of UAE consumers. COVID and recent supply chain challenges impacting consumers considerations in UAE.

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 growing but high reliance on imported meat continues in UAE. Origin, cost and texture drive premium cues.

Recent supply chain challenges
High inflationary pressures due to supply chain issues in the region, result in consumers being under financial stress.

Covid
Covid response of UAE 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 reliance on Online platforms.

Connect
Opportunity to build a strong emotional connection 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 managing mental and physical health through diet, focusing on safe/hygienic products, organic, hormones and gluten free

Omni-channel
Presence in both physical and Online channels is a must to ensure visibility and engagement with consumers.

The Central Question

How can MLA help to build relevance of Australian beef and lamb in the lives of different UAE consumer groups into the future?

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PROTEIN LANDSCAPE

Chicken maintains highest serves and growing salience. Beef's salience dips to 2020 levels, with claimed purchase/serves softening overtime while Lamb's purchase/serves increase.

SPONTANEOUS AWARENESS

	Top of Mind	Total Awareness	'21	'20	'19
Lamb/Mutton	22%	73%	76	78	73
Chicken	20%	66%	64	59	42
Beef	25%	64% ▼	76	65	70
Goat	3%	20% ▲	13	16	18

Top of Mind
Total Awareness

BOUGHT IN LAST MONTH

		'21	'20	'19
Lamb	66% ▲	53	52	57
Mutton	68%	66	71	77
Beef	76%	79	84	92
Chicken	89% ▼	95	91	76
Goat	24%	25	33	42
Fish	64% ▼	76	78	67
Other seafood	39%	34	43	43

AVERAGE SERVES LAST 7 DAYS

		'21	'20	'19
Lamb	1.8	0.9	1	1.2
Mutton	1.6	1	1.2	1.6
Beef	1.6	1.3	1.7	2.1
Chicken	2.3	2	2.2	2.2
Goat	0.9	0.3	0.6	1
Fish	1.6	1.2	1.2	1.6
Other seafood	1.2	0.5	0.6	1.1

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CH1 Spontaneous Awareness – When thinking about meat, which types come to mind?
CH10 How many meals that included the following meats have been prepared and eaten in your home in the last 7 days? CH2 Bought in the last month – Which types of meat have you bought in the last month to prepare for a meal at home?
Base: '22 (n=500), '21 (n=500), '20 (n=500), '19 (n=500)

▲▼ *Sig. different at 95%*

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Meat consumption is high amongst Arabs, while Beef and Mutton are more popular amongst Western Expats and Asians respectively. Chicken continues to be the most popular across ethnicities.

BOUGHT IN LAST MONTH

	Western Expats	Emiratis	Expat Arabs	Expat Asians
	Strong beef consumption	Generally high and even meat consumption		Strong mutton consumption
Beef	80%	78%	76%	68%
Lamb	54%	77%	72%	54%
Mutton	63%	64%	60%	87%
Chicken	85%	88%	90%	92%
Fish	50%	72%	69%	63%

Chicken popular across ethnicities

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CH2 Bought in the last month – Which types of meat have you bought in the last month to prepare for a meal at home?

Sig. different at 95%

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High meat consumption amongst Arabs is reflected in recent a recent qualitative study in 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.

Source: Project Evergreen UAE qual – True Aussie, Jan 2023; Project Cyclone UAE Qual – Trust & Traceability, May 2022

In UAE Beef remains premium, sharing superiority, price and fatty associations with other red meat. Chicken is an everyday staple while Fish is healthiest. Perceptions on the whole, remain stable overtime.

Superior, fatty, tender

Beef

Strengths
- Is the most **superior** meat
- *Am willing to pay a bit more*
- *High **nutritional** value*

Weaknesses
- Not an essential part of a healthy diet for growing children (vs other meats)
- Not Low in fat
- Not Cheap

What's changed this year?

Increased nutrition

Affordable, convenient, versatile

Chicken

Strengths
- Cheaper
- Easy and convenient to prepare
- Can be used in many different meals

Weaknesses
- Not superior
- Not willing to pay more for

What's changed this year?

Less essential part of a healthy diet for growing children (vs other meats)

Low fat, nutritious, healthy

Fish

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

Weaknesses
- Not favourite
- Not superior
- Not well-cared for

What's changed this year?

Overtime less cheap

Specialty

Sheepmeat

- Fatty
- Expensive
- Superior
- Lamb: well-cared for, willing to pay more for

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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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Looking at the associations for Beef and Lamb, it is clear that there are nuanced differences in the roles that they play for different ethnic groups. Beef is seen as superior outside expat Asians (who see lamb as superior).

Emirati | Expat Arabs | Western Expats | Expat Asians

Is the most superior meat

- Tender
- Fresh

- High nutritional value

- Industry is environmentally sustainable
- My/ my family's favourite

- Willing to pay a bit more
- Tender

- Animal is well-cared for

- Consistent quality standards
- Willing to pay a bit more
- Can be used in many different meals
- My/ my family's favourite

Is well cared for (Mutton for Expat Asians)

Superior

Mutton: Favourite

Lamb: Superior

Delicious

Mutton: Delicious

Mutton: Sustainable

Willing to pay more

Tender

Lamb is not easy and convenient to buy, but Mutton is

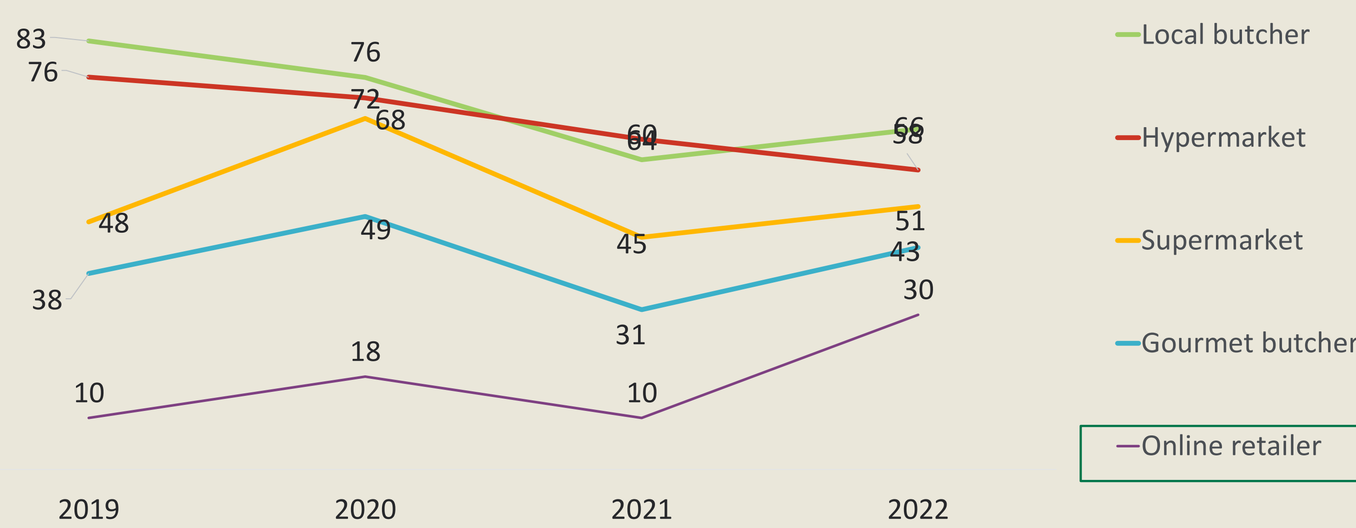
Consistent Quality

Mutton: Consistent Quality

Expected value analysis calculated to define the relative strengths of associations

There has been a convergence of channel usage post-Covid with Hypermarkets and Local butchers appearing to soften, while monthly usage of other channels grows, in particular claimed online usage.

BEEF MONTHLY PLACES OF PURCHASE

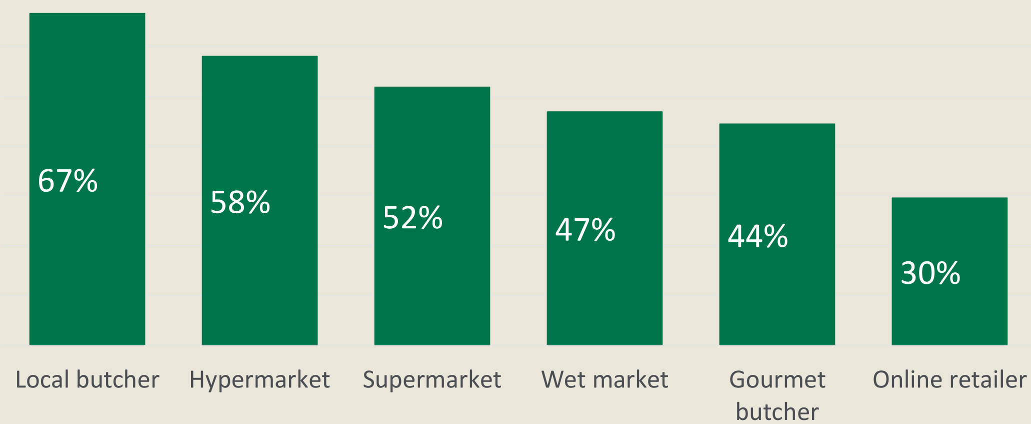


Online growth a general trend post-Covid, however UAE well above global average

Similar patterns for lamb channel purchase

There are different channels to focus on if we are to engage the different targets. Hypermarkets, supermarkets and online more common for Western expats. Butchers are more common for Arabs.

BEEF MONTHLY PLACES OF PURCHASE



Skews by Ethnicity

Western Expats	Expat Arabs	Emirati	Expat Asians
Hypermarket	Local Butcher	Local Butcher	Hypermarket
Supermarket	Gourmet Butcher	Gourmet Butcher	Supermarket
Online			Local Butcher

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QR3A. How often have you bought beef from each of these locations in the last six months?
Base: '22 (n=243), '21 (n=249), '20 (n=247), '19 (n=251), '18(n=227)

Sig. different at 95%

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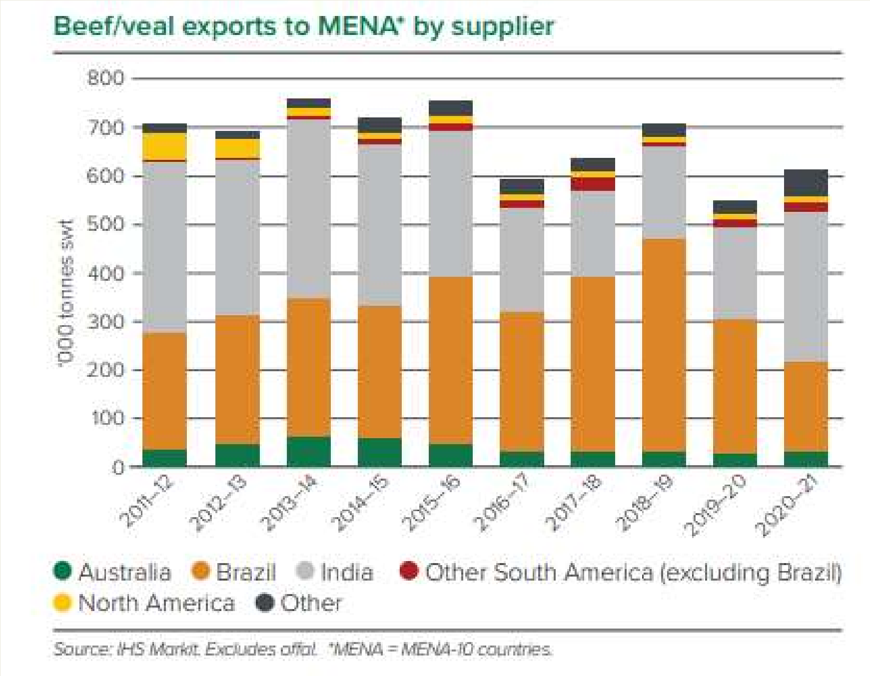
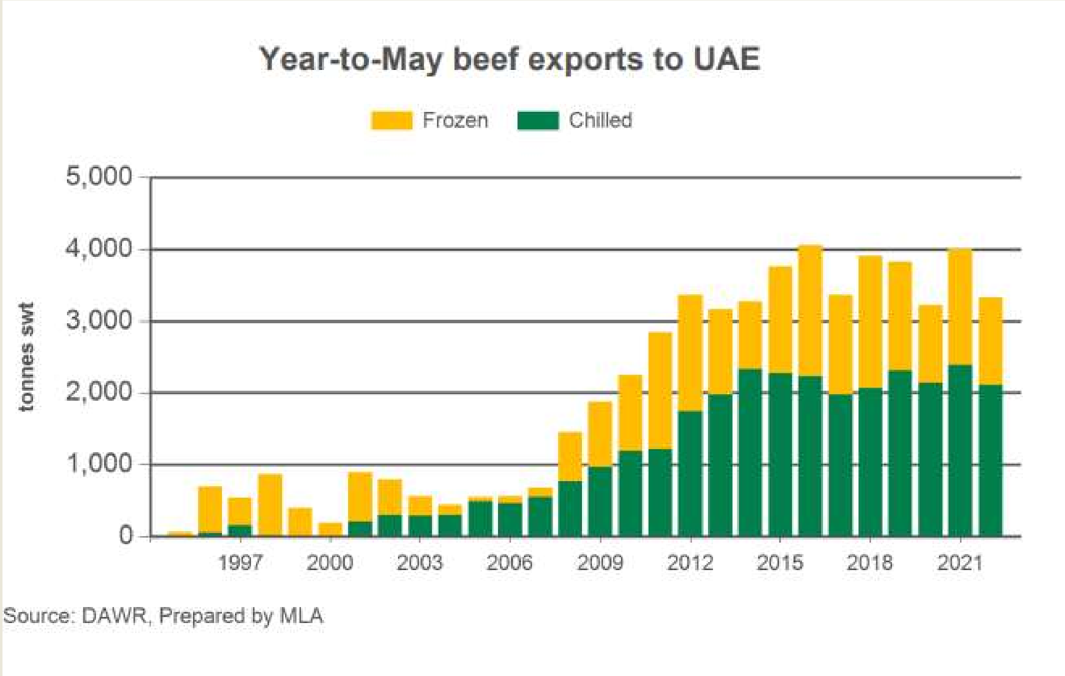
BEEF BRAND HEALTH & TRUST

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.

We have seen a downturn, YoY, for Australian beef exports to UAE, with Brazilian and Indian remaining the dominant players in terms of volume.

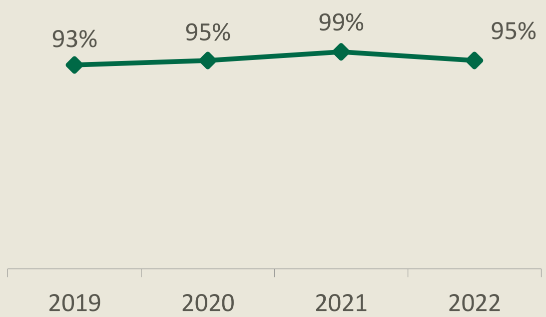
MLA market snapshot – MENA (November 2021)





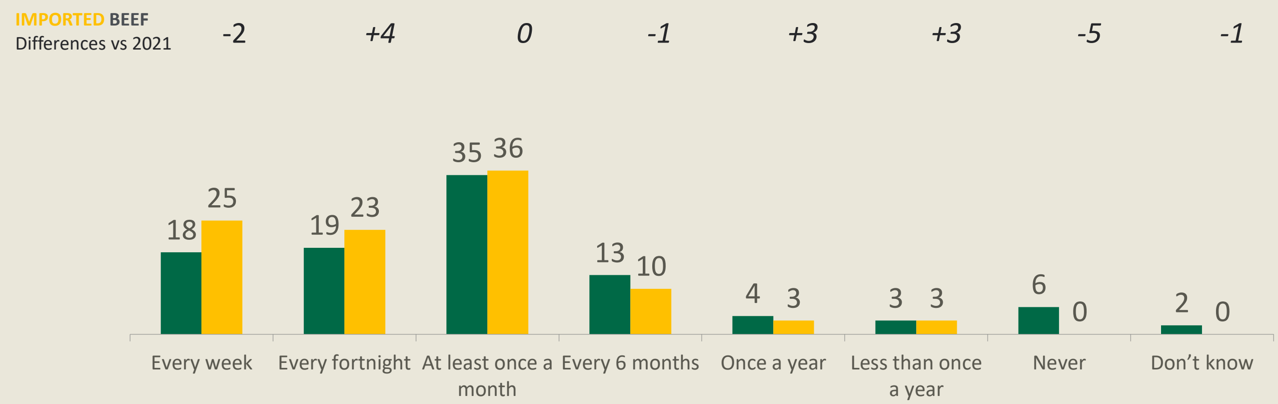
Consumers claim to know the country of origin while buying their beef – driven by a saturated import market; Frequency of purchase of imported beef remains largely similar to ‘21 levels.

Know Country of Origin?



This is consistent and high for all ethnicities

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=436)
(CH4) How often do you buy imported beef? (n=436)
(CH4LOC) How often do you buy local beef? (n=436)

Sig. different at 95%

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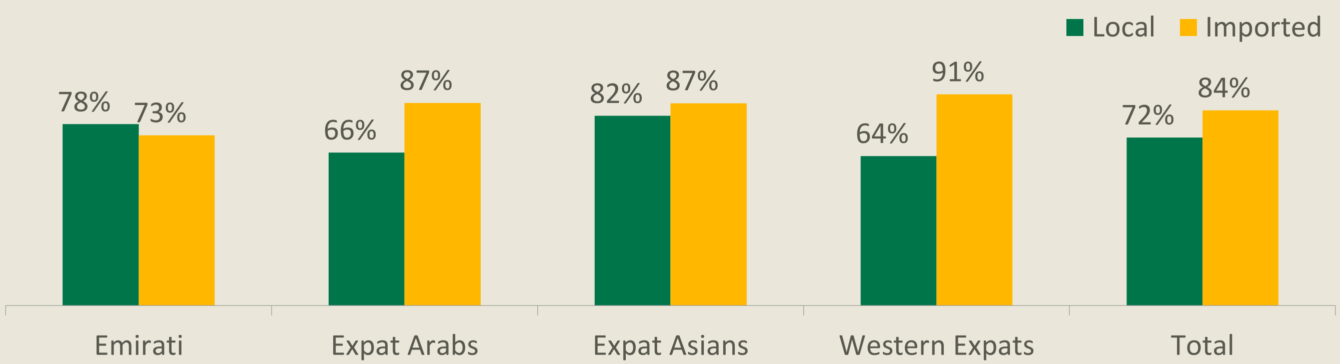
9 in 10 Western expats buy imported product monthly, showing a similar ratio of local to imported as Expat Arabs. A high proportion of Expat Asians claim to buy both local and imported beef at least monthly.

Buying Beef once a month or more often (Imported vs. Locally Slaughtered)



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Local beef continues to be the most consumed in UAE, and AU has largely maintained through the funnel with the exception of a dip in P12M consumption.
Awareness of both Indian and Pakistani beef see a drop.

BRAND HEALTH – BEEF

	UAE LOCAL BEEF %	'21	'20	'19	AUSTRALIAN BEEF %	'21	'20	'19	PAKISTANI BEEF %	'21	'20	'19	INDIAN BEEF/ BUFFALO %	'21	'20	'19
Spontaneous awareness	53	55	55	62	69	72	70	43	46▼	58	35	26	43▼	59	39	40
Total Awareness	77	82	80	84	85	91	80	80	67▼	85	61	56	61▼	84	70	81
Ever Eaten	70	69	71	74	69	71	70	43	52	60	40	32	42▼	55	47	40
Eat P12M	64	62	67	66	54▼	63	62	34	44	51	34	20	35	42	34	31
Eat P3M	56	51	56	60	41	42	45	26	33	34	27	13	26	27	24	25
Past Month	45	38	47	58	31	31	33	20	27	23	22	6	22	21	16	18
Most Often	28	26	39	53	19	23	15	12	15	17	13	3	13	14	11	14

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=243), '21 (n=258), '20 (n=254), '19 (n=264) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

Brazilian beef recovered from its 2021 declines, while American beef has increased consumption across the board in line with its increase in spontaneous awareness.

BRAND HEALTH – BEEF

BRAZILIAN BEEF
%

		'21	'20	'19
Spontaneous awareness	37▲	26	44	24
Total Awareness	67	70	67	56
Ever Eaten	38	41	47	27
Eat P12M	28	25	33	17
Eat P3M	22▲	14	24	7
Past Month	16▲	9	15	4
Most Often	7	5	7	1

NEW ZEALAND BEEF
%

		'21	'20	'19
Spontaneous awareness	30▲	20	26	18
Total Awareness	58▼	69	61	51
Ever Eaten	37	35	34	25
Eat P12M	27	22	23	19
Eat P3M	18	15	14	12
Past Month	14	10	9	8
Most Often	6	6	2	3

AMERICAN BEEF
%

		'21	'20	'19
Spontaneous awareness	20▲	10	10	14
Total Awareness	49	46	33	38
Ever Eaten	27▲	15	15	23
Eat P12M	21▲	7	11	17
Eat P3M	11▲	4	6	12
Past Month	7▲	2	5	8
Most Often	4	0	4	6

CANADIAN BEEF
%

		'21	'20	'19
Spontaneous awareness	16▲	7	3	4
Total Awareness	35	40	22	25
Ever Eaten	14	11	6	9
Eat P12M	9	5	4	5
Eat P3M	8	4	3	3
Past Month	6	3	2	2
Most Often	4	2	1	1

SOUTH AFRICAN BEEF
%

		'21	'20	'19
Spontaneous awareness	5	2	4	1
Total Awareness	35▼	44	32	29
Ever Eaten	12	14	11	7
Eat P12M	6	7	5	4
Eat P3M	5	3	3	3
Past Month	1	2	2	1
Most Often	1	2	0	1

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Base: '22 (n=243), '21 (n=258), '20 (n=254), '19 (n=264) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

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Once awareness is established for local, conversion through the funnel is stronger than AU's for all ethnicities except Western Expats. This suggests some scope to build usage/loyalty amongst Arabs and Western Expats, but conversion is less clear for the Expat Asian population.

BRAND HEALTH – BEEF

UAE LOCAL BEEF
%

	Total	Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	53	73	75	28	24
Total Awareness	77	92	89	64	56
Ever Eaten	70	88	88	47	51
Eat P12M	64	86	75	39	47
Eat P3M	56	77	67	33	38
Past Month	45	69	49	27	24
Most Often	28	53	19	16	11

AUSTRALIAN BEEF
%

	Total	Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	69	78	75	66	49
Total Awareness	85	95	88	81	69
Ever Eaten	69	79	74	67	47
Eat P12M	54	66	63	47	31
Eat P3M	41	48	46	44	20
Past Month	31	34	40	34	11
Most Often	19	14	30	23	7

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Sig. different at 95%

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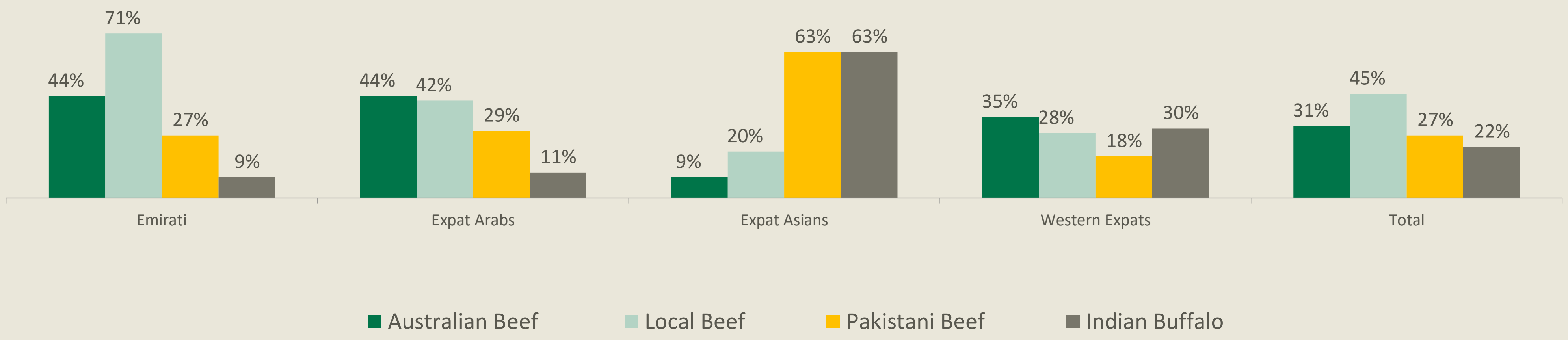
And digging a little deeper, for those who buy imported beef monthly, there are clear differences in the COO the different ethnicities consume monthly.

Country of Origin product eaten in last month (Funnels)

By Ethnic groups - who purchase imported monthly



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(CH4LOC) How often do you buy local beef? (n=436)
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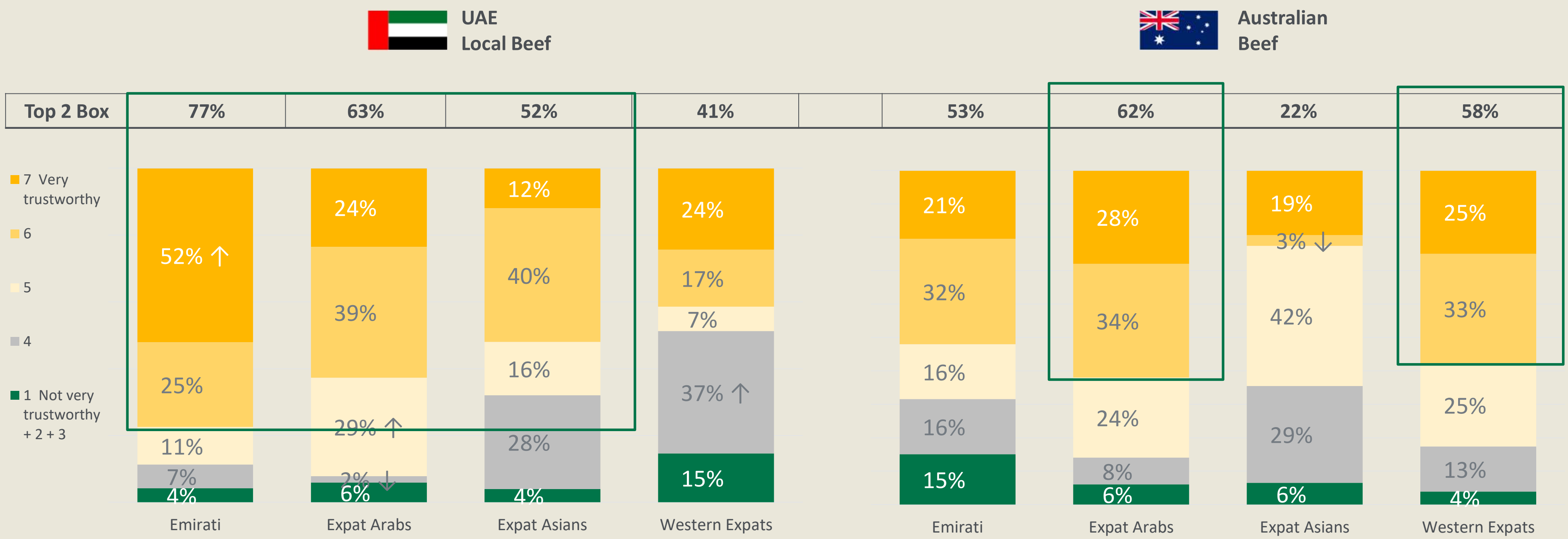
This is reflected in the level of trust we see amongst different ethnic groups for Local Beef vs Australian beef.

Trustworthy - COO BEEF
By ethnic group



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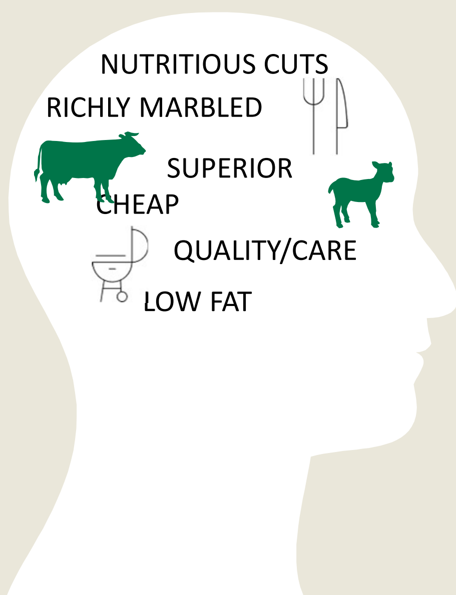
BTR2B. How trustworthy is the imported beef from these countries – 7 point scale
Base: Australian Beef (206) American beef (118), Indian beef/Buffalo meat (149), New Zealand beef (141), Canadian beef (86), Brazilian beef (163), UAE local beef (188), South African beef (86), Pakistani beef (162)

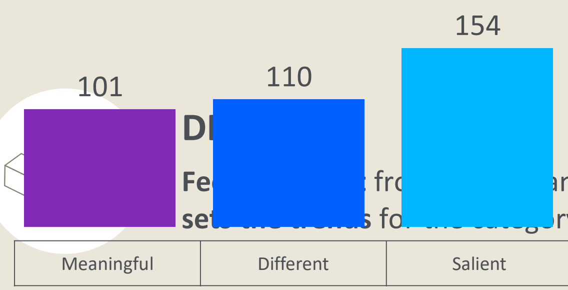
BUILDING COO PERCEPTIONS TO GROW AUSTRALIAN BEEF

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**



DI

Fe fr ands or **se** fo ory

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

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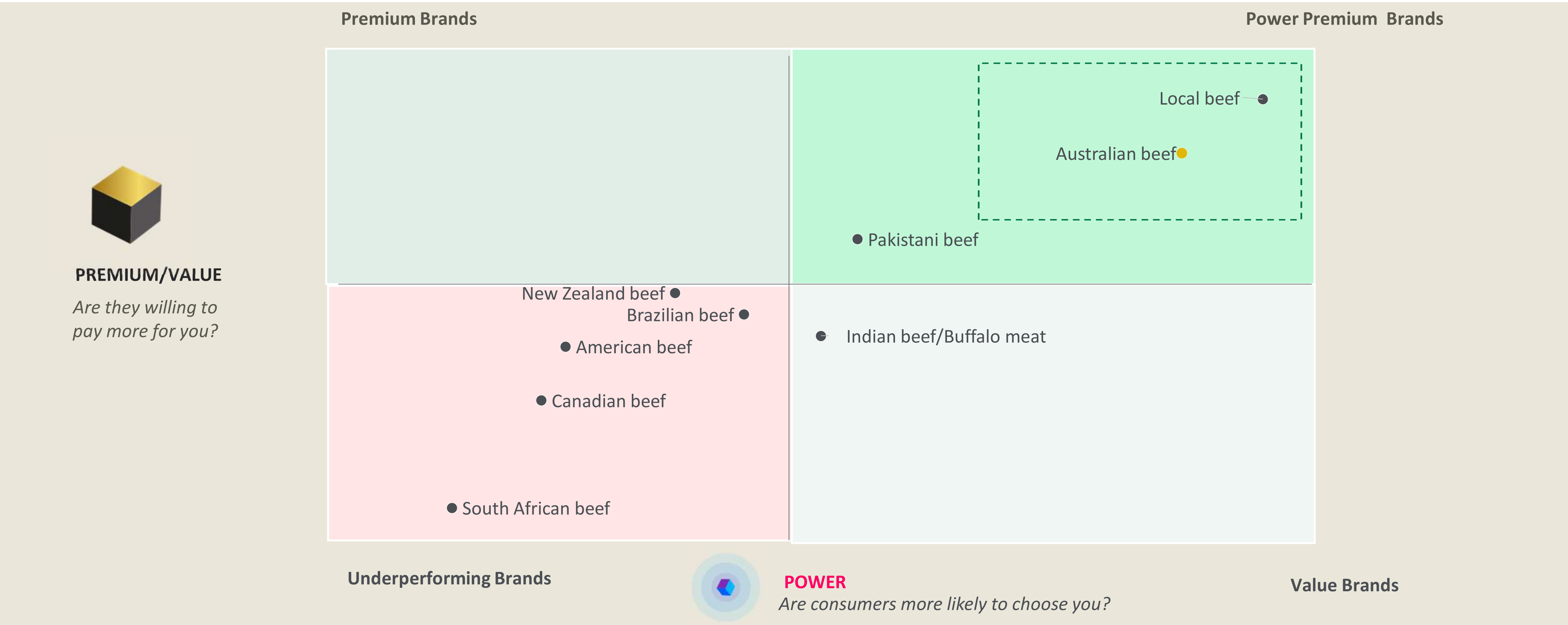
AU and Local Beef continue to battle for lead position in the UAE, with Local Beef retaking #1 this year. Pakistani Beef remains Powerful, while Indian beef drops to a value offering.



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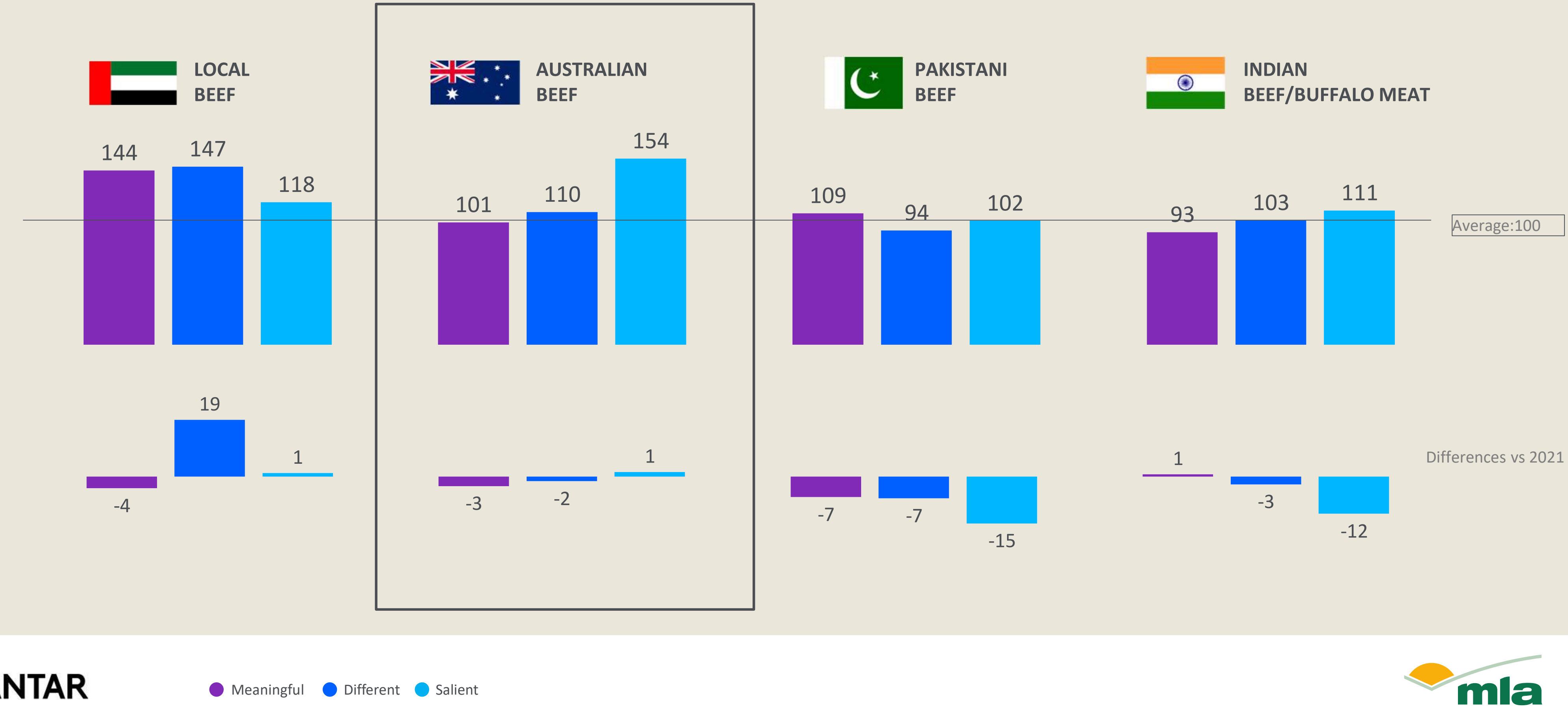
In line with market presence, Local and AU beef remain dominant, with AU coming to mind readily. But Local has strong established relevance, and difference in the market. As reflected in awareness, Pakistani and Indian buffalo have lost some mental availability this year.



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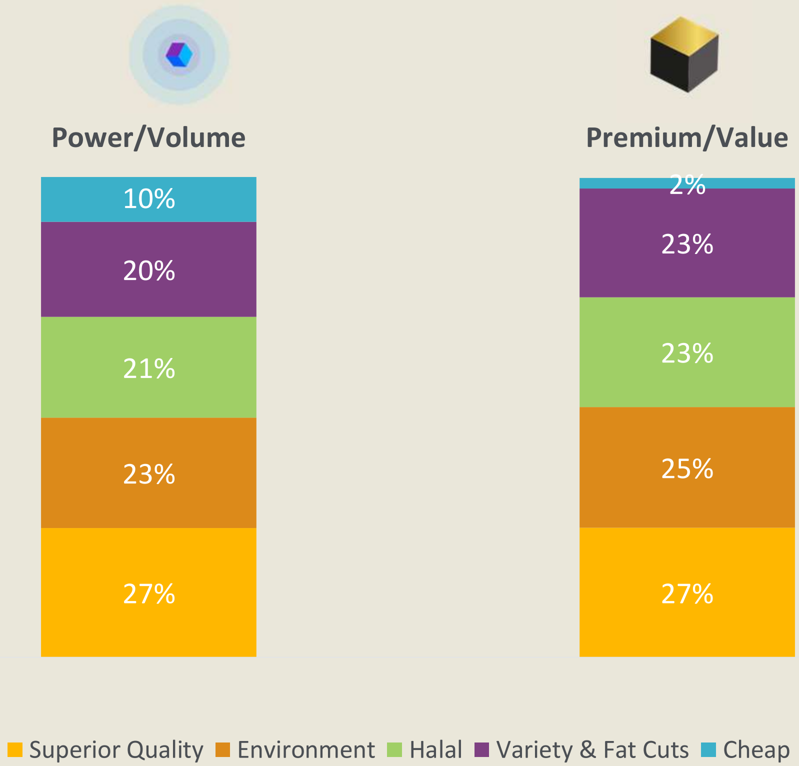
MENA markets show an interesting idiosyncrasy in red-meat brand choice that we rarely see elsewhere…

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*.

All factors, except cheapness, have relatively equal impact on Power and Premium.



- Cheaper
- Offers a variety of cuts that suit the meals I make
- The fat is nicely marbled
- Low in fat
- I trust that this beef is slaughtered according to sharia law and is therefore Halal
- The animal is well cared for
- The industry is environmentally sustainable
- The meat is usually tender
- Is easy and convenient to purchase
- Guaranteed safe to eat
- Consistent quality standards
- More nutritious
- Is my/my family's favourite beef
- Fresh
- Is the most superior beef

While Superior Quality and being Halal are more important in driving relevance, Environmental cues and variety of cuts helps to differentiate.

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Amongst local consumers, the perception is that Australian and Local product are the closest to each other in terms of quality and safety.

"Australian beef is the closest to our beef at the market regarding cleanliness and softness. With it, you don't need to use so many spices. Some meats need spices to change the taste. Australian beef doesn't need anything. You only add salt and pepper. They already dry all the blood, unlike the Brazilian that has to be dried. Australian beef can be used as it is"

Consumer, Emirati

A clear positioning not owned by Australian, in comparison with Local UAE beef holding strengths in fresh and consistent quality and largely owning the 'Superior quality' space. Opportunity to differentiate in the 'Sustainable' space.

DRIVERS OF POWER
(ranked top to bottom)

		AUSTRALIAN BEEF	UAE LOCAL BEEF	INDIAN BEEF/ BUFFALO MEAT	PAKISTANI BEEF
Superior Quality (27%)	Is the most superior beef	-1	2	1	0
	Fresh	2	5	2	3
	Is my/my family's favourite beef	2	2	-1	0
	More nutritious	-4	2	2	-3
	Consistent quality standards	1	6	-1	1
	Guaranteed safe to eat	1	3	-1	0
	Is easy and convenient to purchase	3	-2	0	-2
Environmental (23%)	The meat is usually tender	3	-1	0	0
	The industry is environmentally sustainable	3	-2	0	1
Halal (21%)	The animal is well cared for	-1	-2	-3	-3
	I trust that this beef is slaughtered according to sharia law and is therefore Halal	3	2	-3	0
Variety & Fat Cuts (20%)	Low in fat	-1	3	-1	-2
	The fat is nicely marbled	-2	-4	-2	0
	Offers a variety of cuts that suit the meals I make	3	4	-2	-4
Cheap (10%)	Cheaper	-11	-17	10	11

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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=243). *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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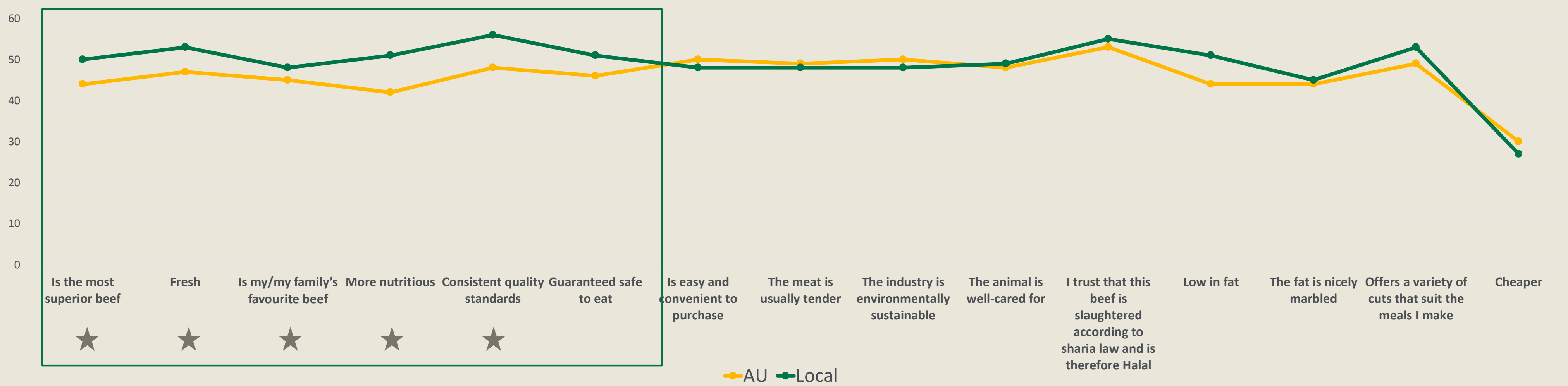
AU seen to be primarily weaker vs. local on the key aspects that drive volume and premium perceptions – more so amongst Emiratis and Expat Arabs; Need to maintain its strong position amongst Western Expats.

% Endorsement for AU Beef vs. Local Beef



Gap of Avg. AU vs. Avg. Local endorsements:

Emiratis: -28

Expat Arabs: -9

Western Expats: +28

Expat Asians: +4

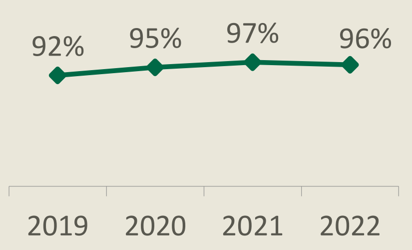
★ Important aspects to drive Value and Volume

LAMB COO BRAND HEALTH, TRUST & PERCEPTIONS

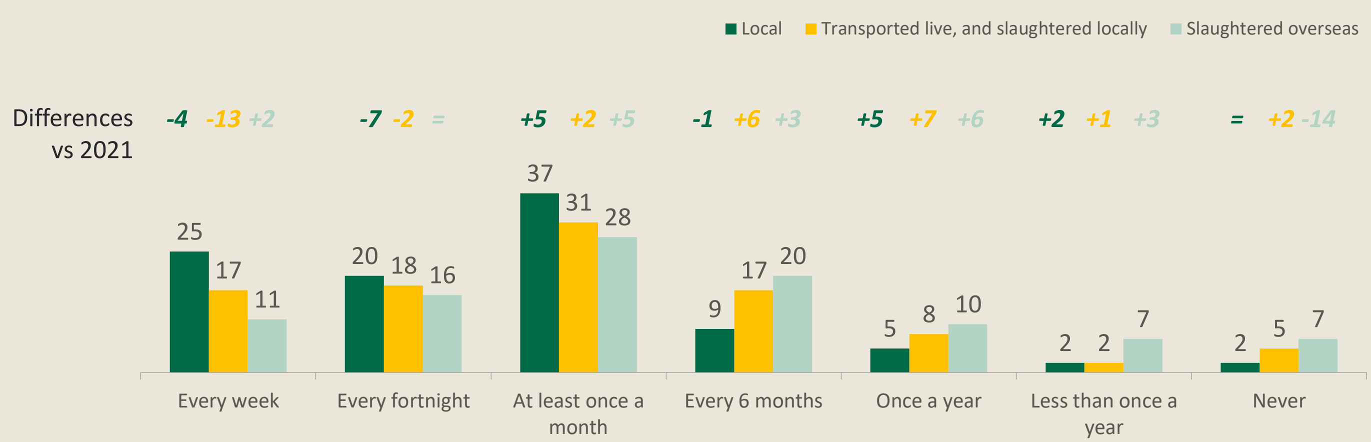
All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.

As with beef, knowledge of COOs continue to be almost universal within lamb as well. Expectedly Local lamb is purchased more frequently, though some dip observed in 2022.

Know Country of Origin?



FREQUENCY OF BUYING
LOCAL, TRANSPORTED LIVE, AND SLAUGHTERED LOCALLY & SLAUGHTERED OVERSEAS LAMB

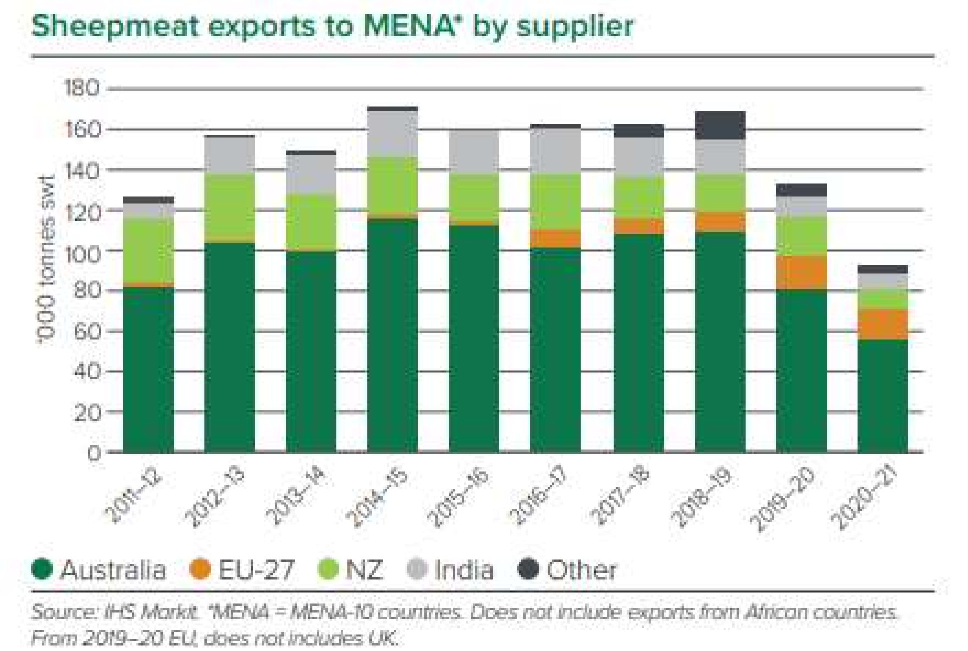


(LBH1A) Do you know the country of origin of the lamb you buy? Base: (n=444)
(CH7A) How often do you buy the following types of imported Halal compliant lamb/mutton? Base: (n=444)
(CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: (n=444)

Sig. different at 95%

MENA beef imports have increased in 20/21, driven by that from India, while Brazilian exports continues to decline. Conversely, sheep-meat volumes continue to decline driven by weakening AU presence.

MLA market snapshot – MENA (November 2021)



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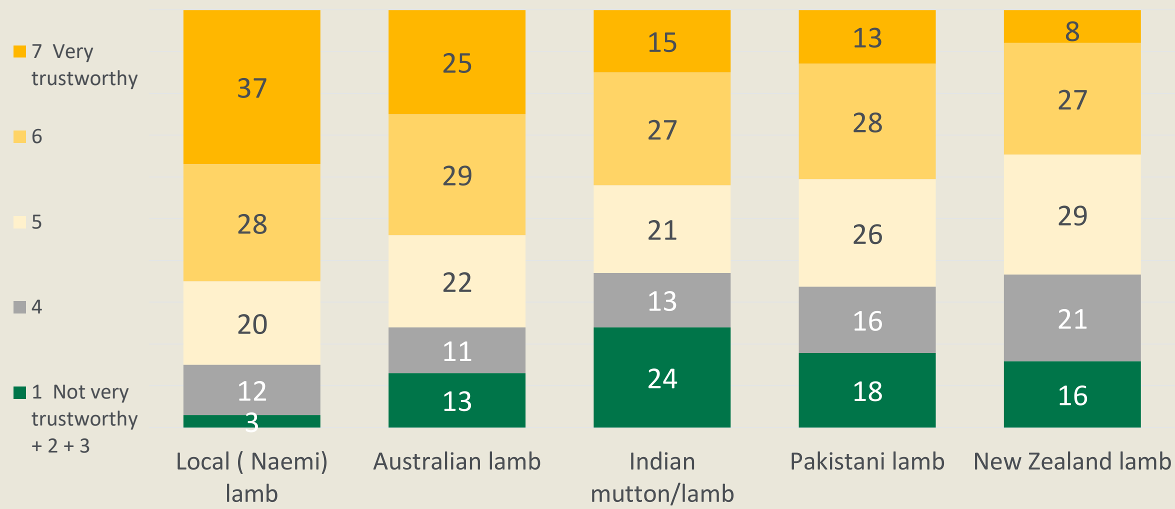
https://www.mla.com.au/globalassets/mla-corporate/prices--markets/documents/os-markets/export-statistics/november-2021/2021-mena-market-snapshot-red-meat_111121_distribution.pdf

mla MEAT & LIVESTOCK AUSTRALIA

Trust for the Local Lamb highest followed by that for AU lamb – more so amongst Western Expats. As with beef, trust scores of AU Lamb also sees a dip in 2022.

Trustworthy – COO Lamb

Top 2 Box	**65%**	**53%**	**42%**	**40%**	**35%**



"I am extremely aware of the process involved in rearing beef, slaughtering and then processing the end products. More importantly, I am aware of the rules and regulations that govern the whole process covering industry best practices, track and trace and cold chain adherences to ensure a product is fit for the end consumer"
Consumer, Westerner

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BTR2L. How trustworthy is the imported lamb from these countries
Base: Australian lamb (210) New Zealand lamb (156), Local (Naemi) lamb (220)
Indian lamb(173), Somalian lamb (137), Welsh lamb (31), Pakistani lamb (189), Sudanese lamb (131)

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Similar to Beef, Local Lamb is steady and leads the pack. Post increases last year, Australian lamb funnel has seen shifts back to 2020 levels, from awareness through to recent usage.

BRAND HEALTH – LAMB

LOCAL (NAEMI) %

		'21	'20	'19
Spontaneous awareness	56	54	**49**	59
Total Awareness	86	82	78	80
Ever Eaten	72▲	62	58	66
Eat P12M	62	54	**49**	59
Eat P3M	48	45	**38**	52
Past Month	39	35	**33**	47
Most Often	29	29	**30**	45

AUSTRALIAN %

		'21	'20	'19
Spontaneous awareness	69	73	**67**	45
Total Awareness	82▼	**93**	86	88
Ever Eaten	60▼	**81**	**65**	48
Eat P12M	52▼	**69**	**48**	34
Eat P3M	43▼	**55**	**41**	29
Past Month	35	39	32	24
Most Often	23	28	24	19

PAKISTANI %

		'21	'20	'19
Spontaneous awareness	47	**51**	30	34
Total Awareness	74▼	**87**	**78**	68
Ever Eaten	47	**55**	30	34
Eat P12M	39	**39**	23	24
Eat P3M	33	**25**	16	13
Past Month	25	**18**	11	10
Most Often	16	**13**	7	8

INDIAN %

		'21	'20	'19
Spontaneous awareness	43	**52**	40	39
Total Awareness	67▼	85	**78**	86
Ever Eaten	47▼	**61**	50	41
Eat P12M	37▼	47	**41**	29
Eat P3M	27	30	31	23
Past Month	22	22	**26**	18
Most Often	17	17	19	14

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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=257), '21 (n=242), '20 (n=246), '19 (n=231) – Bought lamb in past month or ever buy lamb

▲▼ *Sig. different at 95%*

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In contrast to beef there is more of a split between Western consumers and Arabs and Expat Asians. Building use amongst Expat Asians more challenging given the distinct roles of Sheepmeat across the different audiences.

BRAND HEALTH – LAMB

LOCAL (NAEMI)

	LOCAL (NAEMI)	Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	56	88	81	22	22
Total Awareness	86	97	99	67	74
Ever Eaten	72	96	91	47	46
Eat P12M	62	91	81	**31**	35
Eat P3M	48	78	60	**20**	25
Past Month	39	71	47	**18**	14
Most Often	29	59	37	**8**	4

AUSTRALIAN

	AUSTRALIAN	Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	69	77	64	76	62
Total Awareness	82	88	79	90	72
Ever Eaten	60	58	59	80	49
Eat P12M	52	51	49	**76**	41
Eat P3M	43	42	37	**71**	29
Past Month	35	30	31	**63**	25
Most Often	23	14	17	**57**	12

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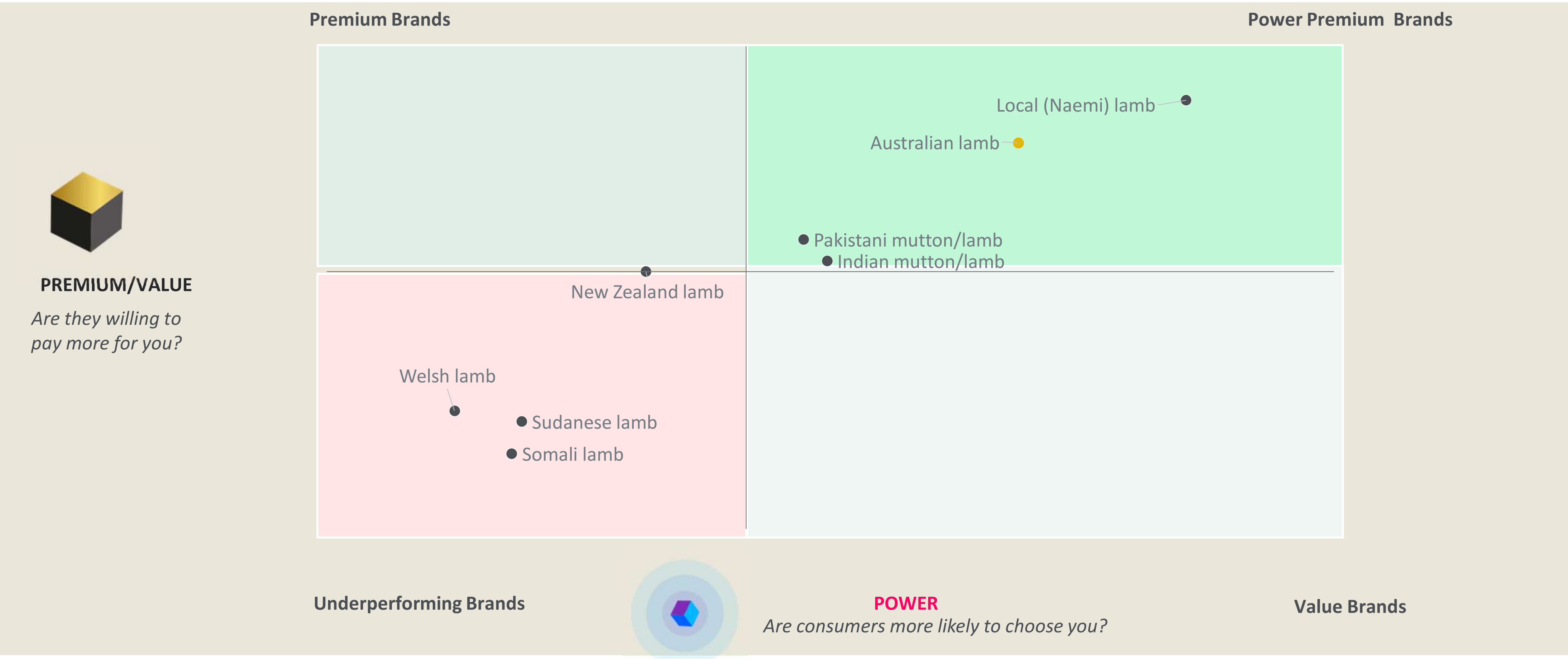
LBH1. Spontaneous Awareness, LBH2. Prompted Awareness, LBH3. Ever Eaten, LBH4. Eaten last year, LBH5. Eaten in the last 3 months, LBH6. Eaten last month, LBH8. Most often
Base: '22 (n=257), '21 (n=242), '20 (n=246), '19 (n=231) – Bought lamb in past month or ever buy lamb

▲▼ *Sig. different at 95%*

MEAT & LIVESTOCK AUSTRALIA

Similar to Beef Local lamb pulls ahead of AU lamb. Pakistani and Indian lamb increase Power in 2022 to move up into the Power Premium quadrant.



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In line with market presence, Local Lamb continues to have the strongest equity. Australian lamb is relying on Saliency and needs to drive relevance to in the market to a broader audience to protect volume.

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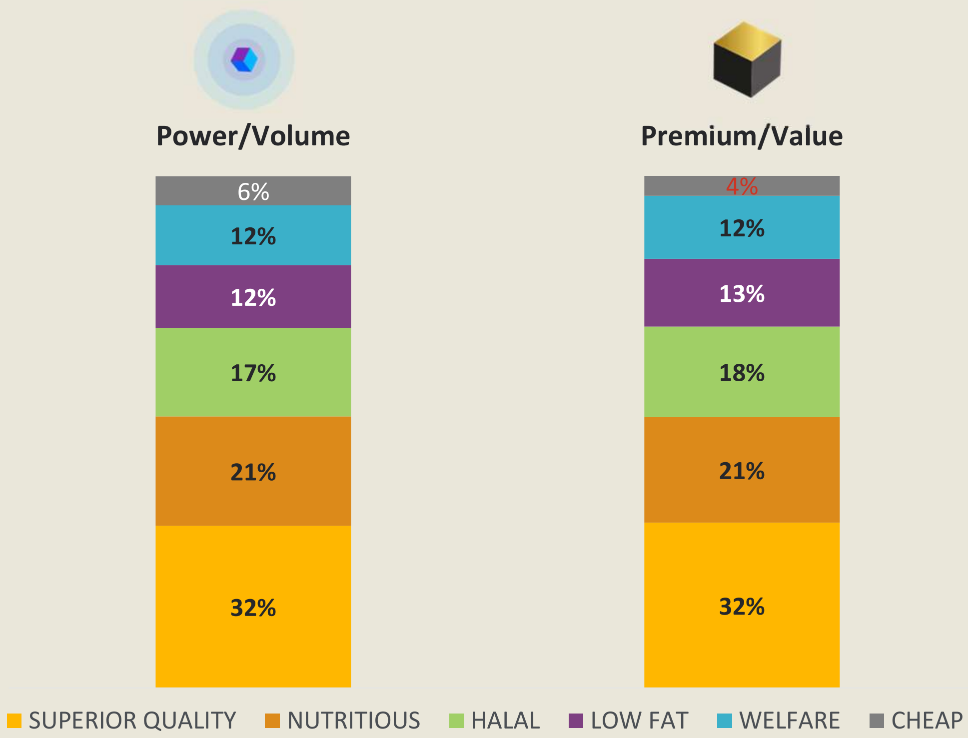
As with beef, what drives volume, also driver premium perceptions. Superior Quality followed by nutritious aspects will help to build brand relevance, Halal perceptions can help differentiate.



Cheaper

The animal is well cared for

The industry is environmentally sustainable

Low in fat

I trust that this beef is slaughtered according to sharia law and is therefore Halal

More nutritious

Is the most superior beef

Offers a variety of cuts that suit the meals I make

Is easy and convenient to purchase

Fresh

Guaranteed safe to eat

The meat is usually tender

Is my/my family's favourite beef

Consistent quality standards

AU lamb newly stands out on ‘variety of cuts’ and continues to offer consistent quality but has lost ground as a family favourite and superior meat. Local lamb is a family favourite, considered to be the freshest and safe to eat.

DRIVERS OF POWER
(ranked top to bottom)

		AUSTRALIAN LAMB	LOCAL (NAEMI) LAMB	INDIAN MUTTON/LAMB	PAKISTANI LAMB	NEW ZEALAND LAMB
Superior Quality (32%)	Consistent quality standards	5	0	2	1	1
	Is my/my family’s favourite lamb/goat	2	5	0	0	-1
	The meat is usually tender	1	3	2	3	0
	Guaranteed safe to eat	1	5	-1	-1	0
	Fresh	2	5	-1	-1	-4
	Is easy and convenient to purchase	3	0	-1	2	0
	Offers a variety of cuts that suit the meals I make	5	-1	-3	-4	3
Nutritious (21%)	Is the most superior lamb	4	2	0	4	-2
	More nutritious	1	2	1	0	1
Halal (17%)	I trust that this lamb is slaughtered according to sharia law and is therefore Halal	-4	3	-3	0	2
Low Fat (12%)	Low in fat	-4	-3	3	-2	-1
Welfare (12%)	The industry is environmentally sustainable	3	-1	-1	-1	0
	The animal is well-cared for	1	3	-3	-2	5
Cheaper (6%)	Cheaper	-17	-21	5	1	-5

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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=257). *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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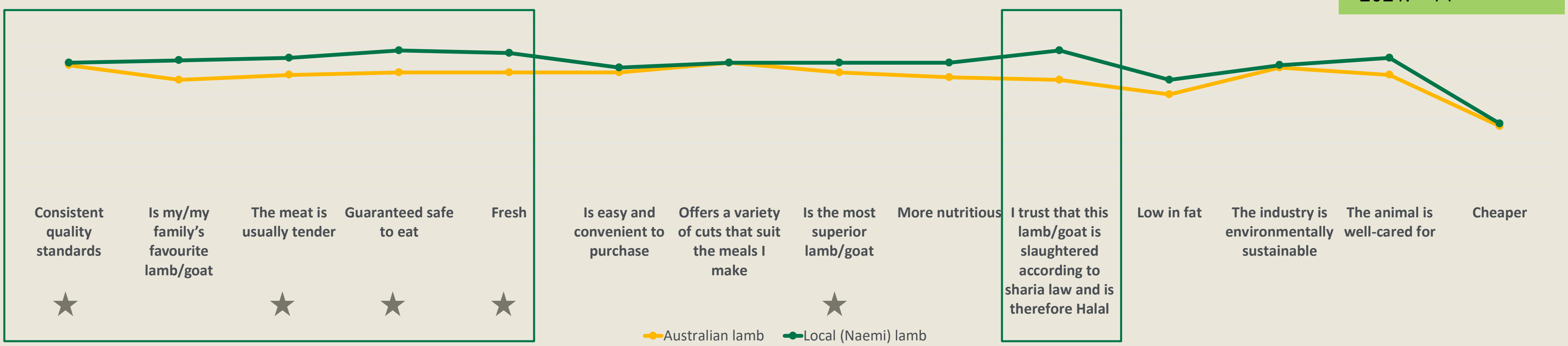
On all the key aspects, AU lags behind Local beef – scope to strengthen amongst Arabs; maintain its standing amongst Western Expats.

AU Lamb vs. Local lamb

Avg Gap AU vs. Local:
- 2022: -5
- 2021: +14



Gap of Avg. AU vs. Avg. Local endorsements:

Emiratis: -32

Expat Arabs: -29

Western Expats: +34

Expat Asians: +15

★ Important aspects to drive Value and Volume

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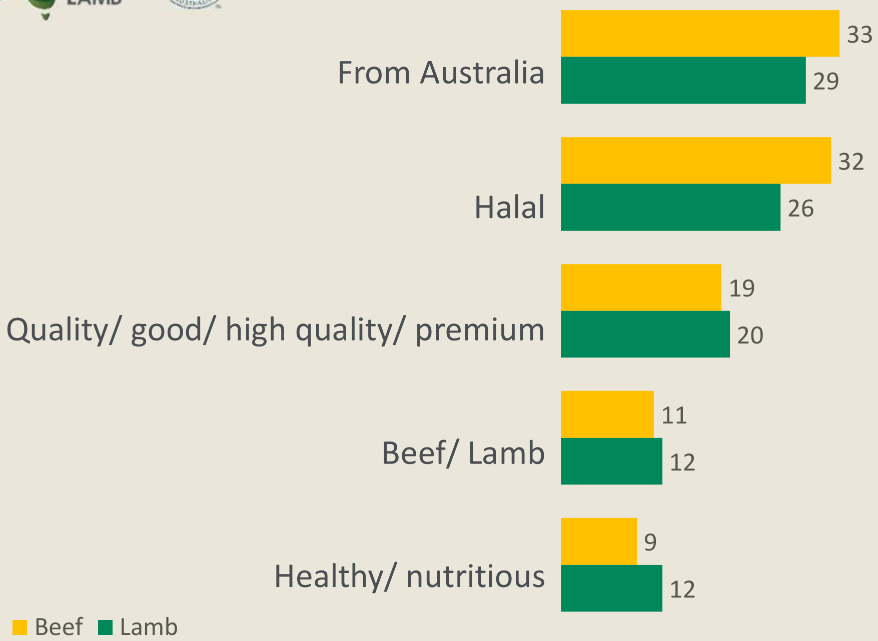
WHAT NEXT FOR AU BEEF AND LAMB IN UAE?

Australian and Halal certification are the key associations with the True Aussie logo, and is communicating the same things, whether labelled on beef or lamb.

% 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]

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

(QTA5) If you saw this logo on a packaged piece beef/lamb, what would it make you think about the meat? Base: Beef '22 (n=90); Lamb '22 (n=110)

Scope to establish AU Beef on some of the key drivers to grow its volume and Value and at the same time strengthen its current standing on Variety aspects.

Associations for AU to communicate

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

1. Consistent quality standards

2. More nutritious

3. Fresh

4. Is the most superior beef

5. Is my/my family's favourite beef

More explicit (1, 2)

Difficult to achieve when competing vs. a local product (3)

Implicit (4)

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

The top 5 drivers of volume and value are the same in the UAE for Lamb. Continuing our focus on our superior meat which comes from our consistent quality, and implies and inherent safety expected to help drive overall equity.

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

Associations for AU to communicate

1.
The meat is usually tender

2.
Fresh

Difficult to achieve when competing vs. a local product

3.
Guaranteed safe to eat

4.
Is the most superior Lamb

5.
Consistent quality standards

Implicit

More explicit

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

MEAT & LIVESTOCK AUSTRALIA

FINAL THOUGHTS & DISCUSSION

A recap of some key takeouts from the presentation today

Overall market landscape

Meat consumption differs across the key ethnicities in UAE.

Opportunities to plan to target and communicate to the diverse groups of consumers in UAE and their different needs for red-meat.

Role of beef

Even though high on consumption, beef has a more varied role across consumer groups.

There is opportunity to build a stronger emotional and rational relevance with consumers in UAE by tapping into these slightly different roles.

AU Brand Perceptions

Both AU beef and lamb see a softening in 2022, both in terms of usage and equity, now 2nd to local beef.

Need to re-establish credentials on superior meat, consistent quality, Justifying premium perceptions and ensuring value maintained.

Jobs to be done

1. Maintain strong position amongst Westerners
2. Build on platform with Expat Arabs.
3. Sheepmeat the more reliable opportunity amongst expat Asians

Channel specific targeting

Availability at the right channels, based on the varied a specific use of channel by different nationalities in the UAE.