

July 2022

# Global Tracker: Vietnam – *Presentation Deck*

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# 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)



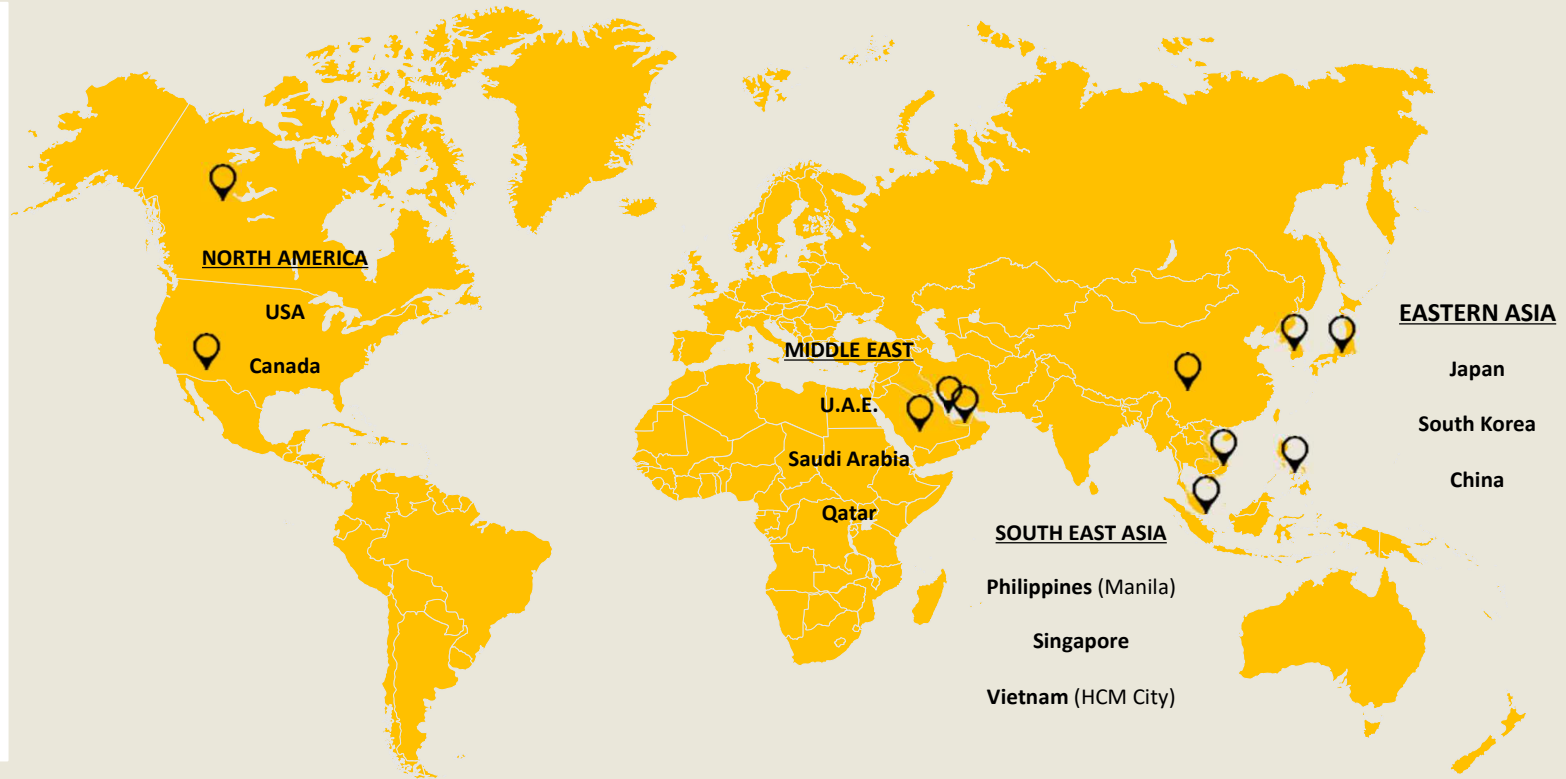
Consumers aged 18-64  
Grocery buyers, meal planners  
Affluent households (skew)  
Selected based on potential  
openness and ability to buy AU  
Beef and/or Lamb  
*(Not representative of total market)*



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



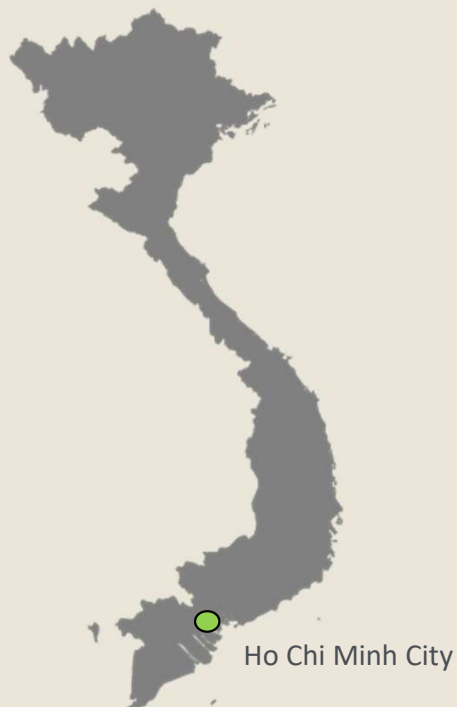
We have conducted the global tracker in 22 markets over the last 8 years, with Vietnam fieldwork run for the past 2 years.

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	





## Vietnam sample – a deliberate skew (not Nationally representative)



Ho Chi Minh City

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	50%	35%
	Female	50%	65%
Age	18-34	-	54%
	35-49	-	35%
	50-64	-	11%
Cities	Ho Chi Minh City	8.7%	100%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	97%
Children	Households with Children	-	77%
Annual HH Income	Under 180,000,000 dong	-	12%
	180,000,000 - 299,999,999 dong	-	23%
	300,000,000+ dong	-	64%

*Sample is made up of 500 consumers*

World Factbook:  
Age: 0-14 (23%), 15-24 (15%), 25-54 (46%), 55-64 (10%), 65+ (6%)

## A recap of the key points we shared in 2021...

### Beef plays a clear role, relevant to AU

Beef has a very clear set of **distinctive strengths** which can be leveraged to communicate and **reinforce AU Beef's distinct strengths** and role in the Vietnamese repertoire.

### Safety drives trust, volume + premium

**AU owns safety** – which is relevant for driving **choice, premium and trust**. As such it should be **protected** and **strengthened** (through product and channel experience and communications).

### Safety critical online

**Safety** is a key concern / **barrier** with **online**.

As the **online channel grows** (off the back of the C-19 pandemic) it's important to **reassure** and deliver **consistent quality** (another AU strength) in a **differentiated** way to Japan and USA.

True Aussie may be a vehicle.

### Lamb superior but unfamiliar

**Availability** was the key reason consumers claim for not buying lamb – followed by **unfamiliarity**.

As such, an opportunity to **build confidence** with Lamb preparation (and differentiate it vs mutton/goat).

Can we leverage the nuanced benefits of lamb in **superiority** and **tenderness** to build this category further?

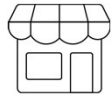
### Competitive watchout: US, NZ

Watchout for US Beef which leverage **consistent quality** to drive premium.

While small, **NZ** exhibits a **similar positioning to AU**.

Consider leveraging AU's **superior awareness, consumption and volume** to establish a **clear, beneficial position** before them.

## Recapping discussions from 2021 session:



### Channel Discussions:



A mix of retail channels is used based on **need/occasion**



### Wet markets *(butchers/farmers interchangeable):*

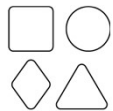
- Used for 'everyday' meat purchases and know sellers (frequented often by older consumers e.g. buying daily)
- Still fundamental channel for high income (albeit smaller overtime)



### Supermarket:

Likely used more for dinner party/event/serving friends or specific dishes.

***Have had a look at Aussie Beef by different channels***



### Competitor Discussions:

Consider adding **Canada** to brand list



***In consultation with you, we've added Canada, Brazil and Argentina Beef to the brand list***



## The Central Question

How can Australian Beef strength its position in Vietnam to maximise volume in the competitive COO context and remain relevant into the future?

# The flow of the story today



## Macro-market context

Briefly recapping some important global trends which are relevant context for changing consumer behaviours



## Protein Landscape, Channel & COO

Setting the scene by looking at the awareness, claimed consumption and perceptions of the key proteins in market. This also includes general beef buying behaviours.



## COO brand health, trust & perceptions

Understanding current role of imported product in people's day-to-day lives, the usage of, Trust in and perceptions of key imported COO brands.



## What next for AU beef in Vietnam

Identifying the key benefits that AU Beef needs to communicate to protect its 'Accessible Premium' position against competitors.



There are 3 broad macro-contextual factors that are impacting markets and these are filtering down to 4 consumer considerations



### Economic

The post-covid economic environment, has increased concerns across markets around managing household income and rising costs and inflation this has left consumers preparing for affordability challenges



### Trade Relations & Politics

Political forces at play have alter the competitive landscape for beef trade impacting accessible product, in particular Bi-lateral trade agreements



### Covid

Covid response has been to refocus on health and well-being, and re-evaluate brand choices. Health consciousness entrenched post-COVID, has impacted food choices, and use of e-commerce to procure products, including groceries.



### Value

Consumers are seeking value, whether buying better - premium products and categories, or bringing value options into their repertoire



### Accessibility & Availability

Supply challenges mean physical availability is increasingly important for maintaining relevance



### Health

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



### Trust

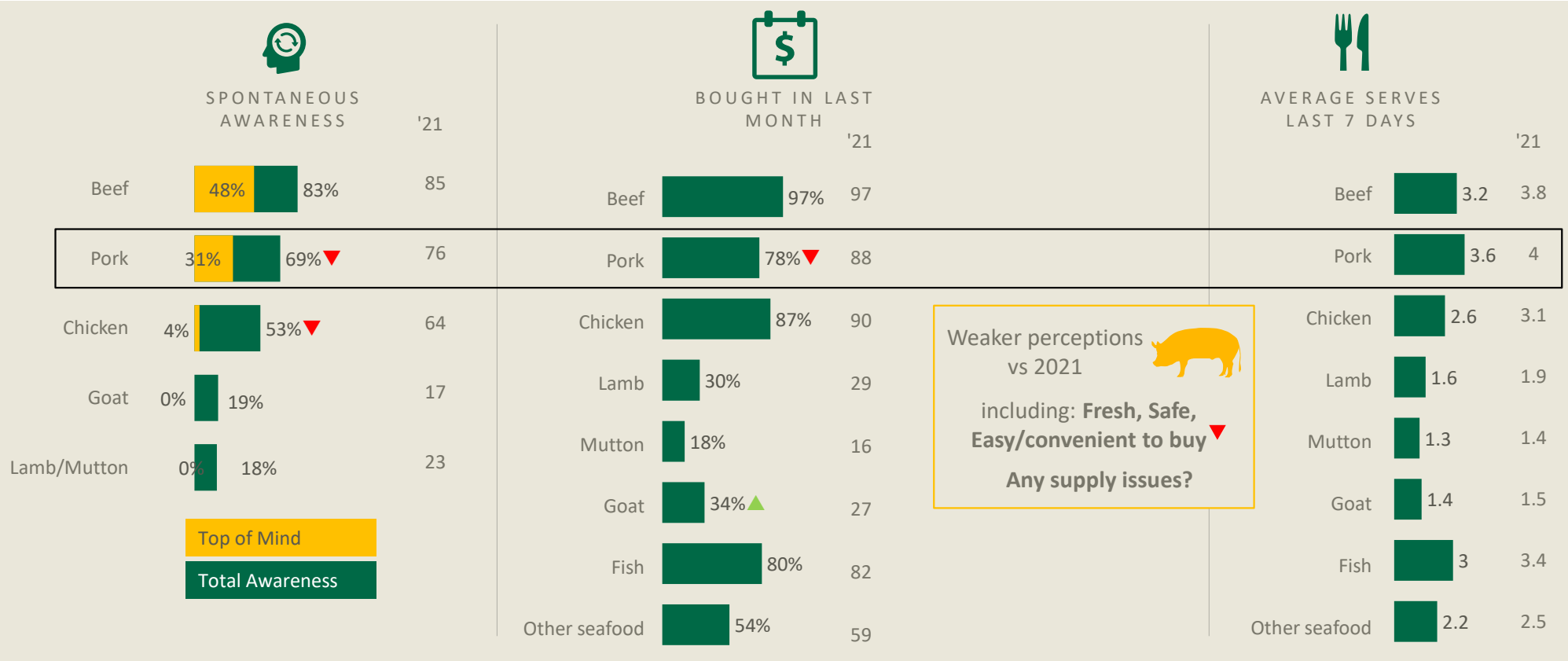
In the dynamic pandemic landscape, consumers have often turned to trusted brands – sometimes meaning a boost local if it's trusted.



# PROTEIN LANDSCAPE



**Beef retains the highest penetration and salience.  
Pork, and to a lesser degree chicken, soften in past month purchase and salience.**



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=501), '21 (n=500)

▲ ▼ Sig. different at 95%



Still seen as 'everyday' like Chicken, Pork loses 'Fresh' strength vs '21 (Chicken 'Favourite' softens). Red meat is superior (sheepmeat less familiar). Fish/seafood is healthy, accessible but quality varies.

Tasty, premium



### Beef

#### Strengths

- Taste delicious
- High nutritional value
- More superior
- Willing to pay more for

#### Weaknesses

- Not sustainable
- Not cheaper

Superior, well-cared for



### Sheep/Goat meat

#### Strengths

- Well-cared for
- More superior
- Worth paying more for
- Lamb: tender, nutritious

#### Weaknesses

- Not versatile
- Not easy to prepare
- Not essential for healthy children's diets

Easy, versatile, affordable



### Chicken & Pork

#### Strengths

- Easy/convenient to purchase and prepare
- Versatile
- Cheaper

#### Weaknesses

- Not nutritious
- Not superior
- Not worth paying more for
- Pork: Not low fat

Fresh, easy, low fat



### Fish & Seafood

#### Strengths

- Fresh
- Low fat
- Easy/convenient to purchase
- Fish: cheaper, essential for healthy kids diets

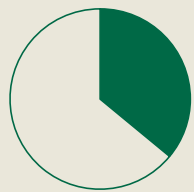
#### Weaknesses

- Not well-cared for
- Not consistent quality
- Not superior
- Not worth paying more for



**Unfamiliarity and availability remain the key barriers holding back lamb purchase. Supporting consumer confidence with the protein remains relevant.**

Global Average: 42%



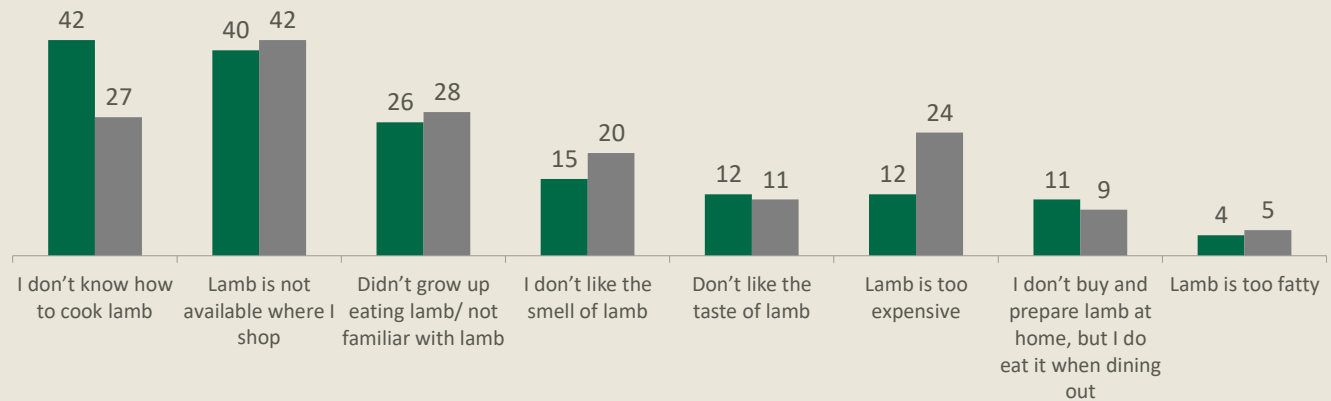
**36%**  
of the sample  
have never  
bought lamb

**2021: 33%**

Global Average:

28	17	29	25	26	18	15	7
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■ 2022 ■ 2021

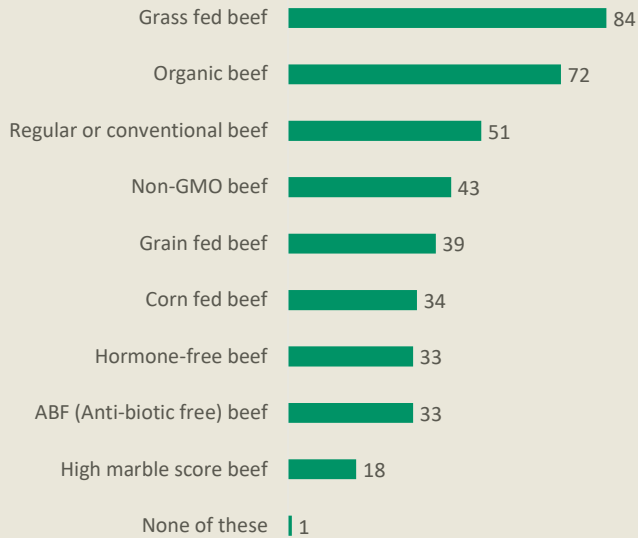




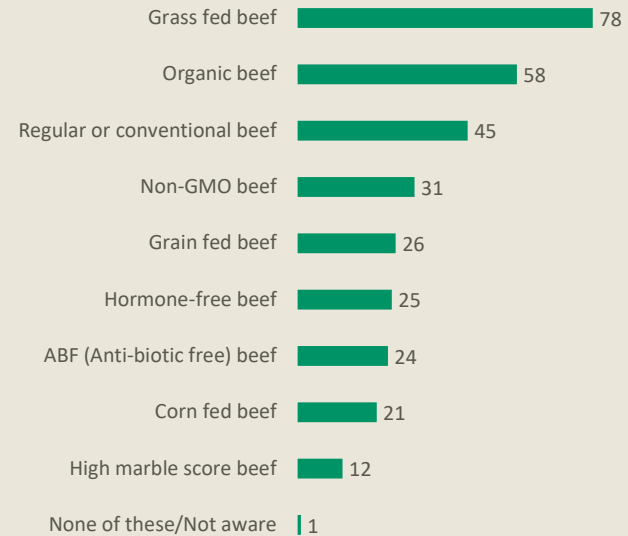
# Consumers are most familiar with Grass fed beef, leading awareness and past month purchase. Organic beef follows in #2. All stronger for high income families (except Regular).



## AWARENESS OF TYPES OF BEEF (%)

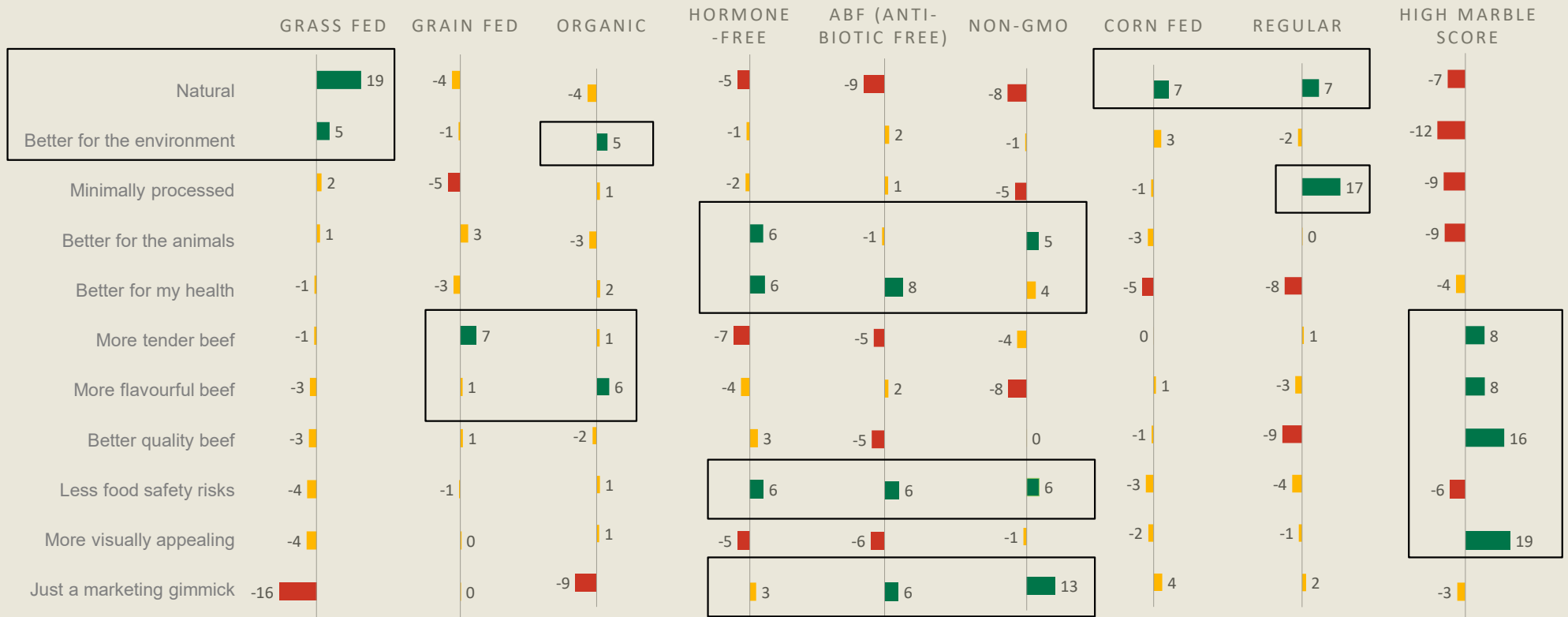


## BEEF BOUGHT IN THE PAST (%)





**GF is most natural; seen as better for the environment (like Organic which ladders to flavour). Marbled (proxy for Wagyu) is flavourful, tender, aesthetic and high quality. 'Free From' Beefs are seen as better for health/animals due to less safety risks – can be less credible/necessary.**



GF5. Which of the following things do you associate with each type of beef below? Base: Grass fed beef (n=421), Grain fed beef (n=196), Organic beef (n=361), Hormone-free beef (n=167), ABF beef (n=167), Non-GMO beef (n=213), Cornfed beef (n=169), Regular or conventional beef (n=257), High marble beef (n=89)

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





# BEEF COUNTRY OF ORIGIN



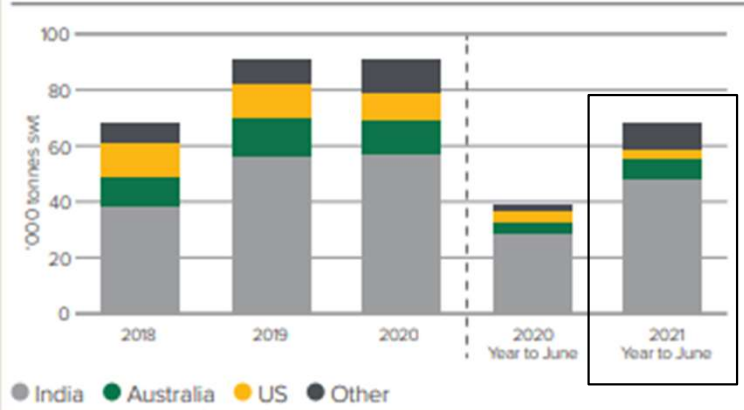
All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.



In 2021, Vietnam experienced higher Beef volumes from India and Other markets. Mostly Live, AU's boxed volume in 2022 is consistent; just more frozen, less chilled.

MLA market snapshot – Vietnam Beef

Vietnam's beef imports by key supplier



Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement (AANZFTA) Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	Under AANZFTA: 0% for all product lines	<b>India</b> (buffalo meat): under India-ASEAN FTA 8% eliminated by 2022 <b>US:</b> No FTA, tariffs vary between 14% – 30% <b>Canada and New Zealand:</b> same as Australia	Zero	No major hurdles

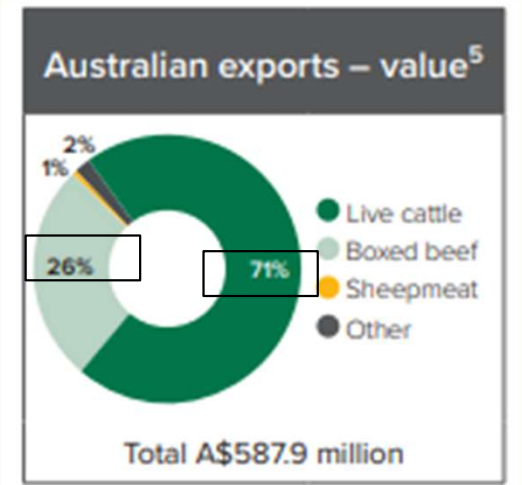
Best access  Major challenges

Source: Trade agreements, DGAT, WTO

12-months ending March

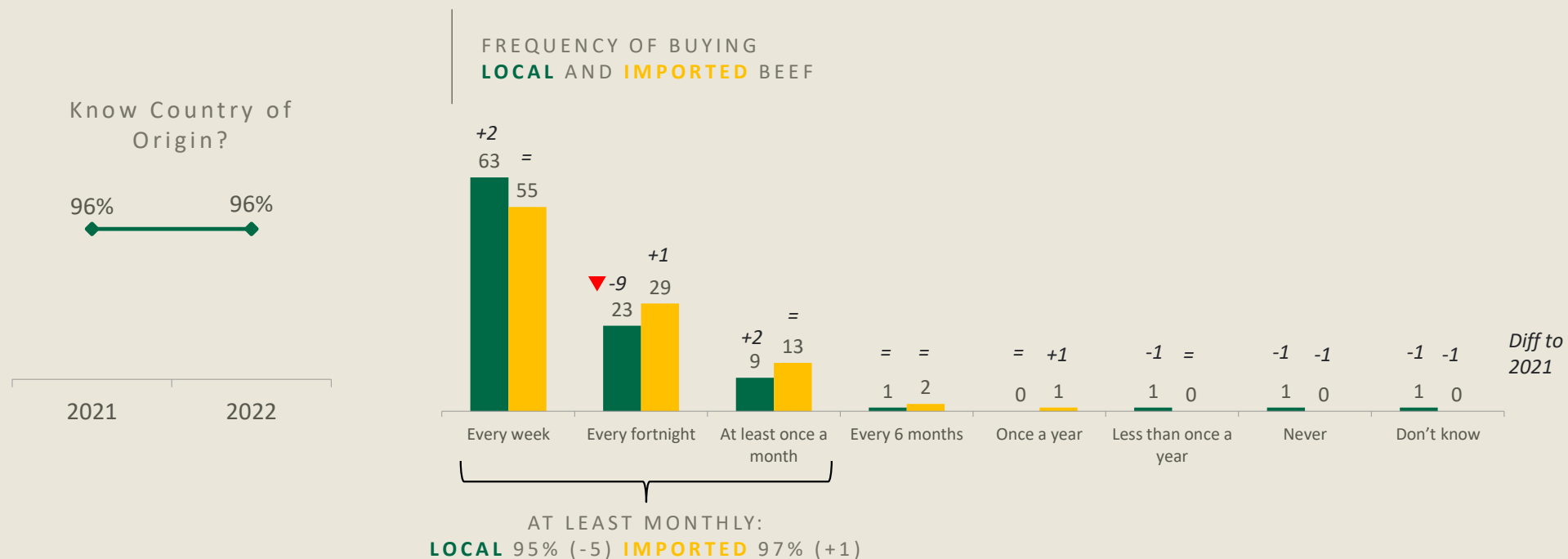
Volume (tonnes swt)	Chilled		Frozen		Total	
	12-months ending March	Y-O-Y % chg.	12-months ending March	Y-O-Y % chg.	12-months ending March	Y-O-Y % chg.
Total	14,211	-20	89,012	2	103,223	-2
Indonesia	2,931	-34	36,993	-9	39,924	-11
Philippines	481	-40	22,806	9	23,287	7
Malaysia	1,991	-6	6,562	24	8,553	15
Singapore	3,940	-17	1,472	-71	5,412	-45
Thailand	3,160	2	8,349	107	11,509	61
Vietnam	1,390	-42	12,168	8	13,558	0
Other	318		662		980	

Source: DAWR. SWT = Shipped weight. YTD = Calendar year-to-March. Y-O-Y





## Consumers claimed knowledge of Beef COO remains high and stable – with the majority buying beef weekly (almost all monthly).



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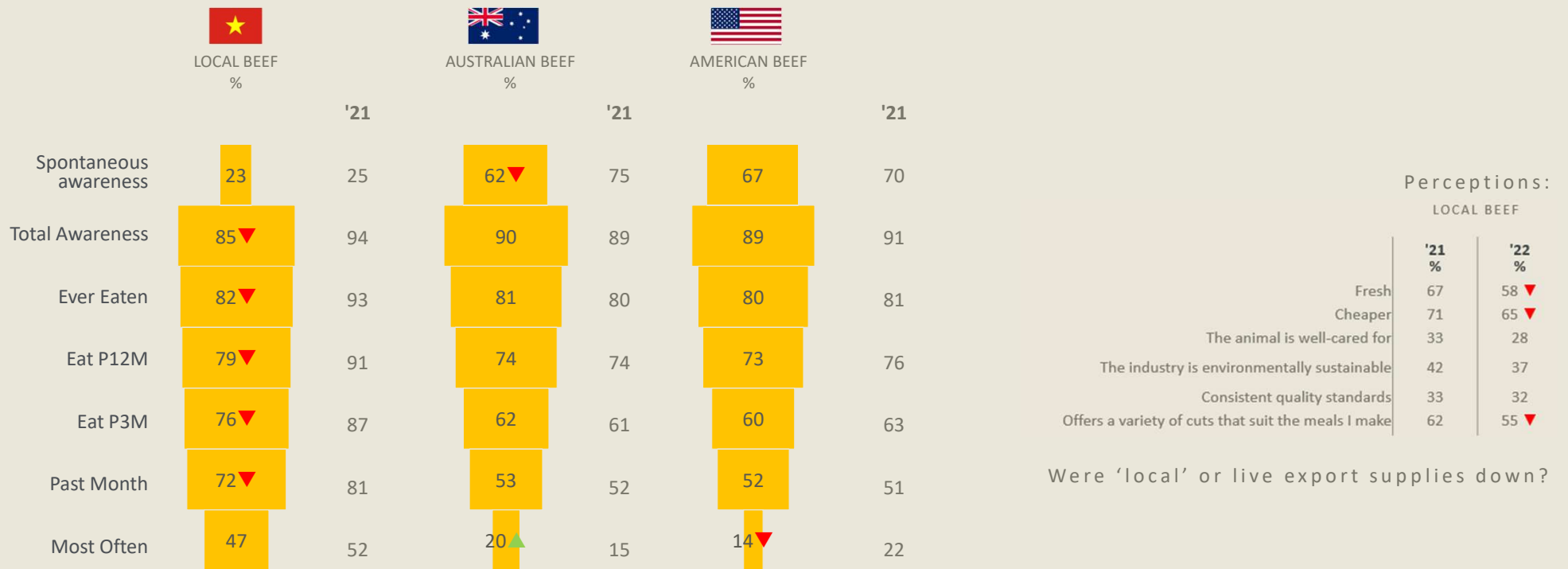
(GF3B) Do you know the country of origin of the beef you buy? (n=501)  
 (CH4) How often do you buy imported beef? (n=501)  
 (CH4LOC) How often do you buy local beef? (n=501)

▲ ▼ Sig. different at 95%





# Local beef leads claimed consumption - but falls in 2022 alongside perceptions of freshness, price and variety of cuts available. Is this live export driven?



Were 'local' or live export supplies down?



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=501), '21 (n=500) – Bought beef in past month or ever buy beef

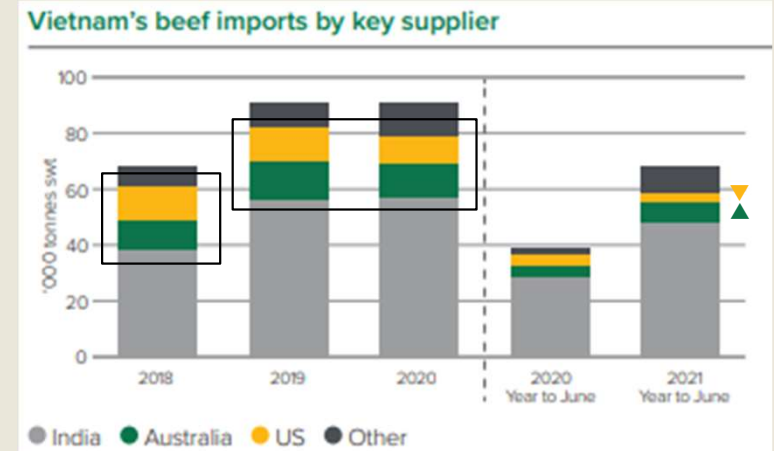
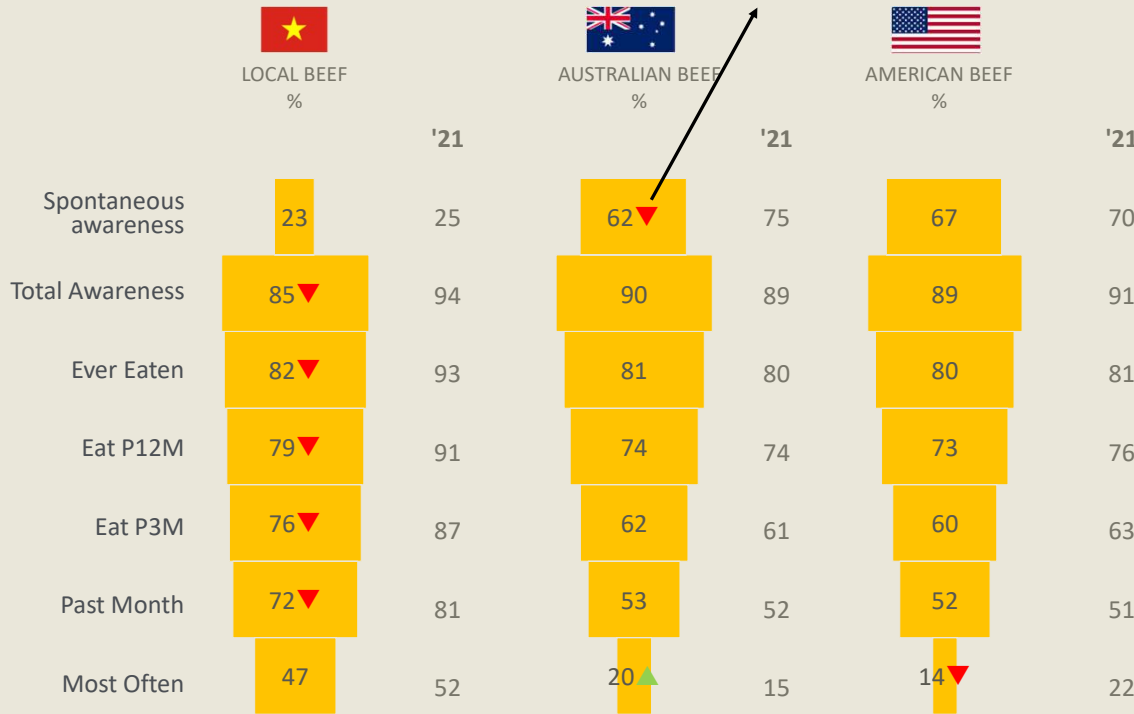
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US/AU beef have even historical supply, but AU overtakes US in 'most often' in '22. May relate to higher supply in 2021 and weaker US perceptions (consistent quality, safe, marbling). Less chilled supply in 2022 may impact AU salience.

Female, weekly shopper driven



12-months ending March

Volume (tonnes swt)	Chilled		Frozen		Total	
	12-months ending March	Y-O-Y % chg.	12-months ending March	Y-O-Y % chg.	12-months ending March	Y-O-Y % chg.
Vietnam	1,390	-42	12,168	8	13,558	0



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  
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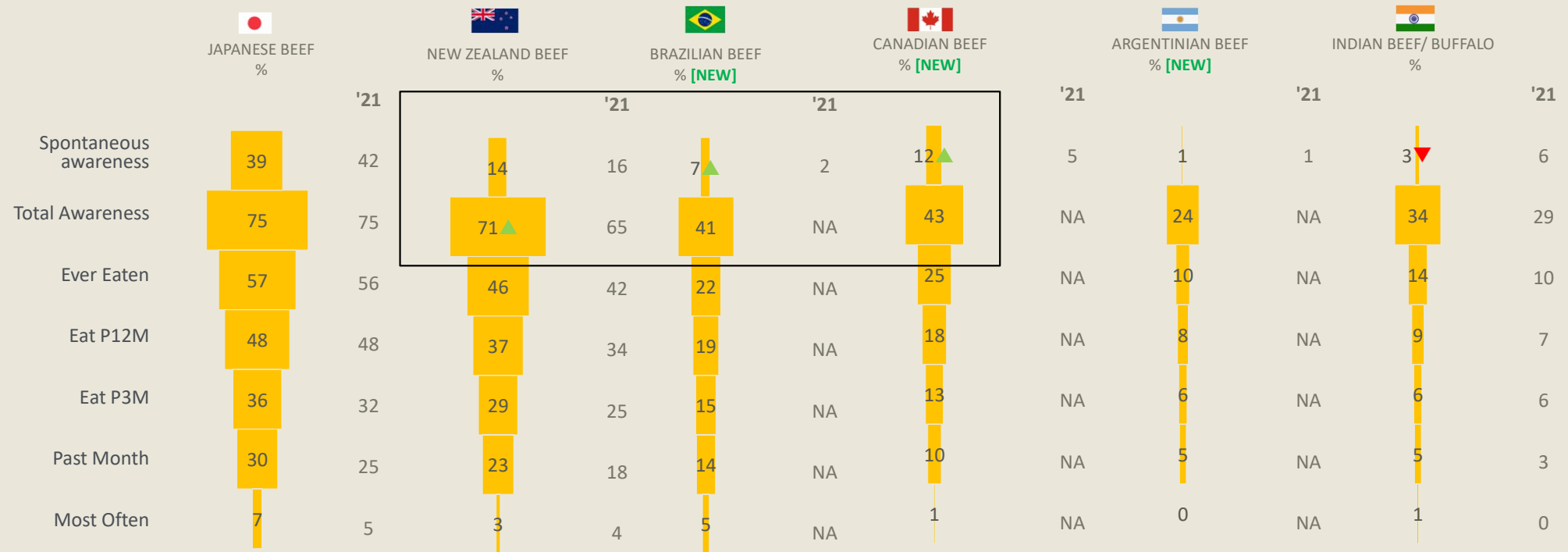
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# With increased supply outside AU/US/India (top 3), awareness of NZ, Brazil and Canada grow. Japan maintains specialist role. Despite volume, India isn't salient.

## BRAND HEALTH – BEEF



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=501), '21 (n=500) – Bought beef in past month or ever buy beef

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# Our funnel is strongest for consumers who never shop online. While supermarket should remain a key focus (largest channel along with Butchers) can we leverage online to secure younger / future consumers who have high trust in AU?

## BRAND HEALTH – AUSTRALIAN BEEF



Online is used significantly more for **18-34s, families** and **main meal planners**

Despite lower usage, **monthly online beef shoppers** have **high trust in Australian** (even higher than non online shoppers)



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=501), '21 (n=500) – Bought beef in past month or ever buy beef

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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 **5x higher** volume share

By increasing the likelihood  
**consumers will pay for a brand**

We call this Brand  
Premium

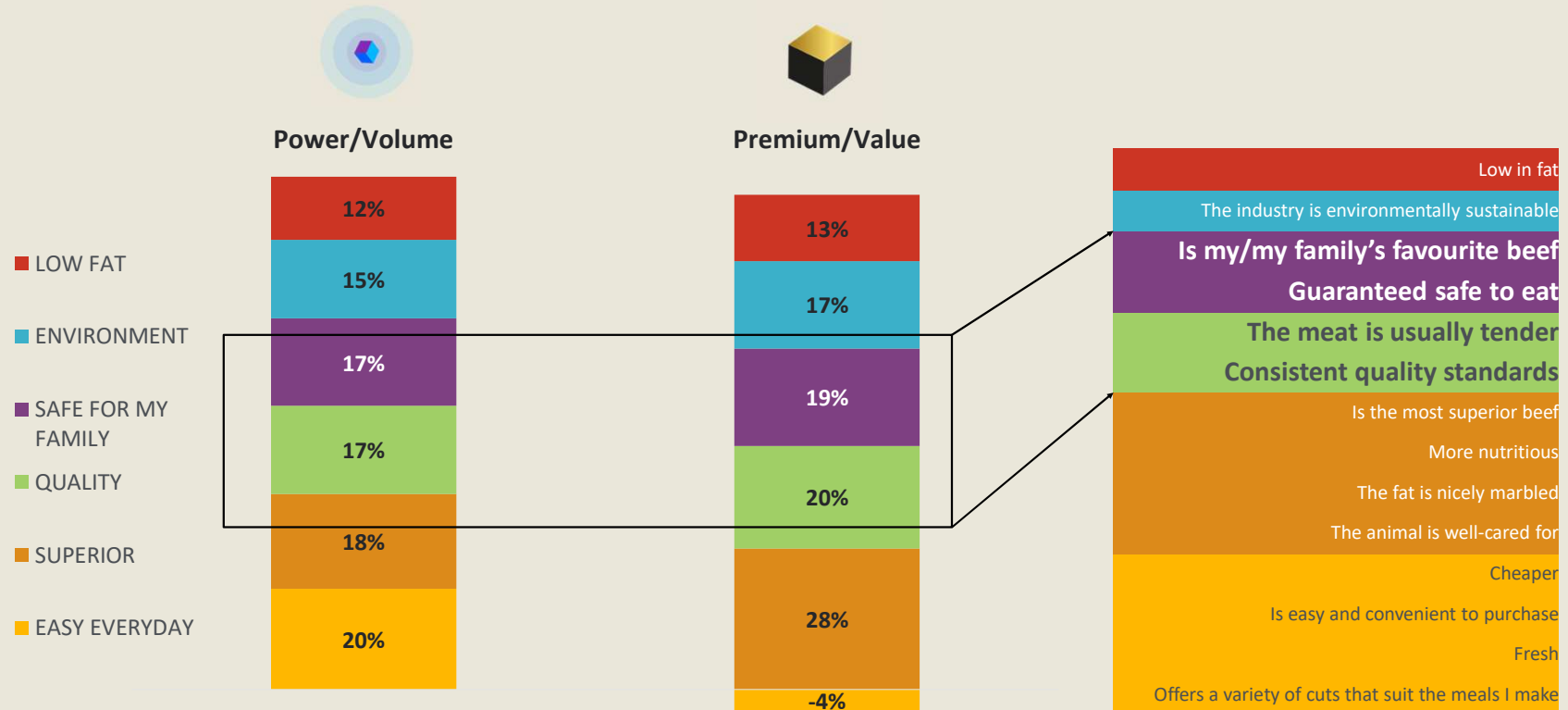


**Premium**

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









Perceptions of 'Easy Everyday' drive predisposition/volume, but negatively drive Premium (not always the case Globally). Superiority drives premium. Tender, consistent quality and safe play dual roles.





**Australia holds steady while competitors weaken. NZ weakens generally while Local declines in heartland impressions (fresh, cheap, variety) and US on consistent quality, safe and marbled. Japan bucks the trend growing some favourite (but remains a specialist player).**

	 LOCAL		 AUSTRALIAN		 AMERICAN		 JAPANESE		 NEW ZEALAND		 INDIAN BEEF/ BUFFALO	
	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %
Fresh	67	58 ▼	52	50	50	46	41	43	35	32	18	20
Cheaper	71	65 ▼	30	30	29	29	17	20	23	17 ▼	23	24
The animal is well-cared for	33	28	60	55	56	50	51	52	44	35 ▼	20	17
The industry is environmentally sustainable	42	37	54	55	52	48	46	46	41	34 ▼	22	19
Consistent quality standards	33	32	60	60	62	55 ▼	54	54	45	37 ▼	20	20
Offers a variety of cuts that suit the meals I make	62	55 ▼	53	56	54	57	38	44	39	35	22	20
Low in fat	39	38	50	53	51	48	47	50	38	31 ▼	19	20
Guaranteed safe to eat	48	46	67	64	65	56 ▼	53	56	46	40	22	23
Is my/my family's favourite beef	56	52	56	51	51	50	34	43 ▲	34	26 ▼	16	16
Is the most superior beef	24	21	50	47	47	45	56	56	35	32	13	15
More nutritious	35	31	58	55	57	57	54	56	42	40	19	19
Is easy and convenient to purchase	70	65	50	45	49	43	28	29	29	24	17	19
The meat is usually tender	37	35	58	56	57	54	50	51	38	33	17	18
The fat is nicely marbled	28	23	49	44	49	42 ▼	46	49	36	28 ▼	18	17
	<b>Heartland declines</b>				<b>Weakens in key drivers</b>				<b>Generally weaker</b>			









Base: '22 (n=501), '21 (n= 500)  
 QBBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.

▲ ▼ Sig. different at 95%





## Safe/consistent quality are relevant and credible perceptions for AU to capitalise on given the role these have on driving choice, premium and AU's stronger position.

	 LOCAL		 AUSTRALIAN		 AMERICAN		 JAPANESE		 NEW ZEALAND		 INDIAN BEEF/ BUFFALO	
	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %	'21 %	'22 %
Fresh	67	58 ▼	52	50	50	46	41	43	35	32	18	20
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Low in fat	39	38	50	53	51	48	47	50	38	31 ▼	19	20
Guaranteed safe to eat	48	46	67	64	65	56 ▼	53	56	46	40	22	23
Is my/my family's favourite beef	56	52	56	51	51	50	34	43 ▲	34	26 ▼	16	16
Is the most superior beef	24	21	50	47	47	45	56	56	35	32	13	15
More nutritious	35	31	58	55	57	57	54	56	42	40	19	19
Is easy and convenient to purchase	70	65	50	45	49	43	28	29	29	24	17	19
The meat is usually tender	37	35	58	56	57	54	50	51	38	33	17	18
The fat is nicely marbled	28	23	49	44	49	42 ▼	46	49	36	28 ▼	18	17

### Key opportunities for AU

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Base: '22 (n=501), '21 (n= 500)

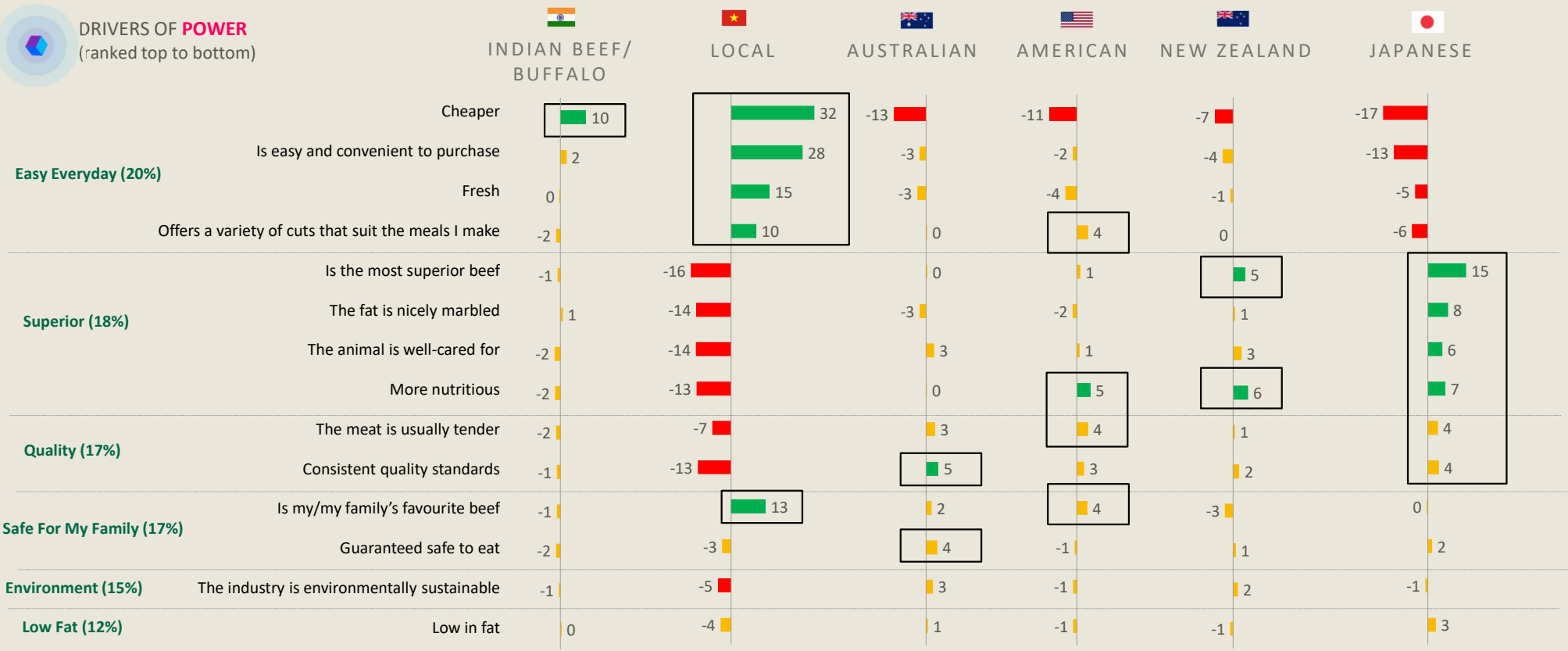
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▲ ▼ Sig. different at 95%





# COOs play clear roles. Local 'easy everyday', Japanese maximum Superiority, Indian Cheap. AU/US/NZ compete as 'accessible premium'; with elements of superior/quality/safe.



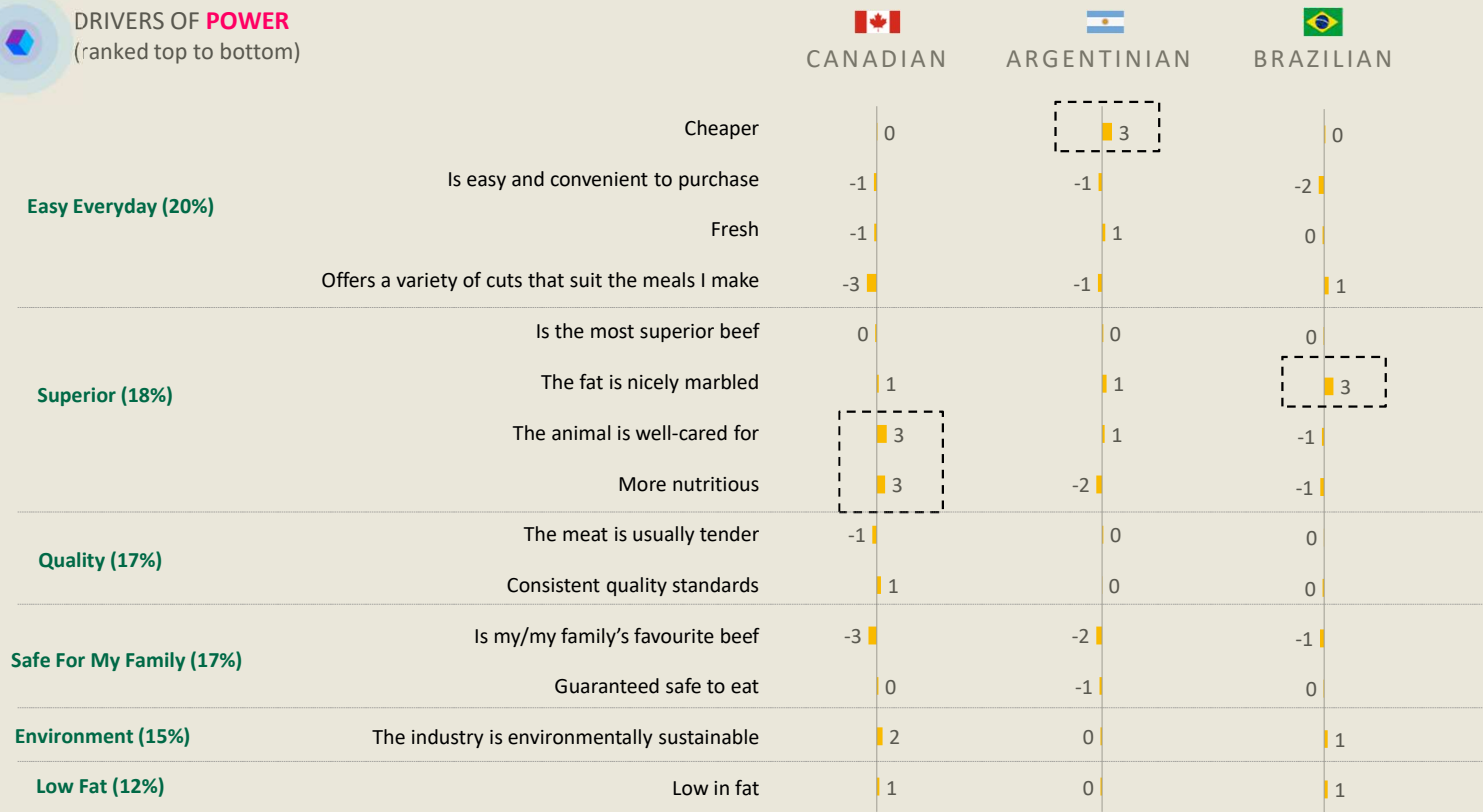
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# Smaller COOs are less defined in Vietnam at this stage, but begin to build some associations.



DRIVERS OF **POWER**  
(ranked top to bottom)



BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=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=501).

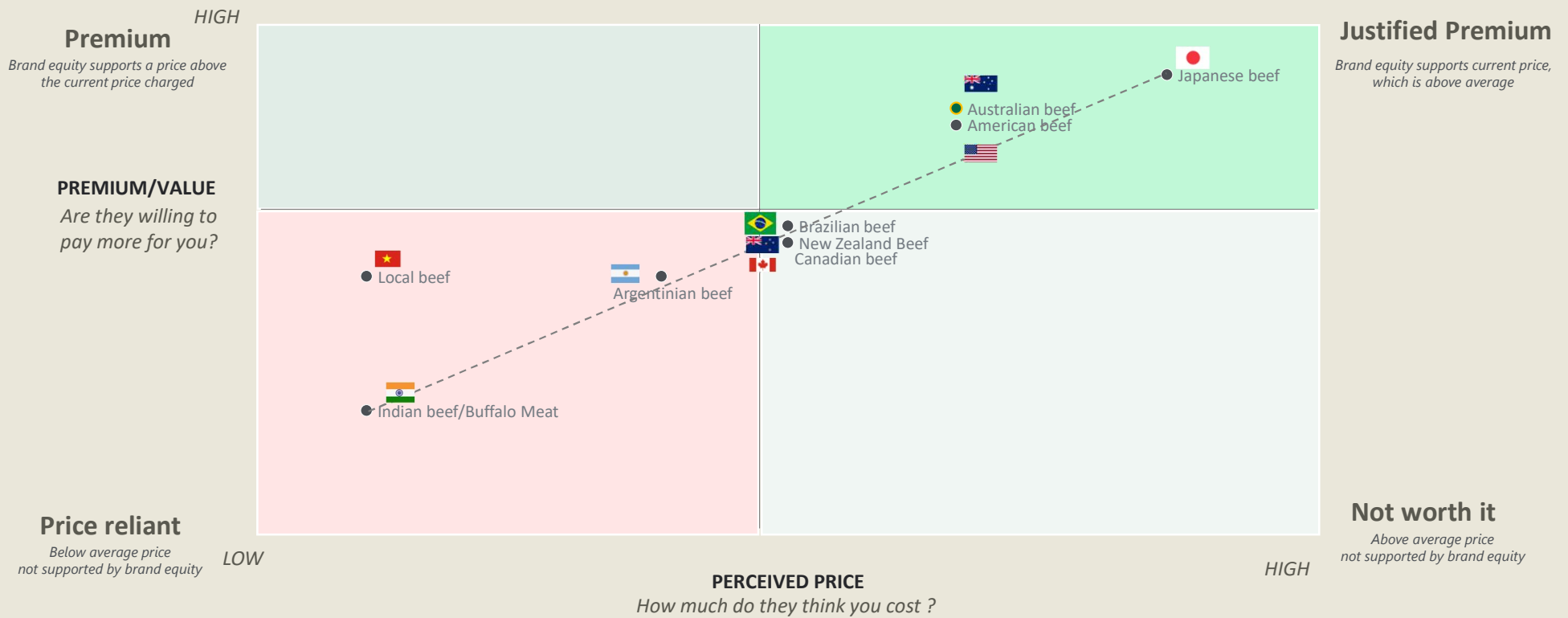
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+5 or more = relative category strength  
-5 or less = relative category weakness.





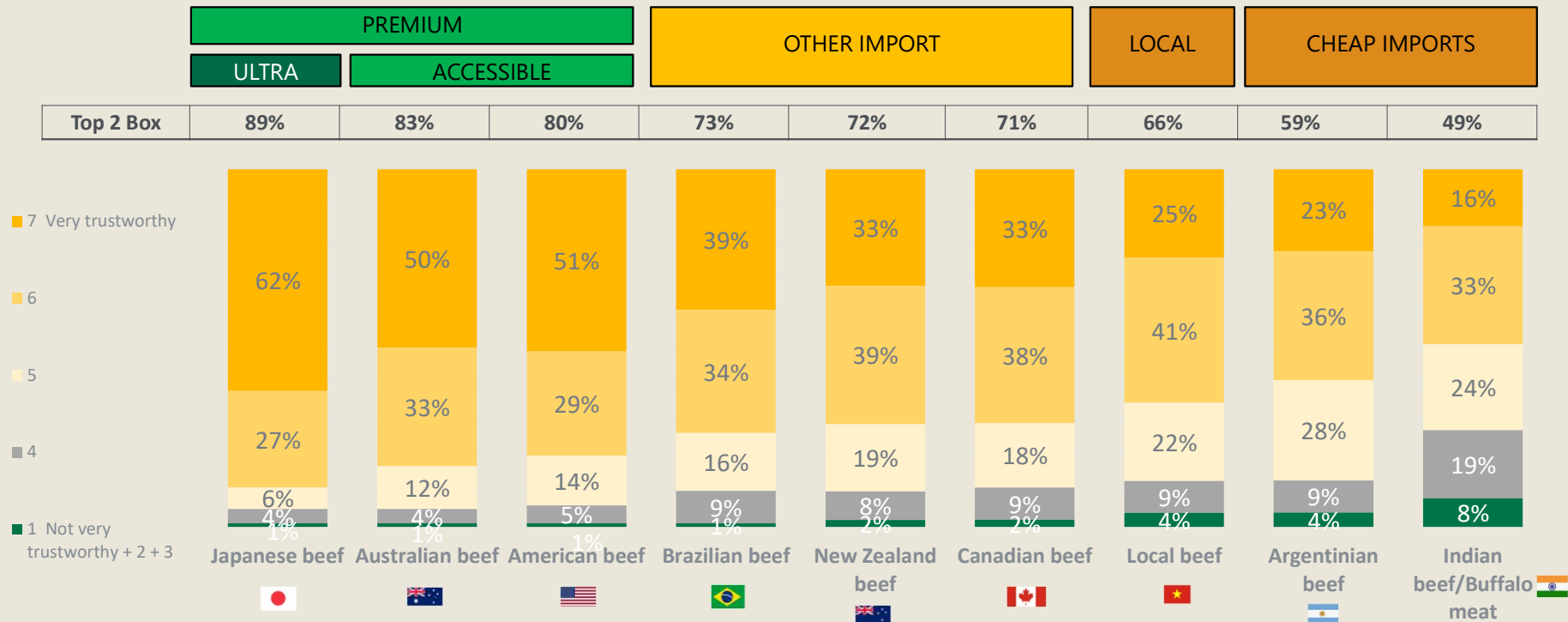
There is linear relationship between price and worth. AU, US and Japan charge a fair price for their quality (justified premium) while Local, Indian, Argentina rely on low price.





This level of premium reflects in perceived trust – with Japan leading, followed by AU/US, then smaller imports (Brazil, NZ, Canada) followed by Local (not typically low trust) and unfamiliar/cheap imports (Argentina and Indian Buffalo).

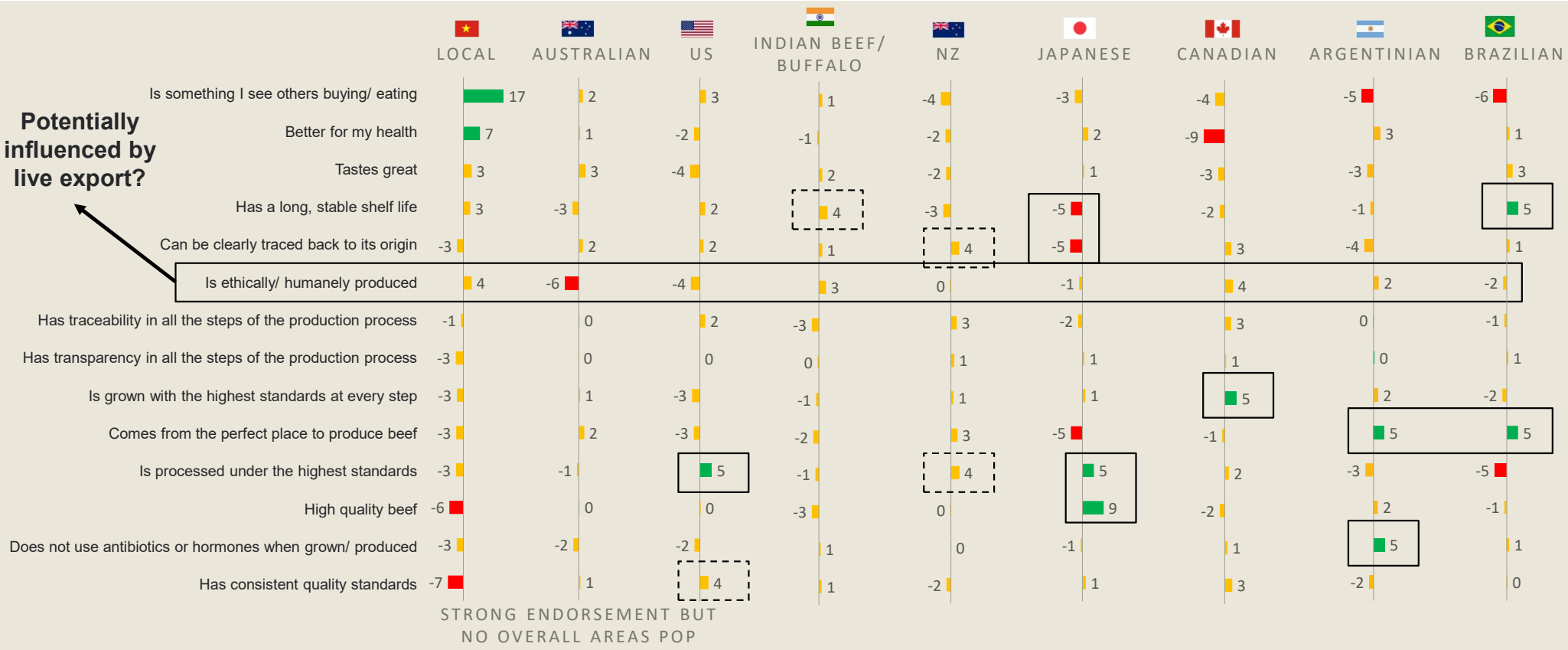
Trustworthy - COO BEEF



BTR2B. How trustworthy is the imported beef from these countries – 7 point scale  
 Base: Local beef (426) Australian beef (449), American beef (444), Indian beef/ Buffalo meat (171), New Zealand beef (356),  
 Japanese beef (374), Canadian beef (215), Argentinian beef (120), Brazilian beef (204)



JP, AU, US, NZ are highly endorsed for trust/traceability. Stripping out the effect of brand size uncovers underlying strengths/weaknesses. Room for AU to take elements of 'perfect place to produce beef' from small South American players - to align globally and underpin safety/quality.




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

IMGB. Associate with each of the different countries for imported beef  
Base: Local Beef (n=426), Australian Beef (n=449), American Beef (n=444), Indian Beef/ Buffalo (n=171), New Zealand Beef (n=356), Japanese Beef (n=374), Canadian Beef (n=215), Argentinian Beef (n=120), Brazilian Beef (n=204)




# Building safety and consistent quality perceptions supports both likelihood to choose AU Beef and justify premium. Opportunity to underpin these perceptions with perfect place associations.


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



1.  
**Guaranteed safe to eat**




2.  
**Nutritious**



3.  
**Favourite / OR / Well-cared for**



4.  
**Consistent quality standards**



5.  
**Sustainable / OR / Superior**

**BUILD** - implicit

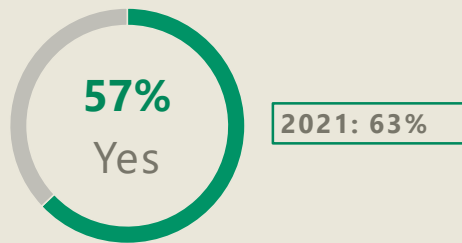
Underpin with clean/green perfect place reasons to believe

**STRENGTHEN** - explicit

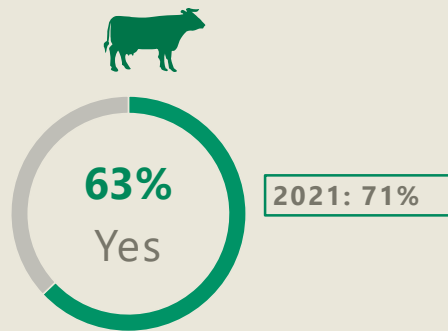
Underpin with clean/green perfect place reasons to believe



The True Aussie logo means 'Australia' for 1 in 4, with some associations of quality, safe. Consistent, branded communications offer an opportunity to link together the concepts of Australia, safe, consistent quality and clean/green rearing under the True Aussie brand.



Term: 'True Aussie'



KANTAR

QTA1. Have you heard the term "True Aussie" before? Base: '22 (n=501), '21 (n=500)

QTA3. Have you ever seen this logo before? Base: Beef '22 (n=501), '21 (n=500)

(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=313)

▲ ▼ Sig. different at 95%



## 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'.**



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

## Recapping what we have seen today...

Beef plays a dual role of tasty superior protein, while delivering nutrition. Pork and chicken share the role of the easy, versatile, everyday option.

Lamb and sheepmeat/goat is seen as more specialised, premium option. More than 1 in 3 haven't had lamb in the past, with availability and familiarity key barriers.

Awareness and claimed trial of grass-fed is high at 4 in 5. It delivers clearly on the promise of 'naturalness', along with being better for the environment.

Local beef funnel shows a decline across all measures. AU, US and Local now all on par. AU increases use most often, but has lost some salience amongst frequent female shoppers.

Younger consumers, who have high trust in AU beef, are using online as a key channel, but have a slightly weaker funnel, particularly on recent consumption.

AU and US are the dominant COO brands in terms of Power, and Premium. Both are relying on their brand Salience to maintain their position at the top, but AU is seen as more relevant.

Local, Japanese and NZ all own distinct territories, AU beef has fewer 'owned' associations. Consistent quality and safety have fallen significantly for USA, pointing to the opportunity for AU to consolidate.

A platform of Trust exists for us to leverage in order to continue growing quality and safety perceptions, and current TA assets lean into this space (with room to strengthen the linkage).

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