2023

Global Tracker: **UAE** – *Presentation Deck*

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MEAT & LIVESTOCK AUSTRALIA

Contents of today's presentation

The Central Question

UAE sample – a deliberate key city and higher income skew (not Nationally Representative)

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)

Sample n=500 consumers

DEMOGRAPHICS		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	70%	45%
	Female	30%	55%
Age	18-34	-	45%
	35-49	-	50%
	50-64	-	5%
Cities	Abu Dhabi	16%	50%
	Dubai	30%	50%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	97%
Children	Households with Children	-	70%
Annual HH Income	241K - 322K AED	-	67%
	322,001 + AED	-	33%
Religion	Islam	76%	65%

MACRO-MARKET CONTEXT

3 key trends influencing consumer decisions now and into the future:

Inflation

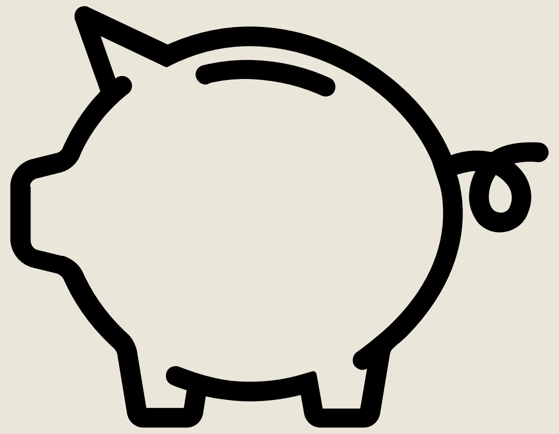
Emerging Sustainability

Increased focus on Health

Source: MLA Industry Insights Market Snapshot: https://www.mla.com.au/contentassets/58569fb8fd6c405196fbdd138bd75f2a/korea_2022-mla-industry-insights-market-snapshot_300123.pdf
https://www.foodnavigator-asia.com/Article/2023/03/29/south-korean-regulator-demands-more-collaboration-as-food-contamination-cases-rise#

While a proportion of consumers notice price increases on Imported and Local red meat, these are least affected by inflation vs other categories

INFLATION

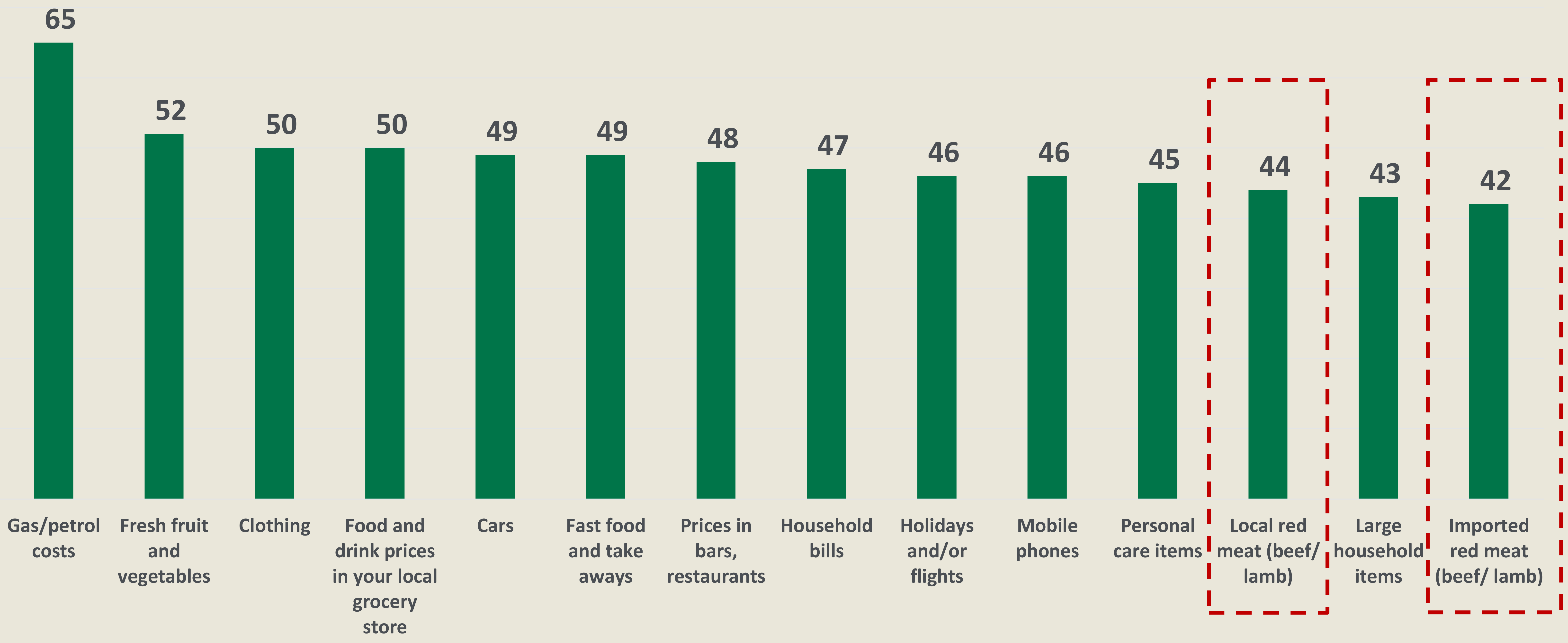


Inflation

Off the back of higher oil prices and measures to mitigate the impact of the covid-19 pandemic, the UAE's economy has recovered sharply.

Despite global economic challenges such as volatile commodity prices, inflation, uncertainty with regards to monetary policies and supply chain disruptions, the government has adopted an array of measures to enhance economic resilience.

PRODUCTS AFFECTED BY INFLATION



Data from the GT23UAE Survey

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Base: Total (n=500)
VOL1: Which of these types of products have you noticed higher prices recently?
Source:[UAE economy grew 7.9% in 2022 amid diversification strategy (thenationalnews.com)]

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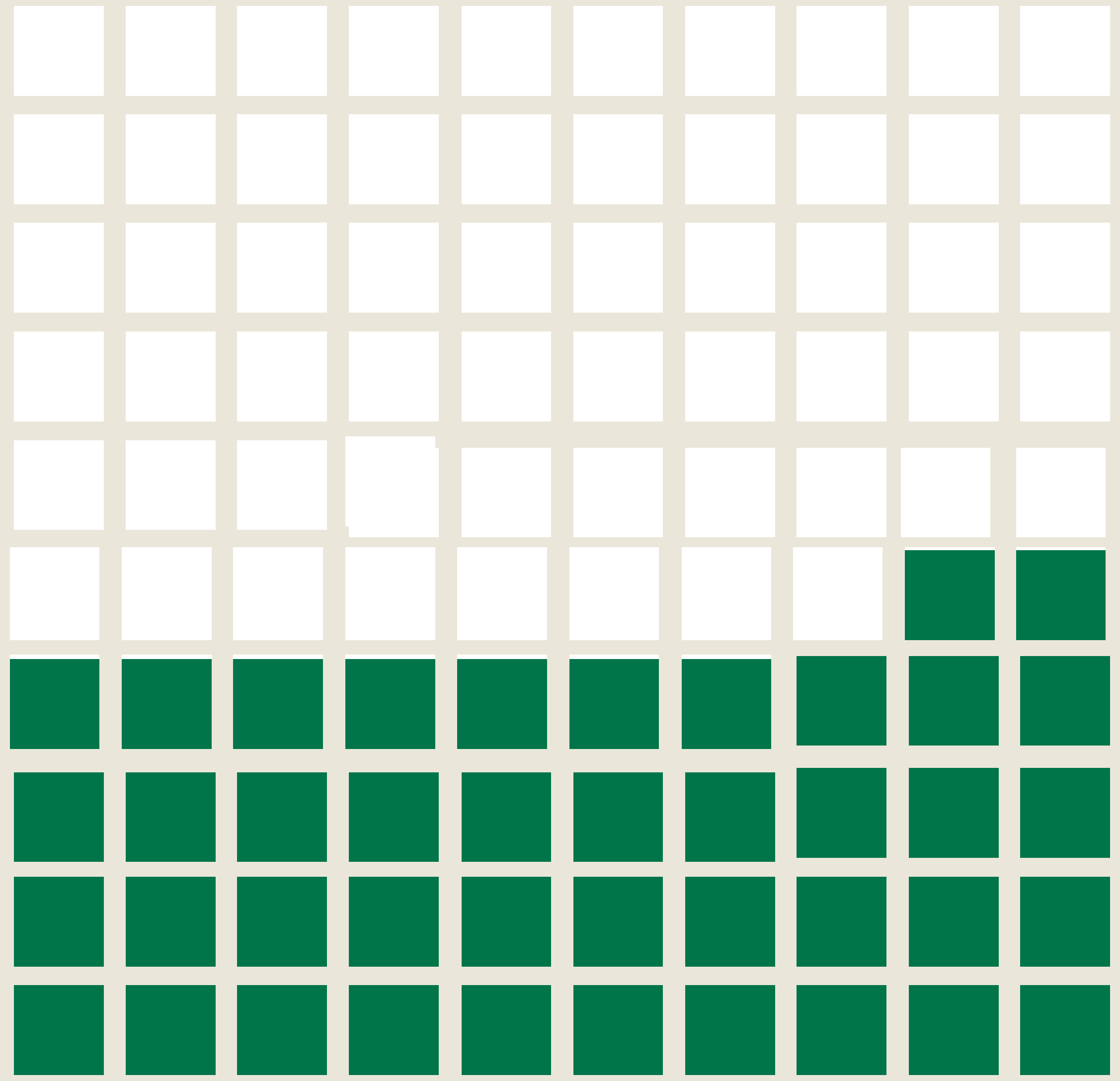
Among those who notice price rises, 4 in 10 continue to buy the same amount, while the remainder claim to have adopted some economising behaviours

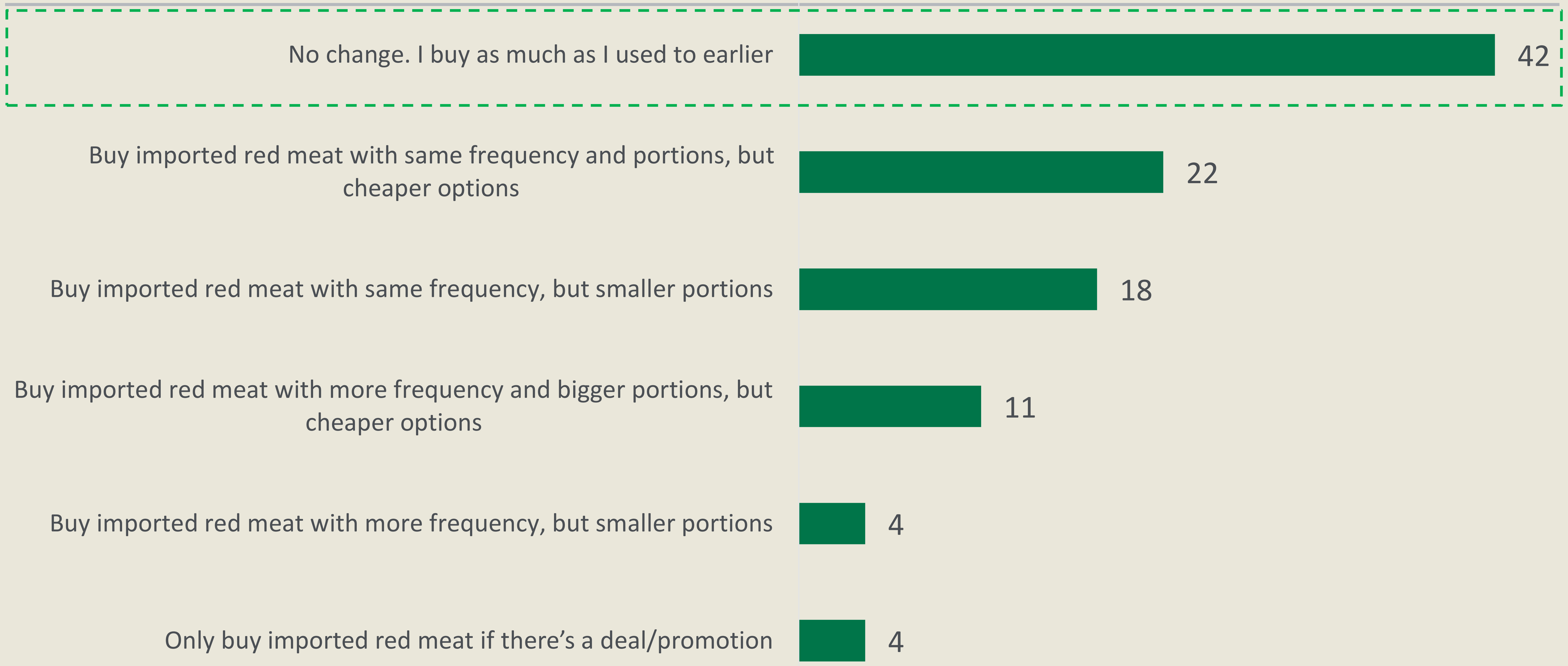
IMPACT OF INFLATION ON IMPORTED RED MEAT PURCHASE

People who noticed higher prices for imported meat recently

42%



Changes in purchase behaviour of imported red meat considering higher prices



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Base: Noticed higher prices for imported red meat recently (n=209)
VOL2: You mentioned you noticed higher prices for imported red meat recently. How has your purchase of imported red meat changed considering the higher prices?

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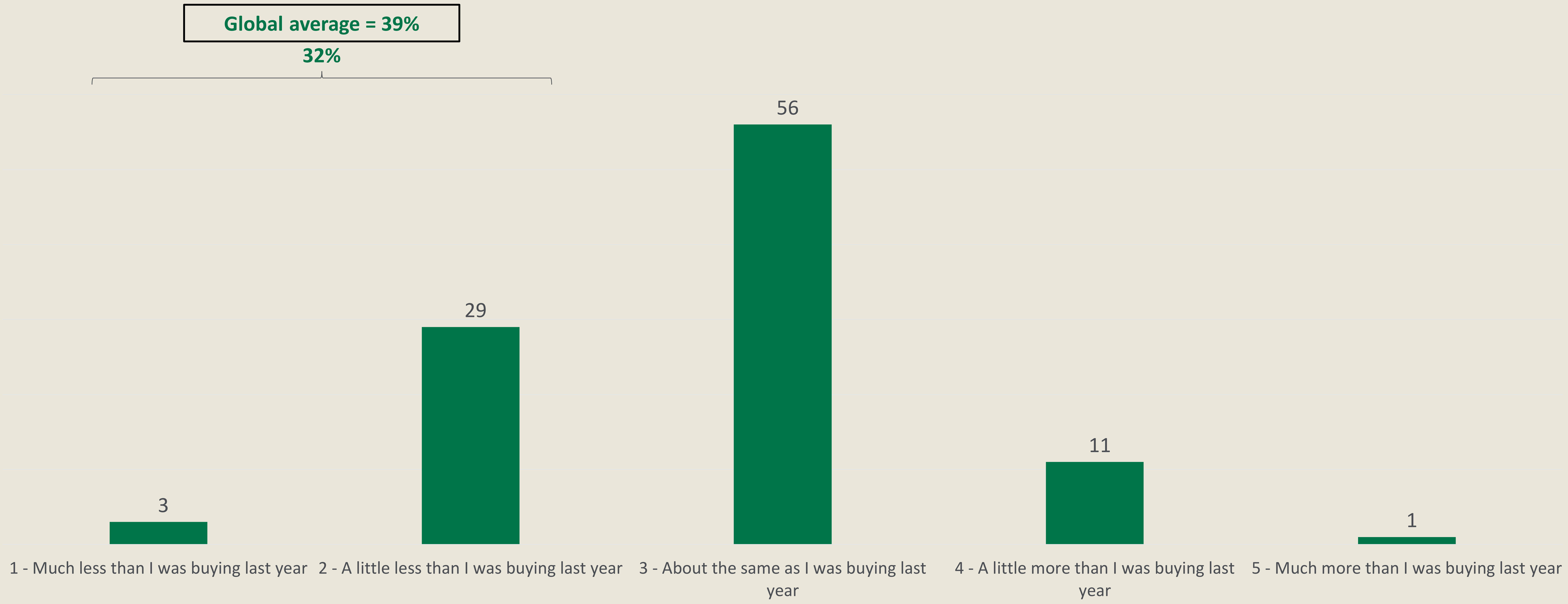
The majority plan to buy the same/ more imported red meat vs last year; indicating inflation is not yet prohibitive in this category

IMPACT OF INFLATION ON IMPORTED RED MEAT PURCHASE



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Base: Total (n=500)
VOL3: Considering the increasing prices for imported red meat, over the next 12 months, how much imported red meat (beef or lamb) do you think you'll be buying? Would you say the amount is…

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UAE has a slightly higher proportion of 'Actives' compared to the Global avg; ahead of most other countries tracked in 2023

SUSTAINABILITY

Sustainability

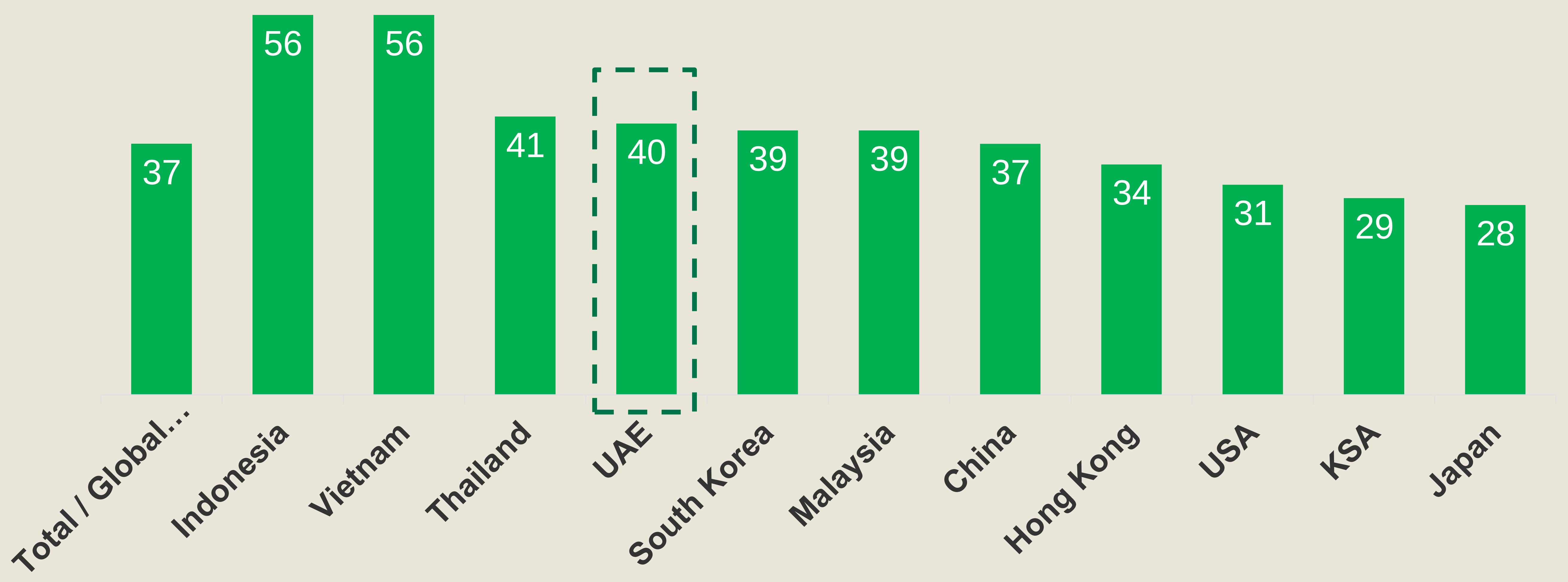
Reflecting broader global trends, sustainability has become an important consideration for UAE consumers.

Linked to sustainability, UAE consumers are increasingly aware of food quality and traceability, and as a result, are willing to pay a premium for food and beverage products that are quality assured, have high nutritional value and are natural.

Actives

- **Much more likely to believe that they can make a real difference** through their actions
- Believe they are personally **affected by social and environmental issues**
- Their actions match their values, **they want to do more, and they are willing to invest their time and money to support companies that try to do good** like offsetting their impact

% OF 'ACTIVE' SUSTAINABLE CONSUMERS IN…



Data from the GT23 UAE Survey

Base: Total (500)
SUS_SEG
Now we'd like to ask you some questions about your values regarding sustainability and the environment.
Please tell us how much you agree or disagree with each statement.
Source: [UAE consumers prioritise sustainability for grocery shopping, food consumption - News | Khaleej Times]

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There is an increased focus on choosing healthier/high quality products in UAE; reflecting in red meat buying behaviours with Premium/better quality and Heathier/leaner meat paying important roles in decision making.

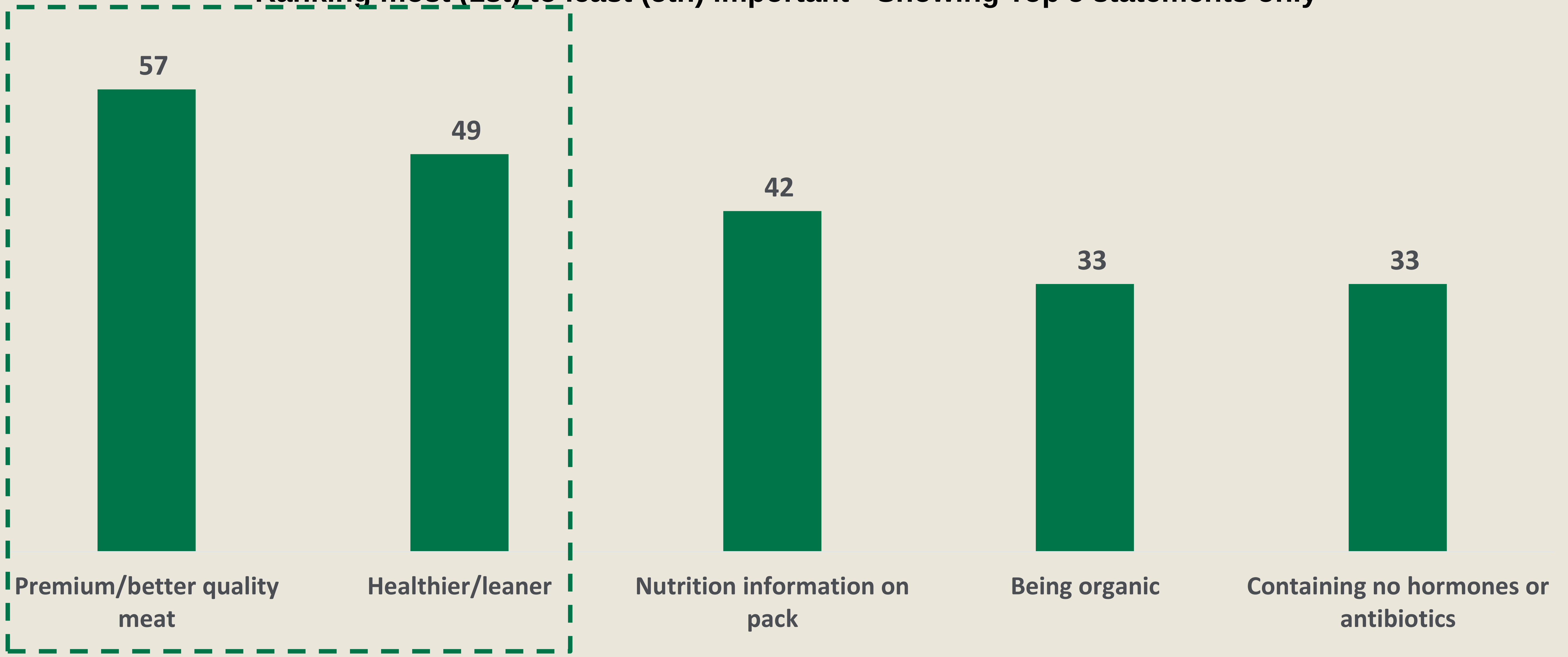
INCREASED FOCUS ON HEALTH

Increased Focus on Health

There has been a growing focus on health and wellness in the Middle East, with a focus on natural, whole foods and the use of traditional, natural ingredients. Consumers are also willing to pay more for healthier eating options.

TOP 5 IMPORTANT FACTORS WHEN DECIDING ON FRESH RED MEAT PURCHASE

Ranking most (1st) to least (5th) important - Showing Top 5 statements only



Data from the GT23 UAE Survey

KANTAR

Base: Total (500)
SUS_SEG
Now we'd like to ask you some questions about your values regarding sustainability and the environment.
Please tell us how much you agree or disagree with each statement.
Source: THE FOOD TRENDS PREDICTIONS IN MIDDLE EAST FOR 2023 | LinkedIn

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PROTEIN LANDSCAPE

A reminder, we know that there are consistent themes when it comes to what different proteins stand for across all of our markets. Beef is the 'Superior' protein.

PROTEIN PERCEPTIONS- GLOBAL

THE STAPLE

- Cheap (cost less) and easily available
- Versatile and easy to prepare
- Family favourite
- Doesn't play to taste
- Not nutritious
- Animals treated poorly
- Not environmentally friendly
- Questionable safety
- Not premium or superior

THE SUPERIOR

- Good quality, great taste, superior
- Family favourite
- Worth paying more for
- Nutritious & versatile

THE CURIOSITY

- Unfamiliar, occasional purchase
- Premium, superior option
- Not sure what to do with it
- Fatty & tender
- Taste is a barrier for some
- *In MENA lamb is Superior*

THE SPECIALTY

- Few strengths or weaknesses
- Weakly positive on animal welfare and sustainability
- Taste is a barrier
- Lean/tough
- Unfamiliar and uncommon except amongst certain groups

THE HEALTHY ALTERNATIVE

- Fresh
- Nutritious – especially for children
- Low in fat
- Tricky to use
- Welfare is not great
- *In SEA, fish is a cheap, low value protein - elsewhere it is premium*

Based on image profiles which show relative strengths and weaknesses relative to other proteins in the consideration set. The consideration set is different for every market hence these are broad characterisations only.

In UAE as well, red meat remains Superior, however, are weaker on health-related perceptions where Chicken and Fish play a role.

PROTEIN PERCEPTIONS- UAE

Superior, Consistent Quality

Beef

Strengths *vs others*
- Consistent quality standards
- ★ Most superior meat

Weaknesses *vs others*
- Not low in Fat
- Not Cheap
- Not an essential part of a healthy diet for growing children

Delicious, Superior, Worth paying more for

Lamb

Strengths *vs others*
- Animal is well-cared for
- ☆ Tastes delicious
- ☆ Most superior
- ★ Willing to pay more for

Weaknesses *vs others*
- Not cheap
- Not low in fat

Affordable, Versatile & Healthy

Chicken

Strengths *vs. others*
- Cheaper
- ★ Versatile
- Low in fat
- Essential part of a healthy diet for growing children

Weaknesses *vs. others*
- Not nutritious
- Animal not cared for
- Not sustainable
- ☆ Not delicious
- ★ Not willing to pay more

Healthy & Affordable

Fish

Strengths *vs. others*
- Cheaper
- Low fat
- Essential part of a healthy diet for growing children

Weaknesses *vs. others*
- Animal is not well cared for
- Not environmentally sustainable
- ★ Not 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.

★ Important associations – *volume of purchase*
☆ Important associations – *willing to pay more*

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Chicken remains most consumed, followed by Beef. Last month purchase is broadly stable across proteins, however, Beef sees a general increase in number of serves overtime.

KEY PROTEIN METRICS

SPONTANEOUS AWARENESS

	Top of Mind	Total Awareness	'22	'21	'20
Beef	34%	63%	64	76	65
Lamb/Mutton	28%	63% ▼	73	76	78
Chicken	7%	41% ▼	66	64	59
Goat	0%	13% ▼	20	13	16
Pork	1%	2%	1	2	5

Drop in awareness seen across all demographic segments

BOUGHT IN LAST MONTH

		'22	'21	'20
Beef	77%	76	79	84
Lamb	62%	66	53	52
Mutton	66%	68	66	71
Chicken	86%	89	95	91
Goat	20%	24	25	33
Fish	70%	64	76	78
Other seafood	39%	39	34	43

AVERAGE SERVES LAST 7 DAYS

		'22	'21	'20
Beef	1.9	1.6	1.3	1.7
Lamb	1.5	1.8	0.9	1
Mutton	1.5	1.6	1	1.2
Chicken	2.4	2.3	2	2.2
Goat	0.5	0.9	0.3	0.6
Fish	1.5	1.6	1.2	1.2
Other seafood	0.9	1.2	0.5	0.6

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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: '23 (n=500), '22 (n=500), '21 (n=500), '20 (n=500)

▲▼ *Sig. different at 95%*

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Overall meat consumption is high among Arabs and Western Expats. Lamb is more popular among Western Expats while Mutton is more popular among Asian Expats

BOUGHT IN LAST 1 MONTH

	Total	Emirati	Expat Arabs	Western Expats	Expat Asian
		Generally high meat consumption		Strong beef and lamb consumption	Strong mutton low beef consumption
Chicken	86%	77%	94%	83%	89%
Beef	77%	**79%**	**91%**	**79%**	**57%**
Lamb	62%	57%	60%	**77%**	54%
Mutton	66%	57%	56%	73%	**80%**

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?
Emirati-145, Expat Arabs- 126, Expat Asian-114, Western Expats-115

Sig. different at 95%

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In the context of accelerating demand for healthy, organic options, Organic Beef significantly increases in awareness and consumption; now leading in claimed beef type bought.

AWARENESS AND PURCHASE OF DIFFERENT TYPES OF BEEF

AWARENESS OF TYPES OF BEEF (%)

		‘22	’19
Organic beef	68 ▲	50	31
Grass fed beef	60	55	43
Regular or conventional beef	58	55	38
Hormone-free beef	44	43	13
Grain fed beef	40 ▲	29	25
ABF (Anti-biotic free) beef	30 ▲	23	9
Corn fed beef	28 ▲	21	17
Non-GMO beef	23 ▲	17	3
High marble score beef	14 ▼	23	6
None of these	4 ▼	14	34

2020: Increase high income sample

BEEF BOUGHT IN THE PAST (%)

		‘22	‘19
Organic beef	50 ▲	32	18
Regular or conventional beef	47	47	31
Grass fed beef	46	46	31
Grain fed beef	28 ▲	15	14
Hormone-free beef	23	27	6
ABF (Anti-biotic free) beef	16 ▲	11	3
Corn fed beef	14	11	6
High marble score beef	10 ▼	16	4
Non-GMO beef	10 ▲	6	-
None of these/Not aware	5 ▼	14	34

2020: Increase high income sample

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QGF1. Which of the following types of beef are you aware of?
QGF2. And which types of beef have you bought in the past? (rebased to QGF1)
Base ‘23 (n=437), ‘22 (n=436)

▲▼ *Sig. different at 95%*

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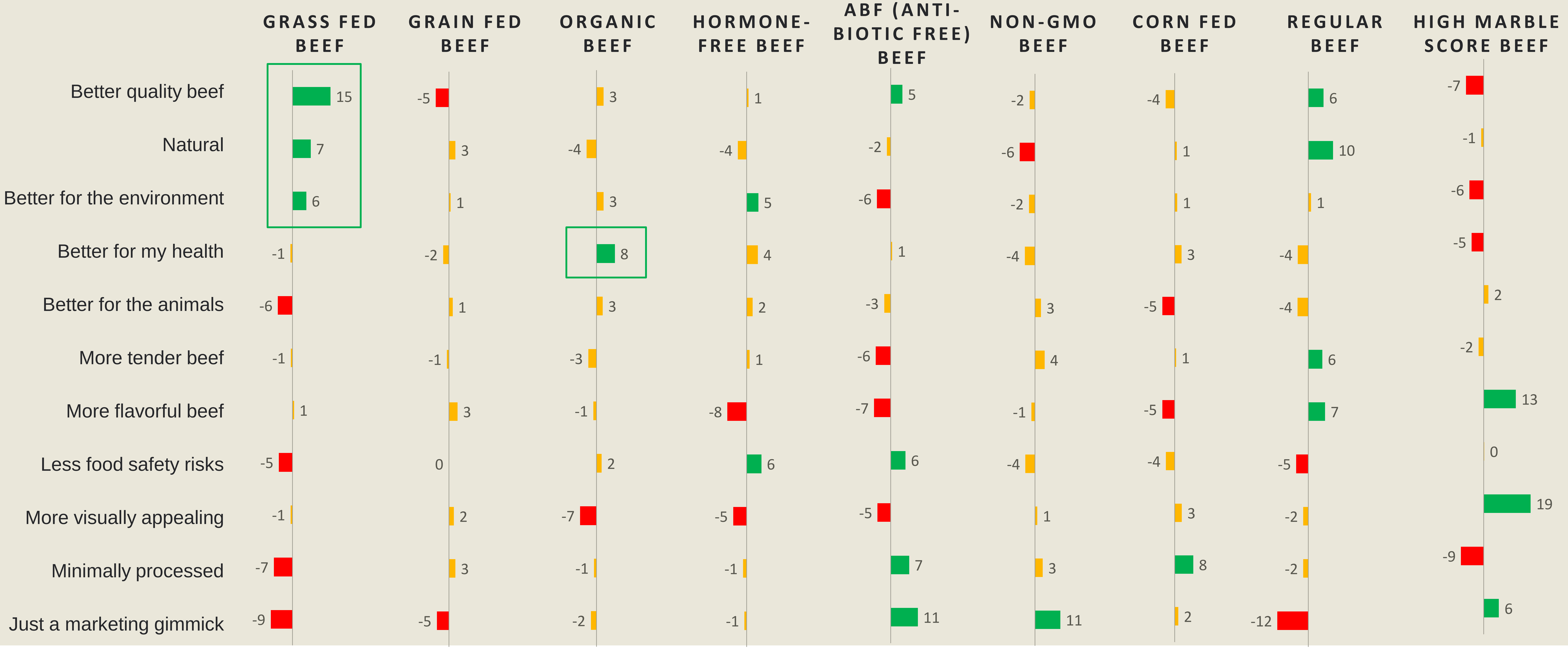
In consumers minds' Organic beef is 'Better for my health' supporting its increased popularity. Highly consumed Regular and Grass fed are seen as 'Better quality', 'Natural' and 'Better for the environment'.

PERCEPTIONS OF DIFFERENT TYPES OF BEEF



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

GF5. Which of the following things do you associate with each type of beef below?

Base: Grass Fed Beef (n=262), Grain Fed Beef (n=173), Organic Beef (n=298), Hormone-Free Beef (n=191),Abf (Anti-Biotic Free) Beef (n=129), Non-Gmo Beef (n=100), Corn Fed Beef (n=122), Regular Beef (n=252),High Marble Score Beef (n=63)

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With post-COVID restrictions easing, Local butchers, Hypermarket and Supermarket regain Beef and Lamb purchase; while claimed online purchase stabilises.

PLACES OF PURCHASE- BEEF AND LAMB

Beef – Once per month or more often (net)

	'20 %	'21 %	'22 %	'23 %
Local butcher	76	60 ▼	66	82 ▲
Hypermarket	72	64	58	71 ▲
Supermarket	68	45 ▼	51	57
Gourmet butcher	49	31 ▼	43 ▲	43
Direct from farm/farmer’s market	25	7 ▼	28 ▲	31
Convenience store	43	18 ▼	32 ▲	33
Department store	37	17 ▼	36 ▲	32
Online retailer	18	10 ▼	30 ▲	25

Lamb – Once per month or more often (net)

	'20 %	'21 %	'22 %	'23 %
Local butcher	67	59	68 ▲	84 ▲
Hypermarket	78	68 ▼	52 ▼	70 ▲
Supermarket	65	43 ▼	40	59 ▲
Gourmet butcher	40	30 ▼	38	40
Direct from farm/farmer’s market	22	6 ▼	27 ▲	27
Convenience store	38	14 ▼	32 ▲	31
Department store	32	17 ▼	31 ▲	30
Online retailer	13	13	31 ▲	25

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QR3A. How often have you bought beef from each of these locations in the last six months? Base: ‘23 (n=248), '22 (n=243), '21 (n=249), '20 (n=247)

▲▼ *Sig. different at 95%*

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

PLACES OF PURCHASE- BEEF AND LAMB BY ETHNIC GROUPS

Once per month or more often (net)

2023 %	Total	Emirati	Expat Arabs	Expat Asian	Western Expats
Local butcher	82	91	84	85	65
Hypermarket	71	52	62	85	92
Supermarket	57	53	57	63	59
Gourmet butcher	43	55	46	48	16
Direct from farm/farmer's market	31	46	29	24	20
Convenience store	33	36	39	30	21
Department store	32	33	37	30	23
Online retailer	25	33	11	30	26

Once per month or more often (net)

2023 %	Total	Emirati	Expat Arabs	Expat Asian	Western Expats
Local butcher	84	86	92	82	75
Hypermarket	70	60	65	67	86
Supermarket	59	53	65	57	63
Gourmet butcher	40	50	44	32	36
Direct from farm/farmer's market	27	32	28	18	26
Convenience store	31	33	40	21	23
Department store	30	35	34	21	29
Online retailer	25	21	20	21	38

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%

Protein landscape in UAE

Red meat marries superiority and willingness to pay more for

Red meat continues to be seen as superior and worth paying more for, however, competitively it has weaker nutrition/ health credentials. Chicken plays the staple role, with strong versatility and health perceptions.

Different preferences across different ethnicities

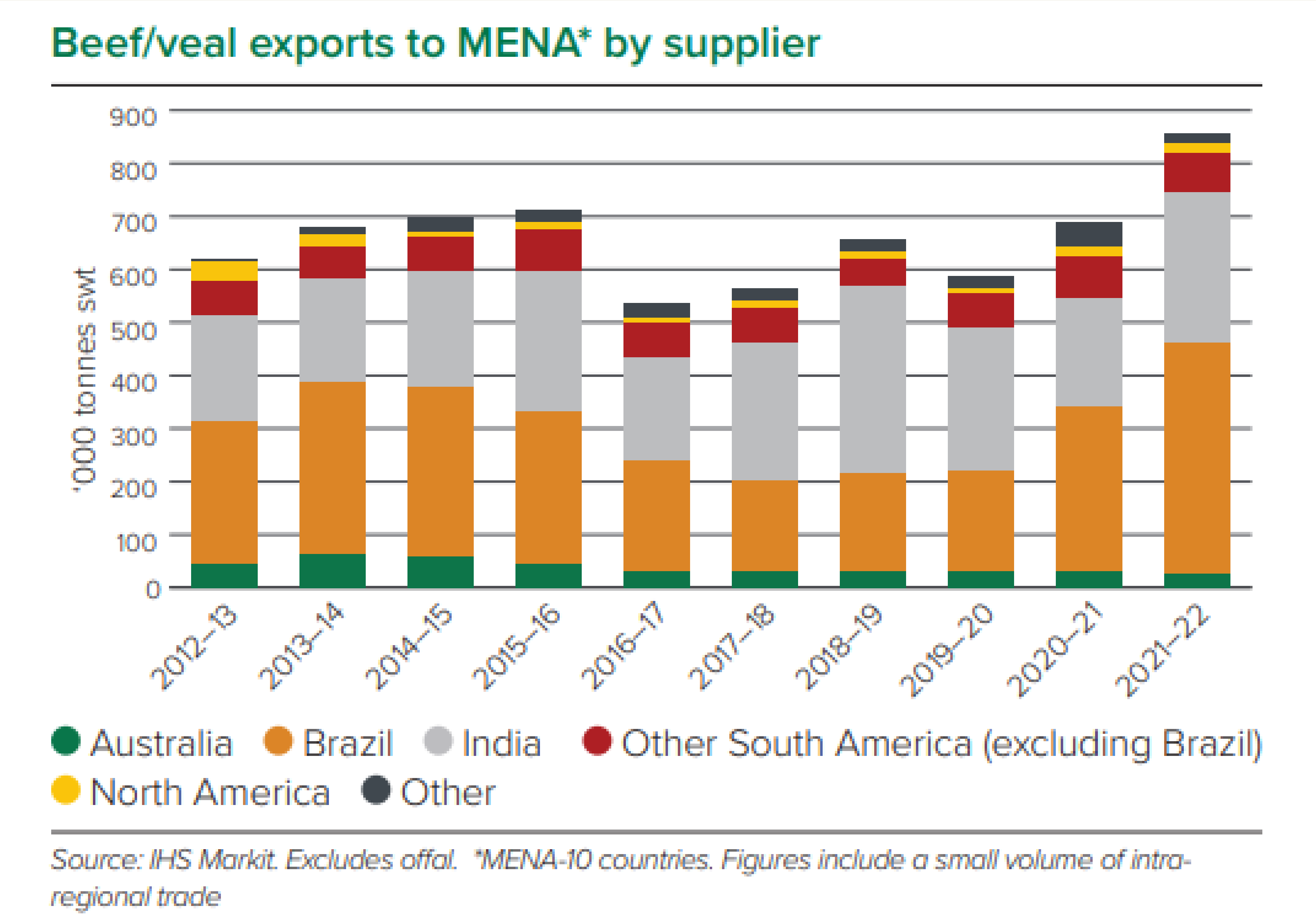
UAE is home to diverse cultures, which reflect in meat preferences and channel behaviours.
It's important to understand preferences across these diverse groups to ensure Australian Red Meat is well placed physically and perceptually to meet audience needs.

BEEF
COUNTRY OF ORIGIN

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

MENA is a major global market for live cattle, although Australian live exports to the region have been on a long-term decline due to several factors.

MLA MARKET CONTEXT - MENA

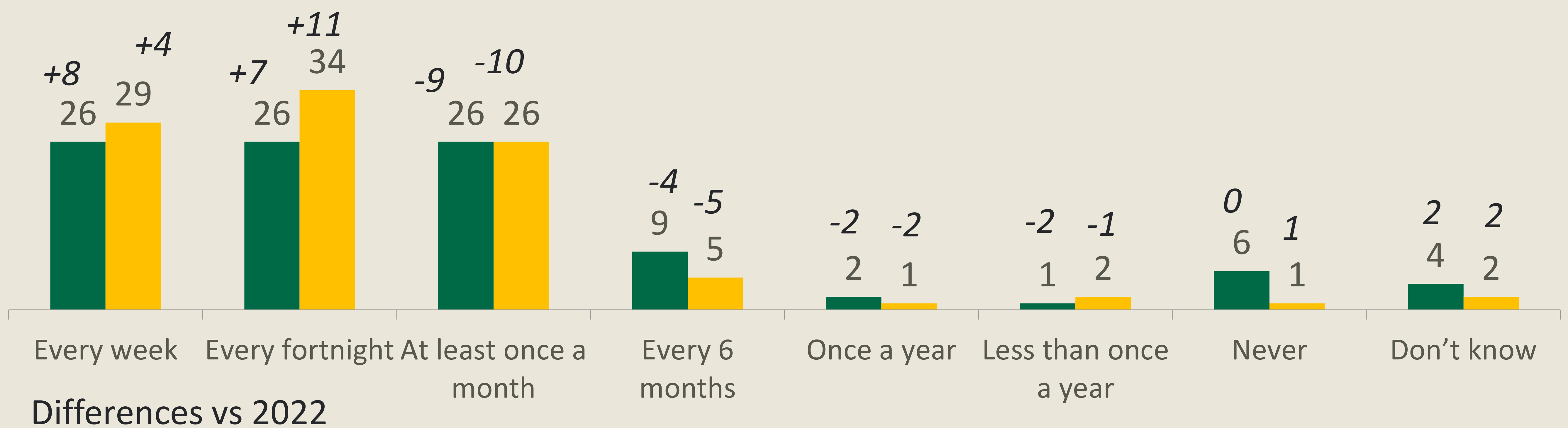


- Beef import demand across MENA varies, depending on domestic production and consumption habits. In some Gulf countries like the UAE, Kuwait, Oman, Qatar and Bahrain, almost all beef consumed is imported.
- Overall, by volume, the largest boxed beef importers are Egypt, the UAE, Saudi Arabia and Iran. The bulk of the region's beef imports are from Brazil and India, comprising mostly of frozen boneless and lean Beef cuts and buffalo meat.
- The past 12–18 months has seen notable increases in supply from smaller suppliers such as Sudan, Ethiopia and Tanzania. Australia is also a key supplier of frozen veal carcass to Saudi Arabia.
- Competition for Australian grain-fed beef comes mostly from the US and, to some extent, Canada and Japan. Japan exports small but increasing volumes of wagyu to the Gulf – mostly to the UAE but also Qatar and Bahrain.

The frequency of imported and local beef purchase has increased; especially fortnightly. Asian and Western Expats lean more towards Imported Beef vs Local Beef.

FREQUENCY OF BUYING BEEF

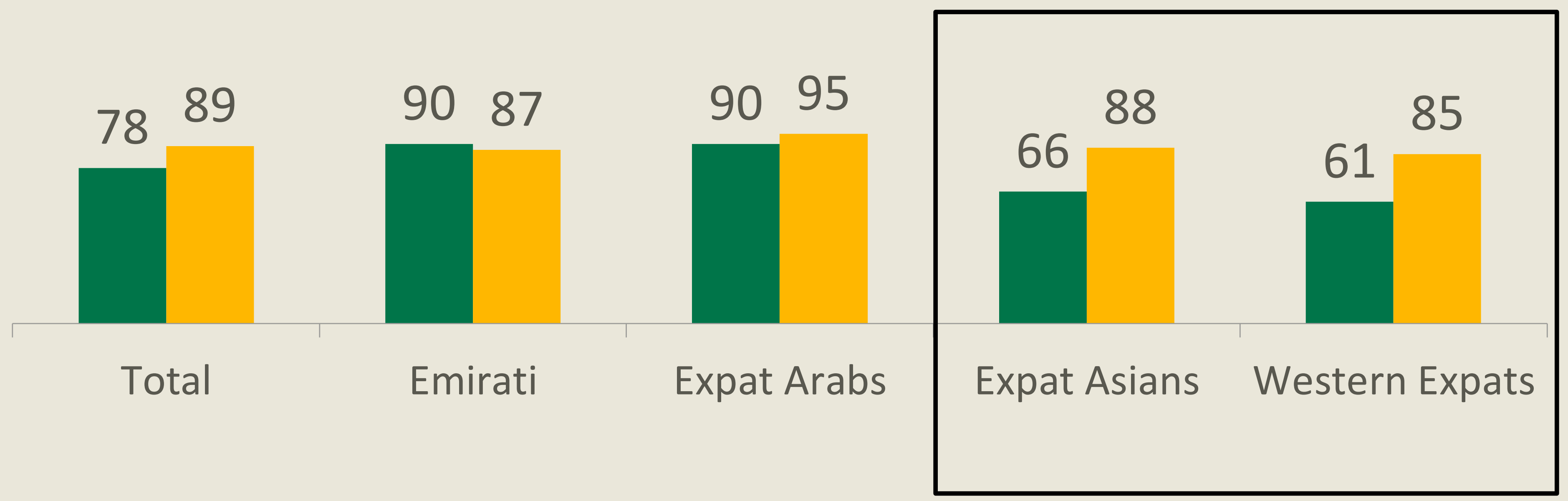
FREQUENCY OF BUYING LOCAL AND IMPORTED BEEF



Differences vs 2022

Buy at least once a month	2022	2023
Local beef	72	84
Imported beef	78	89

MONTHLY PURCHASE BEEF BY ETHINICITY



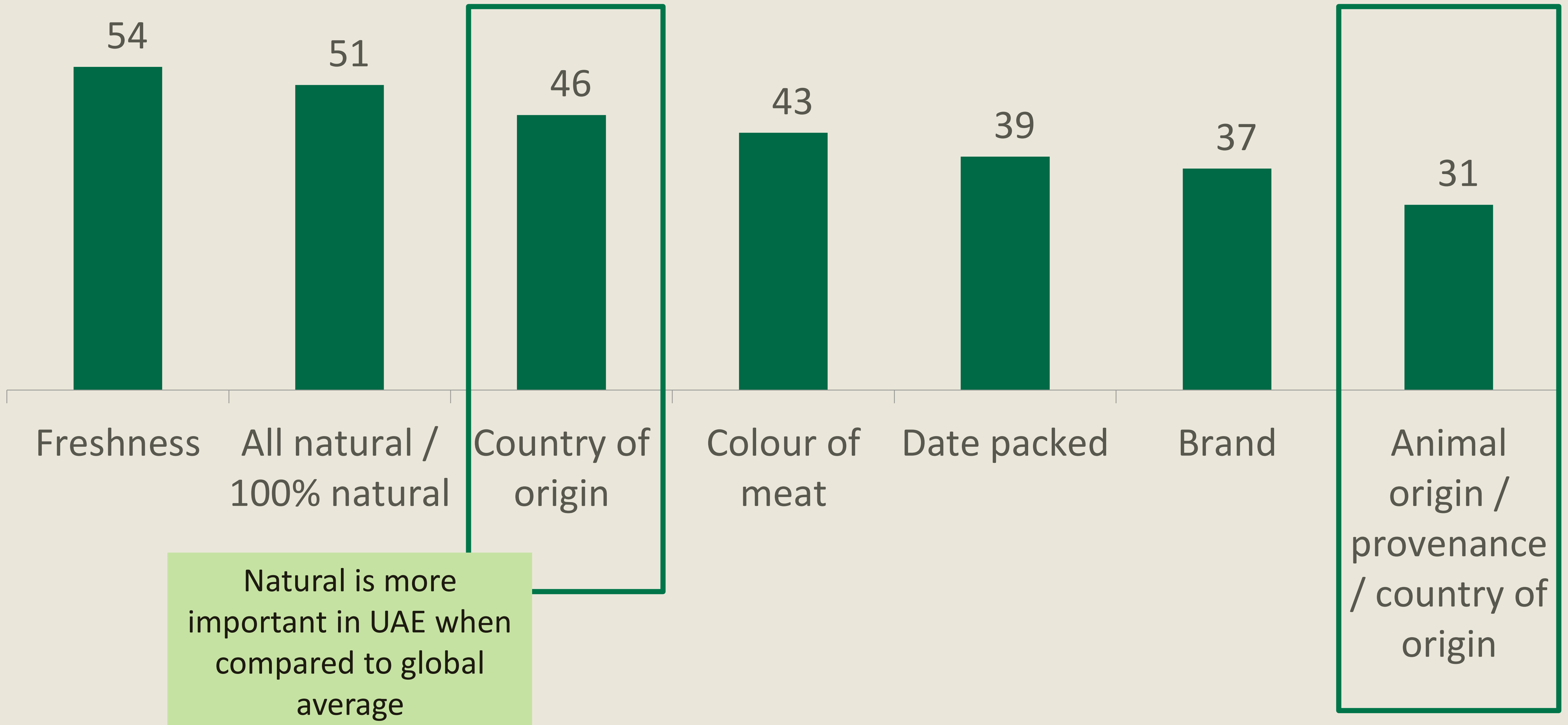
(GF3B) Do you know the country of origin of the beef you buy? (n=437)
(CH4) How often do you buy imported beef? (n=437)
(CH4LOC) How often do you buy local beef? (n=437)

Sig. different at 95%

Considering ‘Country of Origin’ is amongst the top ‘on pack’ cues consumers look for, awareness of Country of Origin is high and stable

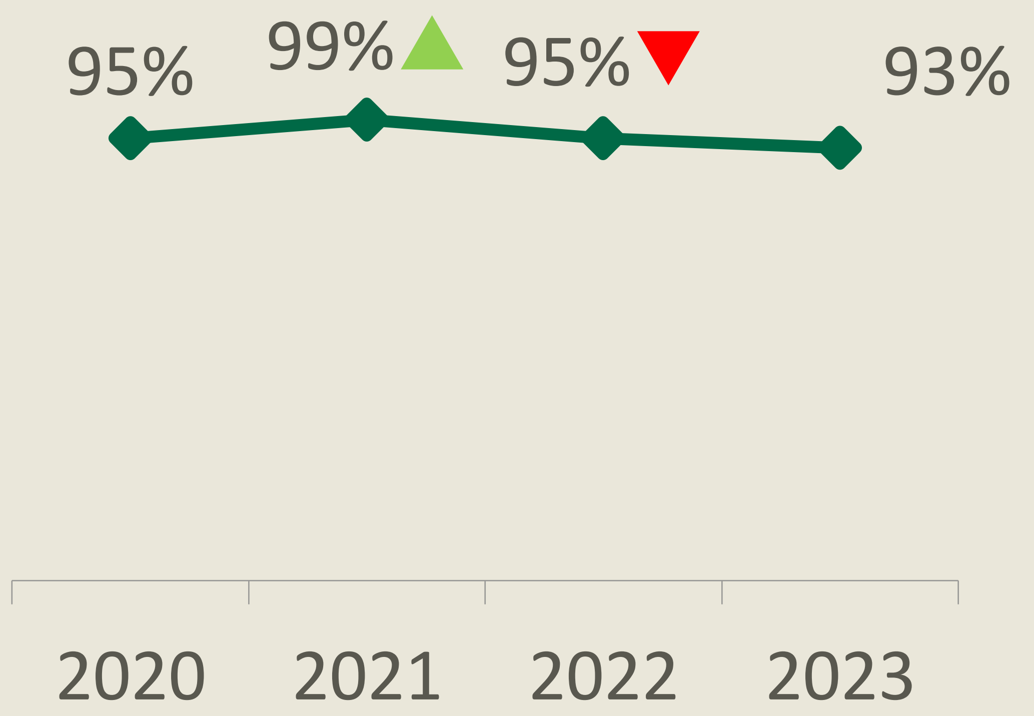
TOP ‘ON PACK’ CUES SOUGHT WHILE BUYING BEEF

Global average 2023	**48%**	**35%**	**33%**	**53%**	**45%**	**25%**	**32%**
Ranking	**#2**	**#4**	**#5**	**#1**	**#3**	**#9**	**#6**



Natural is more important in UAE when compared to global average

Know Country of Origin?



KANTAR

PACK 1- Can you please select up to 6 things you look for (on the pack, on the shelf etc.) when buying beef? Base: (n=392)

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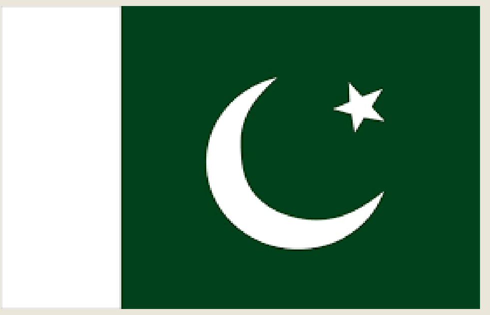
The brand List for Beef was consistent vs 2022

BEEF BRANDS TRACKED IN 2023

Australian beef

UAE Local beef

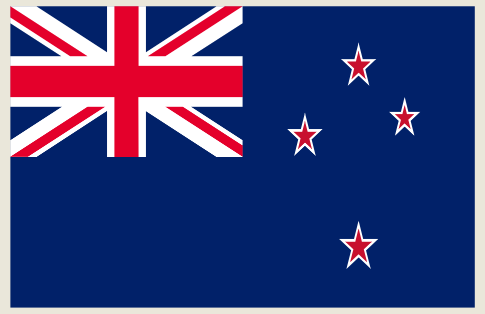
Pakistani beef



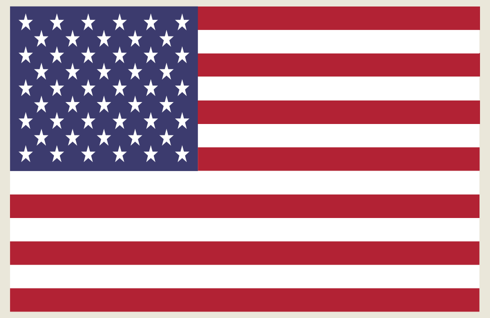
Brazilian beef

Indian beef/ Buffalo

New Zealand beef



American beef



South African beef

Canadian beef

Note: Consumers are not prompted with flags in the survey

Australian Beef strengthens across usage metrics, overtaking Local Beef to be most consumed amongst the target sample. Brazilian Beef sees some momentum on trial.

BEEF- BRAND HEALTH FUNNELS BY COUNTRY OF ORIGIN

	AUSTRALIAN BEEF %	'22	'21	'20	UAE LOCAL BEEF %	'22	'21	'20	PAKASTANI BEEF %	'22	'21	'20	BRAZILIAN BEEF %	'22	'21	'20
Spontaneous awareness	75	69	72	70	40▼	53	55	55	49	46	58	35	40	37	26	44
Total Awareness	85	85	91	80	78	77	82	80	78▲	67	85	61	73	67	70	67
Ever Eaten	76	69	71	70	69	70	69	71	58	52	60	40	49▲	38	41	47
Eat P12M	71▲	54	63	62	64	64	62	67	51	44	51	34	35	28	25	33
Eat P3M	63▲	41	42	45	55	56	51	56	42▲	33	34	27	25	22	14	24
Past Month	54▲	31	31	33	42	45	38	47	35	27	23	22	14	16	9	15
Most Often	31▲	19	23	15	25	28	26	39	15	15	17	13	5	7	5	7

KANTAR

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: '23 (n=255), '22 (n=243), '21 (n=258), '20 (n=254) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

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New Zealand beef also sees momentum, recovering some awareness and building consumption. All other imported Beef are broadly stable.

BEEF - BRAND HEALTH FUNNELS BY COUNTRY OF ORIGIN

INDIAN BEEF/ BUFFALO

	%	'22	'21	'20
Spontaneous awareness	46	43	59	39
Total Awareness	67	61	84	70
Ever Eaten	46	42	55	47
Eat P12M	38	35	42	34
Eat P3M	32	26	27	24
Past Month	22	22	21	16
Most Often	9	13	14	11

NEW ZEALAND BEEF

	%	'22	'21	'20
Spontaneous awareness	30	30	20	26
Total Awareness	68▲	58	69	61
Ever Eaten	45	37	35	34
Eat P12M	36▲	27	22	23
Eat P3M	24	18	15	14
Past Month	16	14	10	9
Most Often	5	6	6	2

AMERICAN BEEF

	%	'22	'21	'20
Spontaneous awareness	17	20	10	10
Total Awareness	47	49	46	33
Ever Eaten	24	27	15	15
Eat P12M	18	21	7	11
Eat P3M	12	11	4	6
Past Month	8	7	2	5
Most Often	3	4	0	4

SOUTH AFRICAN BEEF

	%	'22	'21	'20
Spontaneous awareness	3	5	2	4
Total Awareness	40	35	44	32
Ever Eaten	13	12	14	11
Eat P12M	5	6	7	5
Eat P3M	2	5	3	3
Past Month	2	1	2	2
Most Often	1	1	2	0

CANADIAN BEEF

	%	'22	'21	'20
Spontaneous awareness	10	16	7	3
Total Awareness	37	35	40	22
Ever Eaten	16	14	11	6
Eat P12M	11	9	5	4
Eat P3M	7	8	4	3
Past Month	4	6	3	2
Most Often	0	4	2	1

KANTAR

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: '23 (n=255), '22 (n=243), '21 (n=258), '20 (n=254) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

mla MEAT & LIVESTOCK AUSTRALIA

Western Expats show high consumption for AU beef, conversely weaker for Local. Expat Arabs have strong usage for both, but greater loyalty for AU Beef. This suggests scope to improve frequency of purchase for AU beef amongst Emiratis considering their high usage.

BEEF- BRAND HEALTH FUNNELS BY COUNTRY OF ORIGIN

AUSTRALIAN BEEF
%

		Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	75	79	88	78	43
Total Awareness	85	81	95	91 ▲	70
Ever Eaten	76	74	93 ▲	85 ▲	41
Eat P12M	71 ▲	67	90 ▲	81 ▲	32
Eat P3M	63 ▲	60	75 ▲	80 ▲	30
Past Month	54 ▲	48	68 ▲	74 ▲	16
Most Often	31 ▲	14	45	52 ▲	14

UAE LOCAL BEEF
%

		Emiratis	Expat Arabs	Western Expats	Expat Asians
Spontaneous awareness	40 ▼	60	56	7	16
Total Awareness	78	82	96	59	64
Ever Eaten	69	79	95	41	43
Eat P12M	64	75	93 ▲	31	34
Eat P3M	55	74	79	20	18 ▼
Past Month	42	69	49	15	14
Most Often	25	56	12	9	7

KANTAR

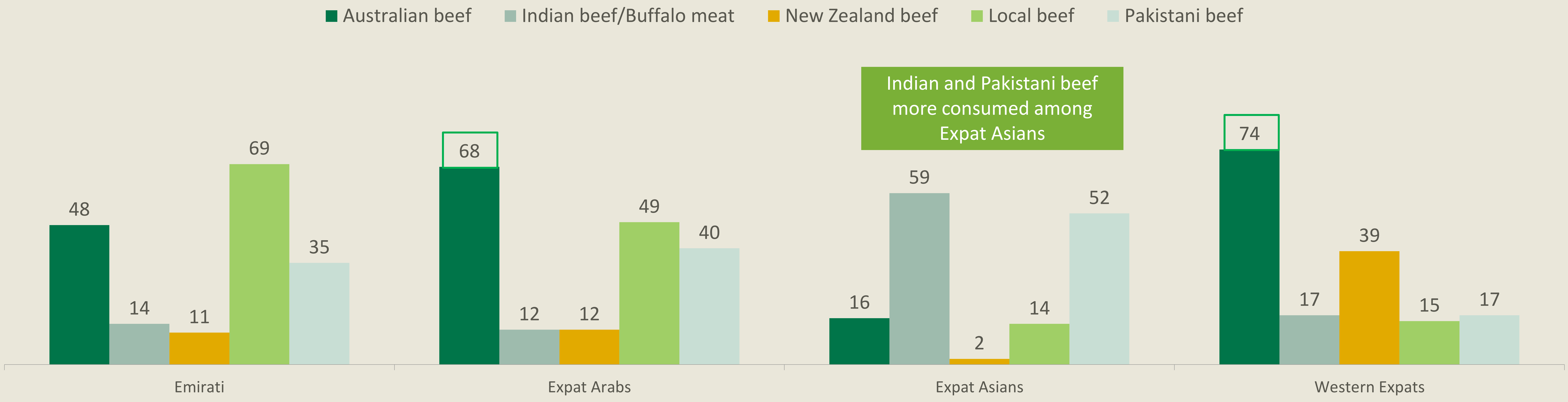
BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often
Base: '22 (n=243), '21 (n=258), '20 (n=254), '19 (n=264) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

mla MEAT & LIVESTOCK AUSTRALIA

Different ethnicities also show clear differences in the Beef consumed. Like AU beef, NZ beef has highest consumption among Western Expats. Expat Arabs, however show preference for AU beef.

BEEF- EATEN IN LAST 1 MONTH



KANTAR

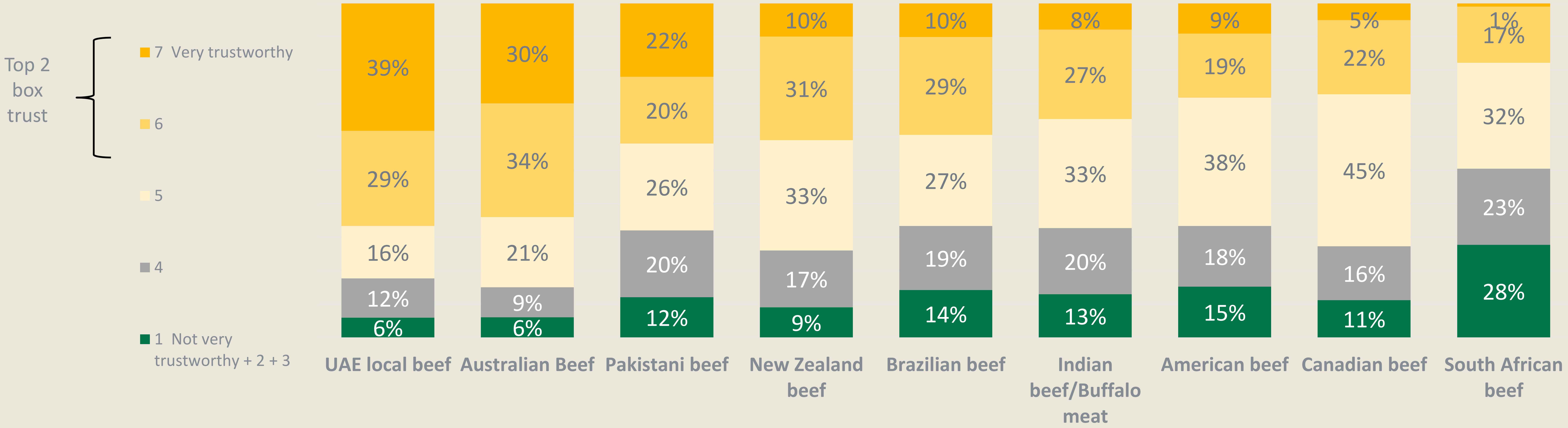
(GF3B) Do you know the country of origin of the beef you buy? (n=436)
(CH4LOC) How often do you buy local beef? (n=436)
(CH4) How often do you buy imported beef? (n=436)

mla MEAT & LIVESTOCK AUSTRALIA

Local beef continues to be most trusted followed by AU beef. Trust for other imported beef brands is much lower when compared to AU beef, and except for US beef, all brands are building trust at their own pace.

TRUST BY COO BRANDS

	UAE local beef	Australian Beef	Pakistani beef	New Zealand beef	Brazilian beef	Indian beef/Buffalo meat	American beef	Canadian beef	South African beef
TOP 2 BOX '22	62%	51%	36%	39%	29%	31%	31%	19%	7%
TOP 2 BOX '23	68% (+6)	64% (+13)	42% (+6)	41% (+2)	39% (+10)	35% (+4)	28% (-3)	27% (+8)	18% (+11)



KANTAR

BTR2B. How trustworthy is the imported beef from these countries – 7 point scale

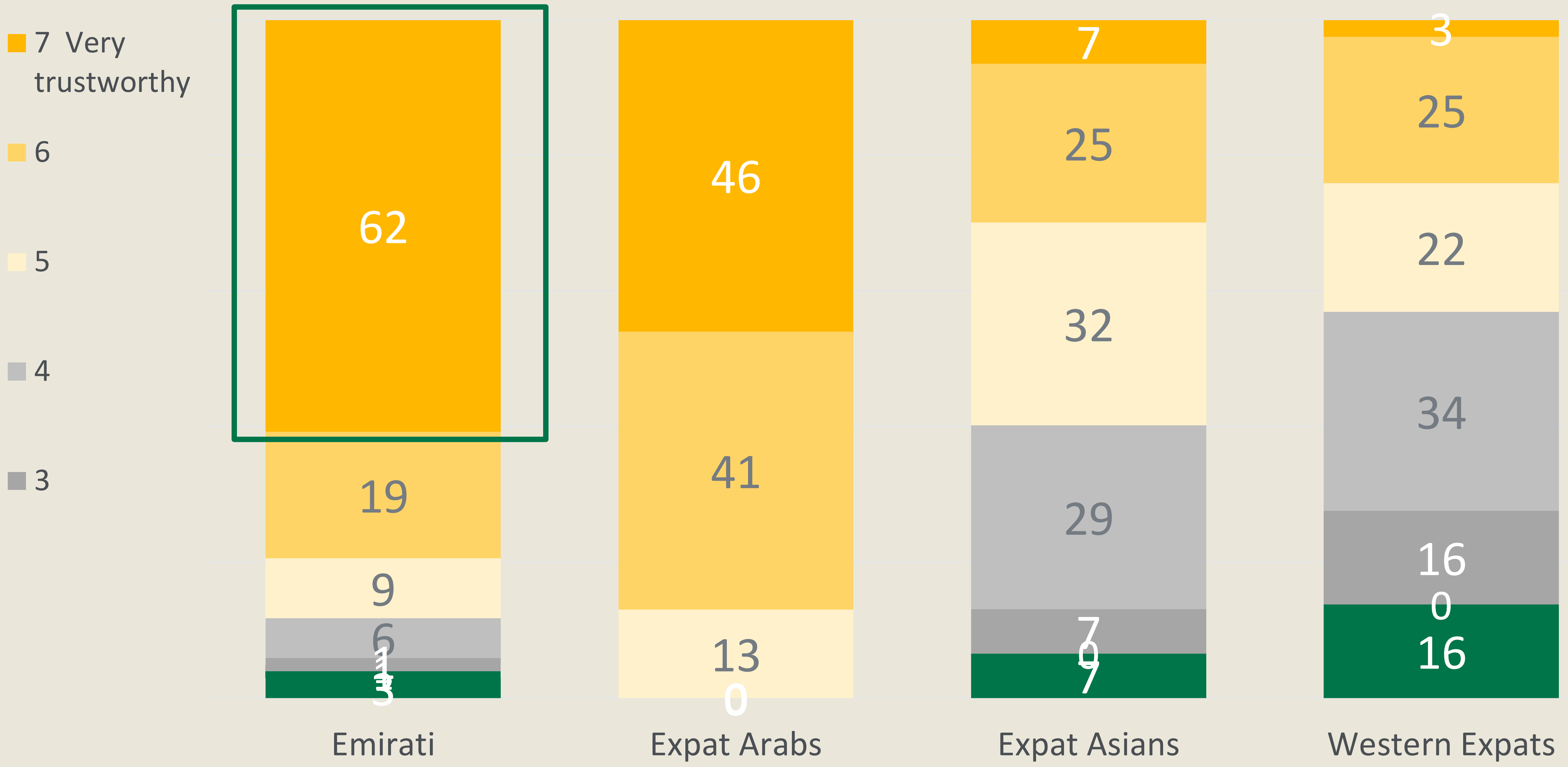
Base: Australian Beef (217) American beef (119), Indian beef/Buffalo meat (171), New Zealand beef (174), Canadian beef (95), Brazilian beef (186),
UAE local beef (199), South African beef (102), Pakistani beef (198)

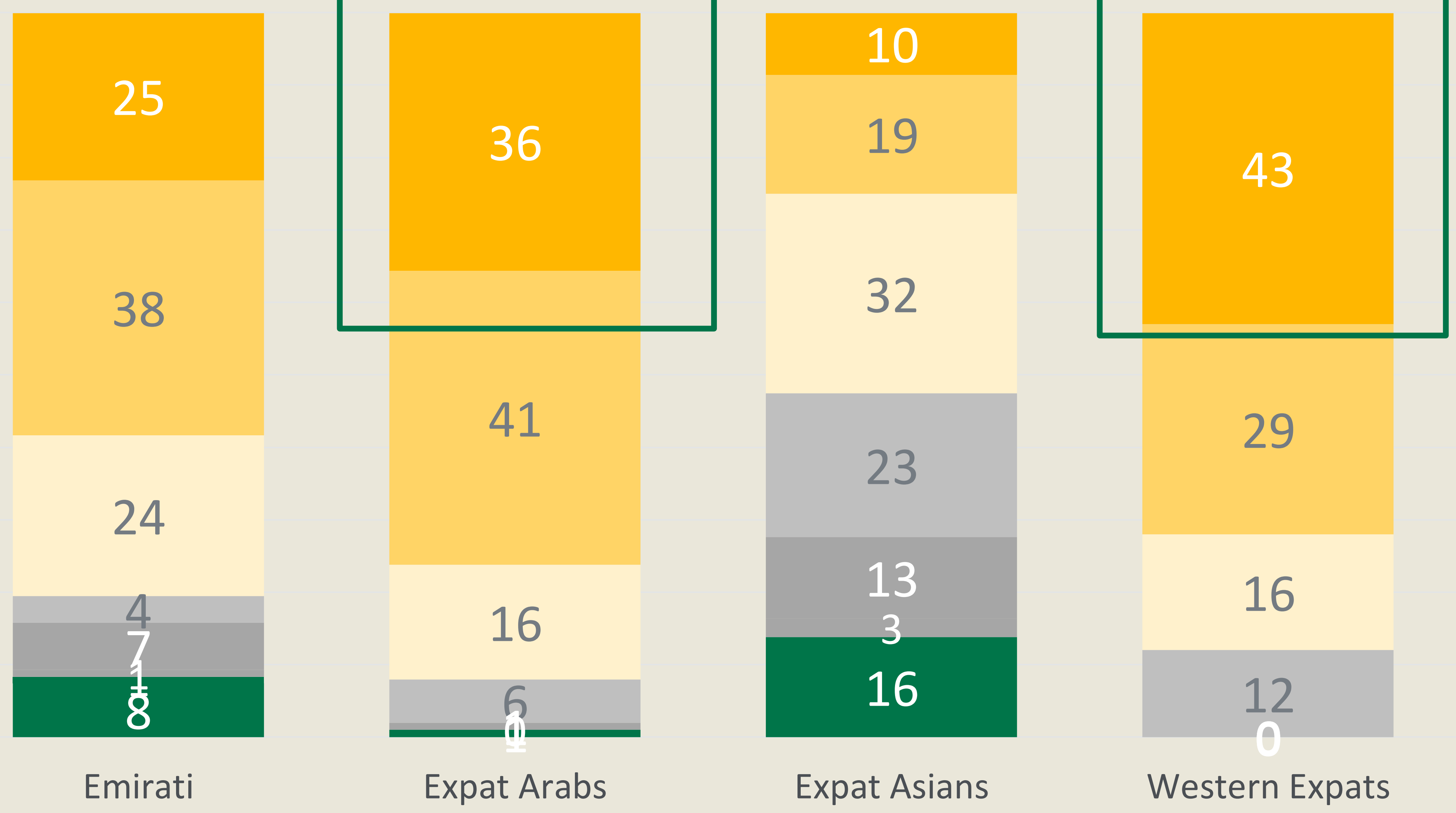
mla MEAT & LIVESTOCK AUSTRALIA

Different preferences among ethnic groups also reflects in the level of trust we see among them. Local beef is weakening on Trust among Asian and Western Expats, while AU beef strengthens across all groups.

COO TRUST BY ETHNICITY

	UAE Local Beef				Australian Beef			
	Emirati	Expat Arabs	Expat Asians	Western Expats	Emirati	Expat Arabs	Expat Asians	Western Expats
Top 2 Box-2022	**77%**	**63%**	**52%**	**41%**	**53%**	**62%**	**22%**	**58%**
Top 2 Box-2023	**81%**	**87%**	**32%**	**28%**	**63%**	**77%**	**29%**	**71%**





KANTAR

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)

mla MEAT & LIVESTOCK AUSTRALIA

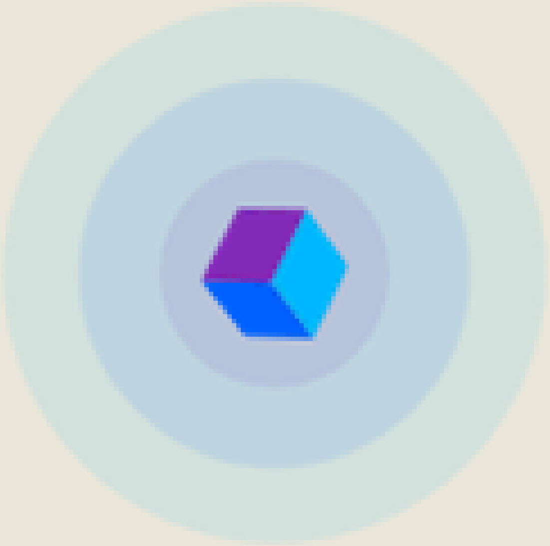
WHAT NEXT FOR AU BEEF IN UAE?

0

There are two paths to brand growth.

By increasing the likelihood
that a consumer will buy a brand

We call this:

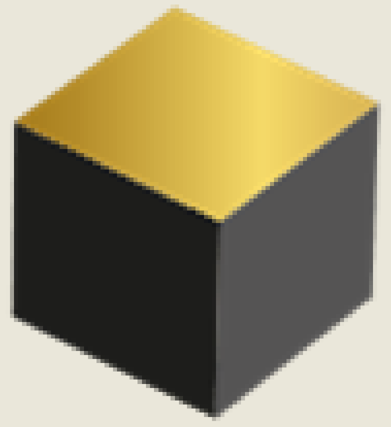


Demand Power

High Demand Power brands capture **5× higher** volume share

By increasing the likelihood
consumers will pay for a brand

We call this:



Pricing Power

High Pricing Power brands can charge **25% more** than brands with a low Pricing Power score

AU and Local Beef are firmly 'Justified Premium' propositions. In line with brand health, Demand Power for AU beef is stronger vs Local beef. The task at hand is for AU beef is to maintain this strong position.

The associations that consumers hold in their minds for beef in UAE breaks up into 5 themes

IMPORTANCE IN DRIVING DEMAND POWER

SUPERIOR QUALITY — 31%

Is the most superior beef

Is my/my family's favourite beef

More nutritious

Guaranteed safe to eat

Is easy and convenient to purchase

Fresh

Consistent quality standards

VARIETY & FAT CUTS — 23%

Offers a variety of cuts that suit the meals I make

The fat is nicely marbled

Low in fat

ENVIRONMENT — 18%

The industry is environmentally sustainable

The meat is usually tender

HALAL — 18%

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

The animal is well-cared for

CHEAPER — 9%

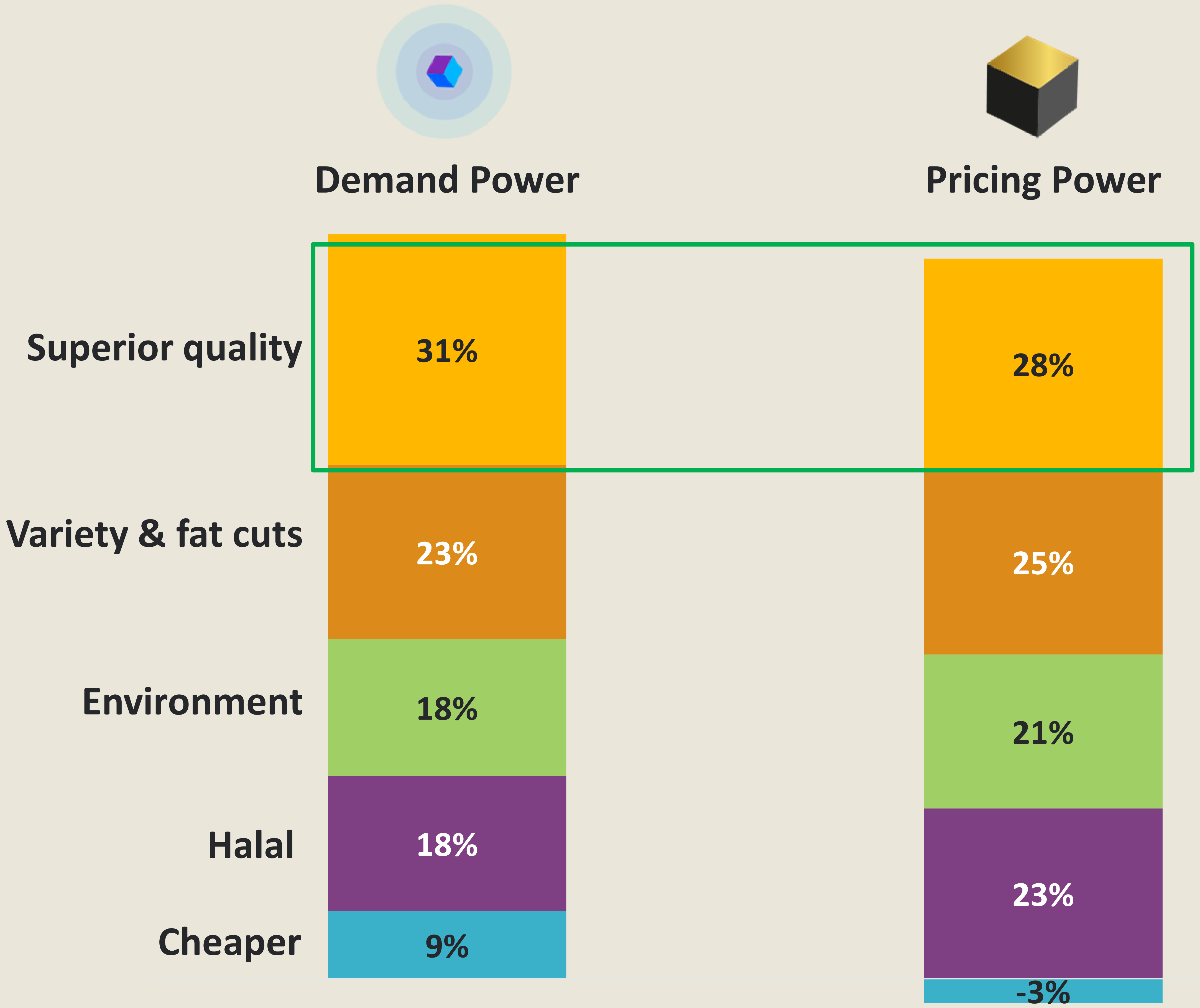
Cheaper

Perceptions of 'Superior Quality' are most important in driving both Demand Power and justifying a higher price in UAE

IMAGERY DRIVERS- POWER AND PREMIUM

SUPERIOR QUALITY

Is the most superior beef
Is my/my family's favorite beef
More nutritious
Guaranteed safe to eat
Is easy and convenient to purchase
Fresh
Consistent quality standards



KANTAR

Sorted in order of driving Demand Power

AU beef has the strongest associations across most attributes. Perceptions of AU beef's nutrition have strengthened vs 2022. UAE local beef is not far behind AU beef in terms of associations.

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

		AUSTRALIAN BEEF	UAE LOCAL BEEF	INDIAN BEEF/BUFFALO MEAT	NEW ZEALAND BEEF	PAKISTANI BEEF
Superior Quality (31%)	Is the most superior beef	53	50	25	27	33
	Is my/my family's favourite beef	49	44	25	28	32
	More nutritious	52 ▲	54	28	31	34
	Guaranteed safe to eat	53	47	30	36	30
	Is easy and convenient to purchase	56	47	31	30	33
	Fresh	51	55	27	30	33
	Consistent quality standards	54	51	27	31	33
Variety & Fat Cuts (23%)	Offers a variety of cuts that suit the meals I make	56	45	29	32	35 ▲
	The fat is nicely marbled	48	42	25	28	29
	Low in fat	46	43	25	31	29
Environmental (18%)	The industry is environmentally sustainable	49	44	27	32	29
	The meat is usually tender	48	47	25	30	29
Halal (18%)	I trust that this beef is slaughtered according to sharia law and is therefore Halal	47	53	33	29	38
	The animal is well-cared for	55	44	29	34	30
Cheap (9%)	Cheaper	29	29	38	18	45 ▲

KANTAR

+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.*

Highest association
Second highest
Third highest

▲▼ *Sig. different at 95%*

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Big brands naturally attract high endorsement, which can limit insights. But we can run a statistical analysis to strip out size to identify relative strengths and weaknesses.

BIP ANALYSIS AND WHY WE SHOULD LOOK AT IT?

Limited Insights:
Big Brand leads on everything, followed by Medium Brand and Small Brand.

More Insights:
- Big brand's strength is driven by Association 2
- Medium brand's role is clear in consumers' minds – it is known for Association 3, but not for Association 1
- While small, Small Brand is a threat on Association 1

We can then **overlay what drives demand and willingness to pay** to help you pursue what matters most (choice/price driving associations, differentiation/competitive white space)

KANTAR

Note: +/- 5 = relative strength or weakness
It is not possible to have a relative strength on everything - brands with relative strengths/weaknesses typically perform best because they play a clear role for consumers

MEAT & LIVESTOCK AUSTRALIA

Local beef stands out in consumers' minds as fresh, nutritious and most superior ('Superior Quality'). AU beef is seen most as easy/convenient to buy with a superior range of cuts; with room to strengthen these.

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

		AUSTRALIAN BEEF	UAE LOCAL BEEF	PAKISTANI BEEF	INDIAN BEEF/BUFFALO MEAT	NEW ZEALAND BEEF
Superior Quality (31%)	Is the most superior beef	4	5	1	-2	-2
	Is my/my family's favourite beef	0	-2	0	-3	-1
	More nutritious	2	7	1	-1	1
	Guaranteed safe to eat	0	-3	-6	-1	4
	Is easy and convenient to purchase	6	0	0	2	0
	Fresh	-1	7	-1	-3	-1
	Consistent quality standards	1	2	-2	-4	-1
Variety & Fat Cuts (23%)	Offers a variety of cuts that suit the meals I make	4	-3	1	-1	1
	The fat is nicely marbled	1	-1	-1	-1	1
	Low in fat	0	0	-1	-1	4
Environmental (18%)	The industry is environmentally sustainable	-1	-2	-4	-1	2
	The meat is usually tender	0	2	-3	-2	1
Halal (18%)	I trust that this beef is slaughtered according to sharia law and is therefore Halal	-3	6	5	4	-1
	The animal is well-cared for	3	-4	-5	-1	3
Cheap (9%)	Cheaper	-16	-12	16	14	-8

KANTAR

+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.*

mla MEAT & LIVESTOCK AUSTRALIA

What does AU beef need to focus on to target further growth in UAE?

Continuing our focus on our Superiority backed by consistent quality, inherent safety and nutrition (reasons to believe) drives both Volume and Value most efficiently.

TOP ASSOCIATIONS TO GROW - VOLUME & PREMIUM (ORDERED BASED ON IMPACT ON BUILDING EQUITY*)

Associations for AU to communicate

1. More nutritious

2. Consistent quality standards

3. Guaranteed safe to eat

4. Fresh

Difficult to achieve when competing vs. a local product

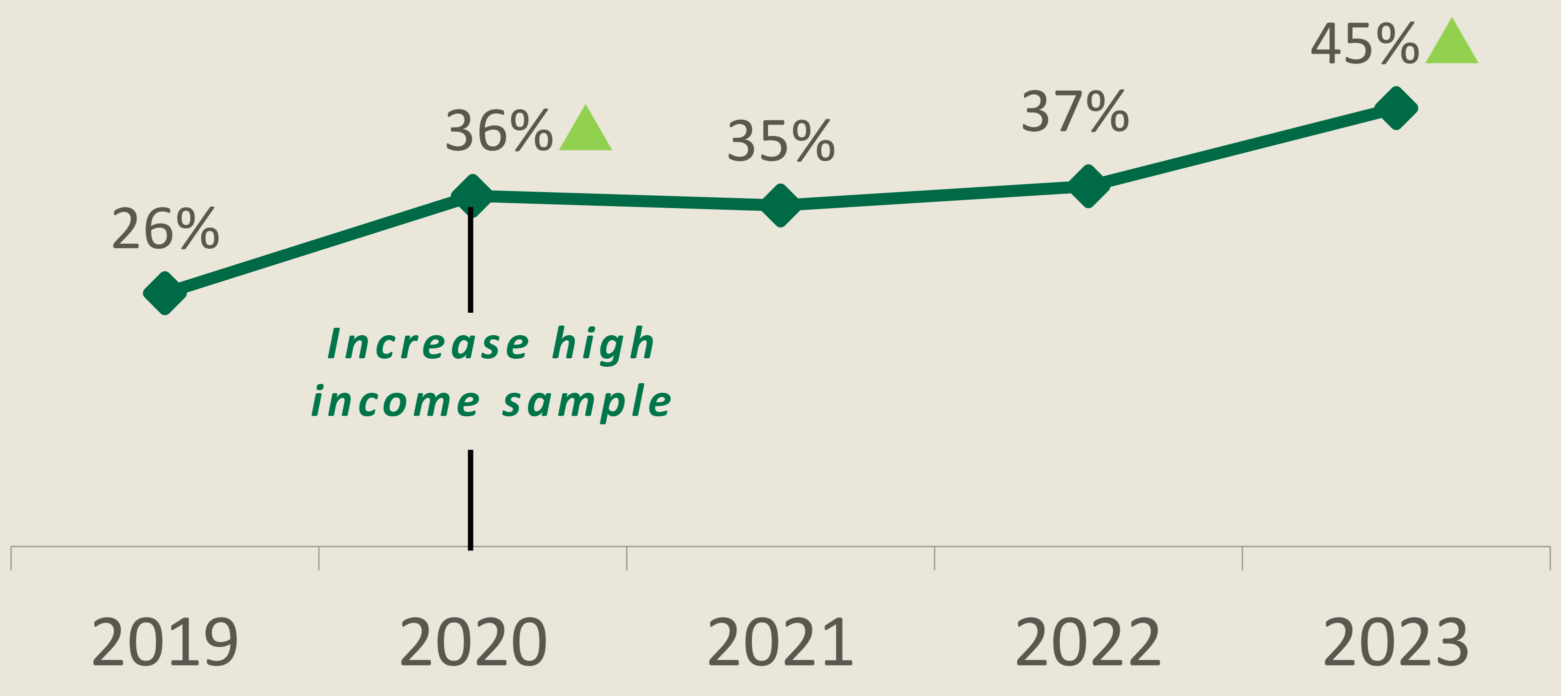
5. Is the most superior beef

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

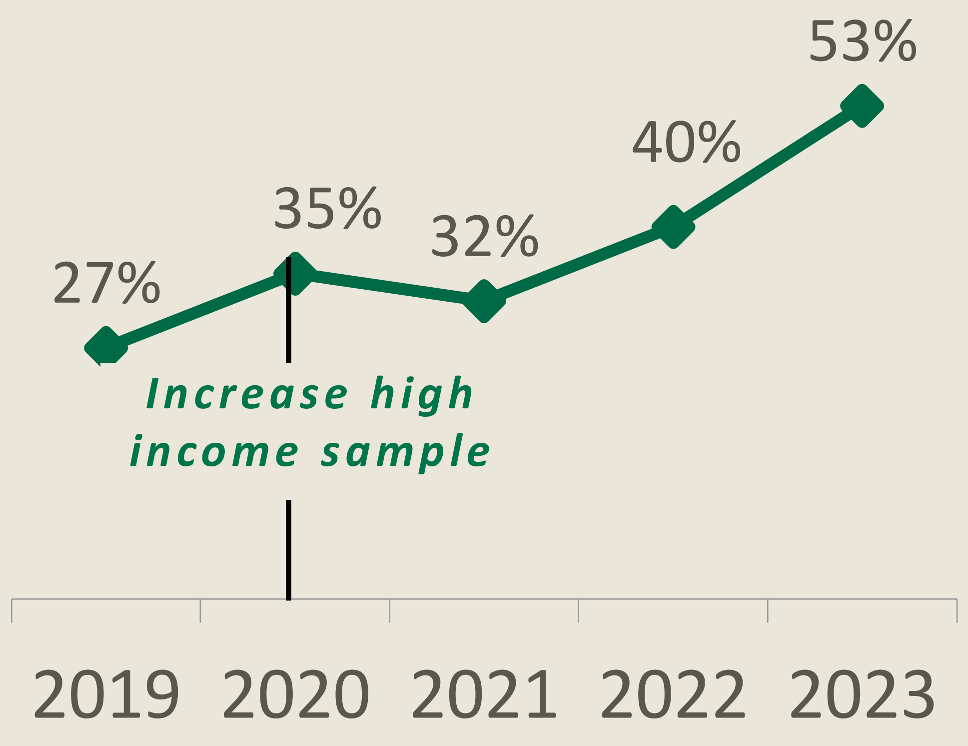
Awareness of True Aussie is strengthening overtime. TA assets strongly communicate trust, high animal welfare standards/care and freshness which can be leveraged to reinforce high quality and nutrition.

TRUE AUSSIE - AWARENESS AND PERCEPTION

Aware of Term: 'True Aussie'



Aware of Logo:



Awareness of True Aussie Logo (without halal certification):
2021: 36%, 2022: 34%, 2023: 35%

Top 5 impressions of True Aussie logo:

1. Is processed under the highest animal welfare standards
2. I trust the beef from here
3. Is fresh
4. They care for their animals when raising them
5. Is my/my family's favourite

Based on imagery associations with the logo

KANTAR

QTA1. Have you heard the term "True Aussie" before? Base: '19 (n=500), '20 (n=500), '21 (n=500), '22 (n=500), '23 (n=500)
QTA3. Have you ever seen this logo before? Base: Beef '19 (n=269), Beef '20 (n=254), Beef '21 (n=258), Beef '22 (n=243), Beef '23 (n=255)
Lamb '19 (n=231), Lamb '20 (n=246), Lamb '21 (n=242), Lamb '22 (n=257), Lamb '23 (n=148)

Sig. different at 95%

MEAT & LIVESTOCK AUSTRALIA

Summarising Beef Module

Maintaining Australian Beef's leadership

Maintaining leadership is the task at hand.

Australian Beef has strengthened across consumption metrics; overtaking local beef (albeit a portion of this is Australian beef in reality) to become the most consumed.

It currently has high loyalty amongst Western Expats and Expat Arabs with potential to strengthen for Emiratis.

With Superior Quality being the key choice driver, Australian beef needs to continue communicating about its Superiority which is backed by its consistent quality, inherent safety and nutrition.

Clean, Green and Natural for Quality and Safety

UAE consumers are highly conscious of the quality of beef and its origin. Country of Origin awareness is very high in this market.

On pack cues of beef being 'Natural' is also more important vs other markets.

AU can deliver to this need functionally and perceptually with its clean, green natural image and processes. This narrative should be leveraged across consumer touchpoints.

LAMB

COUNTRY OF ORIGIN

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.

Among those who have never bought lamb, smell is the key barrier followed by Lamb being too fatty. Taste as a barrier is less significant overtime.

LAMB PURCHASE BEHAVIOUR

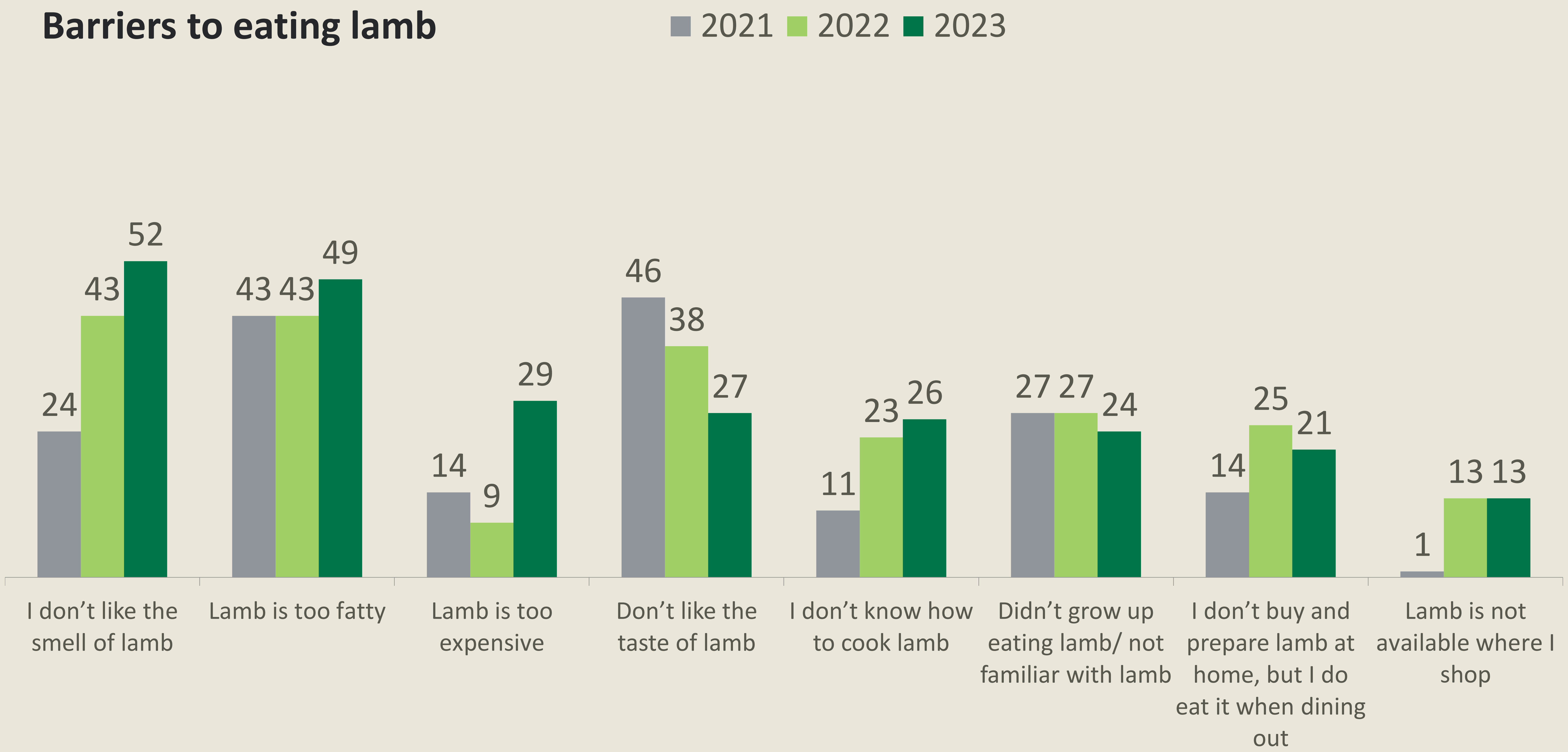
41%

Global average 2023

17%

Of the sample have never bought lamb

2022: 11%
2021: 15%



KANTAR

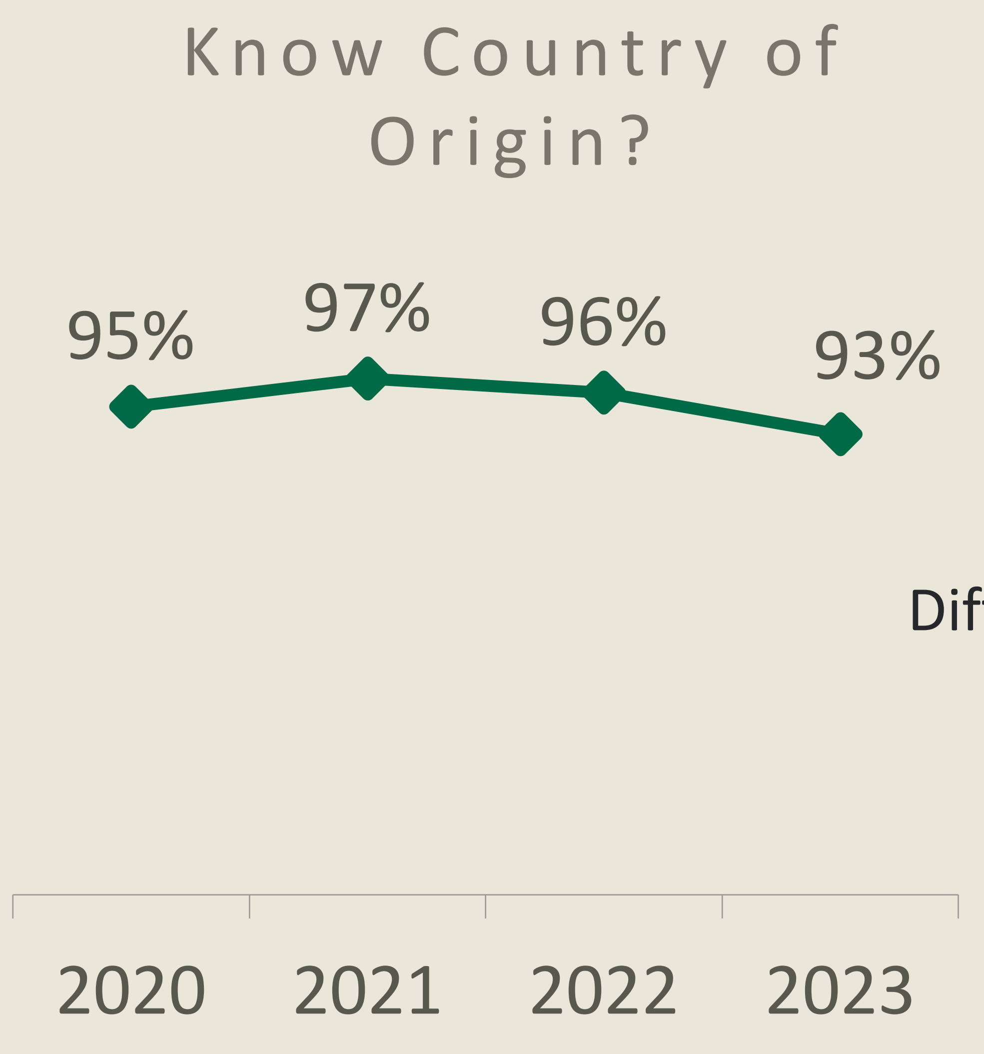
CH6. Do you ever buy lamb? Base: (n=500) (Never bought lamb rebased to total sample)
QCH6a. Why do you not buy lamb? Base: '23 (n=85), '22 (n=56), '21 (n=74)

Sig. different at 95%

mla MEAT & LIVESTOCK AUSTRALIA

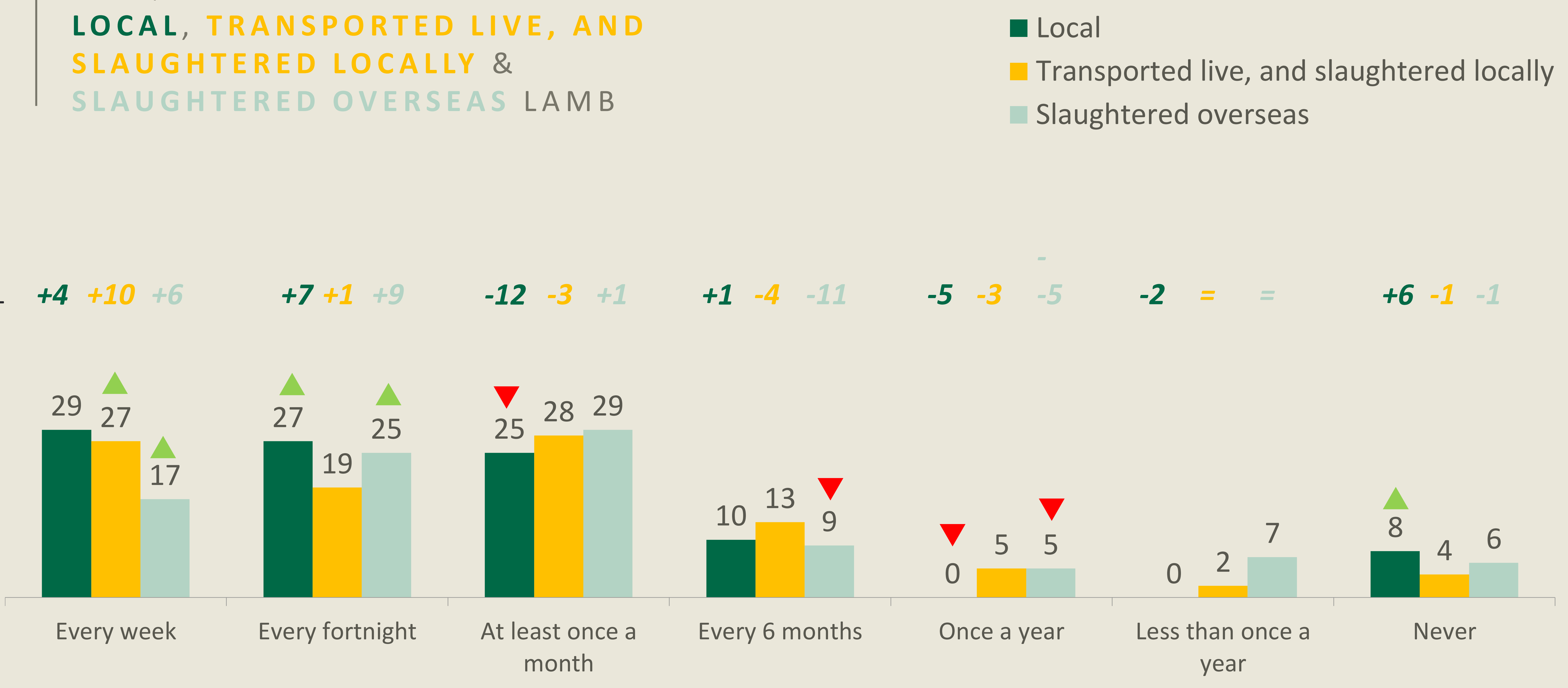
As with beef, knowledge of COO continues to be very high for lamb. Local lamb continues to be purchased most frequently, but there is an increase imported lamb frequency.

LAMB BUYING BEHAVIOUR



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

Differences vs 2021 *+4 +10 +6* *+7 +1 +9* *-12 -3 +1* *+1 -4 -11* *-5 -3 -5* *-2 = =* *+6 -1 -1*



KANTAR

(LBH1A) Do you know the country of origin of the lamb you buy? Base: (n=415)
(CH7) How often do you buy imported lamb/Halal compliant lamb? Base: (n=415)
(CH7LOC) How often do you buy local lamb/Halal compliant lamb? Base: (n=415)

Sig. different at 95%

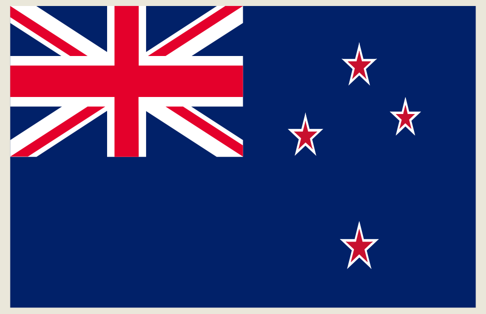
mla MEAT & LIVESTOCK AUSTRALIA

The brand list for Lamb was consistent vs 2022

LAMB BRANDS TRACKED IN 2023

Australian lamb

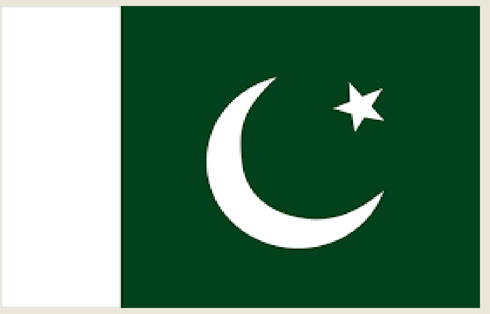
New Zealand lamb



Indian beef/ Buffalo lamb

UAE Local lamb

Pakistani lamb



Sudanese lamb

Somali lamb

Welsh lamb

Note: Consumers are not prompted with flags in the survey

AU Lamb recovers from the drop seen in 2022, at peak levels for most levels of the funnel. In contrast, Local lamb weakens, lagging behind AU lamb on salience and consumption.

LAMB - BRAND HEALTH FUNNEL BY COO

AUSTRALIAN LAMB

%		'22	'21	'20
Spontaneous awareness	74	69	73	67
Total Awareness	91 ▲	82	93	86
Ever Eaten	81 ▲	60	81	65
Eat P12M	72 ▲	52	69	48
Eat P3M	59 ▲	43	55	41
Past Month	51 ▲	35	39	32
Most Often	34 ▲	23	28	24

NEW ZEALAND LAMB

%		'22	'21	'20
Spontaneous awareness	32	33	23	33
Total Awareness	81 ▲	61	67	70
Ever Eaten	45 ▲	33	34	36
Eat P12M	34 ▲	24	24	30
Eat P3M	24 ▲	16	15	20
Past Month	17	12	7	14
Most Often	7	5	5	6

INDIAN MUTTON/LAMB

%		'22	'21	'20
Spontaneous awareness	43	43	52	40
Total Awareness	80 ▲	67	85	78
Ever Eaten	53	47	61	50
Eat P12M	42	37	47	41
Eat P3M	34	27	30	31
Past Month	27	22	22	26
Most Often	16	17	17	19

LOCAL (NAEMI) LAMB

%		'22	'21	'20
Spontaneous awareness	38 ▼	56	54	49
Total Awareness	78 ▼	86	82	78
Ever Eaten	59 ▼	72	62	58
Eat P12M	52 ▼	62	54	49
Eat P3M	46	48	45	38
Past Month	36	39	35	33
Most Often	25	29	29	30

KANTAR

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: '23 (n=245), '22 (n=257), '21 (n=242), '20 (n=246) – Bought lamb in past month or ever buy lamb

▲▼ *Sig. different at 95%*

mla MEAT & LIVESTOCK AUSTRALIA

In line with beef, Western Expats show higher preference towards AU lamb. Expat Arabs show higher loyalty vs Local. Potential to further strengthen usage for Emiratis and Expat Asians.

LAMB - BRAND HEALTH FUNNEL BY COO

AUSTRALIAN LAMB
%

	Total	Emiratis	Expat Arabs	Expat Asians	Western Expats
Spontaneous awareness	74	70	72	70	84
Total Awareness	91▲	90	96▲	87▲	92
Ever Eaten	81▲	80▲	89▲	69▲	90
Eat P12M	72▲	67	79▲	54	87
Eat P3M	59▲	54	74▲	33	82
Past Month	51▲	46	68▲	29	67
Most Often	34▲	13	42▲	20	64

UAE LOCAL LAMB
%

	Total	Emiratis	Expat Arabs	Expat Asians	Western Expats
Spontaneous awareness	38▼	67	55	19	16
Total Awareness	78▼	93	100	69	52
Ever Eaten	59▼	80	92	34	36
Eat P12M	52▼	77	89	24	26
Eat P3M	46	77	79	16	20
Past Month	36	74	53	10	13
Most Often	25	66	30	4	3

KANTAR

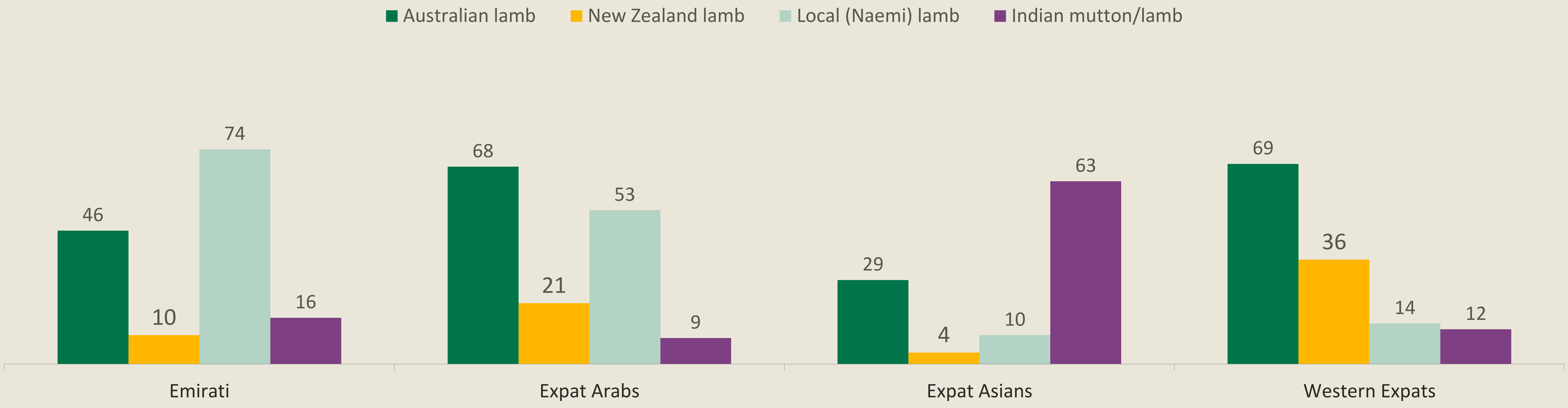
BBH1. Spontaneous Awareness, BBH2. Prompted Awareness, BBH3. Ever Eaten, BBH4. Eaten last year, BBH5. Eaten in the last 3 months, BBH6. Eaten last month, BBH8. Most often
Base: '22 (n=243), '21 (n=258), '20 (n=254), '19 (n=264) – Bought beef in past month or ever buy beef

▲▼ *Sig. different at 95%*

MEAT & LIVESTOCK AUSTRALIA

There are clear differences in consumption behaviour across different ethnicities, with Emirati's consuming Local Lamb more while Expat Asians show higher consumption of Indian mutton/ lamb

LAMB- EATEN IN LAST 1 MONTH



KANTAR

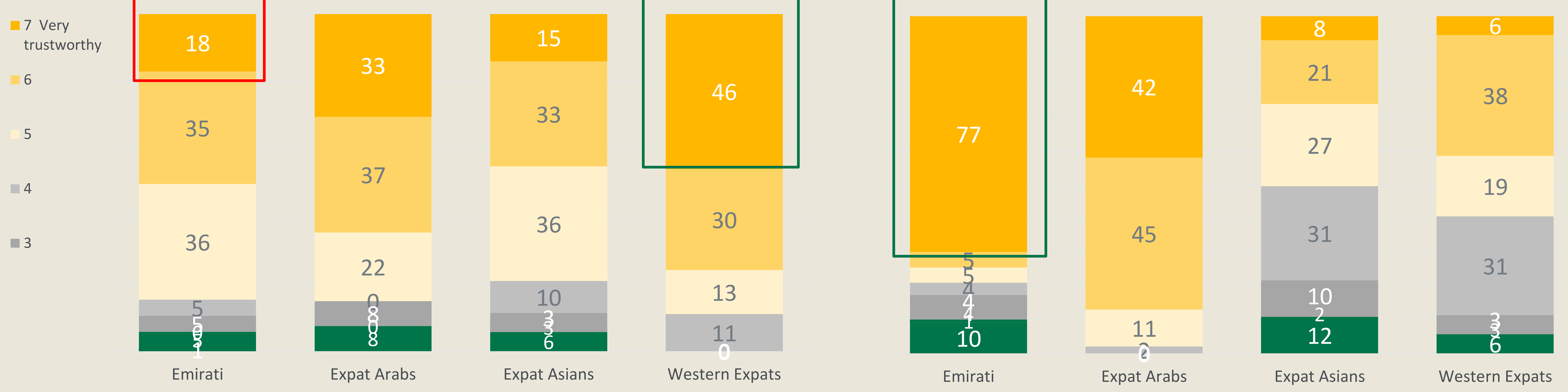
(GF3B) Do you know the country of origin of the beef you buy? (n=436)
(CH4LOC) How often do you buy local beef? (n=436)
(CH4) How often do you buy imported beef? (n=436)

MEAT & LIVESTOCK AUSTRALIA

This also reflects in the level of trust across ethnic groups. Significantly higher trust for local lamb among Emiratis leading to higher consumption vs AU lamb

COO TRUST BY ETHNICITY

	Australian Lamb				UAE Local Lamb			
Top 2 Box- 2023	53	71	48	77	82	87	29	44



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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)

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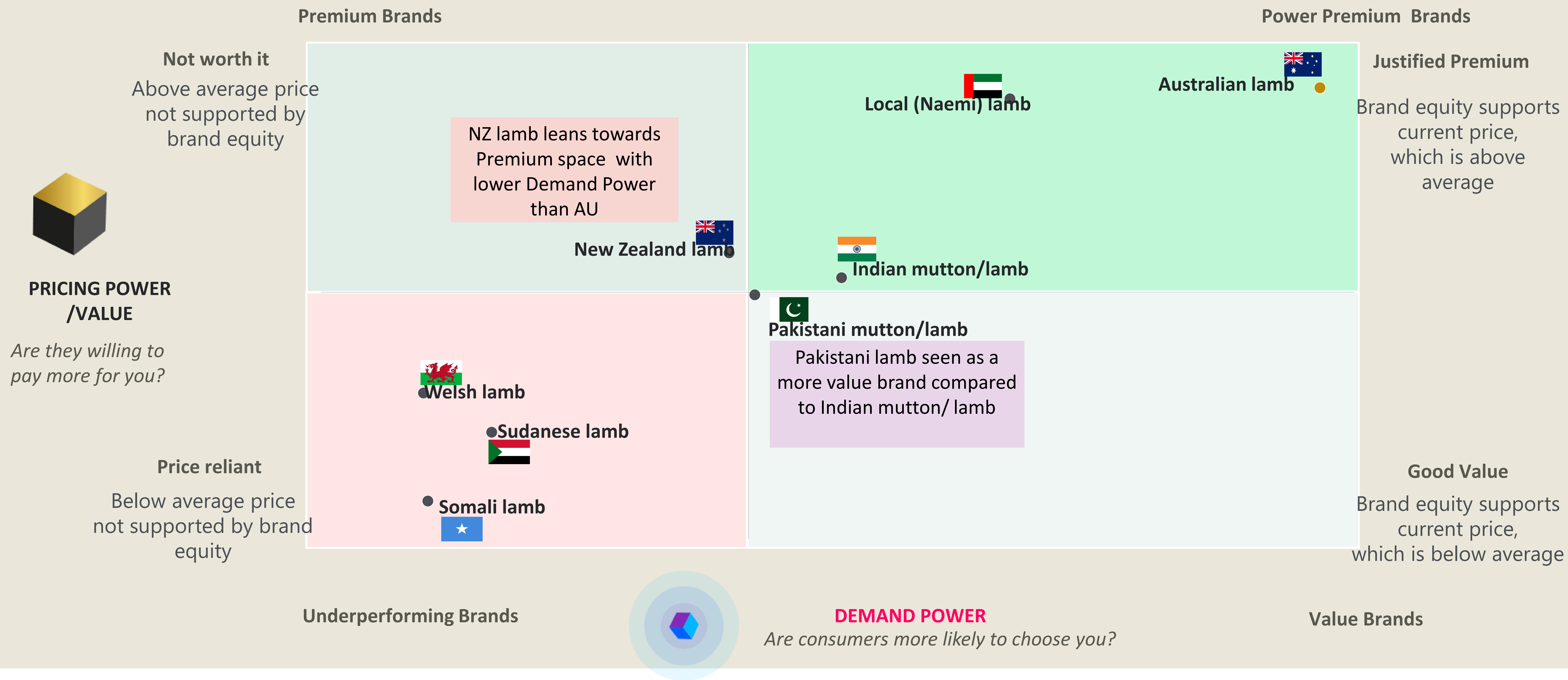
WHAT NEXT FOR AU LAMB IN UAE?

Like beef, AU lamb is a ‘justified premium’ brand. Local Lamb occupies a similar territory but has relatively lower Demand Power. Therefore, the job for AU lamb is to maintain this strong position.



The associations that consumers hold in their minds for lamb in UAE breaks up into 6 themes

IMPORTANCE IN DRIVING DEMAND POWER

28%

QUALITY & VARIETY OF CUTS

Offers a variety of cuts that suit the meals I make
Consistent quality standards
The animal is well-cared for
Is my/my family's favourite lamb

14%

ENVIRONMENT

The industry is environmentally sustainable

14%

HALAL

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

23%

BETTER FOR MY FAMILY

More nutritious
Guaranteed safe to eat
Is the most superior lamb
Is easy and convenient to purchase
Fresh

14%

TENDER & LOW FAT

The meat is usually tender

Low in fat

7%

CHEAPER

Cheaper

Strong perceptions of 'Quality' along with 'Variety of cuts to suit my needs' are most important in driving Demand Power and justifying a premium price for Lamb in the UAE.

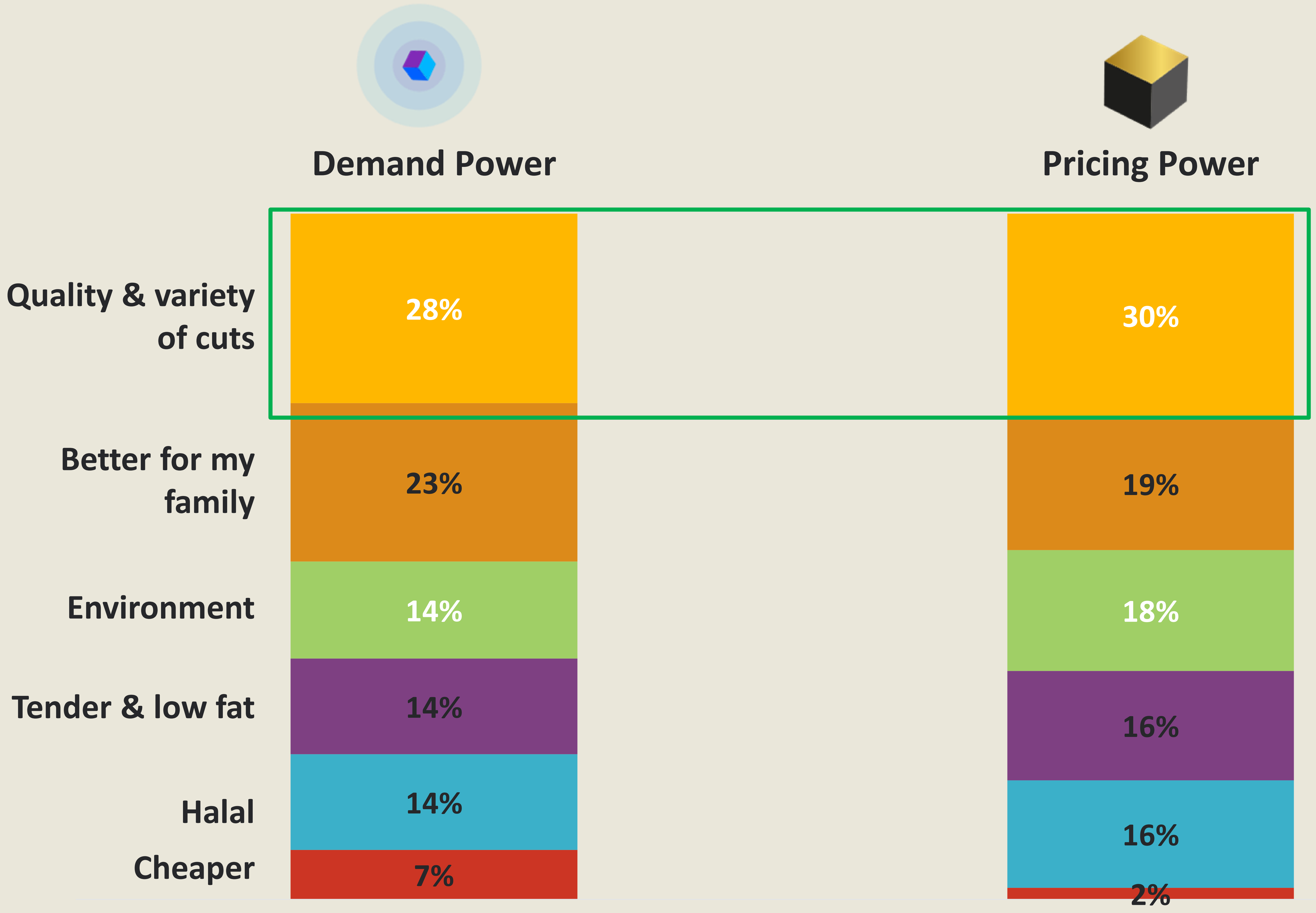
QUALITY & VARIETY OF CUTS

Offers a variety of cuts that suit the meals I make

Consistent quality standards

The animal is well-cared for

Is my/my family's favourite lamb



Sorted in order of Demand Power

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Australian Lamb has strong associations across all attributes except for Cheaper.
Perceptions for Australian lamb saw a drop in 2022 and have now recovered to earlier levels of 2021

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

		AUSTRALIAN LAMB	NEW ZEALAND LAMB	LOCAL (NAEMI) LAMB	INDIAN MUTTON/LAMB	PAKISTANI LAMB
Quality & Variety of Cuts (28%)	Offers a variety of cuts that suit the meals I make	62	37	49	34	28
	Consistent quality standards	63 ▲	36 ▲	51	35	26
	The animal is well-cared for	61 ▲	38	53	34	26
Better for my family (23%)	Is my/my family's favourite lamb	57 ▲	29	51	34	24
	More nutritious	66 ▲	34 ▲	53	33	27
	Guaranteed safe to eat	61 ▲	37 ▲	49	36	29
	Is the most superior lamb	61 ▲	31 ▲	49	31	24
	Is easy and convenient to purchase	64 ▲	40 ▲	50	38	30
	Fresh	62 ▲	36 ▲	47 ▼	37	27
Environment (14%)	The industry is environmentally sustainable	60 ▲	36 ▲	49	31	28
Tender & Low Fat (14%)	The meat is usually tender	55	29	51	30	25
	Low in fat	51 ▲	29 ▲	42	31	21
Halal (14%)	I trust that this lamb is slaughtered according to sharia law and is therefore Halal	56 ▲	38 ▲	50	39	31
Cheaper (7%)	Cheaper	33 ▲	22 ▲	29	36	34

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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.*

Highest association
Second highest
Third highest

▲▼ *Sig. different at 95%*

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The key driver 'Quality & variety of cuts' is currently a white space. Considering AU lamb has strong perceptions across these attributes, it is well placed lean in further to own this differentiated space.

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

		AUSTRALIAN LAMB	LOCAL (NAEMI) LAMB	NEW ZEALAND LAMB	INDIAN MUTTON/ LAMB	PAKISTANI LAMB
Quality & Variety of Cuts (28%)	Offers a variety of cuts that suit the meals I make	3	0	2	-1	0
	Consistent quality standards	4	2	2	0	-2
	The animal is well-cared for	1	4	3	-2	-2
Better for my family (23%)	Is my/my family's favourite lamb	1	5	-3	1	-2
	More nutritious	7	4	0	-2	-1
	Guaranteed safe to eat	1	-1	1	0	0
	Is the most superior lamb	5	3	-1	-1	-1
	Is easy and convenient to purchase	4	0	5	2	2
	Fresh	2	-3	1	1	-2
Environment (14%)	The industry is environmentally sustainable	2	1	2	-3	1
Tender & Low Fat (14%)	The meat is usually tender	0	6	-2	-1	0
	Low in fat	-3	-2	-1	0	-3
Halal (14%)	I trust that this lamb is slaughtered according to sharia law and is therefore Halal	-5	-1	2	2	2
Cheaper (7%)	Cheaper	-22	-16	-9	4	9

KANTAR
+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.*

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What does AU lamb need to focus on to target further growth in UAE?

Continuing our focus on Superiority and communicating the clean, green rearing conditions in Australia can reinforce safety and animal care; while supporting associated nutrition perceptions

TOP ASSOCIATIONS TO GROW - VOLUME & PREMIUM (ORDERED BASED ON IMPACT ON BUILDING EQUITY*)

Associations for AU to communicate

1. Easy and convenient to purchase

2. More nutritious

3. Animal is well cared for

4. Fresh

5. Guaranteed safe to eat

Difficult to achieve when competing vs. a local product

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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

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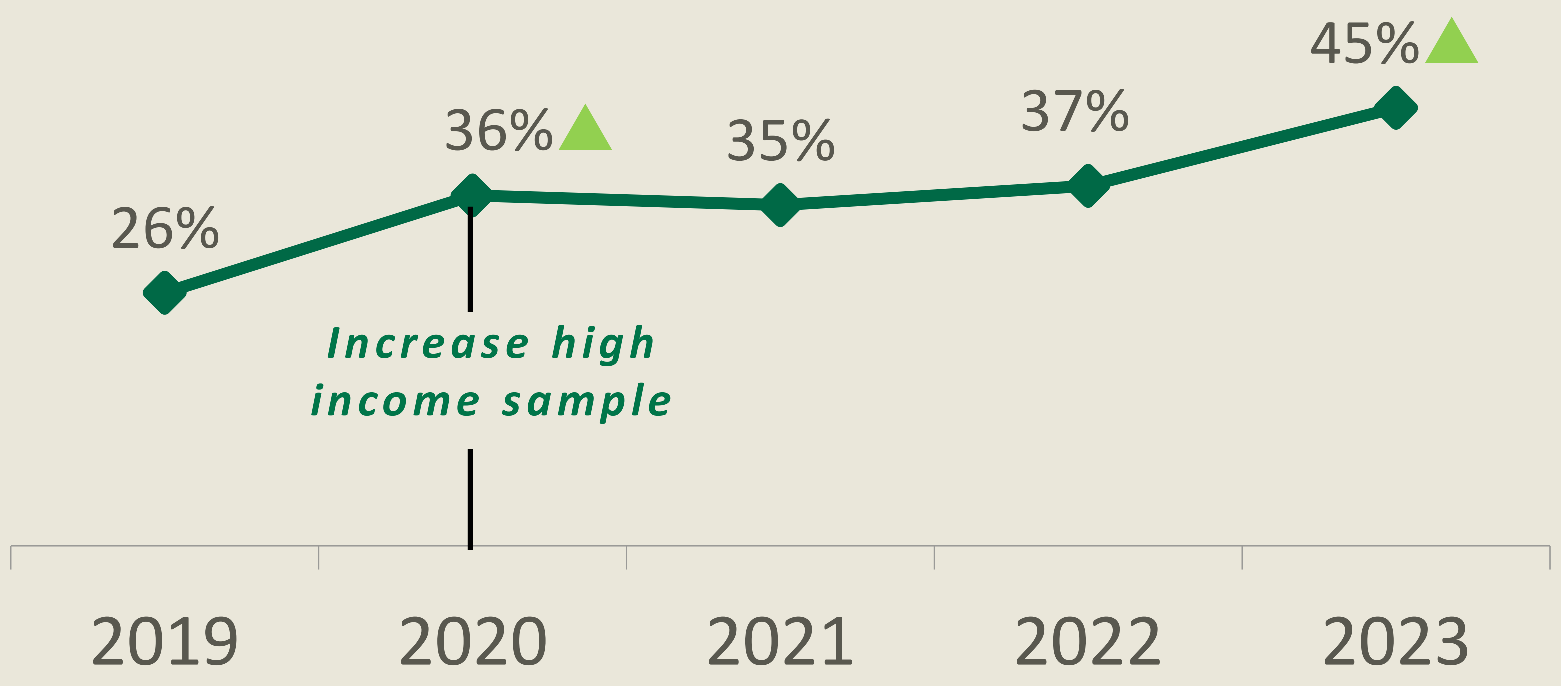
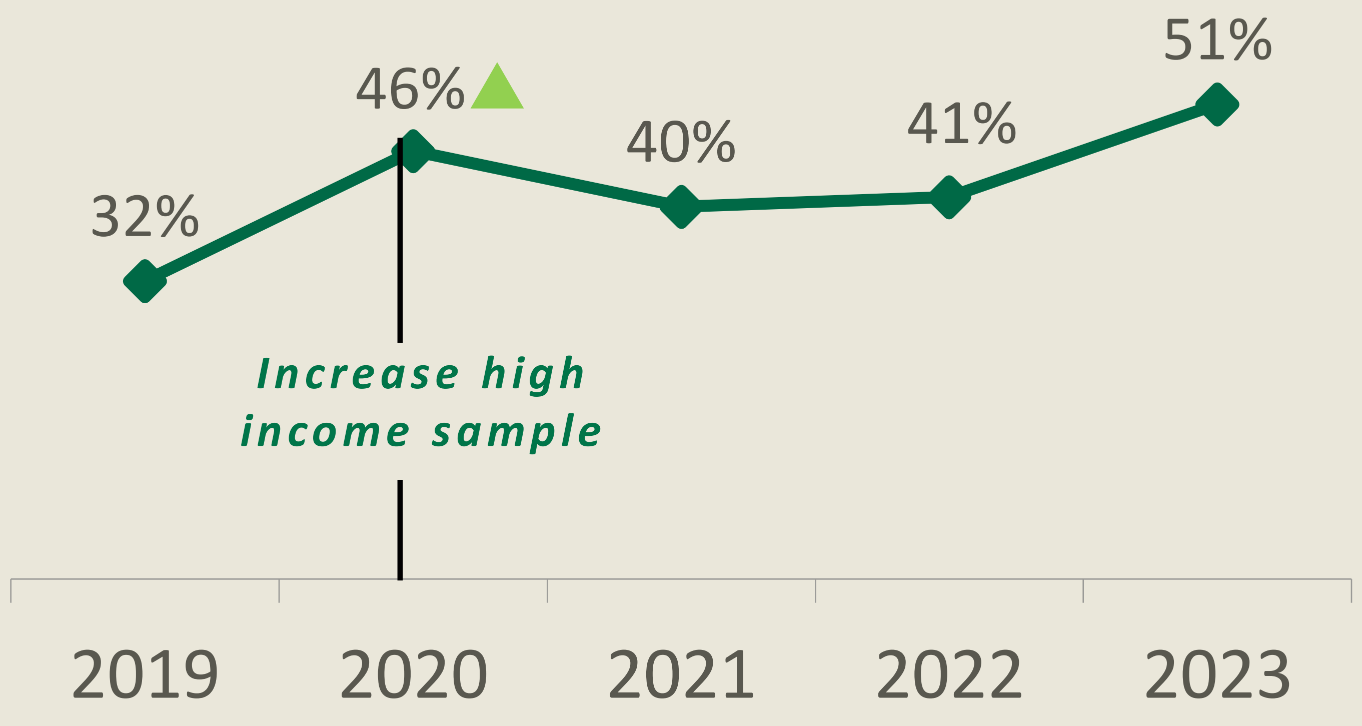
Awareness of True Aussie continues to strengthen. TA assets strongly communicate trust, high animal welfare/care which can be leveraged to support perceptions of high quality and nutritious.

LAMB - TRUE AUSSIE AWARENESS

Aware of Term: 'True Aussie'



Aware of Logo:



Awareness of True Aussie Logo (without halal certification):
2021: 35%, 2022: 45%, 2023: 51%

Top 5 impressions of True Aussie logo:

1. Is processed under the highest animal welfare standards
2. They care for their animals when raising them
3. Is fresh
4. I trust the lamb from here

Based on imagery associations with the logo

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QTA1. Have you heard the term "True Aussie" before? Base: '19 (n=500), '20 (n=500), '21 (n=500), '22 (n=500), '23 (n=500)
QTA3. Have you ever seen this logo before? Base: Beef '19 (n=269), Beef '20 (n=254), Beef '21 (n=258), Beef '22 (n=243), Beef '23 (n=255)
Lamb '19 (n=231), Lamb '20 (n=246), Lamb '21 (n=242), Lamb '22 (n=257), Lamb '23 (n=148)

Sig. different at 95%

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Summarising Lamb Module

Maintain AU Lamb’s Leadership

Maintaining leadership is the task at hand.

Like Australian beef, Australian lamb has strengthened across consumption, overtaking local (Naemi) lamb to become most consumed. Australian lamb also shows significantly higher trust vs other imports.

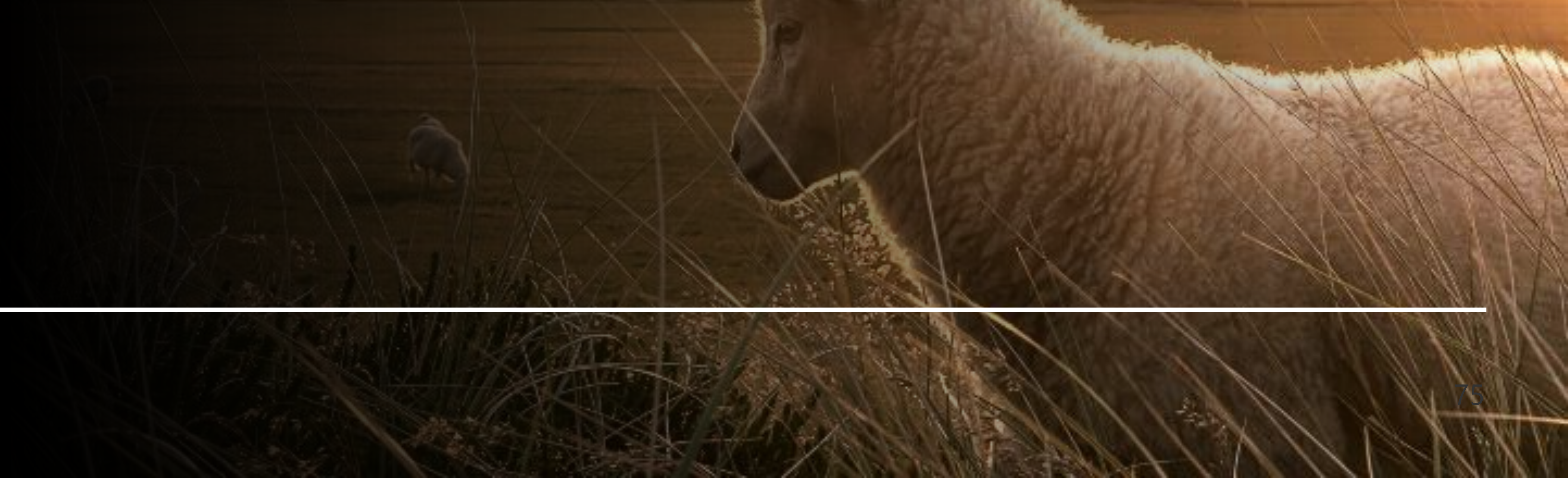
It currently shows high consumption for Western Expats and Expat Arabs, with potential to strengthen for Emiratis and Expat Asians. Key competition differs across ethnicities - Local lamb among Emiratis, Indian mutton/ lamb Expat Asians, NZ Lamb for Western Expats.

Focus on Quality & Variety of cuts

Australian Lamb has strong imagery perceptions and is well placed to differentiate itself on the key driver of ‘Quality & Variety of cuts’ which is currently a white space.

Continuing to focus on Superiority, by communicating the clean, green rearing conditions in Australia will help reinforce safety and welfare; laddering to nutrition.

‘Nutritious’ and ‘Superiority’ are strengths that AU lamb needs to maintain.



FINAL THOUGHTS & DISCUSSION

Final thoughts and discussion

1. Macro Factors- Health Focus & Sustainability

UAE consumers are focusing more on food quality and looking for more natural products from trusted sources.

Organic beef is becoming more popular as it is perceived as ‘better for health’

Australia is well positioned to meet the demand for 'healthy’, ‘natural’ and 'high quality' beef **with its clean, green, natural image.** This narrative should be leveraged in our consumer touchpoints.

2. Different preferences across different ethnicities

Meat consumption differs across the key ethnicities in UAE.

Thus, important to understand preferences across diverse groups and ensure we are well placed from a product as well as channel perspective to meet their needs.

Expat Arabs and Western Expats currently show high preference for both Australian Beef and Lamb. Task is to maintain loyalty among them.

Among Emiratis and Expat Asians, there is potential to grow consumption.

3. Maintaining Leadership position

Task at hand for both AU Beef and Lamb is to maintain its leadership position.

Focus on communicating its **superiority and consistent quality strengths to reinforce nutrition and safety perceptions,** which justify a premium price.

Awareness of True Aussie has strengthened and can be leveraged as a consistent asset across our communications and touchpoints.

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