

MLA Global:
CONSUMER TRACKER
KSA 2021

Presentation Deck



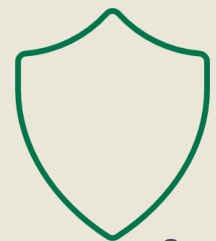


Agenda...



Intros, Background & Methodology

An overview of the sample structure, geographic spread, survey inclusions and approach



Topic 1: COO Trust perceptions for Beef & Lamb

Level of Trust in different COO brands, and the key attributes for building Trust in AU product in the UAE market.



Protein Landscape

A look at the awareness, claimed usage and associations with the different main proteins



Topic 2: True Aussie awareness & perceptions

True Aussie logo performance and key associations tied to the TA brand.



Beef & Lamb COO Brand Health & Perceptions

Digging down the country of origin level for Beef & Lamb to understand their 'brand' associations, any strengths and weaknesses



Topic 3: Purchase Channel online

Usage, barriers and facilitators of online red-meat purchase

MENA (KSA & UAE): A recap of some of your specific areas of focus from the brief



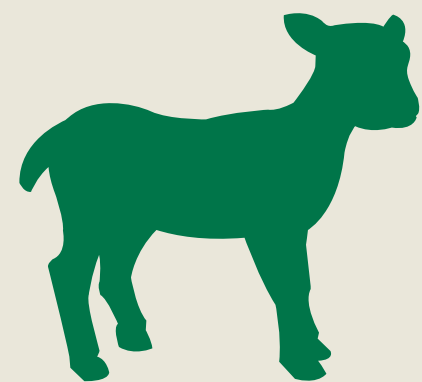
True Aussie

- Can we test recognition of the True Aussie logo in MENA with and without the halal logo ?

We explore this in the True Aussie section



Lamb barriers



- Can we explore around the smell of lamb: Do new or younger consumers think lamb smells, and is lamb an acquired taste?
- There is a lot of feedback about the smell of lamb (and possible confusion with mutton) so is this actually a real behaviour?

We explore this in the Lamb Deep dive



INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.

7,800 consumer interviews in 2021

*Annual quantitative consumer survey conducted via a 20-minute online interview**

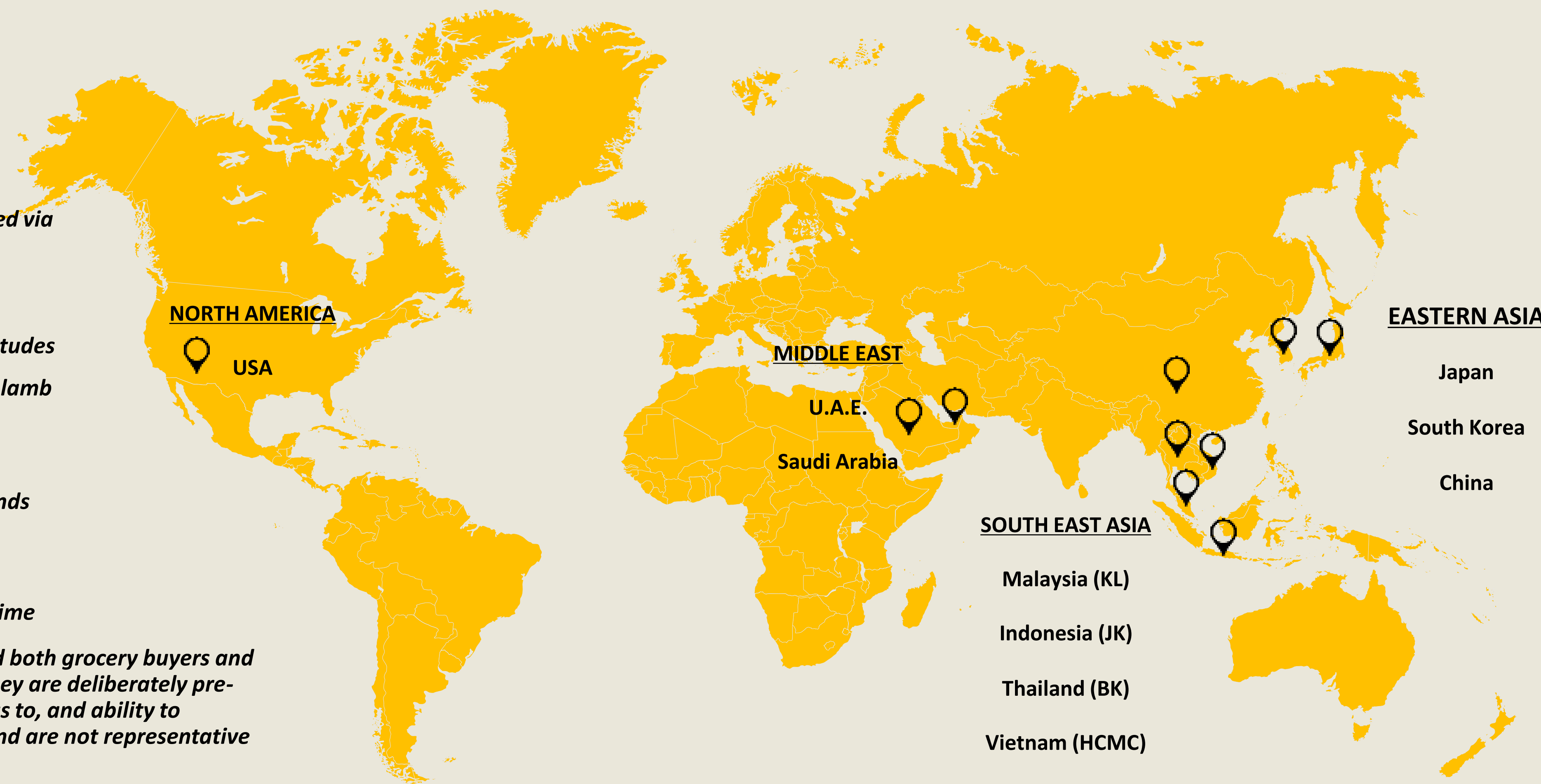
Surveying consumers about

- *their meat consumption habits and attitudes*
- *their perception of Australian beef and lamb versus competitors*
- *Drivers of purchase*
- *Trust and recommendation of COO brands*

10 markets in 2021

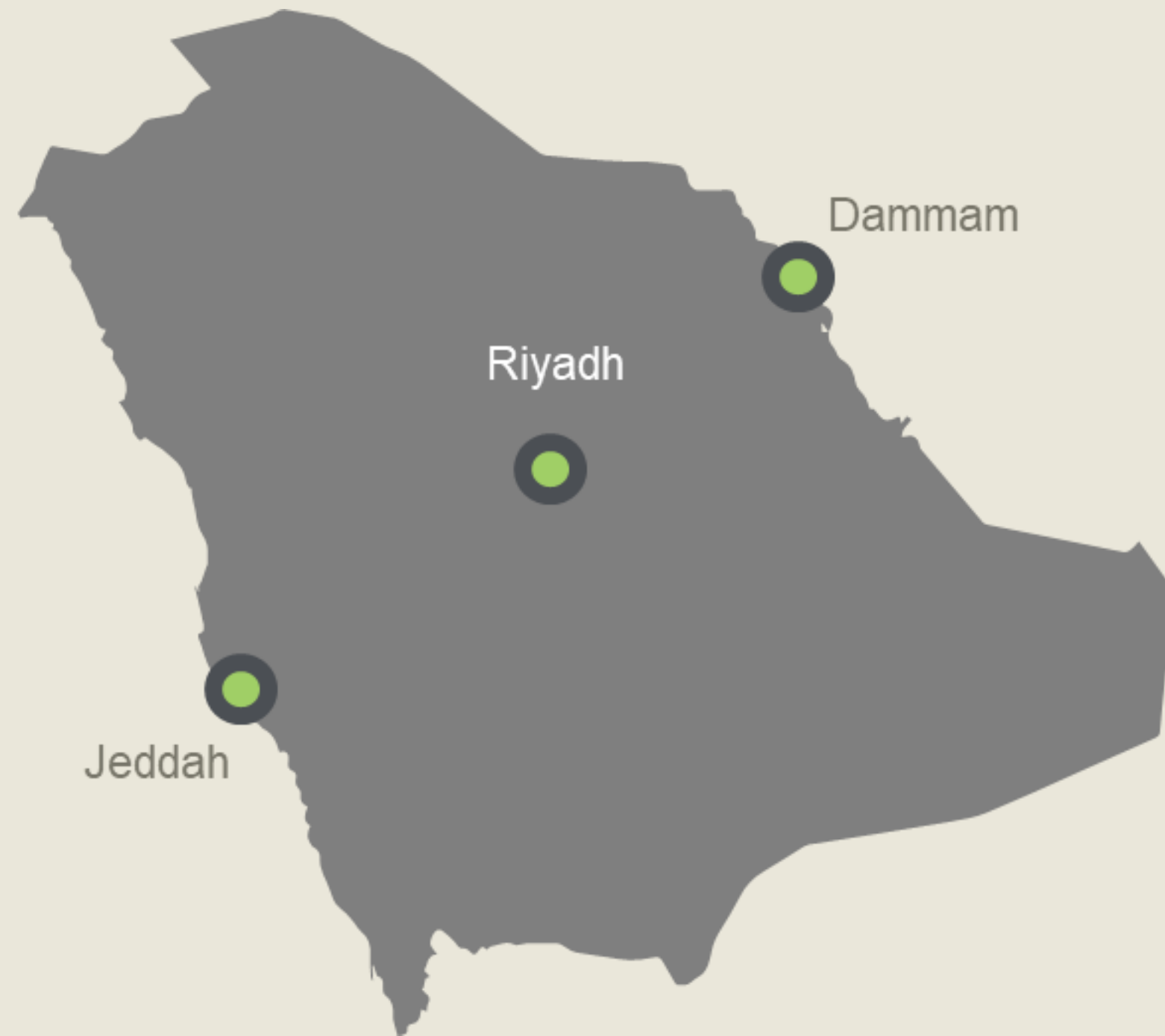
Historical data allows tracking of trends over time

- *Respondents selected are aged 18-64, and both grocery buyers and meal planners for affluent households. They are deliberately pre-selected based on their potential openness to, and ability to purchase, Australian beef and/or lamb, and are not representative of the overall market in each country.*





DEMOGRAPHICS



Sample n=500 consumers

DEMOGRAPHICS		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	56%	50%
	Female	44%	50%
Age	18-34	25%	50%
	35-49	25%	41%
	50-64	11%	10%
Cities	Dammam	3%	37%
	Riyadh	15%	32%
	Jeddah	10%	32%
Consumption	Buy Fresh Meat at Least Occasionally	99%	100%
MGBs	Main Grocery Buyers	-	95%
Children	Households with Children	-	87%
Income	Under 94K - 241K SAR	-	67%
	241K + SAR	-	34%
Religion	Islam	100%	100%



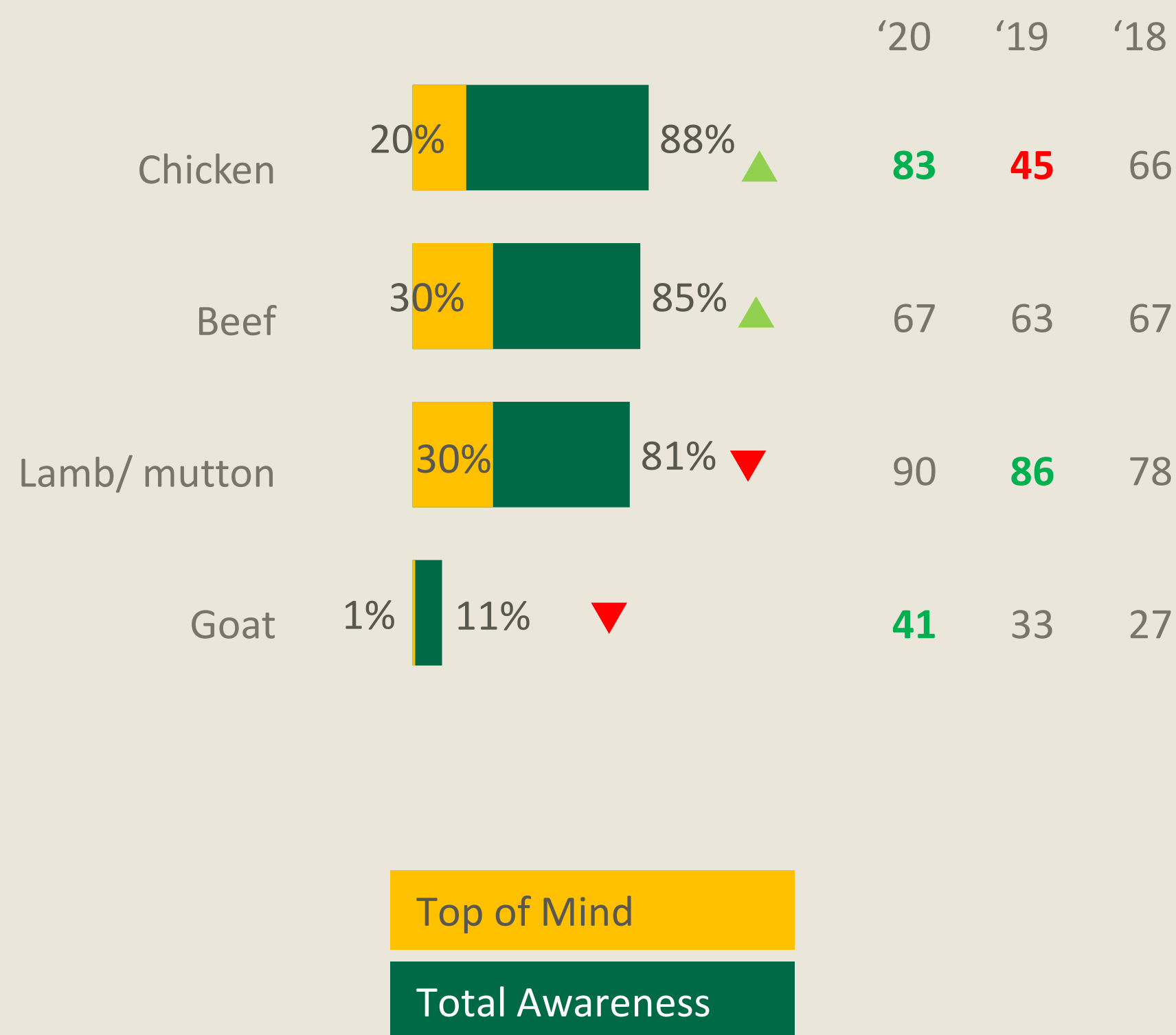
PROTEIN LANDSCAPE



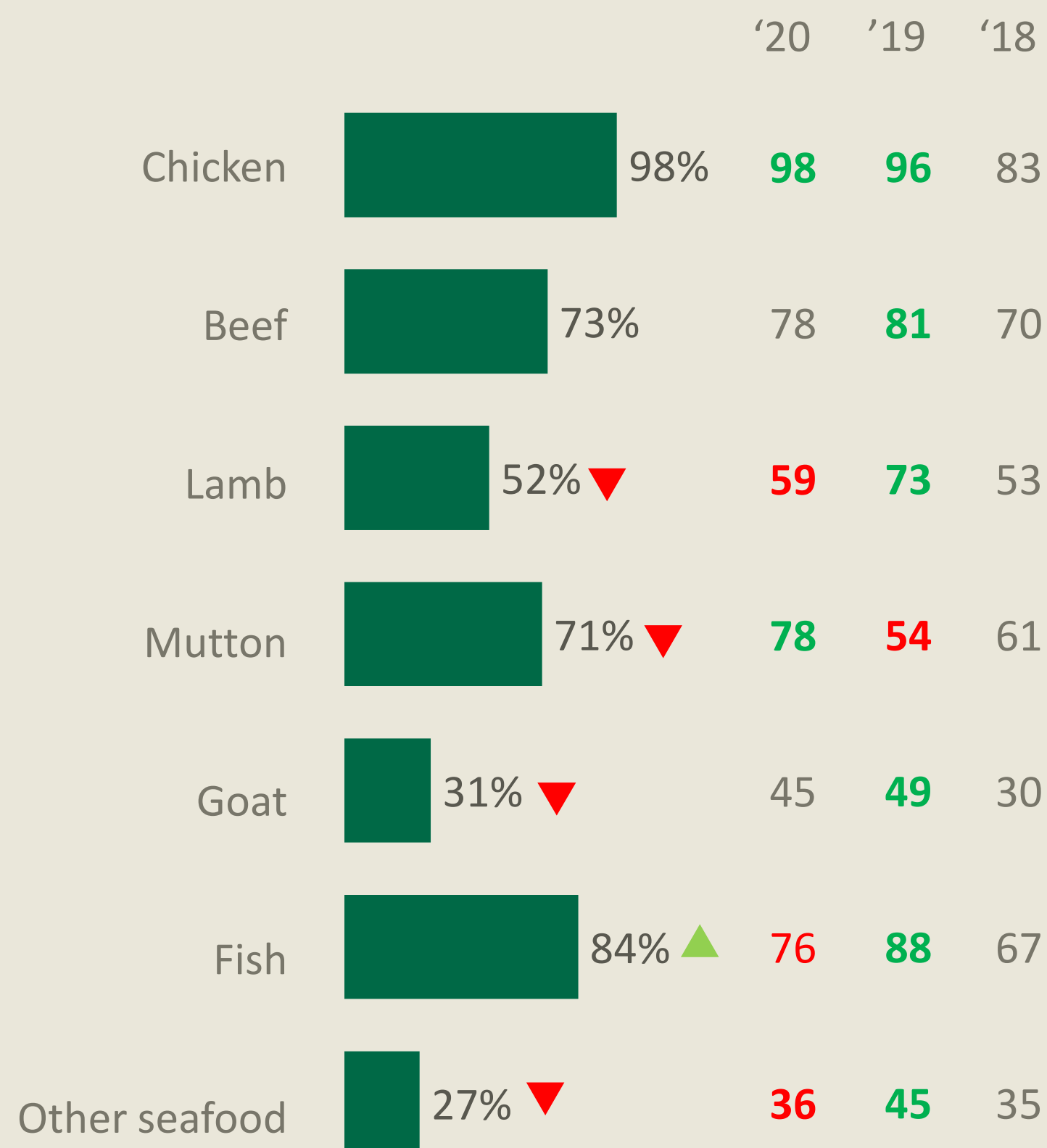
Chicken remains the most purchased, consumed and salient protein, TOM awareness of Beef is up in 2021. Fish back at 2019 levels of purchase.



SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS

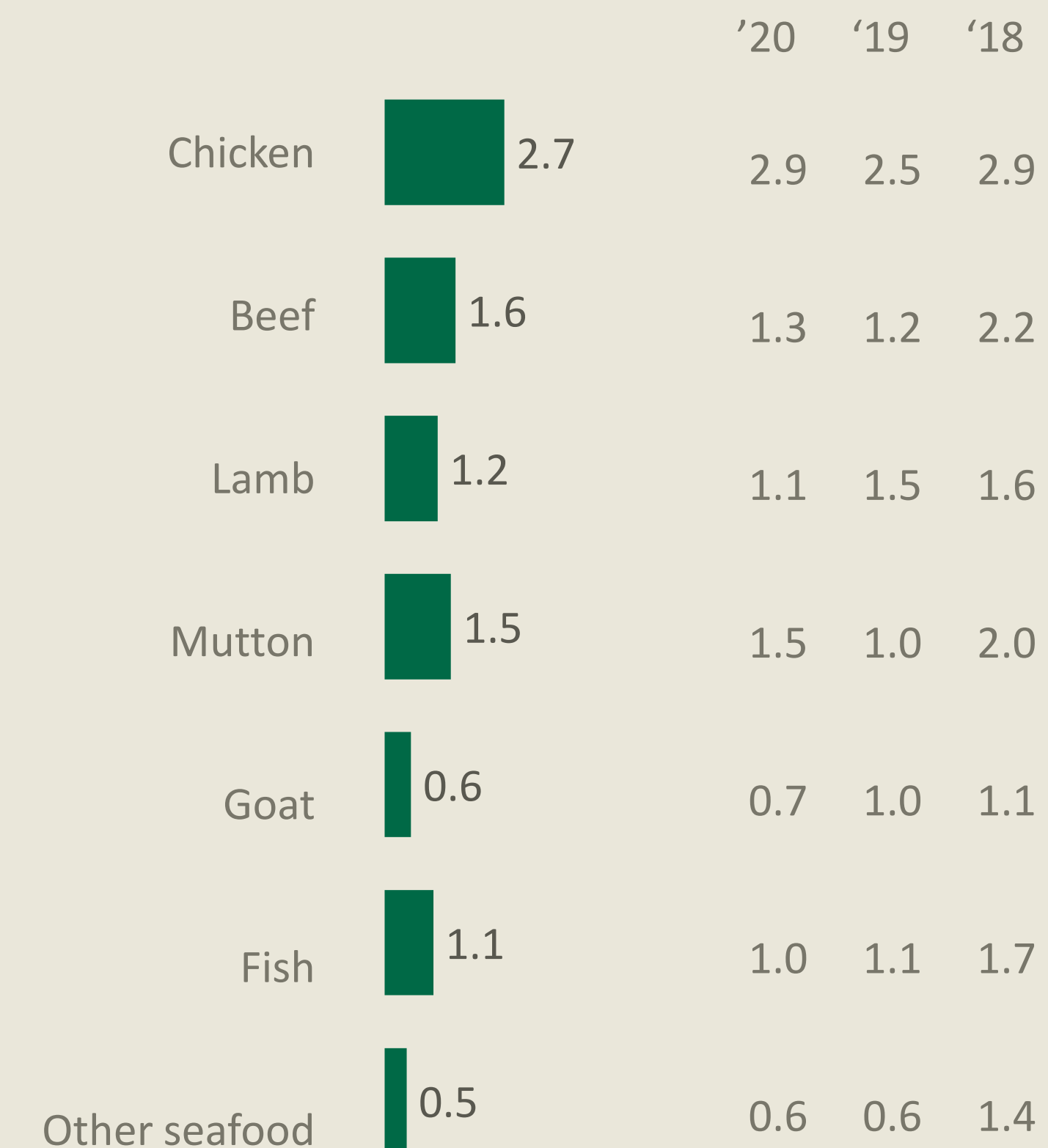




IMAGE PROFILE: Understanding relative strengths and weaknesses

Image Profiling is a unique tool used by Kantar to analyse the *relative strengths and weaknesses* of each brand across a number of attributes/associations

Image Profiling removes two effects from the data:

01 Brand size / familiarity effect

Some brands (or in this instance meat types) are more easily endorsed across all statements. This is often the case where larger, more well-known brands are more endorsed across all of the statements.

02 Statement effect

Certain image statements are more commonly used to evaluate brands than others, and therefore will be associated with more brands. For example, category hygiene statements may be endorsed for many brands – while other statements that are more discriminating.

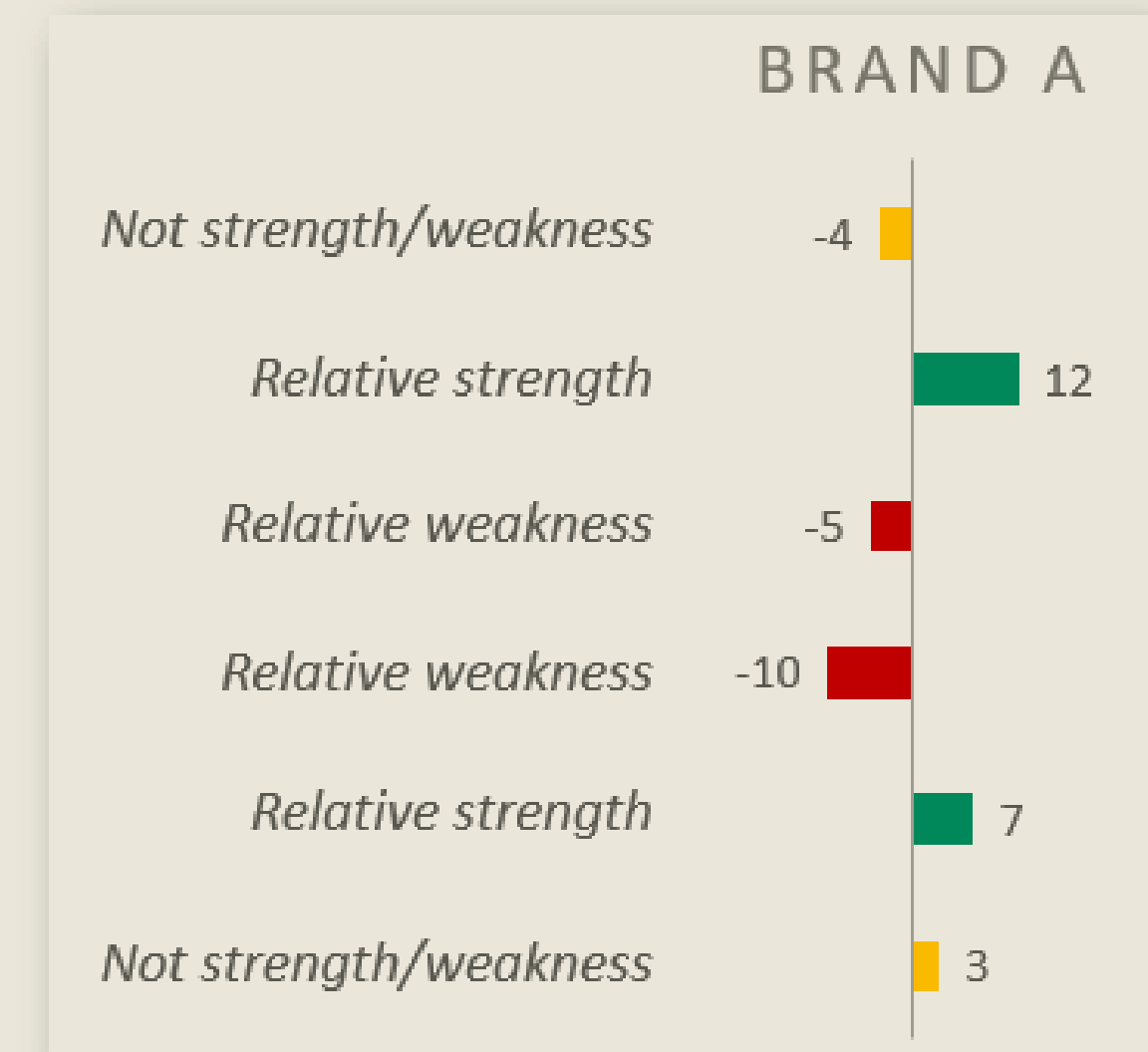
Calculation

The number indicated on the chart is the **difference** between the score that brand is *expected* to receive (for that statement) and its *actual* score (for that statement).

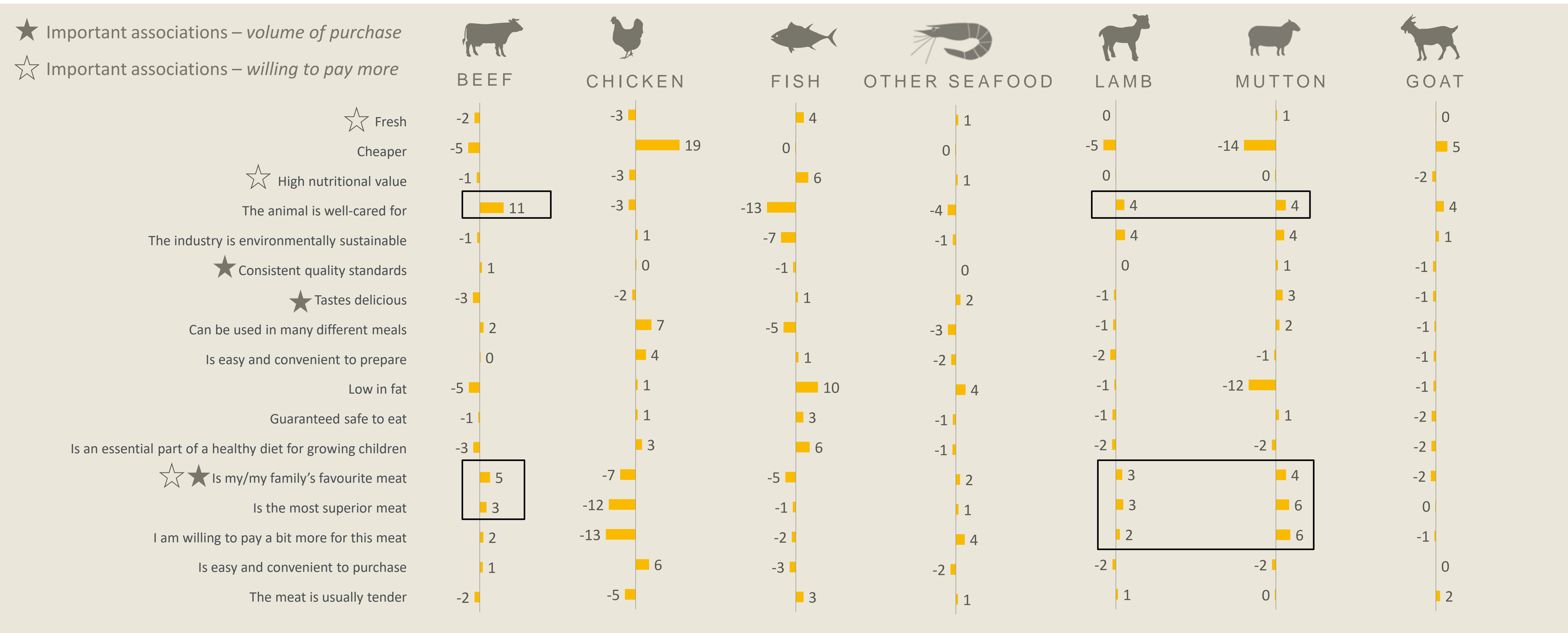
The *expected* score is calculated based on the **average endorsement of that brand across all statements**, as well as the **average endorsement of that statement across all brands**.

If the brand scores a difference of **+5 or more** (from its expected score), this statement is considered a **relative strength** for that brand within the brands tested. Likewise, if that brand scores a differences of **-5 or more** (from its expected score), this statement is considered as a **relative weakness**.

As a result, all scores are relative as the calculation takes into account all the brands tested. Any changes to which or how many brands are tested impacts the *expected* scores and thus the final difference score for each brand.



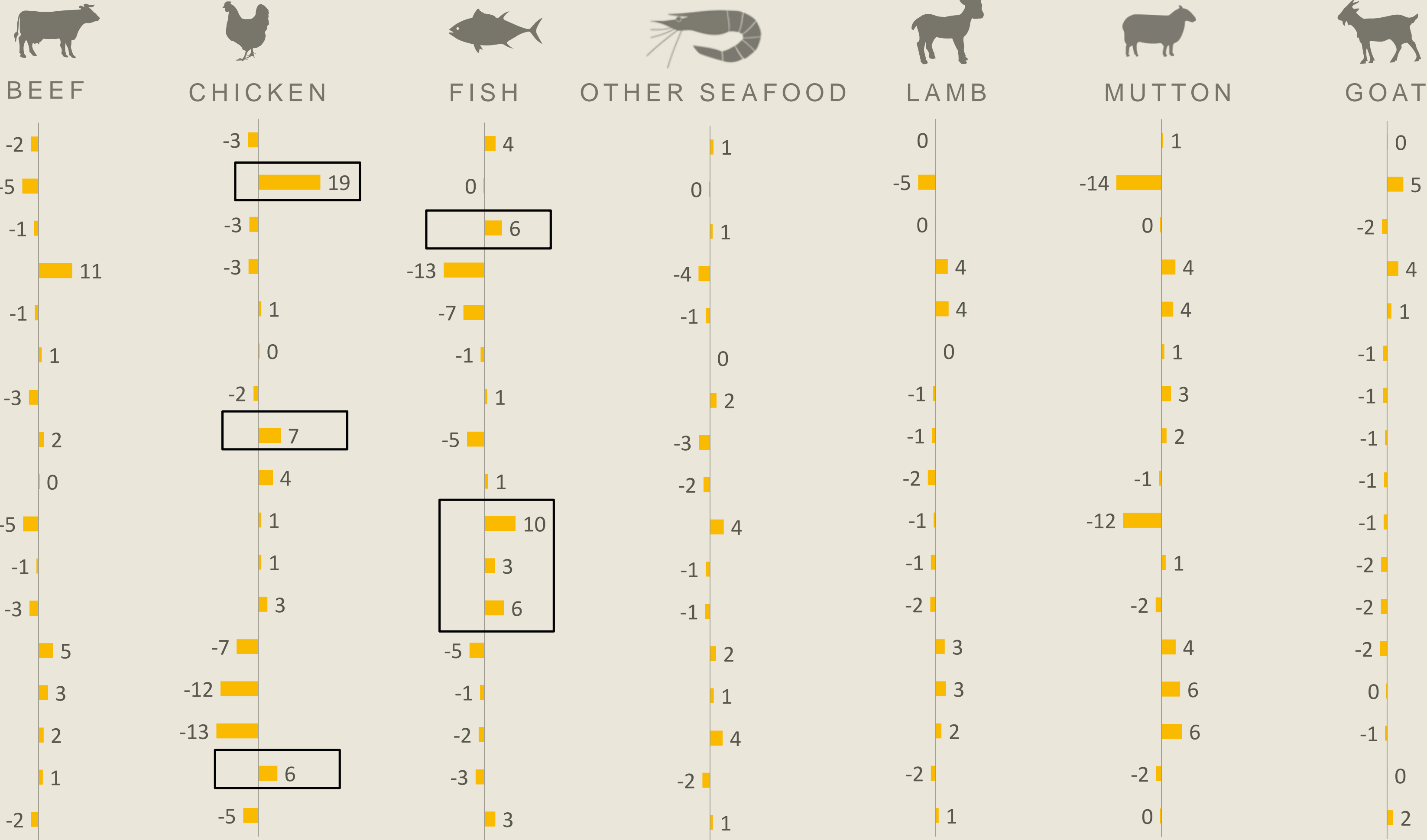
Beef, closely followed by lamb/mutton, are KSA families' favourite meat – seen as well cared for and superior vs other proteins. Sheepmeat also associated with care for animals and a willingness to pay more for the product.



Each of the other proteins plays in a different space – chicken is cheap, versatile and convenient while Fish is fresh, nutritious, low fat.

★ Important associations – *volume of purchase*

☆ Important associations – *willing to pay more*



CH12. Which of the following things do you associate with each type of protein? Base: (n=500)

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



PROTEIN LANDSCAPE IMPLICATIONS:

Beef and Lamb maintain strong TOM awareness, but claimed consumption softens.

What do we see?

1

Awareness of Beef and Chicken on par, but chicken most purchased and consumed

Beef and Chicken on par for TOM awareness, ahead of other proteins. Almost all HH have bought chicken in last month

2

But Beef strengths not as clear

Beef is known as the family favourite, and well cared for, with no other real strengths. Chicken is cheap, versatile and convenient to purchase.

3

Improvements for fish

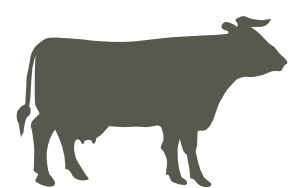
Both purchase and general endorsements are up significantly for fish.

Now what?

Beef perceptions are stable, but worth understanding that it's role is less clear vs, other proteins. Both an opportunity to take advantage of and a challenge to consider in ensuring a role for AU beef in the repertoire of those in KSA.

Has there been a notable shift in volumes or role of fish and seafood in the last year in KSA?

BEEF & LAMB COO BRAND HEALTH & PERCEPTIONS

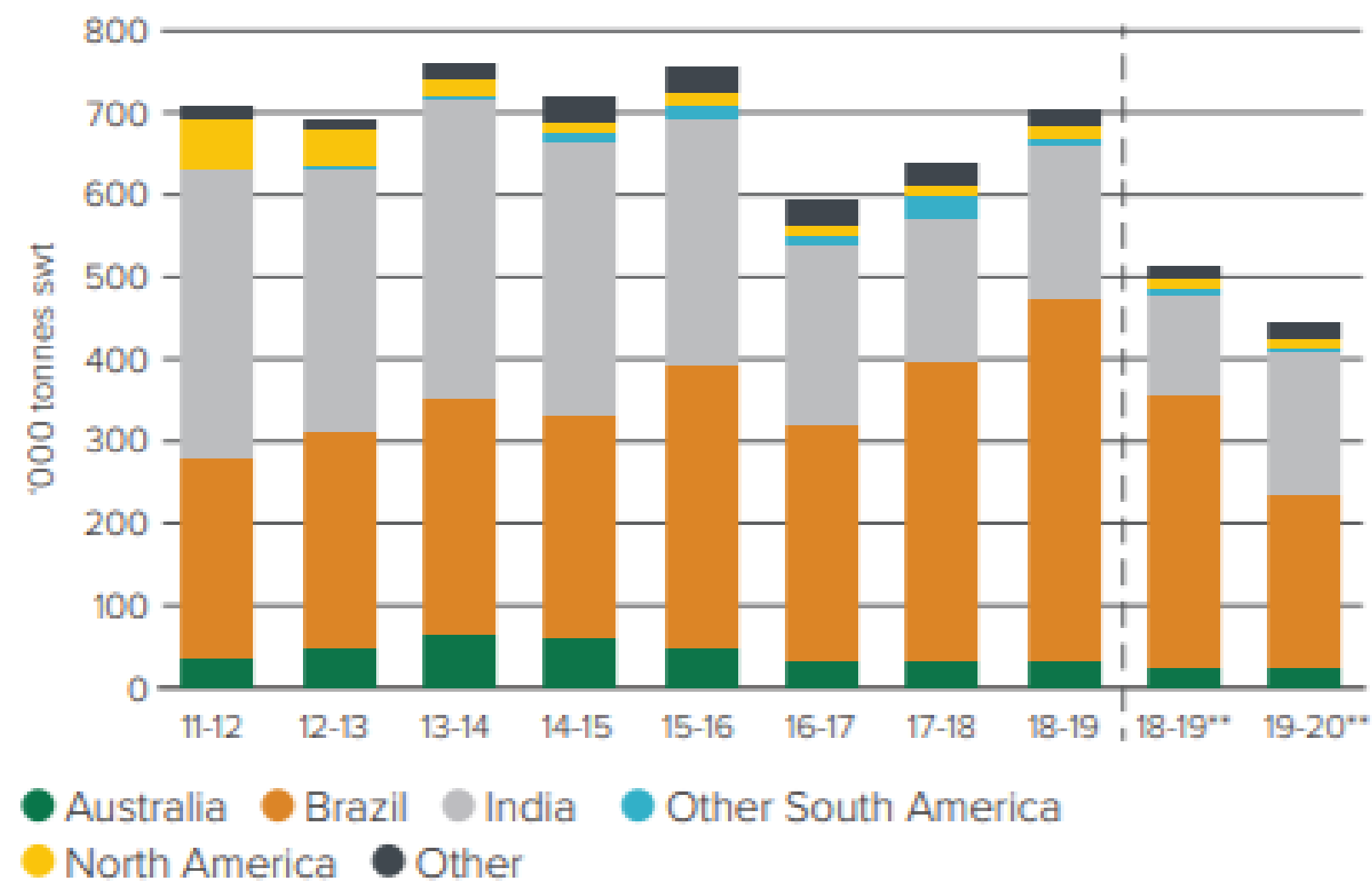


All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.

We have seen a downturn in exports to MENA since 2018 for both beef and sheep-meat impacting the volumes of all key exporters although beef exports from India showing resilience recently. Brazil the big imported player for Beef.

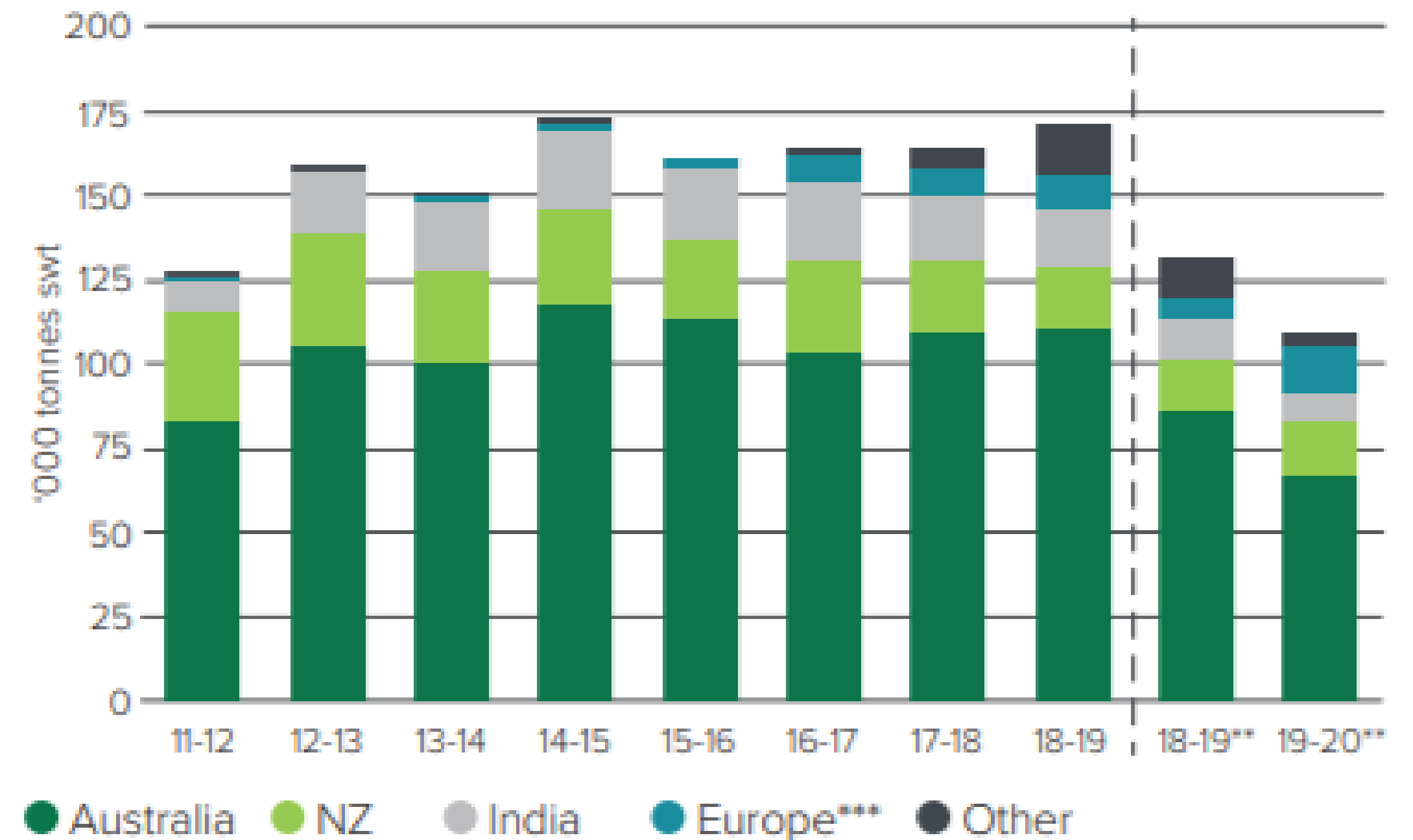
MLA market snapshot – MENA (2020)

Beef/veal exports to MENA* by supplier



Source: IHS Markit. Excludes offal. *MENA-10 countries **FYTD Jul-Mar

Sheepmeat exports to MENA* by supplier

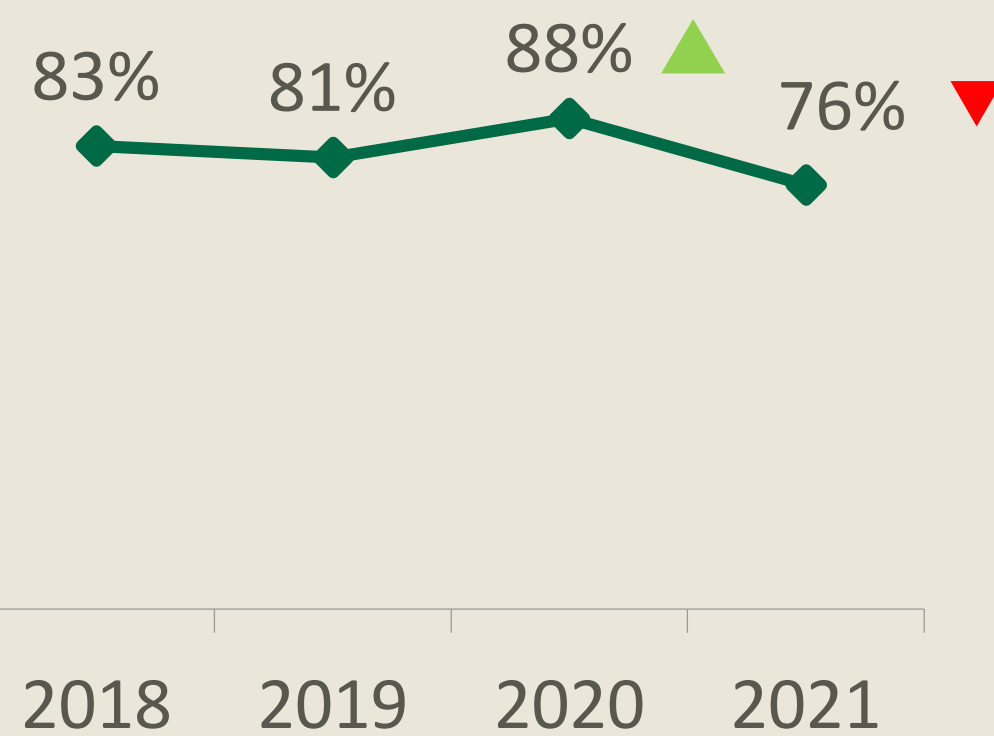


Source: Source: IHS Markit.

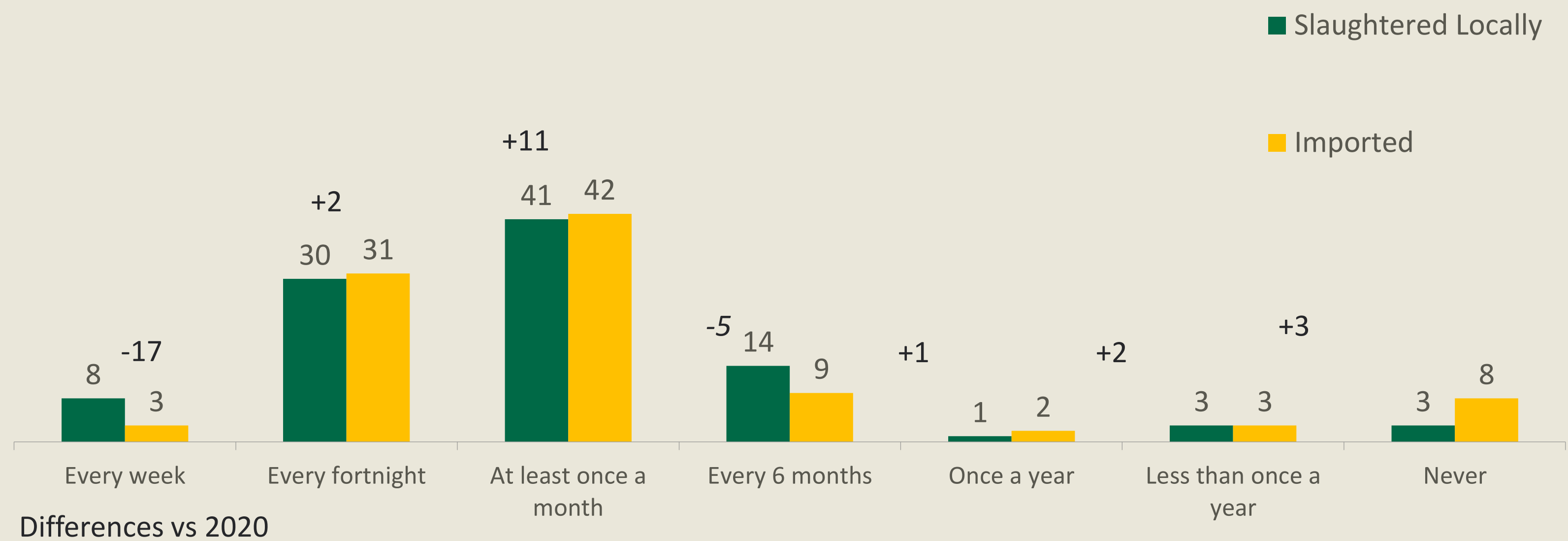
*MENA-10 Countries **FYTD Jul-Mar ***Europe includes EU-27 and UK

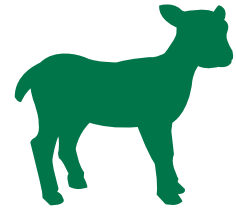
While claimed awareness of beef COO rose during the pandemic has declined this year. The proportion purchasing imported beef weekly has fallen, down amongst those aged 30+ versus last year.

Know Country of Origin?



FREQUENCY OF BUYING **SLAUGHTERED LOCALLY** AND **IMPORTED** BEEF





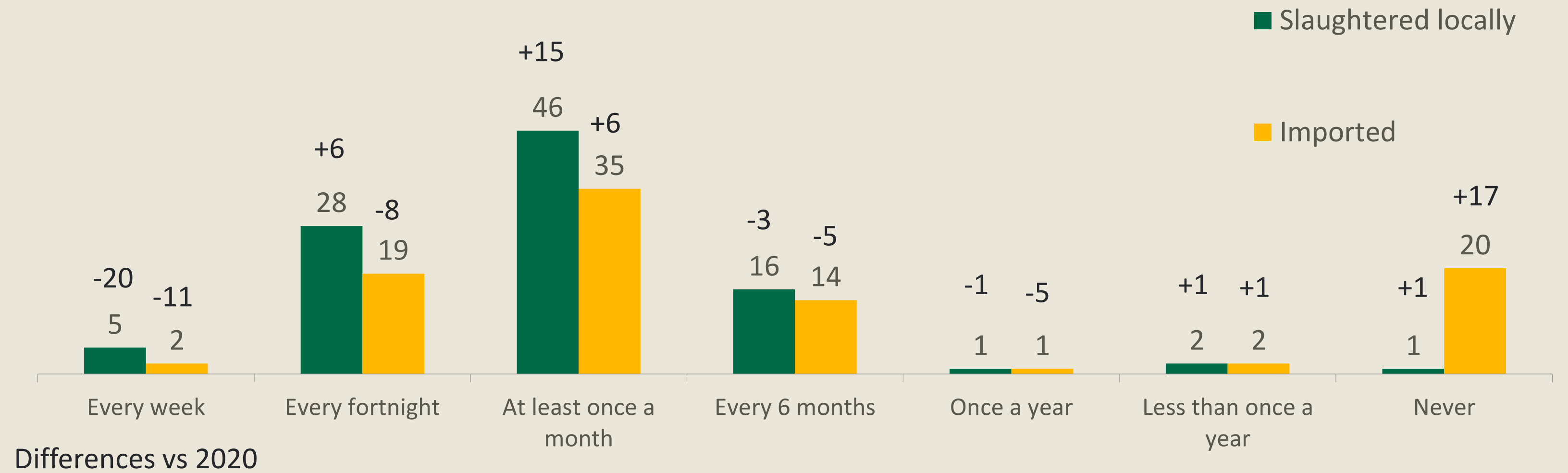
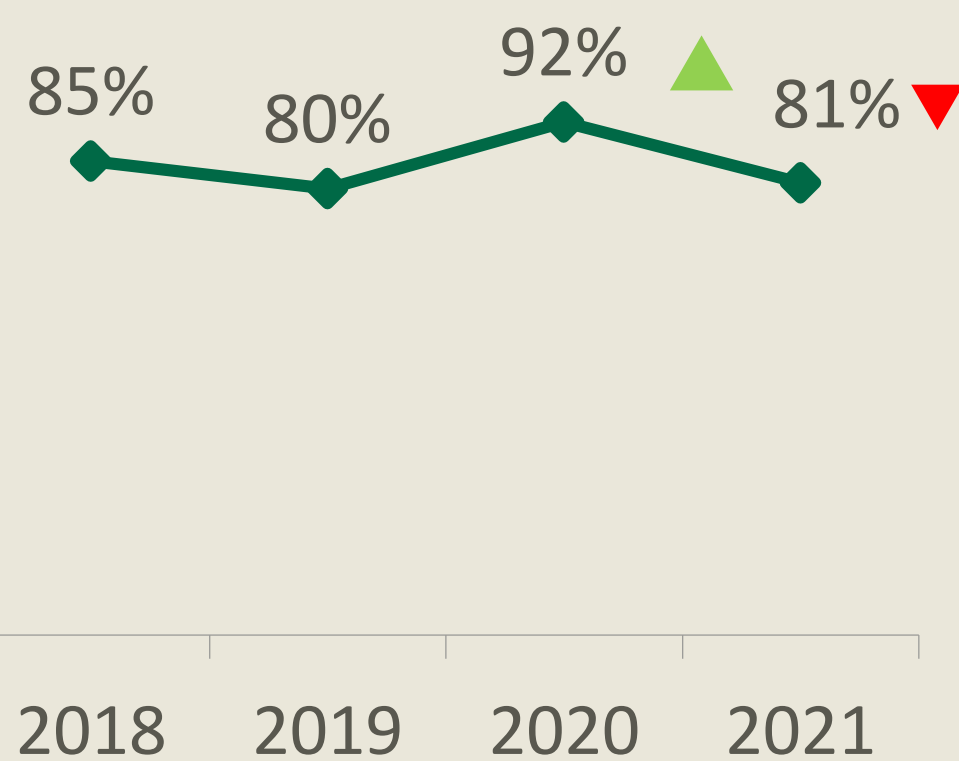
Similarly to beef, claimed awareness of lamb COO has fallen in the last year, now back to pre-COVID levels. Frequent purchase of imported product has also declined, with a commensurate rise in those who claim they have 'never' bought imported.



Thought for discussion:
Has there been a change in the regulation or labelling that could impact awareness of imported purchase?

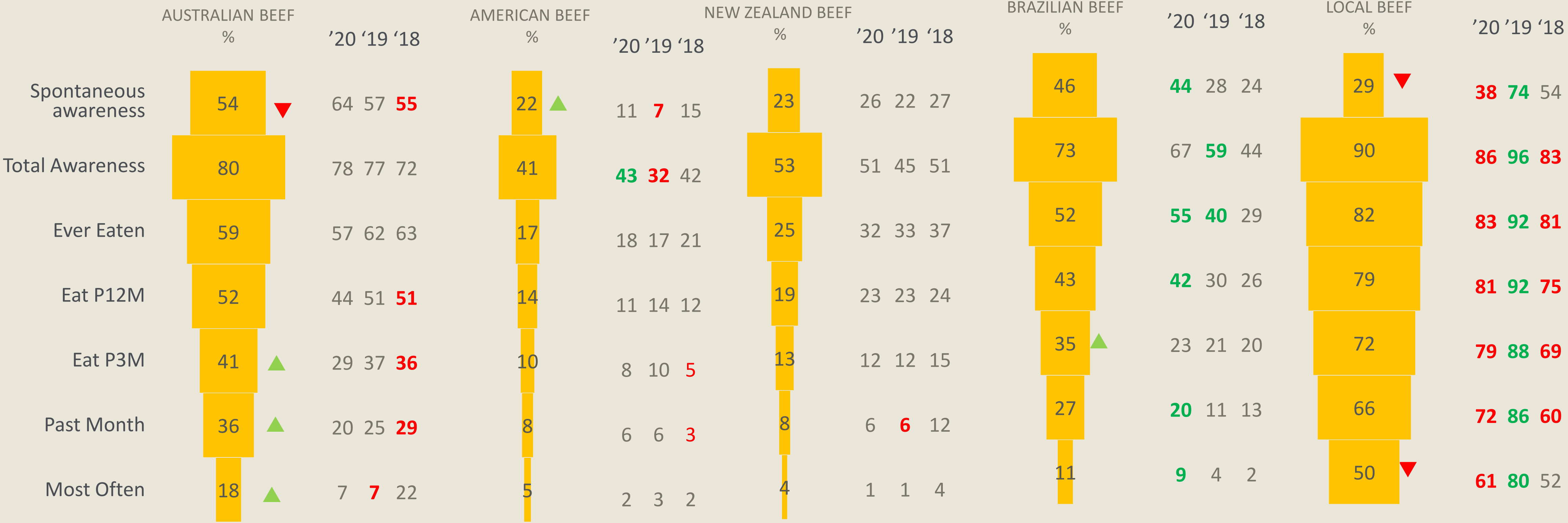
FREQUENCY OF BUYING
KEY: **SLAUGHTERED LOCALLY** AND **IMPORTED** LAMB

Know Country of Origin?

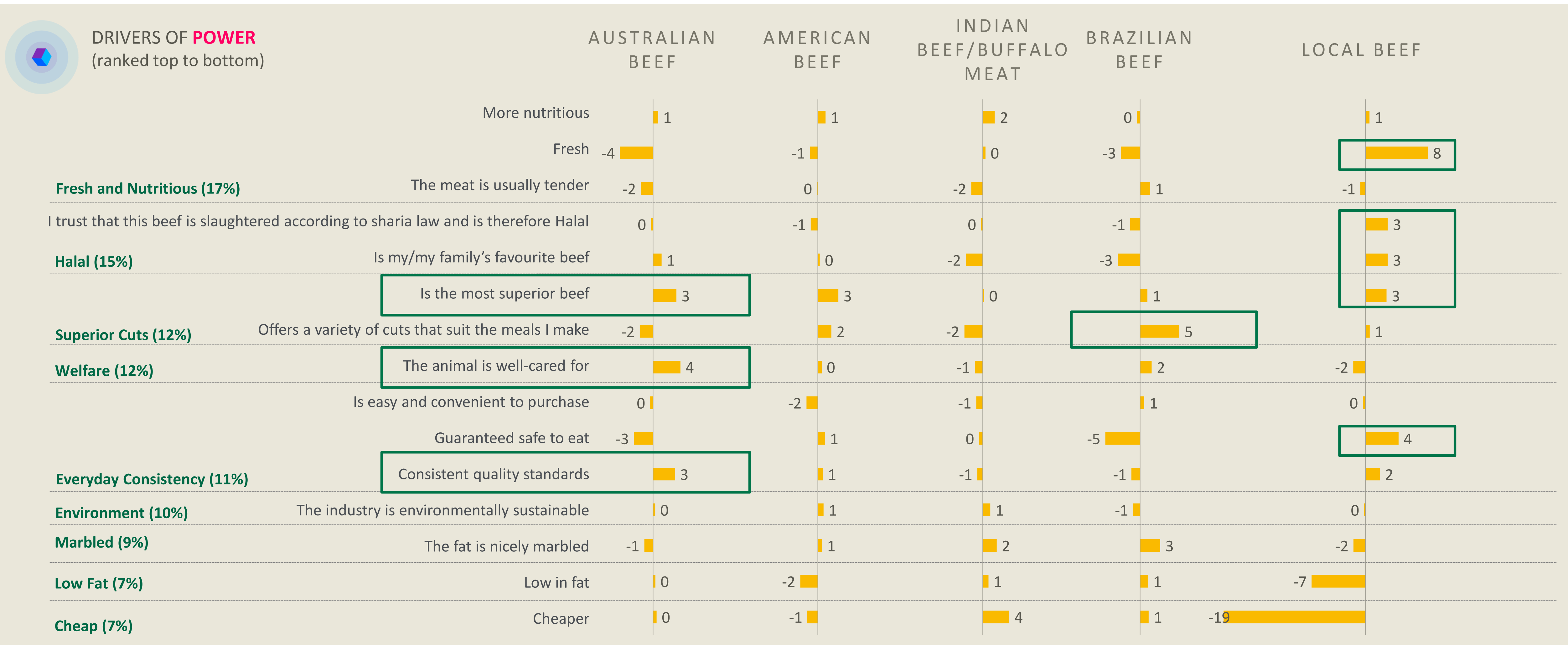


Top of mind awareness is down for Local and Australian Beef, taking AU back to 2018 levels. Lower funnel metrics (claimed consumption) returning for AU after dip in 19/20, but local still well ahead.

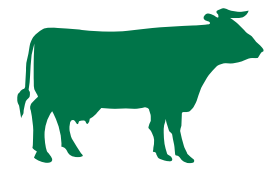
BRAND HEALTH – BEEF



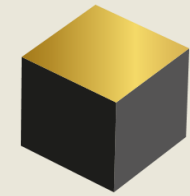
AU has three clear associations, bordering on strengths: consistent quality, welfare and most superior beef, but not seen as Fresh. Local beef associations are clear in consumers minds, standing for fresh, superior, families favourite and safe to eat (the same as 2020, but softening).



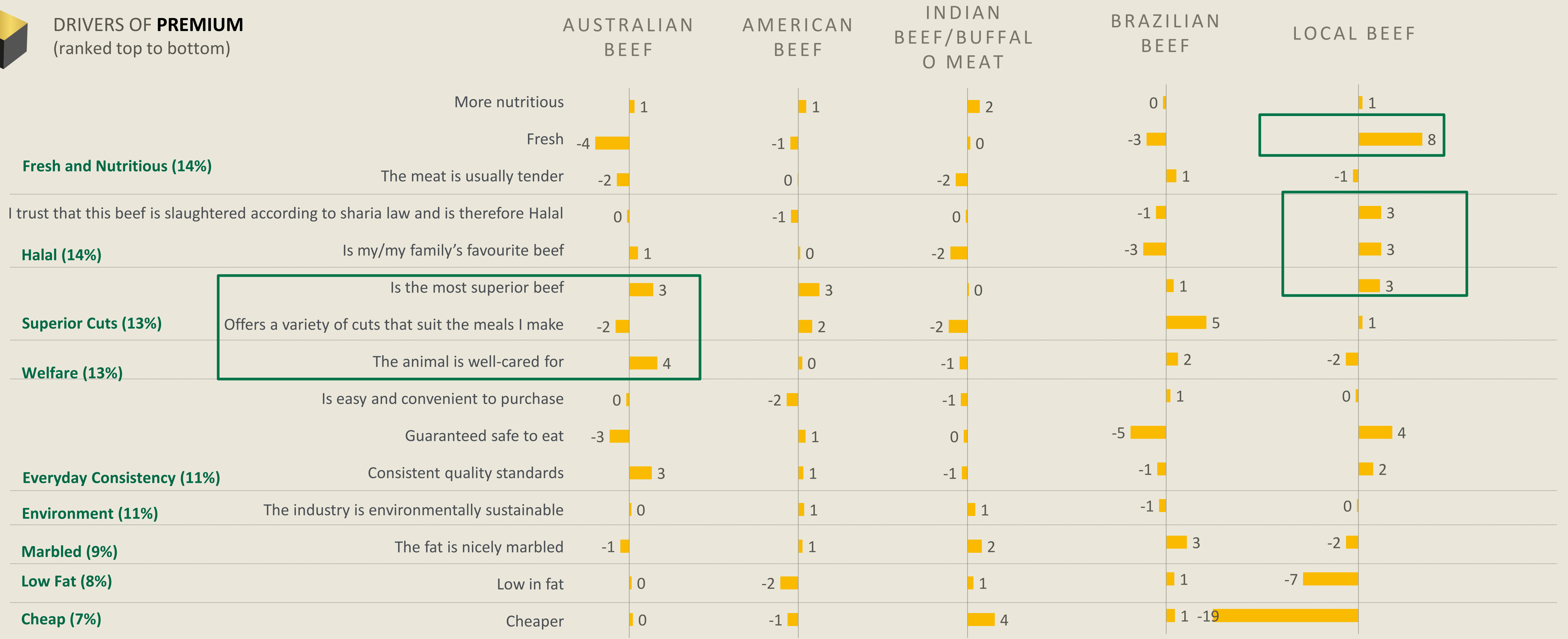
BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=249). 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.



While they have softened in the last year, Local's strengths are drivers of Premium, in particular Fresh, Halal and Family Favourite.



DRIVERS OF PREMIUM (ranked top to bottom)

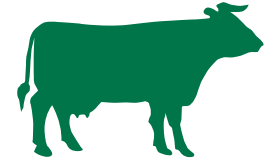


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KANTAR

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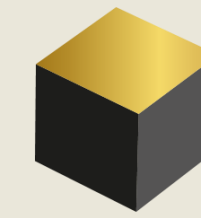
As we see with the factor groupings, at the statement level, what drives Power, also drives Premium. Fresh, safe to eat, Halal and consistent quality should be communicated to grow brand volume and value.

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

OBJECTIVE:



GROWING **EQUITY/VOLUME**



GROWING **PREMIUM/VALUE**

TOP 5 ASPECTS TO
FOCUS ON WHEN
DRIVING THESE
OBJECTIVES IN
THIS MARKET...

1. Fresh

2. Guaranteed safe to eat

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

4. Consistent quality standards

5. Is my/my family's favourite beef

1. Fresh

2. Guaranteed safe to eat

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

4. Consistent quality standards

5. Is my/my family's favourite beef

BEEF BRAND HEALTH & PERCEPTIONS - IMPLICATIONS:

AU Beef has strong equity which supports both brand power and our premium. Local is the family favourite but has seen equity eroded this year.

What do we see?

1

AU and Local strongest brand health

AU and Local are the dominant brands, but local is by some way the #1 brand in market.

2

Brazil and AU beef very similar brand equity, but differing associations

AU is has some associations that are leaning towards strengths but in truth it is not clearly defined. These are in consistent quality, superior and animal well cared for. Brazil is known for offering variety

3

The attributes that build power, also build premium

Associations of Fresh, guaranteed safe to eat, and consistent quality are all attributes that build brand power and premium.



Now what?

AU well positioned with an established brand to take advantage of any shortfall for local and continue to hold the position amongst imported product.

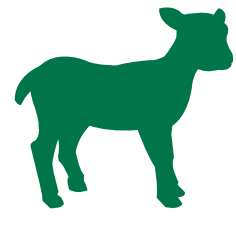
Consistent quality is an association with which we already have some traction and can credibly re-build. Ensure that we are communicating how we achieve our consistent quality (through process) and then ensure we are delivering against expectations of that consistent quality to grow premium equity and drive consumer choice.
(Consistent with UAE)



LAMB BRAND HEALTH & PERCEPTIONS

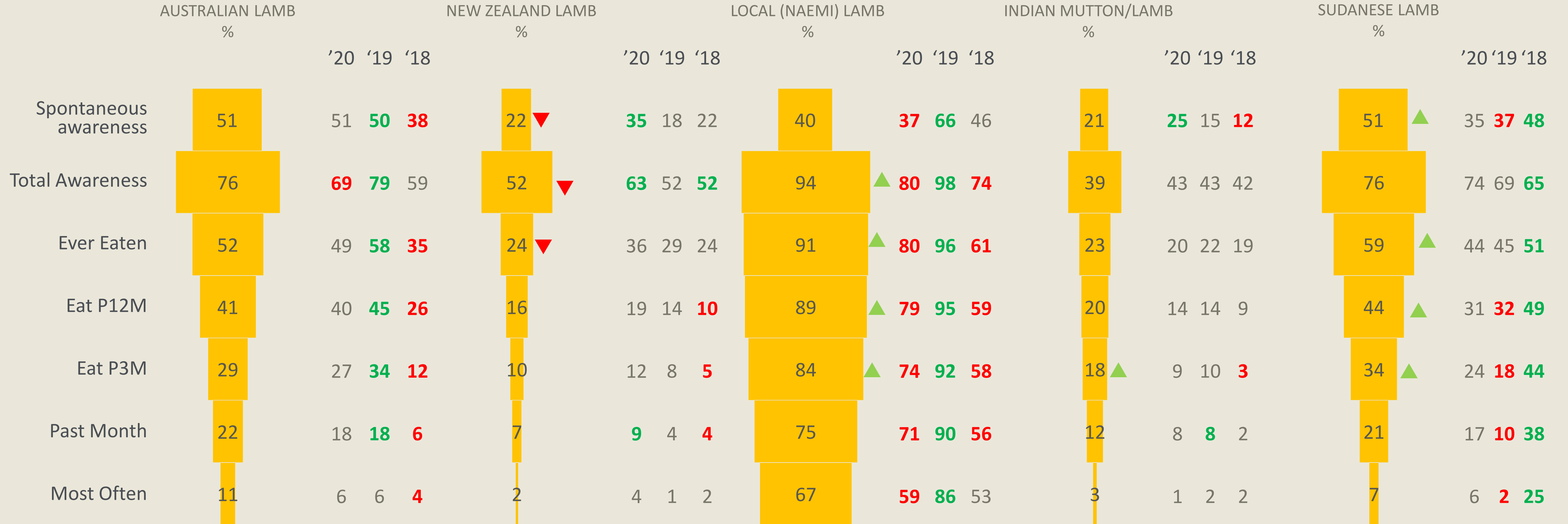


All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.



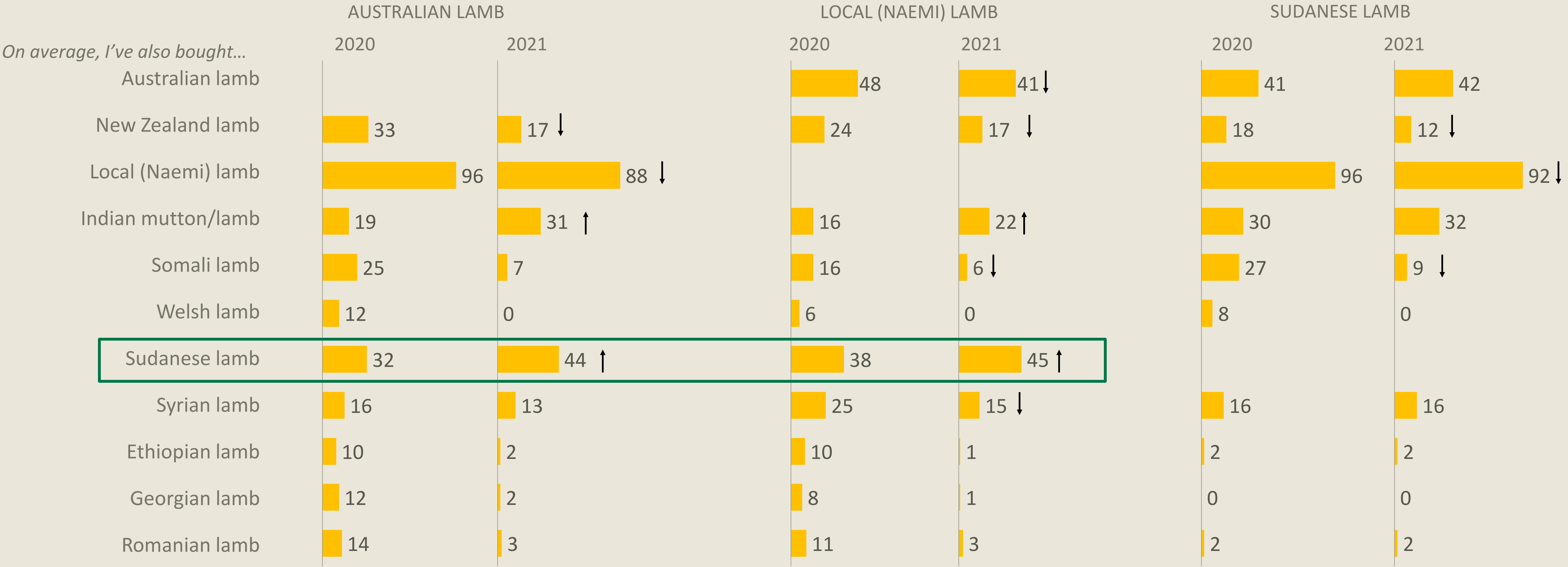
Within the competitive landscape, local lamb recovers from 2020 declines, while Sudanese has built top of funnel back to 2018 levels. AU remains stable through all funnel metrics.

BRAND HEALTH – LAMB



We also see some YoY shifts in repertoire. With the growth in Sudanese flowing through into the repertoire of both local and AU lamb consumers.

If I've bought...

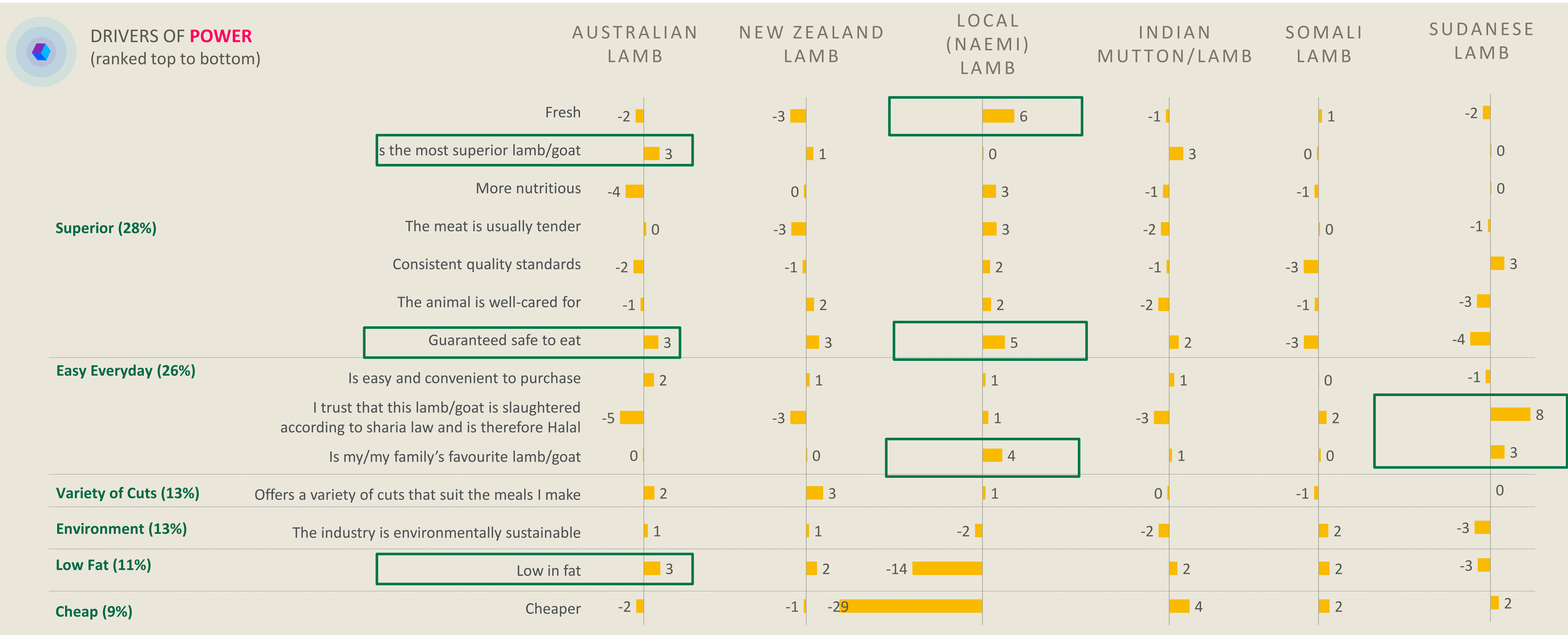


Base Trialists: Total (n=245), Australia (n=104); New Zealand (n=41), Local (n=224), India(n=50), Sudan (n=110)
 QLBH4. And which have you eaten in the last year?
 *Caution low base

EATEN PAST 12 MONTHS



Local Lamb is clearest in consumers minds, a safe, fresh favourite that's high in fat, but expensive. AU plays to some superiority and safety but Halal is weaker relative to the competitive set where Sudan is strongest.

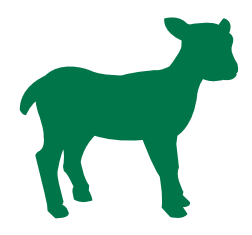


LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to lamb from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=251). 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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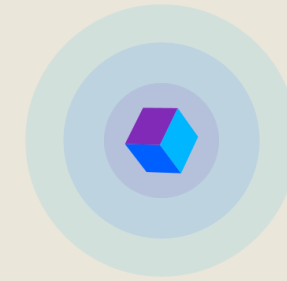
mla
MEAT & LIVESTOCK AUSTRALIA



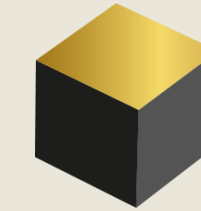
As with Beef, the associations that grow brand equity also grow Premium. Safe, nutritious and fresh, coupled with quality standards.

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

OBJECTIVE:



GROWING **EQUITY/VOLUME**



GROWING **PREMIUM/VALUE**

TOP 5 ASPECTS TO
FOCUS ON WHEN
DRIVING THESE
OBJECTIVES IN
THIS MARKET...

1. Fresh

2. Guaranteed safe to eat

3. More nutritious

4. The meat is usually tender

5. Consistent quality standards

1. Fresh

2. Guaranteed safe to eat

3. More nutritious

4. The meat is usually tender

5. Consistent quality standards

LAMB BRAND HEALTH & PERCEPTIONS- IMPLICATIONS:

Australian and Local product remain #1 and 2, Sudanese lamb the big improver. With the key drivers of equity and premium the same in KSA we can build both with focused activity.

What do we see?

1

Local lamb very strong, Sudanese lamb a big improver moving past AU.

Local Lamb has a very strong brand, while Sudanese have increased their strength through the brand funnel and this is reflected in improved brand equity.

AU is known for being the low in fat, superior and safe to eat.

Now what?

Sudanese more of a substitute for Local but establishing a growing role in the repertoire of Saudis, including those who consume AU.

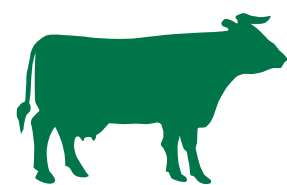
2

Current associations can be leveraged to build both Power and Premium

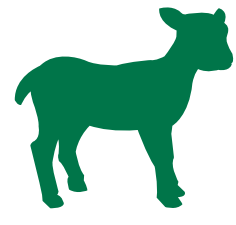
The top 5 attributes that drive Power and Premium are the same: Being seen as safe to eat, nutritious, and being seen as fresh, tender along with consistent quality. Two of these are already areas of relative strengths

Presents an increasing need to differentiate on our superior and safe associations, which are currently bordering on strengths.

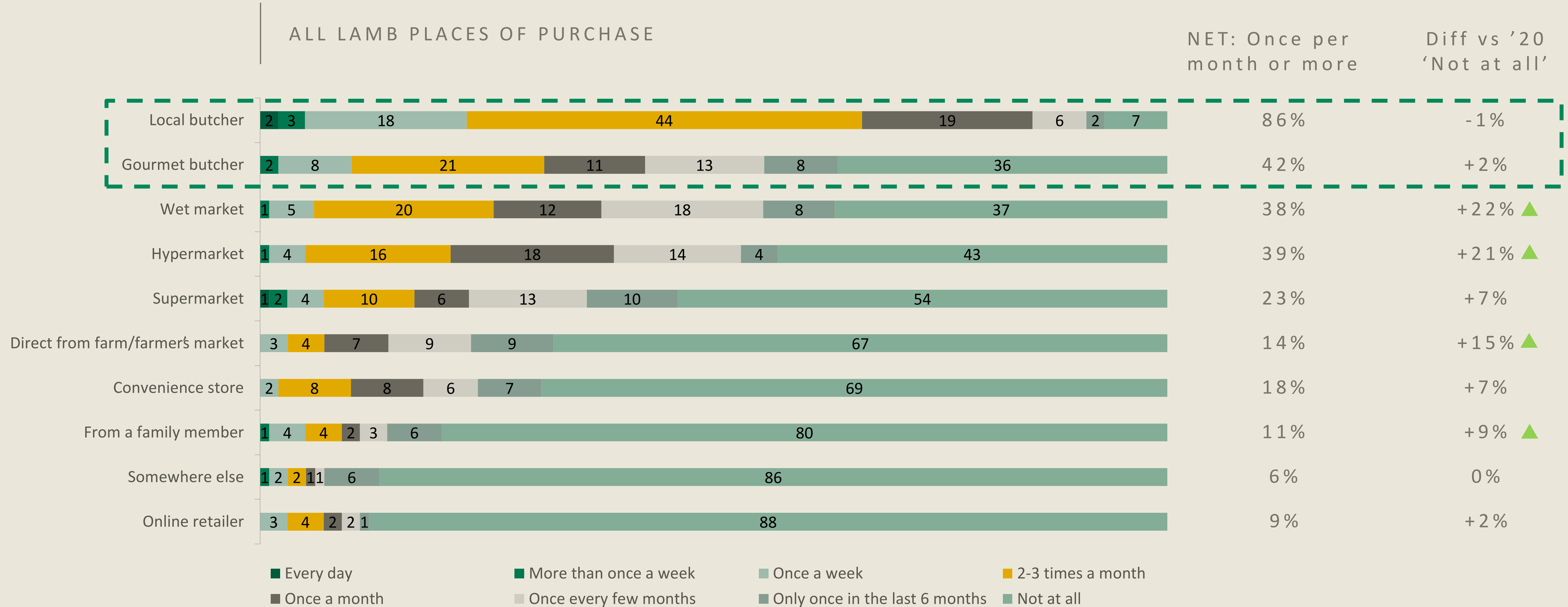
LAMB DEEP DIVE

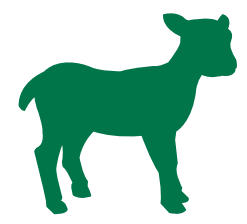


All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.



Local Butchers are the primary and most frequently used channel for lamb purchase, gourmet butchers are #2 with no change in their frequency of use since versus last year.

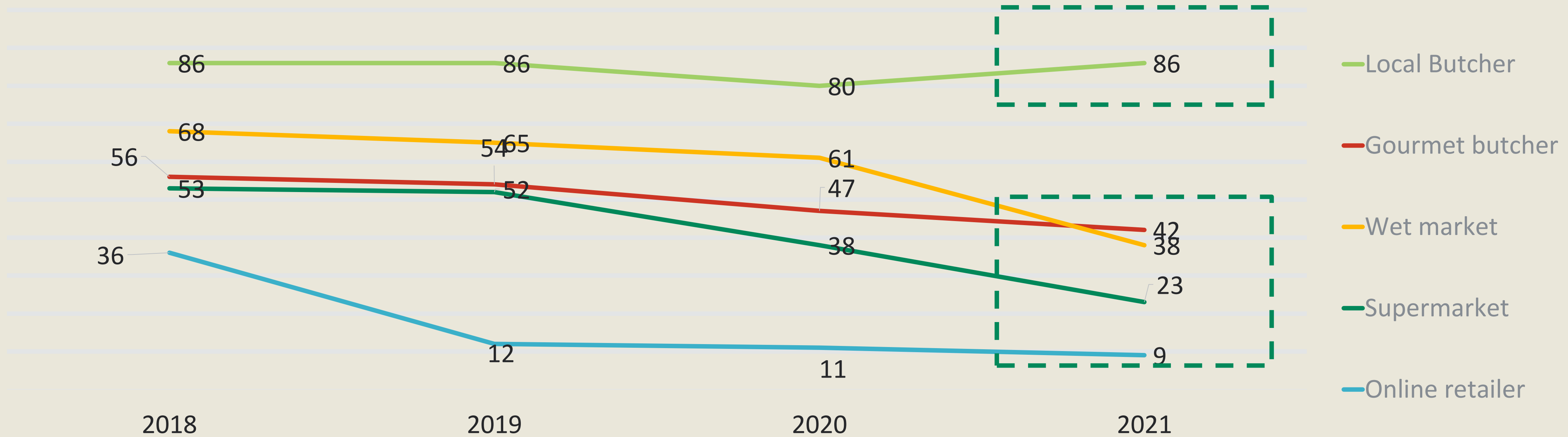




With the exception of local butchers, all other channels monthly usage has been on a downward trend in recent years.

PLACES OF PURCHASE (Lamb)

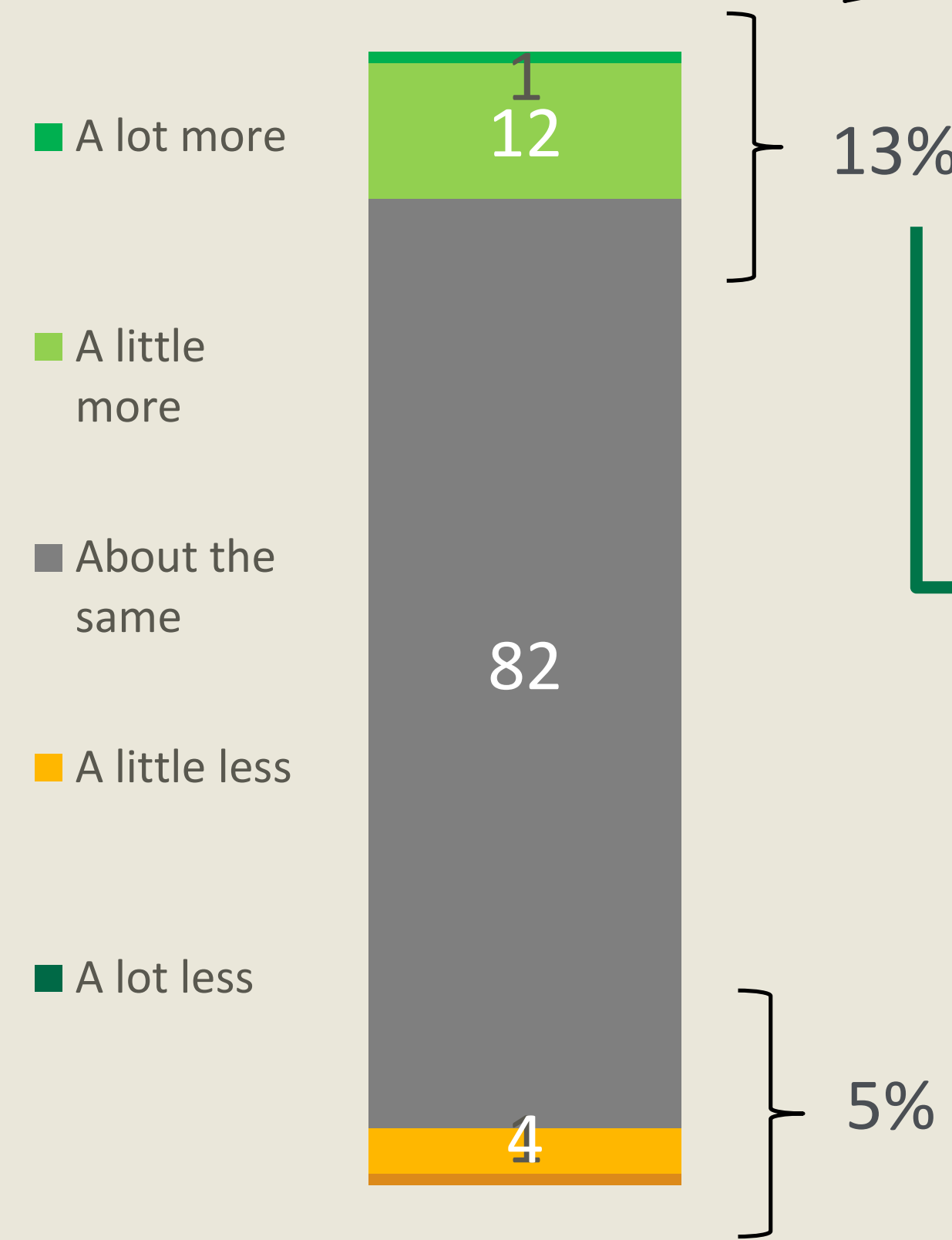
Once per month or more often (net)



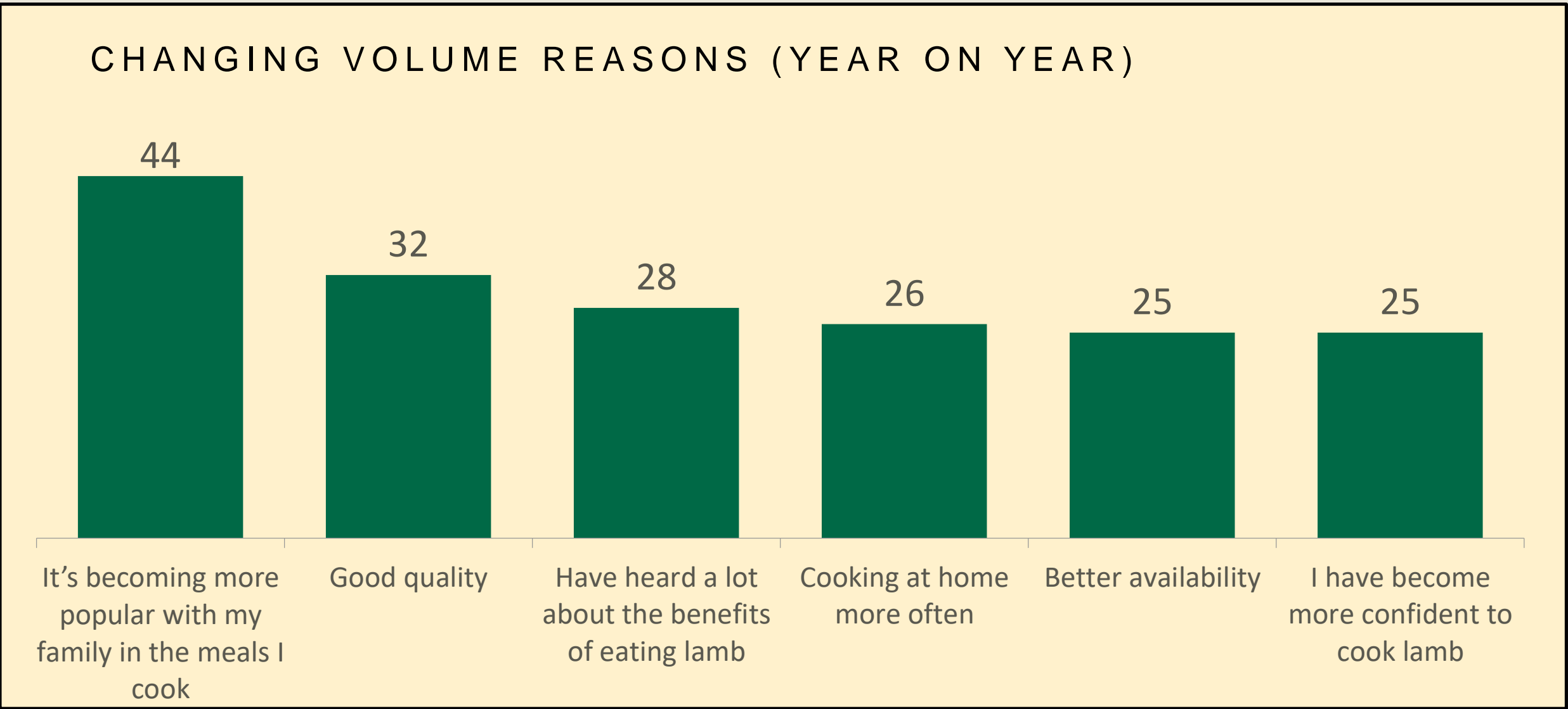
That said, those who are buying lamb, which is most of our sample, claim to be doing so to similar levels vs. last year. For the 1 in 9 who are buying more this year the primary driver is family influence.

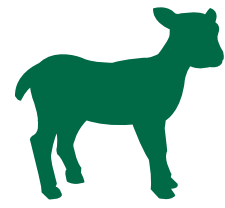
VS LAST YEAR, I AM BUYING...

EVER BOUGHT LAMB:
90%
Yes



Who?
Skews towards consumers who are **Male, AB** social class and **higher income** (241K SAR+), and more likely to shop online for meat.





Only 1 in 10 imported red meat consumers have never bought lamb, falling from about 2 in 10 back in 2019. The #1 barrier is lamb being too fatty, an issue for half of all non-users, significantly higher than the global average. #2 is the smell, a barrier for about 1 in 3.

10%



Who? Skews towards consumers of C1 social class, Jeddah and more frequent beef buyers

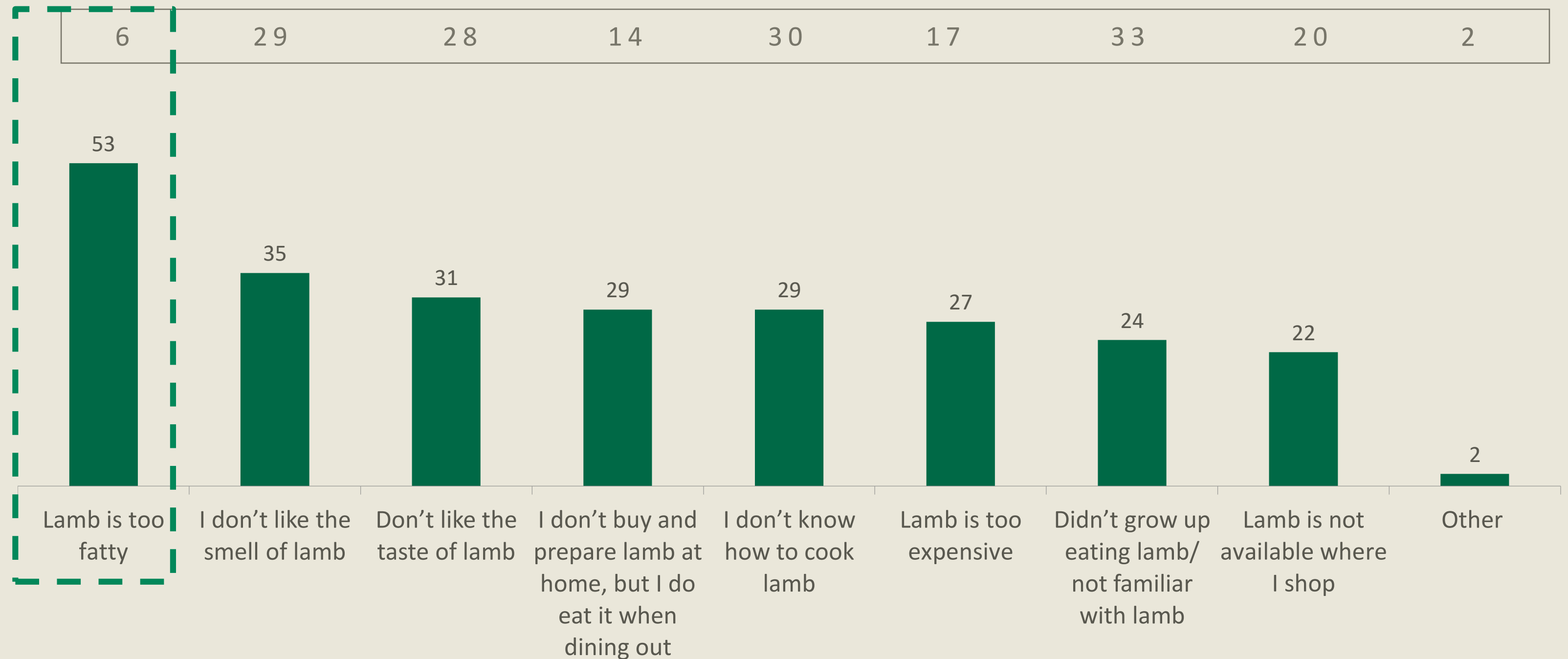
Of the sample have never bought lamb

2020: 18%

2019: 17%

Barriers

Global Average:



LAMB DEEP DIVE - IMPLICATIONS:

Most in the KSA are purchasing and eating lamb, with little change compared to last year. Taste, fattiness and smell, and a lack of familiarity the key barriers for those not eating

1

Narrowing of channel options in 2021

Only local butchers (the channel with greatest penetration for lamb) have seen their frequency maintained over time. All other channels have declined in their more frequent use.

What do we see?

Now what?

If there is a narrowing route to consumers for Lamb, or less frequent purchasing, how does this impact the way that we support distribution in the KSA market for our Lamb?

2

Barrier of fattiness, and facilitator of better quality

In KSA fattiness of lamb significantly above the global average and comfortably #1 barrier, those who don't currently eat suggesting better quality and opportunities to try the product.

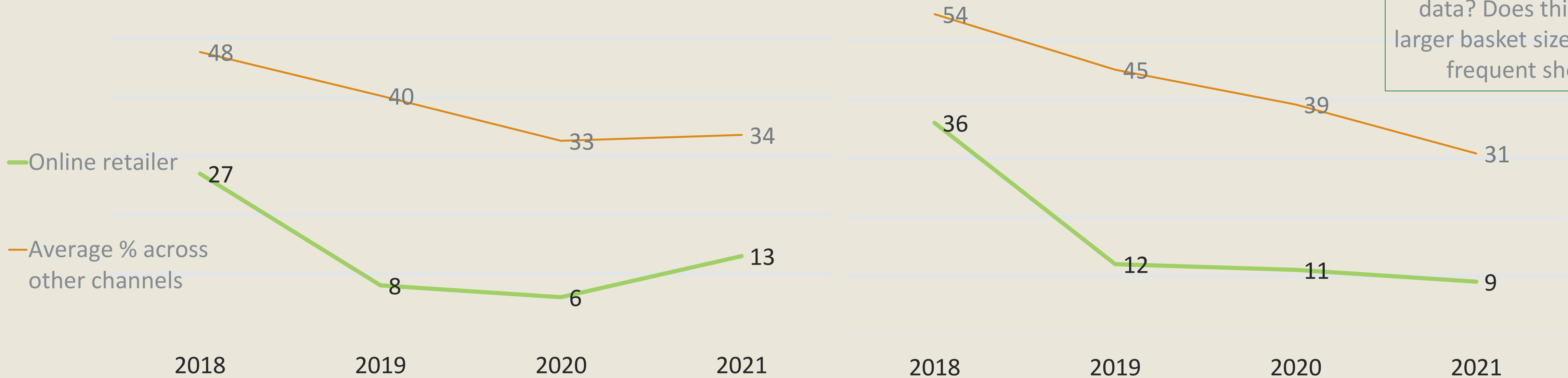
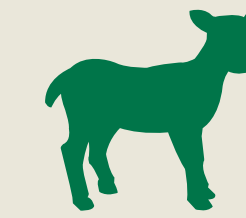
Does our product lend itself to alleviating this barrier, or facilitating communication or quality of the product?



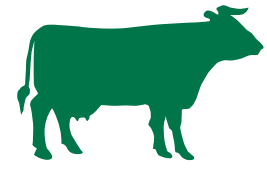
ONLINE SHOPPING BEHAVIOUR

Online shifted down in 2018 and has remained low, apparent uplift for purchasing beef online this year. Online monthly use has generally reflected the trends in the overall category rather than uncharacteristic changes.

PLACES OF PURCHASE (MONTHLY OR MORE OFTEN) – ONLINE

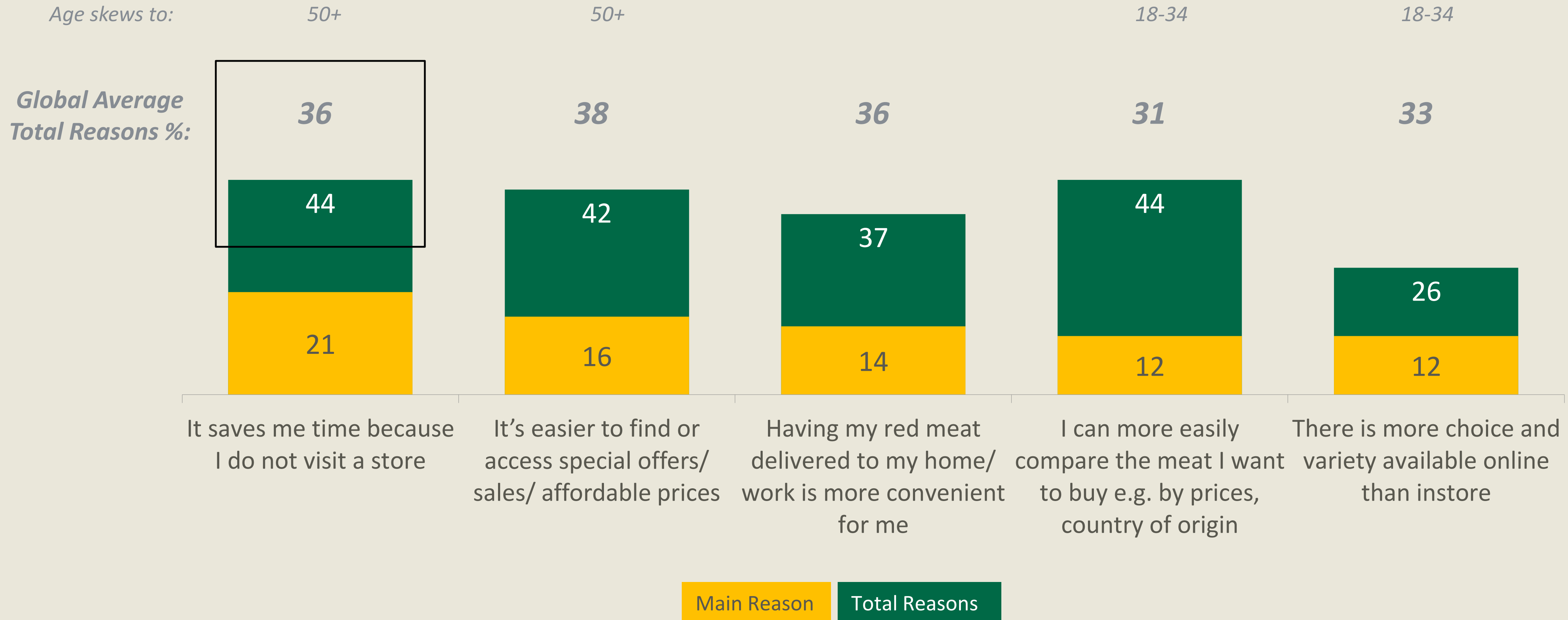


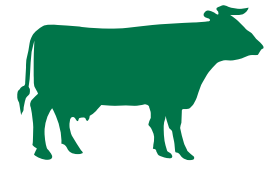
Is there other evidence of fewer channels used and less frequent visits across channel in any secondary data? Does this mean larger basket sizes but less frequent shops?



For those who've ever bought beef online, the most common reason for doing so is saving time, which is the primary reason for more than 1 in 5 and above the global average. Comparison of products also seen as a benefit for 2 in 5.

FACILITATORS TO BUYING BEEF ONLINE:

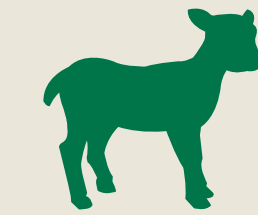
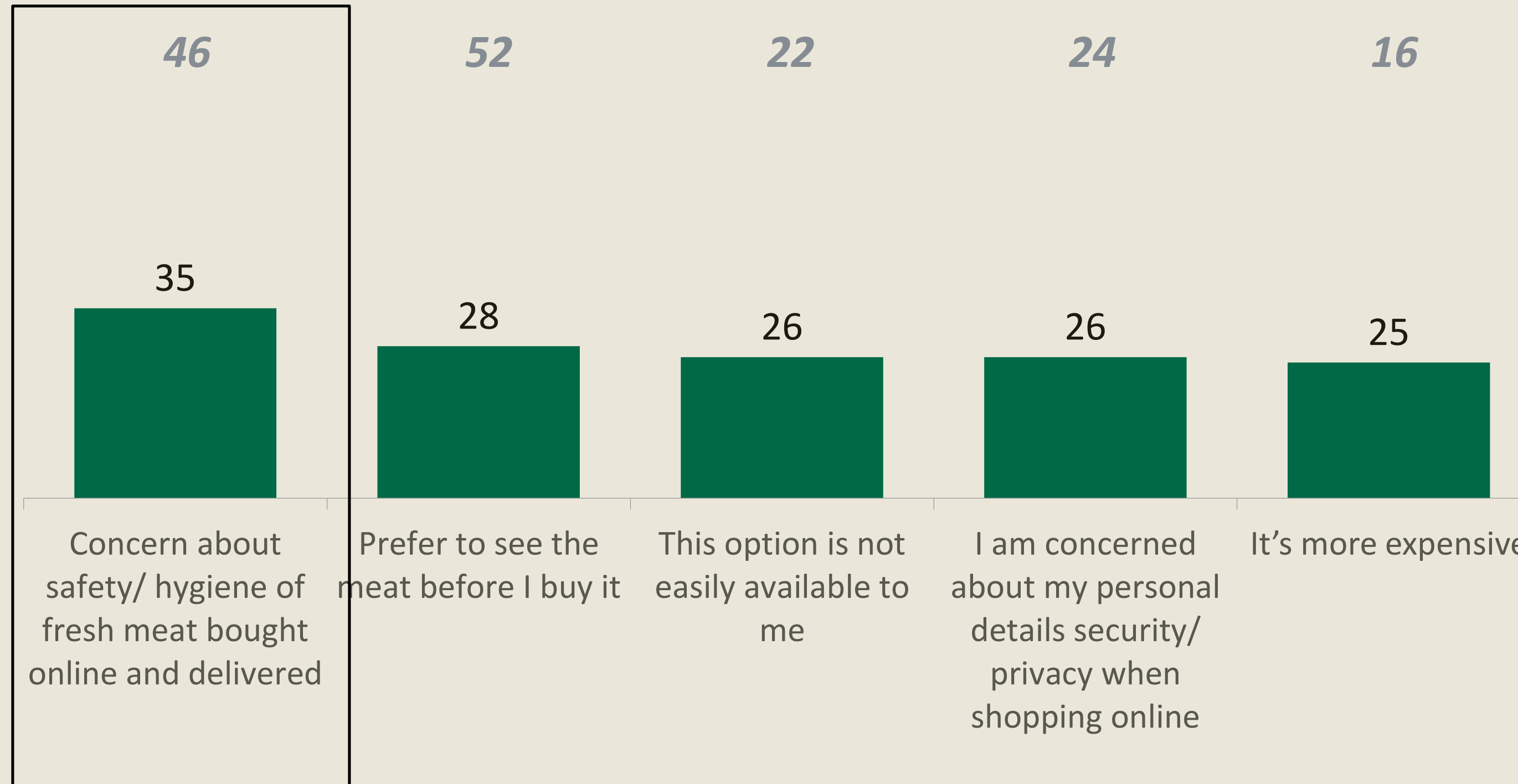




For those who have not purchased beef online, concerns about the safety of the product are the #1 barrier (#2 at a global level).

BARRIERS TO BUYING BEEF ONLINE:

Global Average
Total Reasons %:



No differences in order, or size of barriers for lamb.

CHANNEL, ONLINE FACILITATORS & BARRIERS - IMPLICATIONS:

Unlike in other markets, we have seen a continued fall in the use of online for purchasing beef and lamb in recent year. Barriers and drivers align with global.

1

Online falls versus 2018 for both beef and lamb

Monthly or more frequent purchase of beef and lamb online has been falling since 2018, for beef this has seen a slight uplift this year, but the trend aligns with other channels, with fewer claiming to be used

A reduction in the use of online by consumers suggests a limited role for the channel in getting red meat to consumers for the time being. But targeted approach to reflect specific behaviours could give online a role.

What do we see?

Now what?

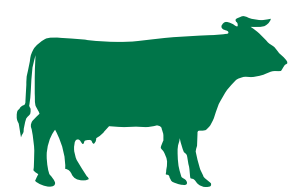
2

Convenience, value and comparability key facilitators

As seen in other MENA markets, largest facilitators of online beef purchase are the convenience of access, as well as ability to compare product on key variables in the more structured online environment.

Supporting distributors or retailers to facilitate this convenience could help to increase the frequency of use amongst those already comfortable with the channel.

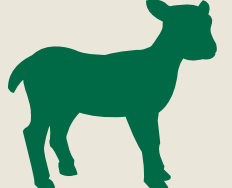
BEEF & LAMB COO TRUST PERCEPTIONS



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

In MENA Trust in the AU COO red meat is above (for Beef) or in line (for Lamb) with the global average.

Trustworthy (7 Point scale) – AU Beef & Lamb
MENA



Global average

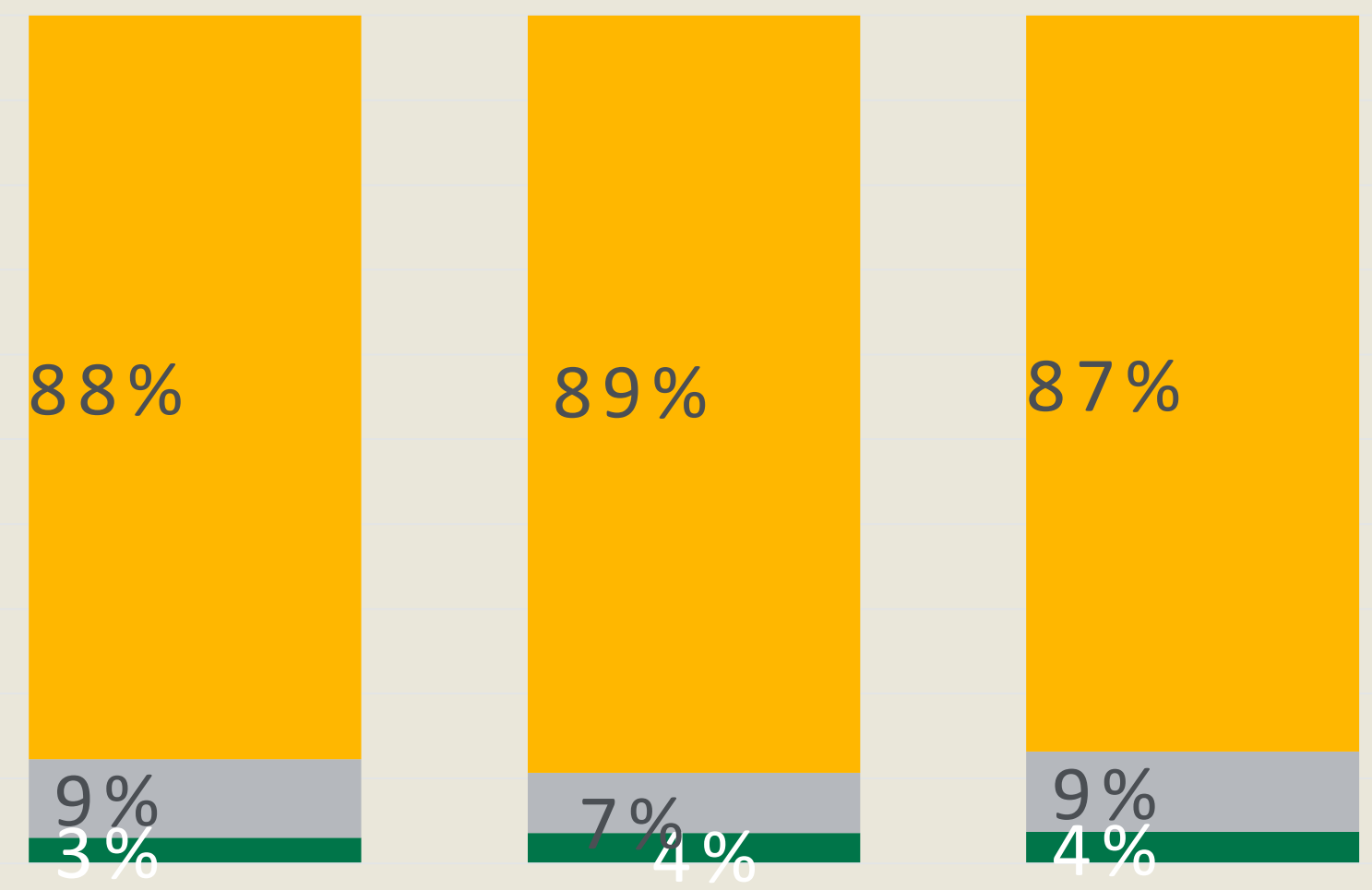
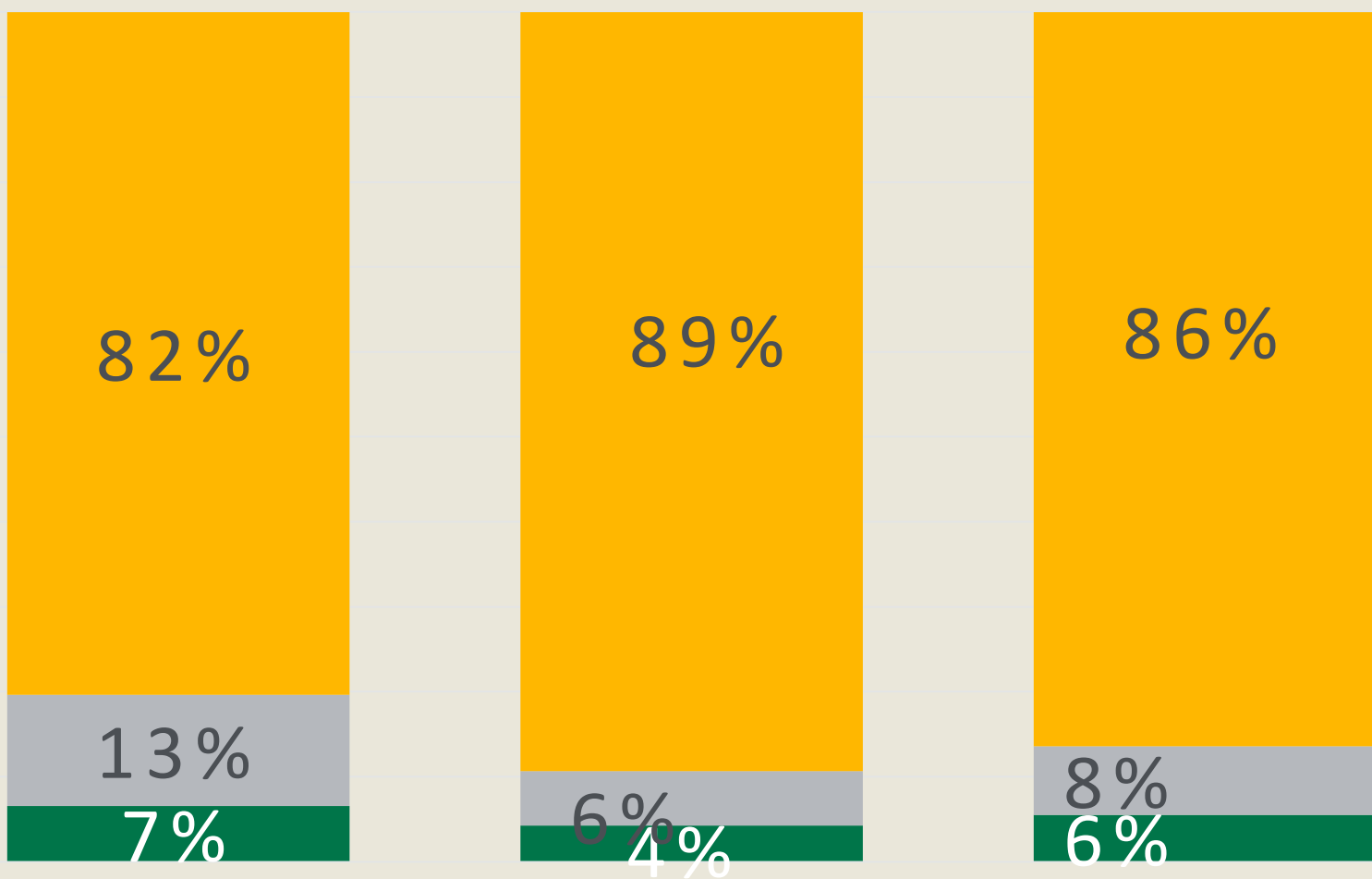
UAE

Saudi Arabia (KSA)

Global Average

UAE

Saudi Arabia (KSA)



■ 5 + 6 + 7 Very trustworthy
■ 4
■ 1 Not very trustworthy + 2 + 3



BTR2B. How trustworthy is the imported beef from these countries – 7 Point scale
Base: UAE (225); KSA (190)

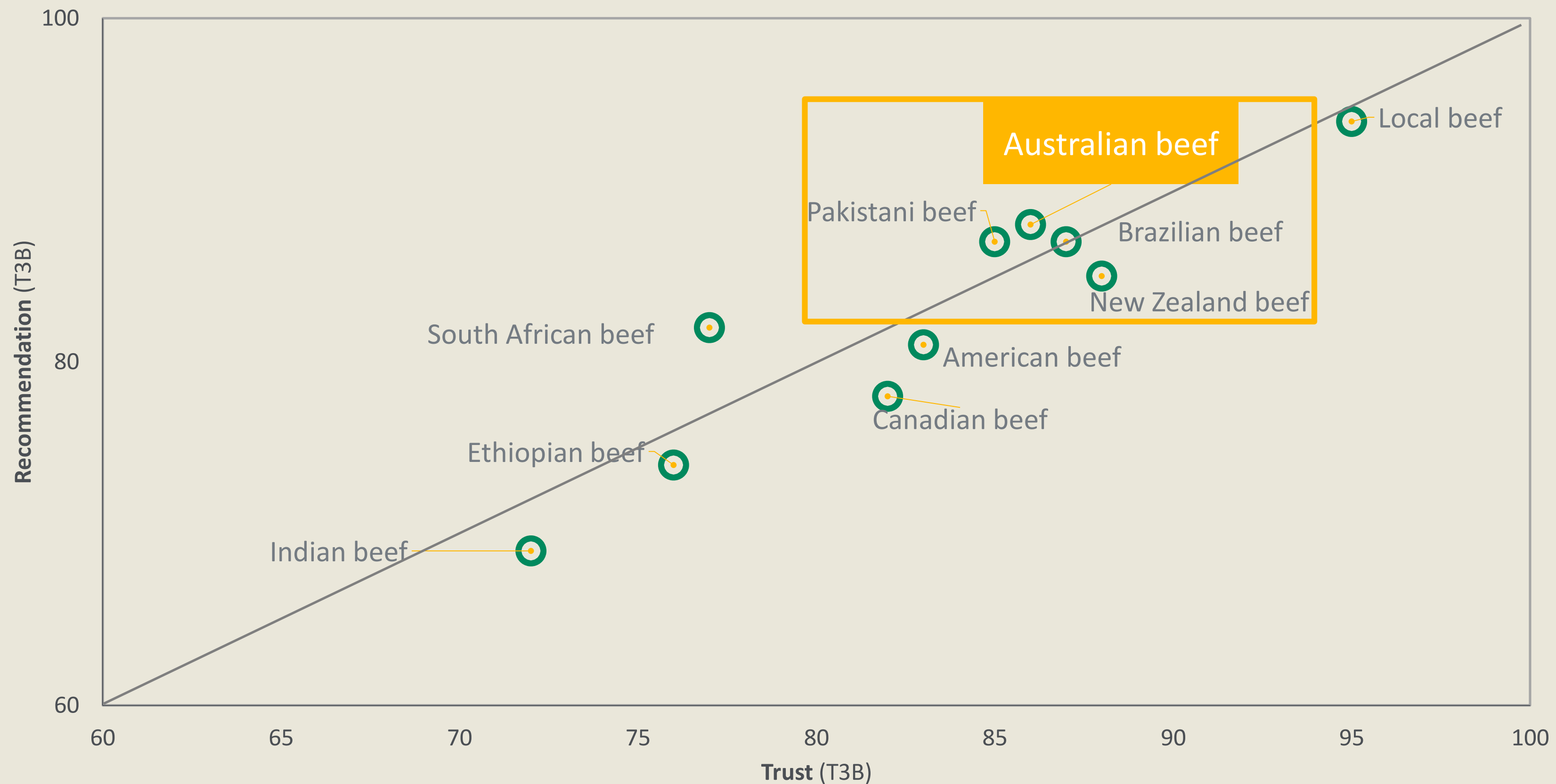
Beef Global average – 10 markets – Japan, Korea, China, Malaysia, Indonesia, USA, KSA, UAE, Vietnam, Thailand;
Lamb Global average – 7 markets - China, Malaysia, Indonesia, USA, KSA, UAE, Thailand



Looking at overall Trust, local beef by far the most trusted and AU beef sits in a cluster of COO beef brands with Brazilian, NZ and Pakistani. But AU has a larger proportion saying AU beef is 'very trustworthy' vs other international product.



Top 3 Box - Trustworthy vs. Recommendation (beef)
(KSA)



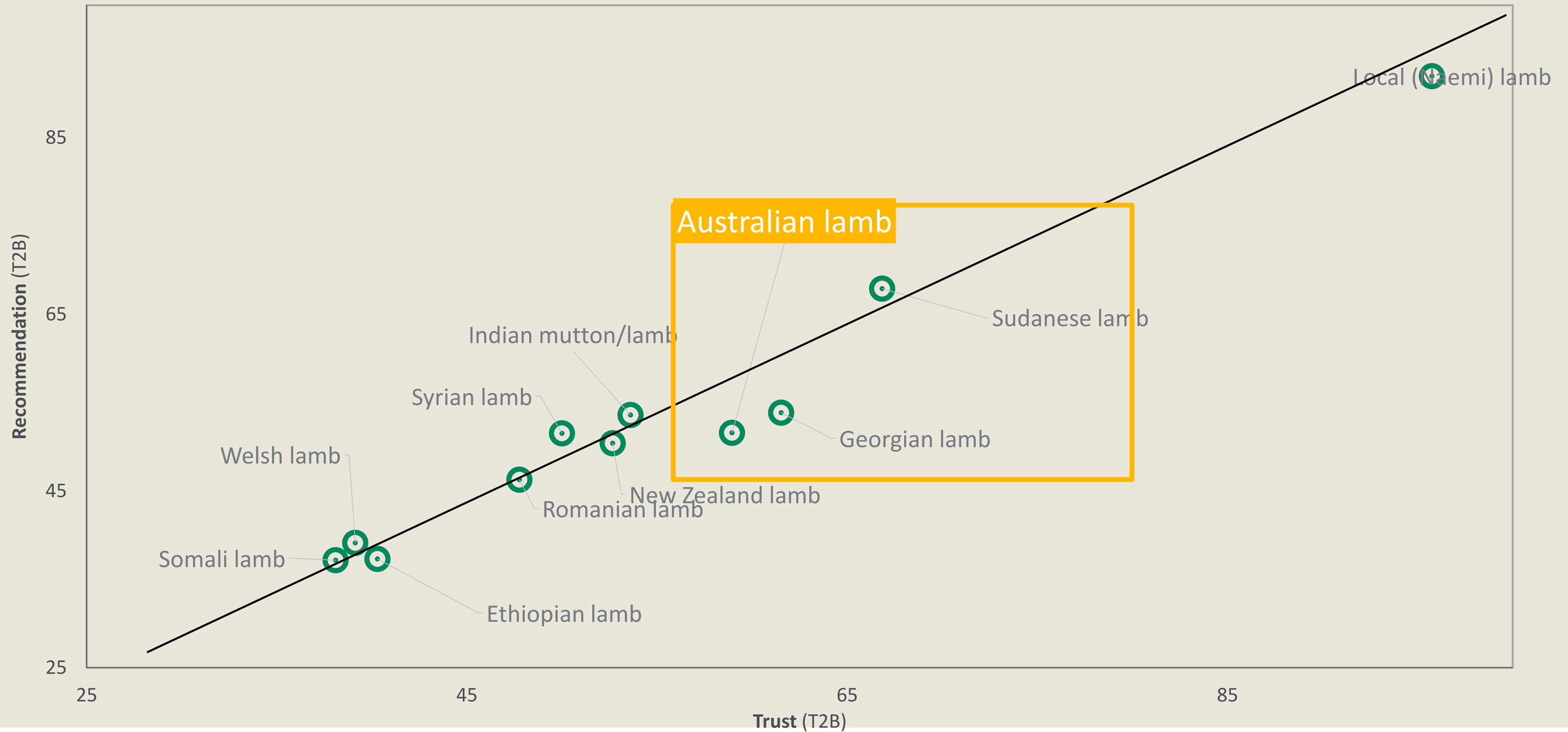
AU beef is a clear #2 when looking at % who nominate top box (very trustworthy, or top 2 box).

Note: scale truncated for visualisation



And AU lamb similarly falls into a grouping in a tier below the local product, this time grouped with Sudanese and Georgian lamb. AU and Georgian product are slightly more trusted relative to recommendation

Top 2 Box - Trustworthy vs. Recommendation (KSA)



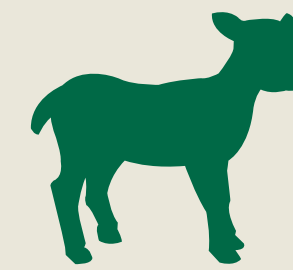
Note: scale truncated for visualisation

For both Beef and Lamb in KSA, consumers unprompted reasons for their trust are the same. For those who are very Trusting of AU product, Freshness, Natural (and product reputation for lamb) are significantly stronger.

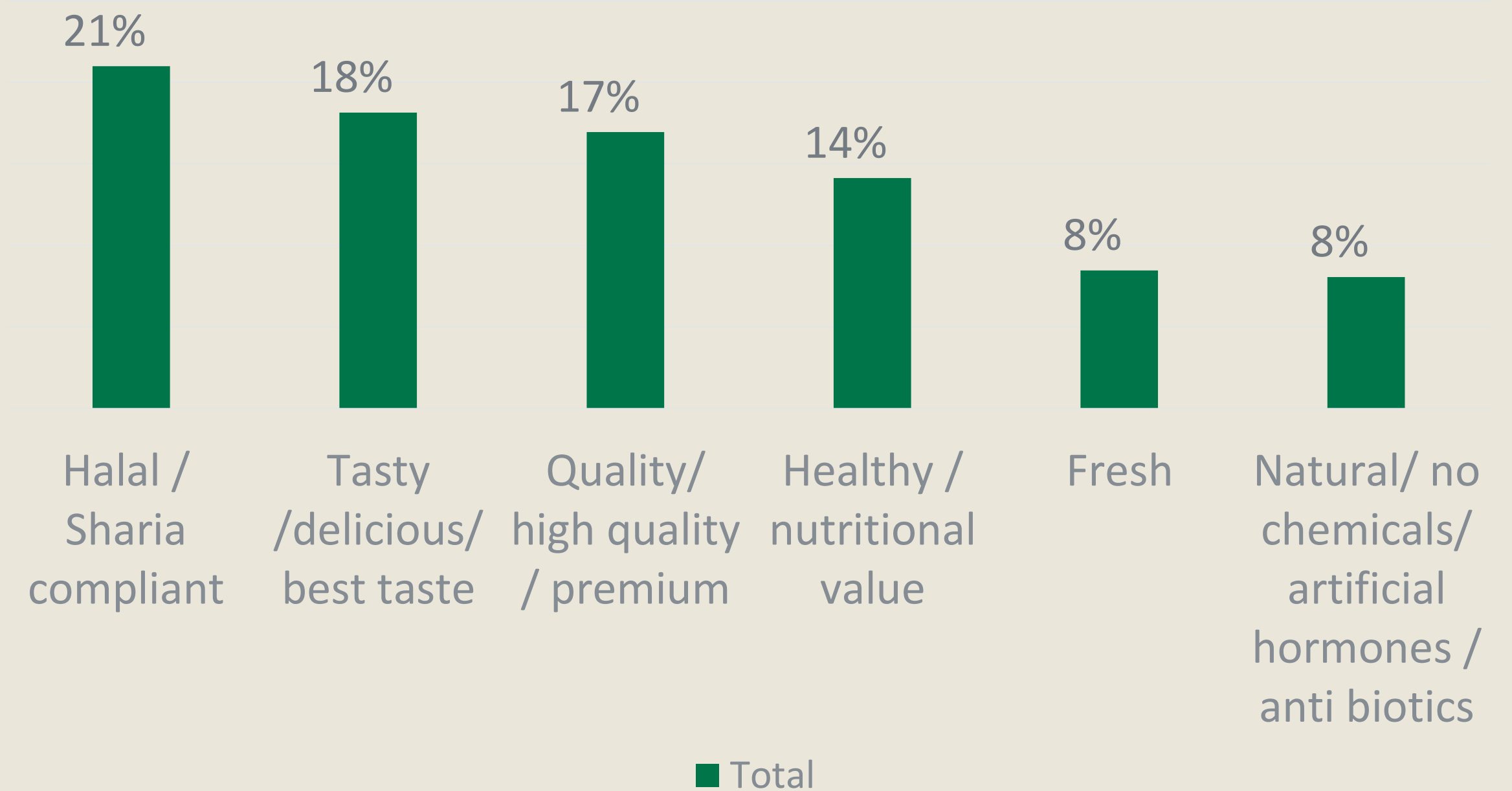
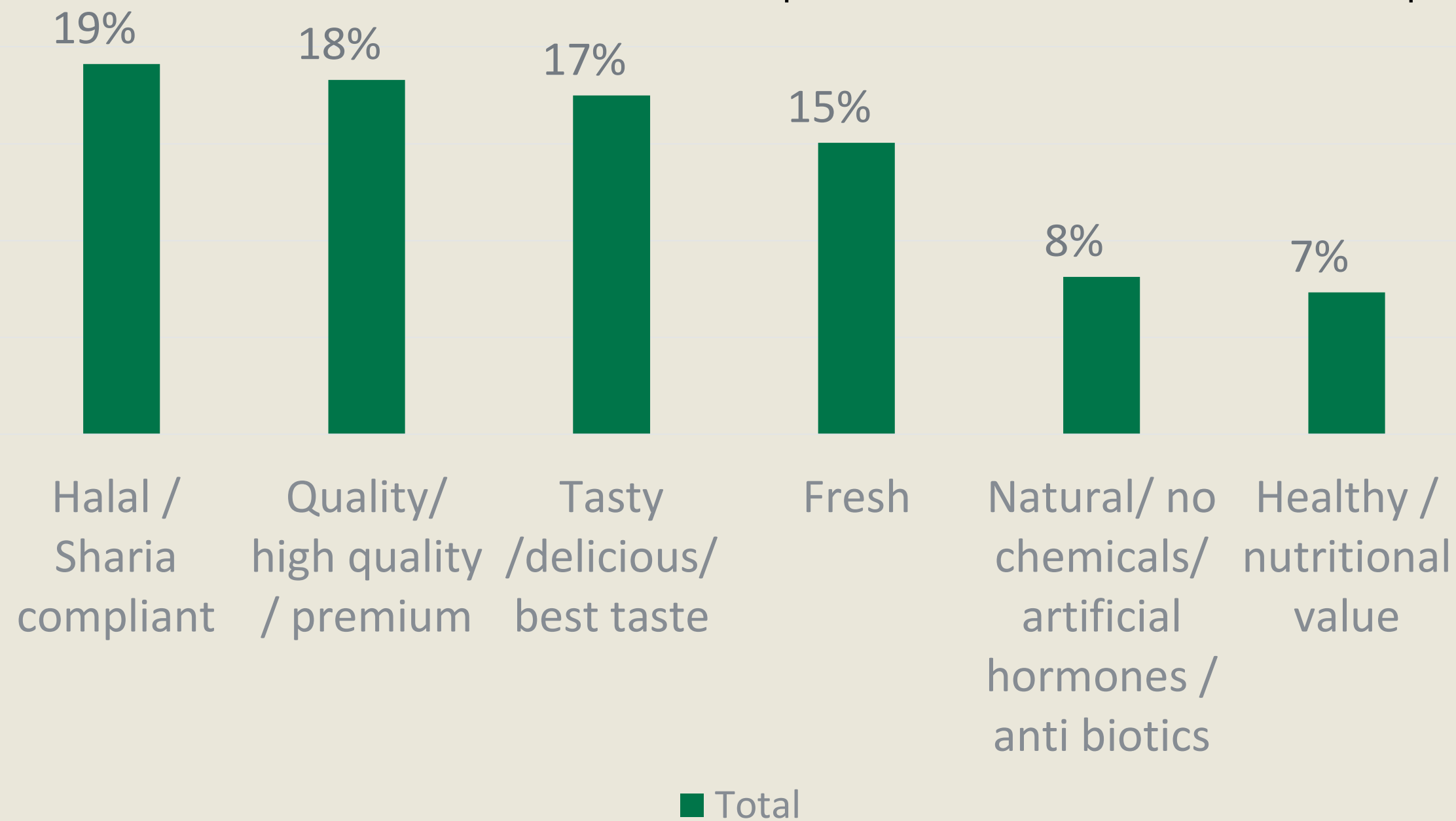
Unprompted Reasons rated Trust (Top 3 Box Trust AU BEEF)
Total vs. AU vs. Local
(KSA)

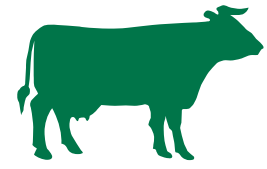


For those who rate AU 'very trustworthy' **these 3 reasons** are significantly stronger



For those who rate AU 'very trustworthy' **these 2 reasons** are significantly stronger





Taste and quality are key drivers of trust however uniquely to KSA, provenance is the main contributor, and only seen in Korea and Malaysia in the top 5.

Trust imagery – Top 5 Correlations with Trust of AU BEEF
(All Markets)

Japan	Korea	Vietnam	Thailand	Malaysia	Indonesia	China	UAE	KSA
Tastes great	High Quality Beef/Lamb	Tastes great	Is grown with the highest standards at every step	Has consistent quality standards	Has transparency in all steps of production	Tastes great	Tastes great	Comes from the perfect place to produce beef
Has consistent quality standards	Better for my health	Has transparency in all steps of production	Does not use antibiotics or hormones when grown/produced	Has transparency in all steps of production	Can be clearly traced to its origin	Has transparency in all steps of production	Better for my health	Tastes great
High Quality Beef/Lamb	Comes from the perfect place to produce beef	Better for my health	Is processed to the highest standards	Comes from the perfect place to produce beef	Has consistent quality standards	Is processed to the highest standards	Is processed to the highest standards	High Quality Beef/Lamb
Better for my health	Is grown with the highest standards at every step	Is something I see others eating	Ethically and humanely produced	Can be clearly traced to its origin	Ethically and humanely produced	Is something I see others eating	Has transparency in all steps of production	Can be clearly traced to its origin
Is processed to the highest standards	Has consistent quality standards	Is grown with the highest standards at every step	Has transparency in all steps of production	Is processed to the highest standards	Is grown with the highest standards at every step	High Quality Beef/Lamb	Has consistent quality standards	Has consistent quality standards

Quality	Process	Provenance	Traceability/ Transparency	Health/Taste/ Shelf life	Social
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BEEF & LAMB COO TRUST PERCEPTIONS - IMPLICATIONS:

AU Beef and Lamb have both established high levels of Trust, along with local red meat stand apart from the other COO product.

1

Local most trusted, AU strong, but sitting with a second tier

Local stands apart from other COO on Trust for both beef and Lamb. AU is strong with between 8 and 9 in 10 saying they trust beef and lamb – ahead of the global average.

However for both AU beef and lamb are some way behind local, for beef in line with some other imported product, and for lamb trailing Sudanese.

What do we see?

2

Some key differentiators to tap into

The same key reasons show up unprompted, for both beef and lamb, to explain their reason for Trust: Halal, taste, health and quality.

But, for those who are very trusting of AU, fresh and natural are significantly higher.

Now what?

Our job is not necessarily to move people into top 3 Trust, the challenge is to elevate people from 5 and 6 into 7 by finding ways to communicate our unique assets. In particular communicating around our clean rearing environment and natural approach to rearing can help to support trust of AU in a differentiating manner.

FINAL THOUGHTS & DISCUSSION



FINAL THOUGHTS

1

Beef perceptions are stable, but worth understanding that it's role is less clear vs, other proteins. Both an opportunity to take advantage of and a challenge to consider in ensuring a role for AU beef in the repertoire of those in KSA.

2

Consistent quality is an association with which we already have some traction and can credibly re-build. Ensure that we are communicating how we achieve our consistent quality

3

Sudanese lamb has grown this year, and now established as a strong brand with improved brand equity. While Sudanese more of a substitute for Local it is establishing a growing role in the repertoire of Saudis, including those who consume AU. Need to ensure we have a clear and distinct role versus these local brands.

4

A narrowing of channel options means fewer routes to consumers for Lamb, or less frequent purchasing, how does this impact the way that we support distribution in the KSA market for our Lamb?

5

A reduction in the use of online by consumers suggests a limited role for the channel in getting red meat to consumers for the time being. But targeted approach to reflect specific behaviours could give online a role.

6

AU is strong with between 8 and 9 in 10 saying they trust beef and lamb – ahead of the global average. To move those 5/6s to 7s communicating around our clean rearing environment and natural approach to rearing can help to support trust of AU in a differentiating manner.

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