

MLA Global:
CONSUMER TRACKER
UAE 2021

Presentation Deck



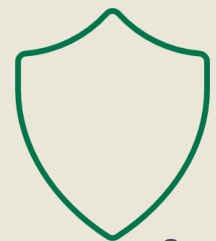


Agenda...



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 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



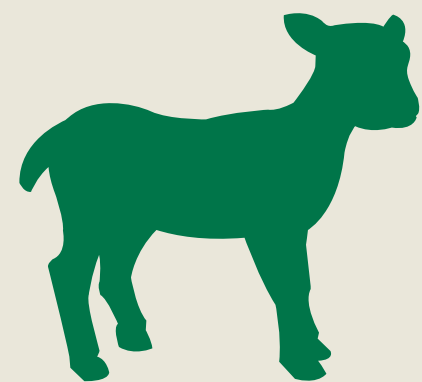
True Aussie

- 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, purchase channel*
- *Trust in 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	74%	45%
	Female	26%	55%
Age	18-34	53%	45%
	35-49	36%	49%
	50-64	11%	5%
Cities	Abu Dhabi	30%	50%
	Dubai	26%	50%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	86%
Children	Households with Children	-	70%
Income	241K - 322K AED	-	67%
	322,001 + AED	-	33%
Religion	Islam	-	77%



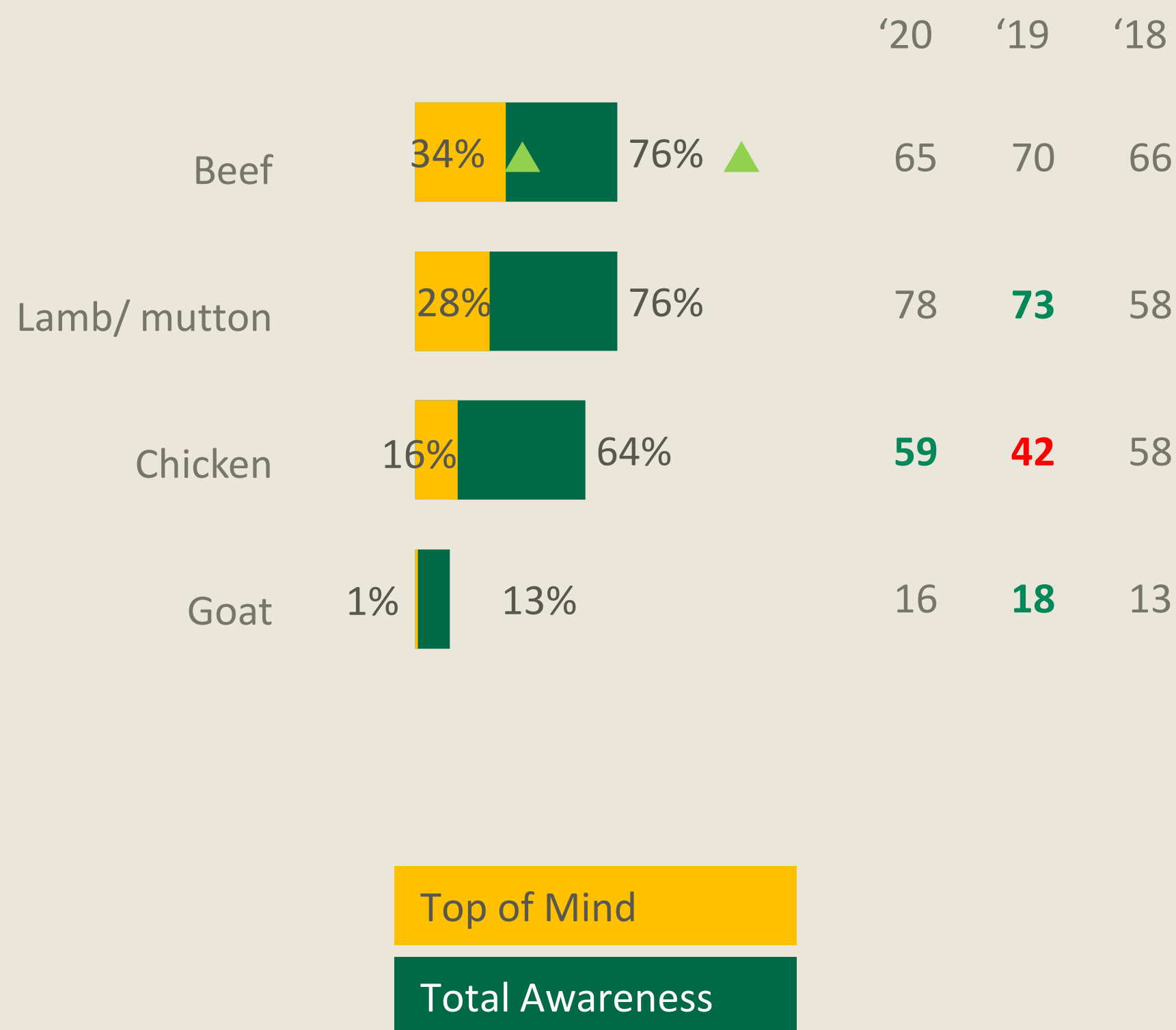
PROTEIN LANDSCAPE



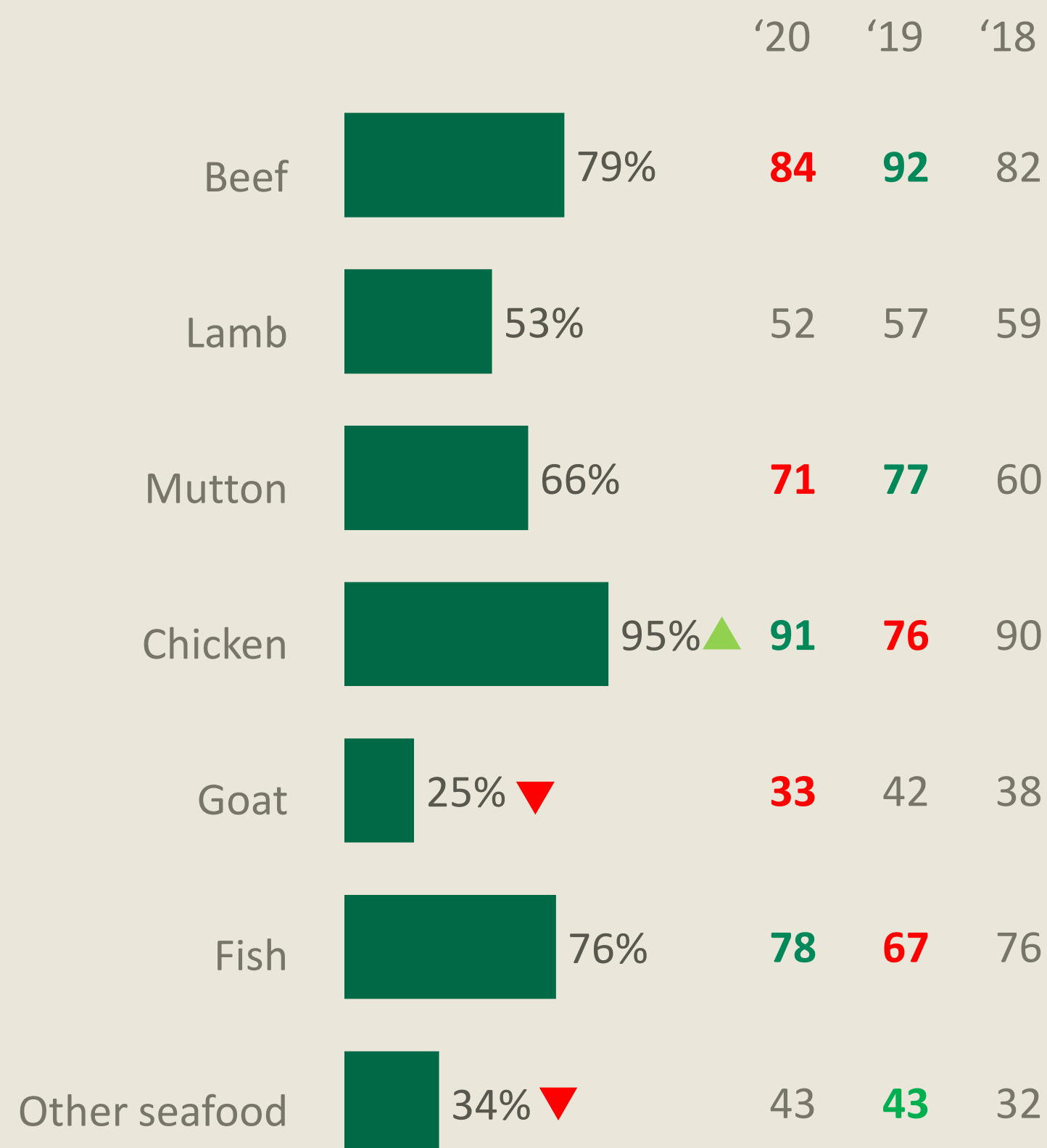
Beef TOM awareness increases this year, now on par with lamb which remains stable. For beef, last month purchase and last 7 day serves are back at 2018 levels, while lamb is stable. Chicken remains most purchased and consumed.



SPONTANEOUS AWARENESS



BOUGHT IN LAST MONTH



AVERAGE SERVES LAST 7 DAYS

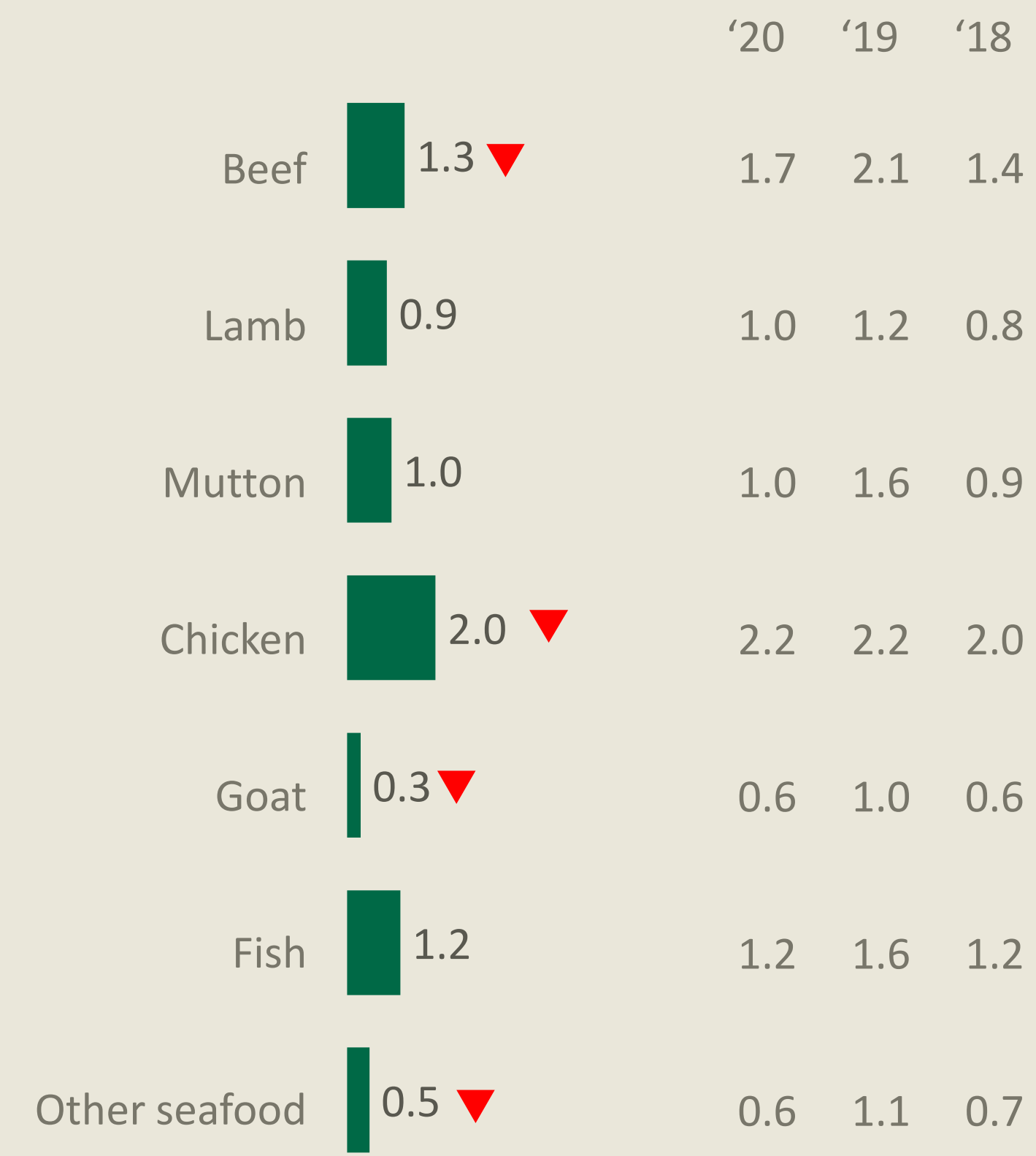




IMAGE PROFILE: Understanding relative strengths and weaknesses

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.

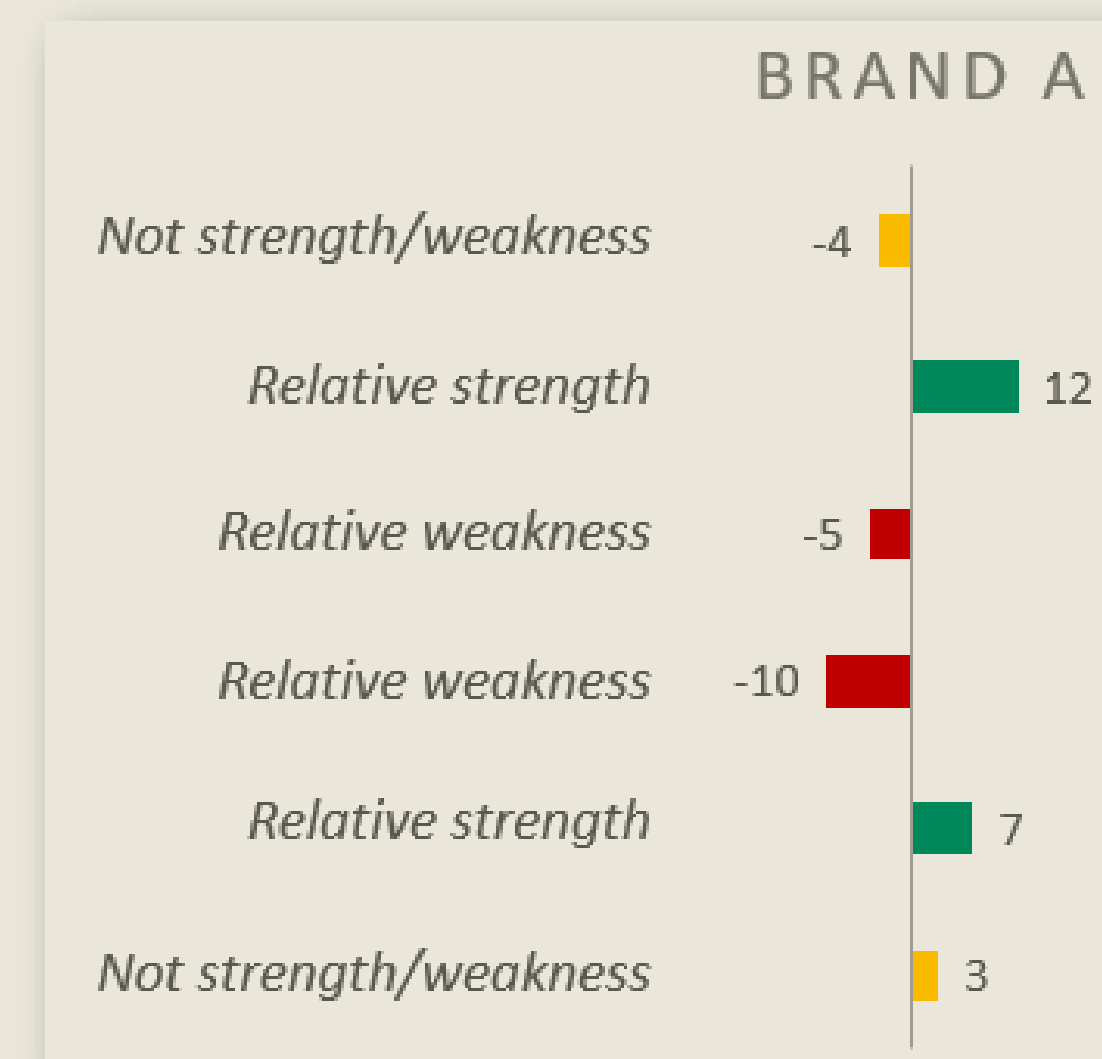
Calculation

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**.

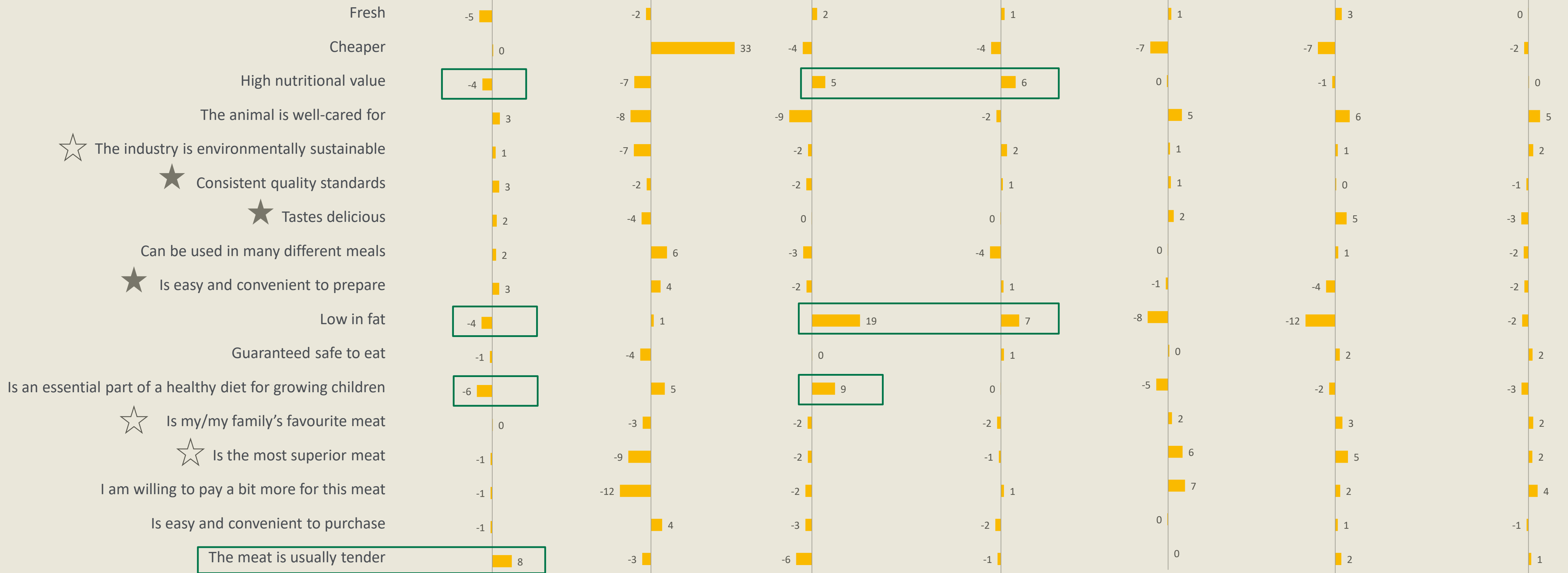
As a result, all scores are relative as the calculation takes into account all the brands tested. Any changes to which or how many brands are tested impacts the *expected* scores and thus the final difference score for each brand.



In UAE, Beef profile is fairly flat, with tenderness being the one clear strength. Consistent quality, easy to prepare and animal care are slight strengths. Beef's relative weaknesses are clearer, they align with Fish and other Seafood strengths – high nutritional value, low in fat and important for growing children.

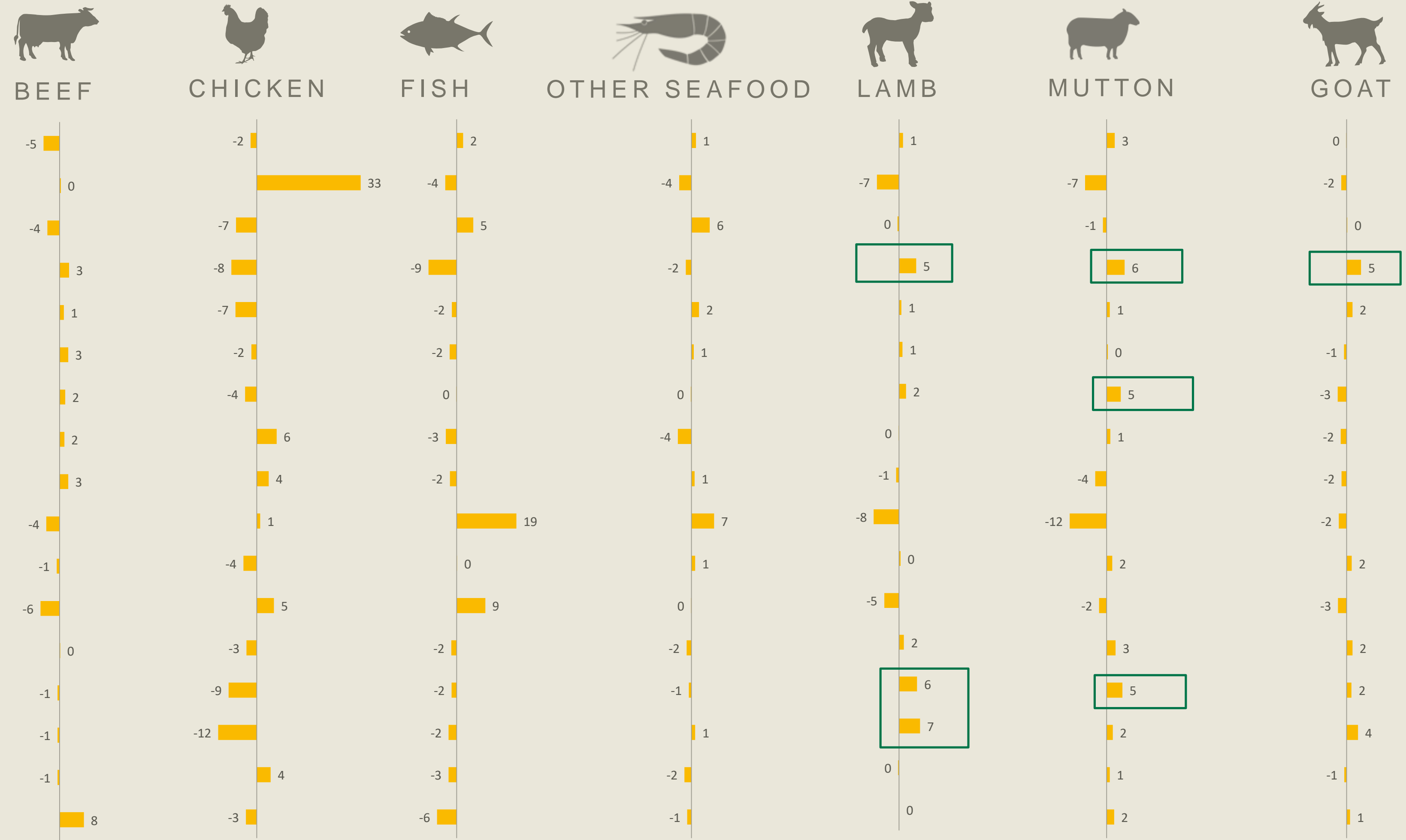
★ Important associations – volume of purchase

☆ Important associations – willing to pay more



Lamb and Mutton are the proteins seen as superior and well cared for driving consumers'. Lamb differentiates with willingness to pay more for, while mutton is associated with tasting delicious.

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

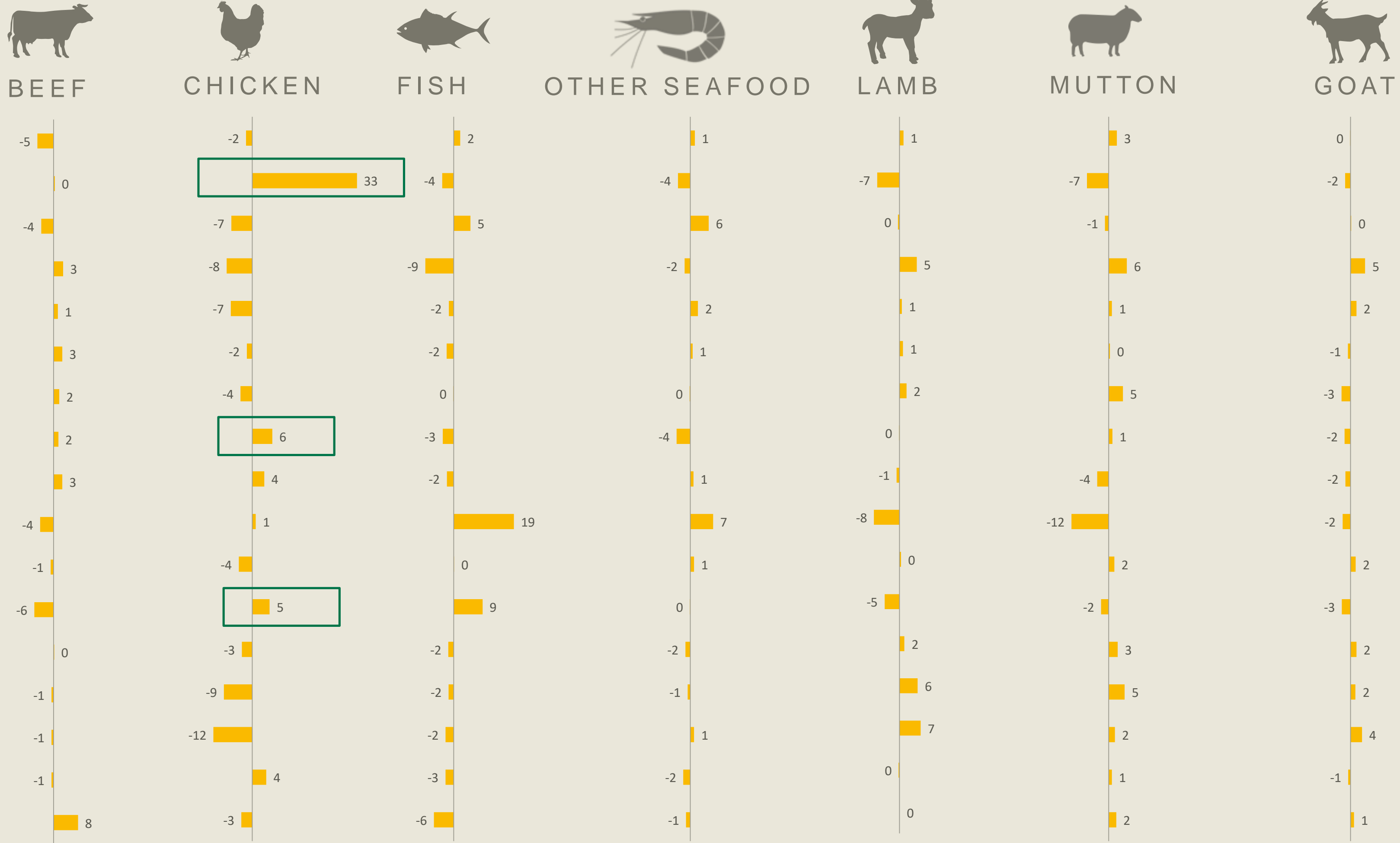


CH12. Which of the following things do you associate with each type of protein? Base: (n=500)

Chicken's clearest strength is affordability. It is also seen as being versatile as well as important for growing children.

★ 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, lamb has a distinct profile of benefits in the UAE, positioning of beef is less clear compared to other proteins.

What do we see?

1

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

Lamb and beef on par in terms of awareness and purchase, chicken remains purchased and eaten more frequently than other proteins

2

Chicken is cheap, beef lacking clear definition vs other proteins

Chicken seen as considerably cheaper protein than others, while beef lacks clear strengths other than tenderness. It's clearest definition is in weaknesses vs. fish and seafood.

3

Lamb seen as superior and premium

Lamb has some clear strengths in being superior, well cared for and also consumers willing to pay more.

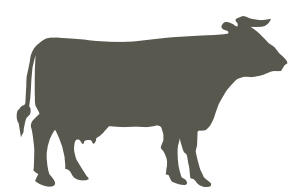
Now what?

Defined roles in protein repertoire of UAE consumers for beef, lamb and chicken. Beef losing some definition vs other proteins, a potential watchout for beef overall and presents need for imported to begin to reinforce quality associations that are near to being a strength.

Australia's expertise in of growing Premium red meat product aligns with the role of lamb in UAE market, presenting an opportunity for AU product

BEEF

BRAND HEALTH & PERCEPTIONS

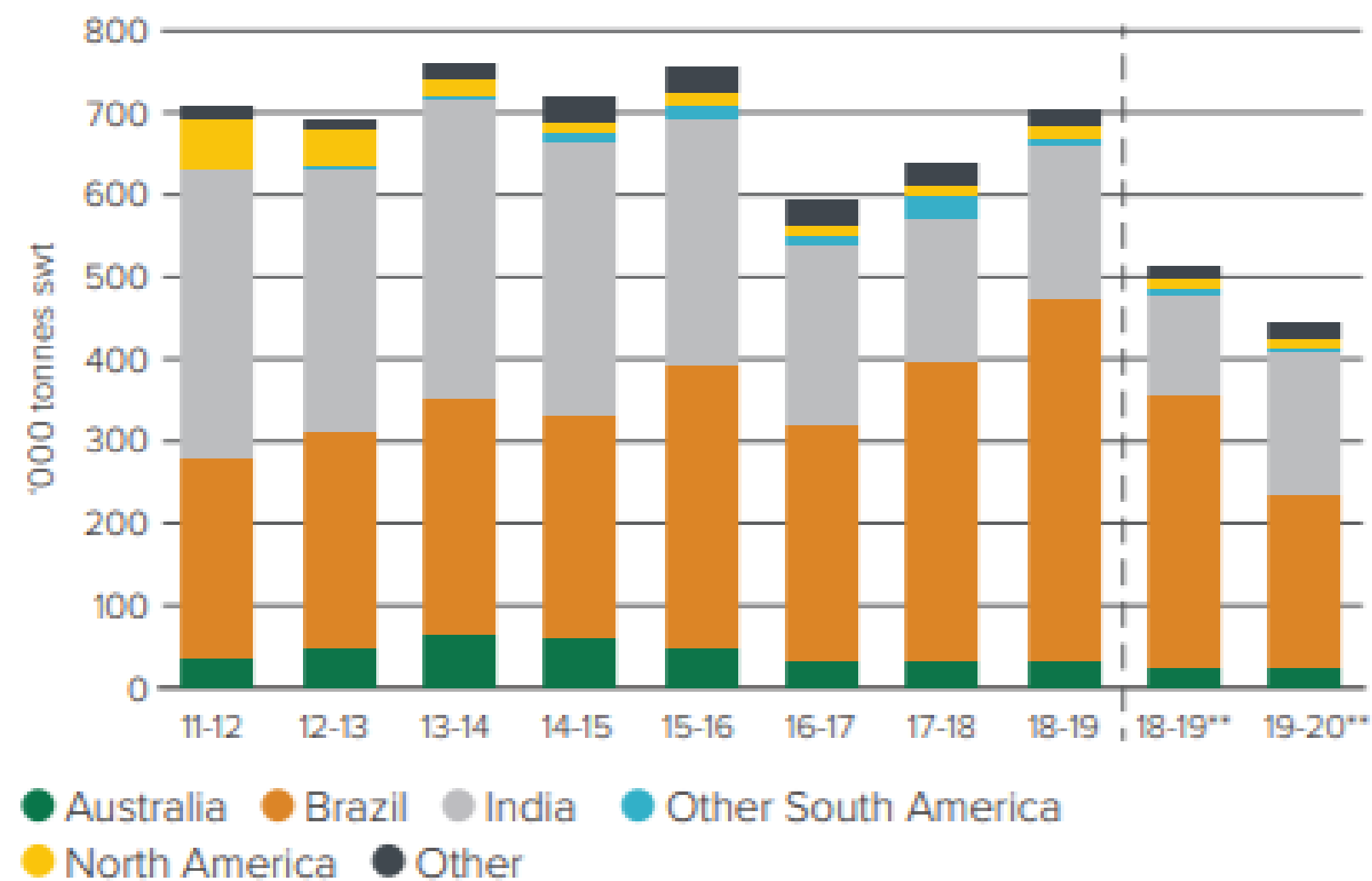


All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.

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.

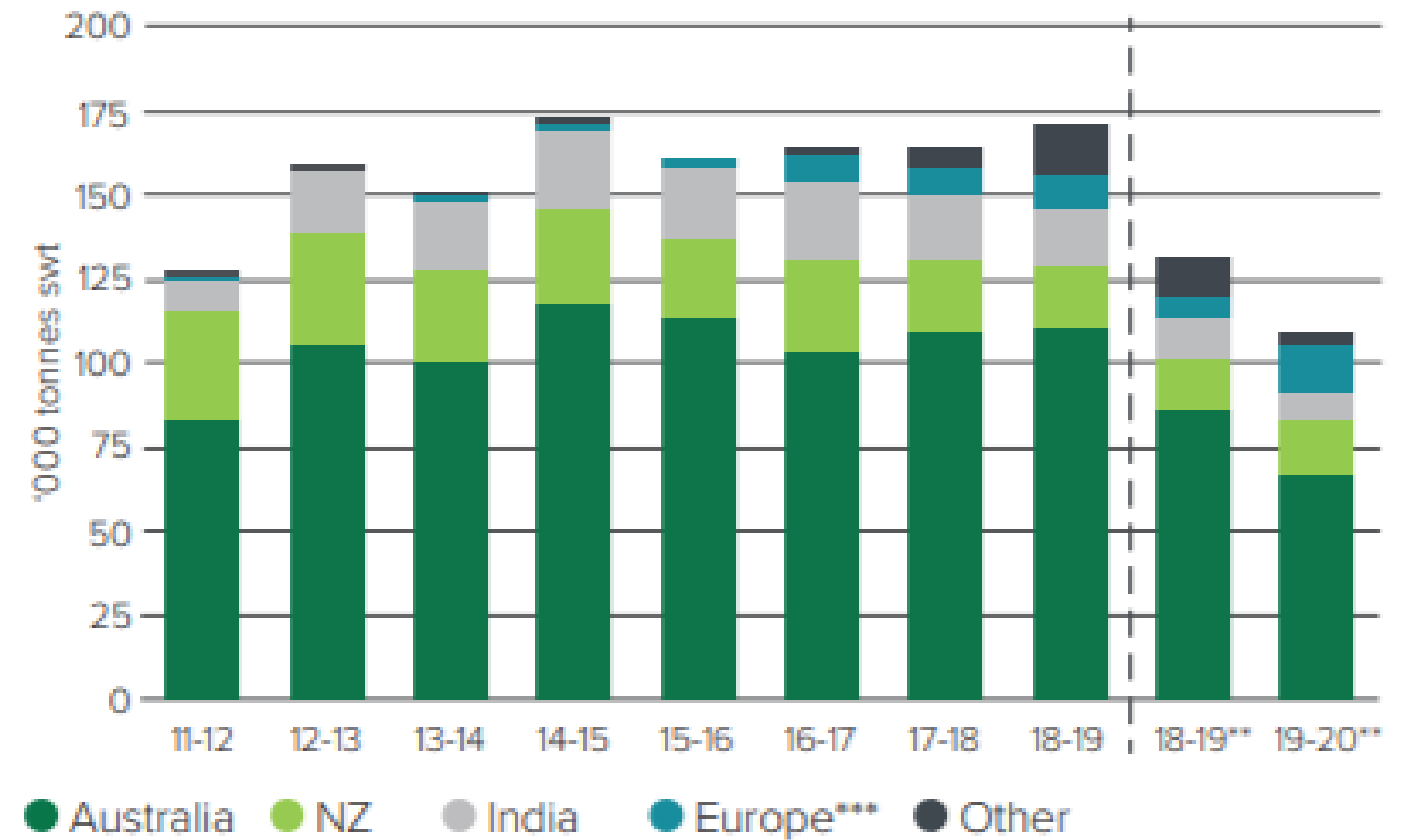
MLA market snapshot – MENA (2020)

Beef/veal exports to MENA* by supplier



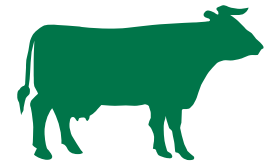
Source: IHS Markit. Excludes offal. *MENA-10 countries **FYTD Jul-Mar

Sheepmeat exports to MENA* by supplier

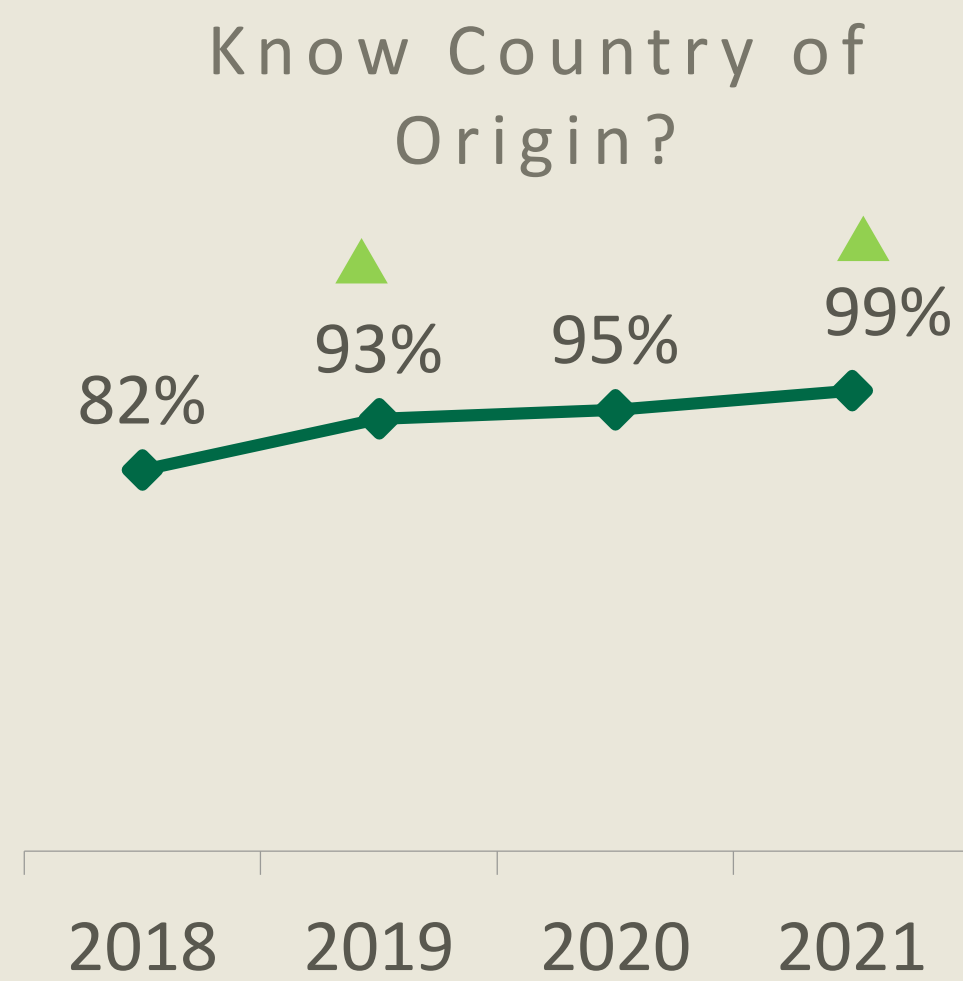


Source: IHS Markit

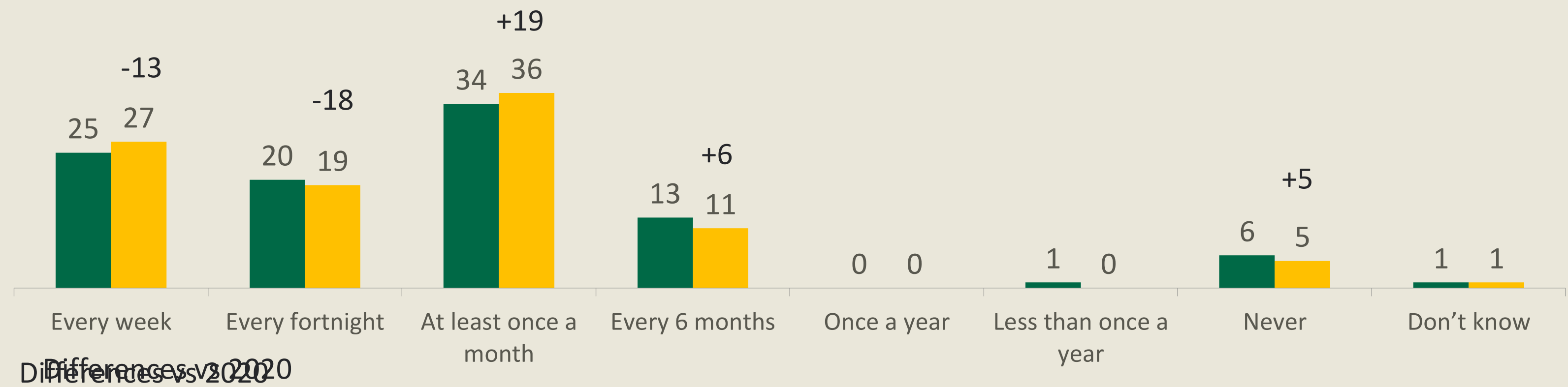
*MENA-10 Countries **FYTD Jul-Mar ***Europe includes EU-27 and UK

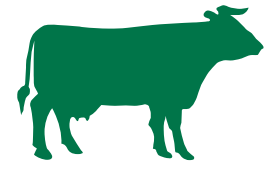


The vast majority of UAE consumers claim to know the country of origin of the beef they buy, which has increased consistently from 2018. Frequency of imported beef purchase has shifted from a weekly/ fortnightly skew in 2020 to a monthly skew in 2021.



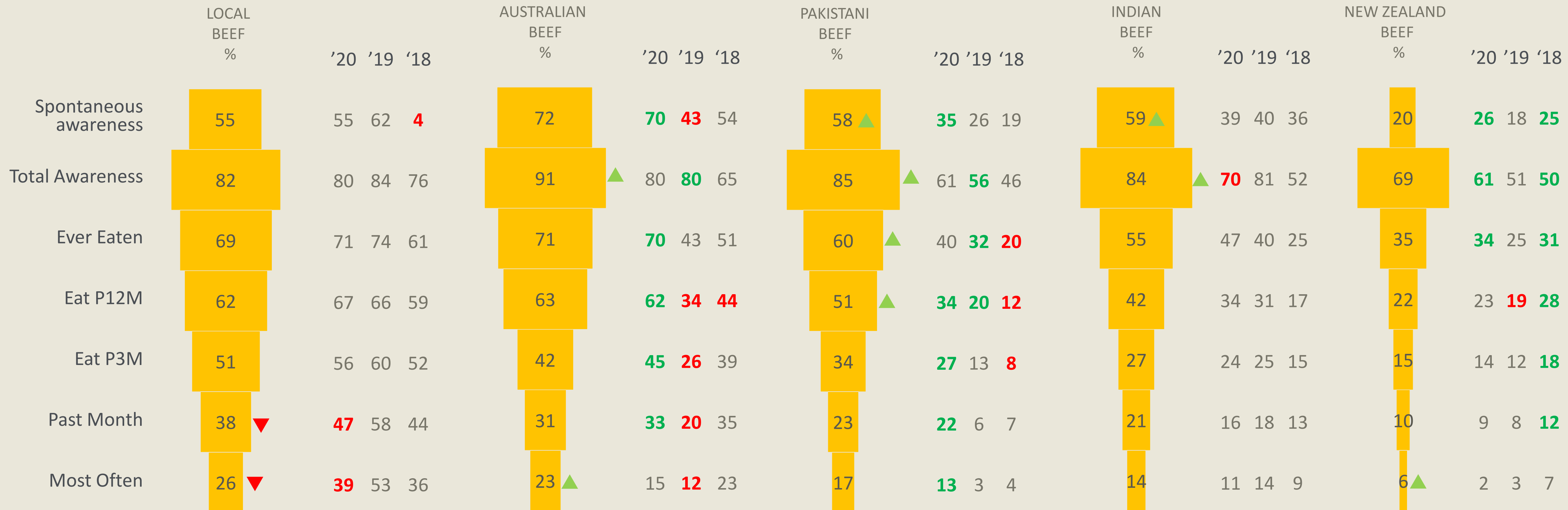
FREQUENCY OF BUYING LOCAL AND IMPORTED BEEF

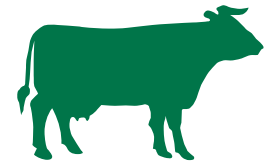




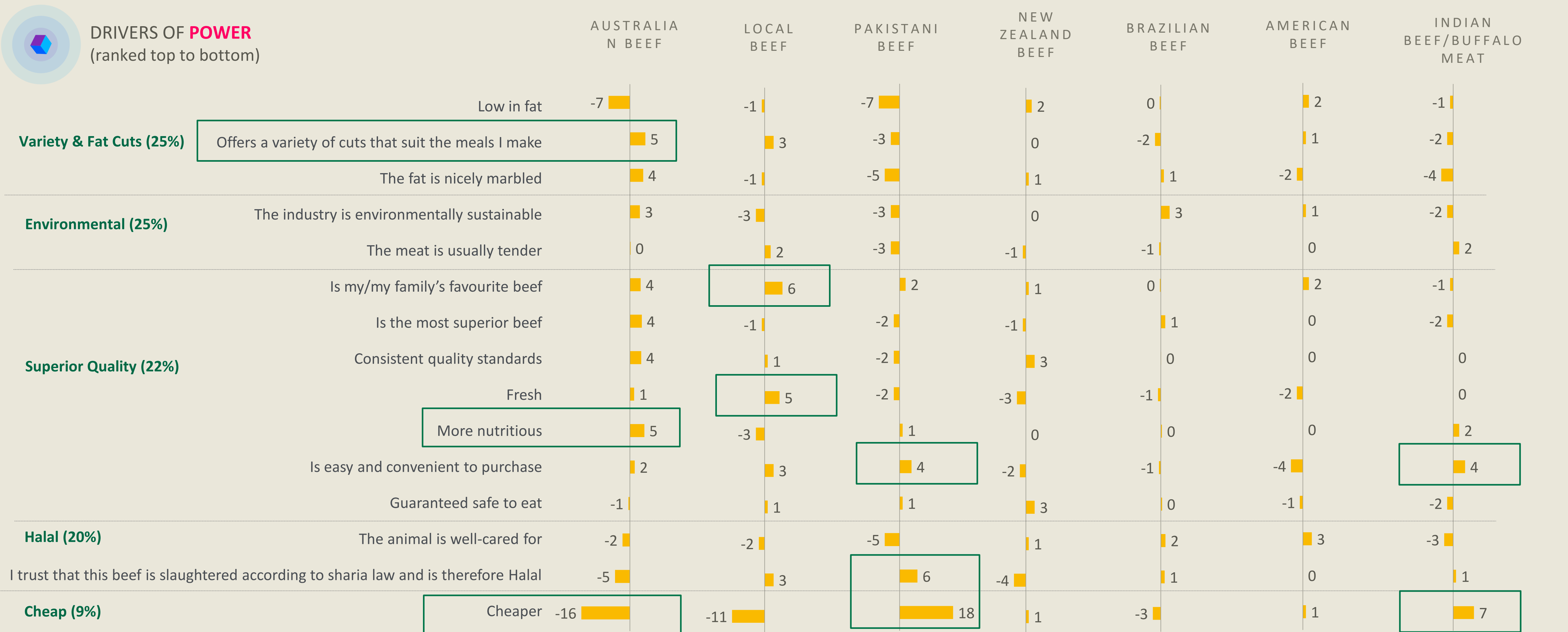
The softening of past month Beef consumption in UAE is driven by the softening of consumption of Local Beef. Pakistani Beef has grown awareness and trial but Australian Beef has managed to grow loyalty and is now on par with Local Beef on this measure.

BRAND HEALTH – BEEF





AU Beef is perceived in consumers minds as having strengths over competitor COOs in being more nutritious and offering variety of cuts, and has a number of associations that are bordering on strengths. It is seen as having a relatively high price.

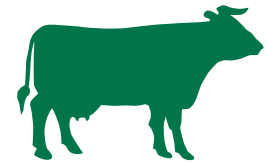


BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=258). 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.



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

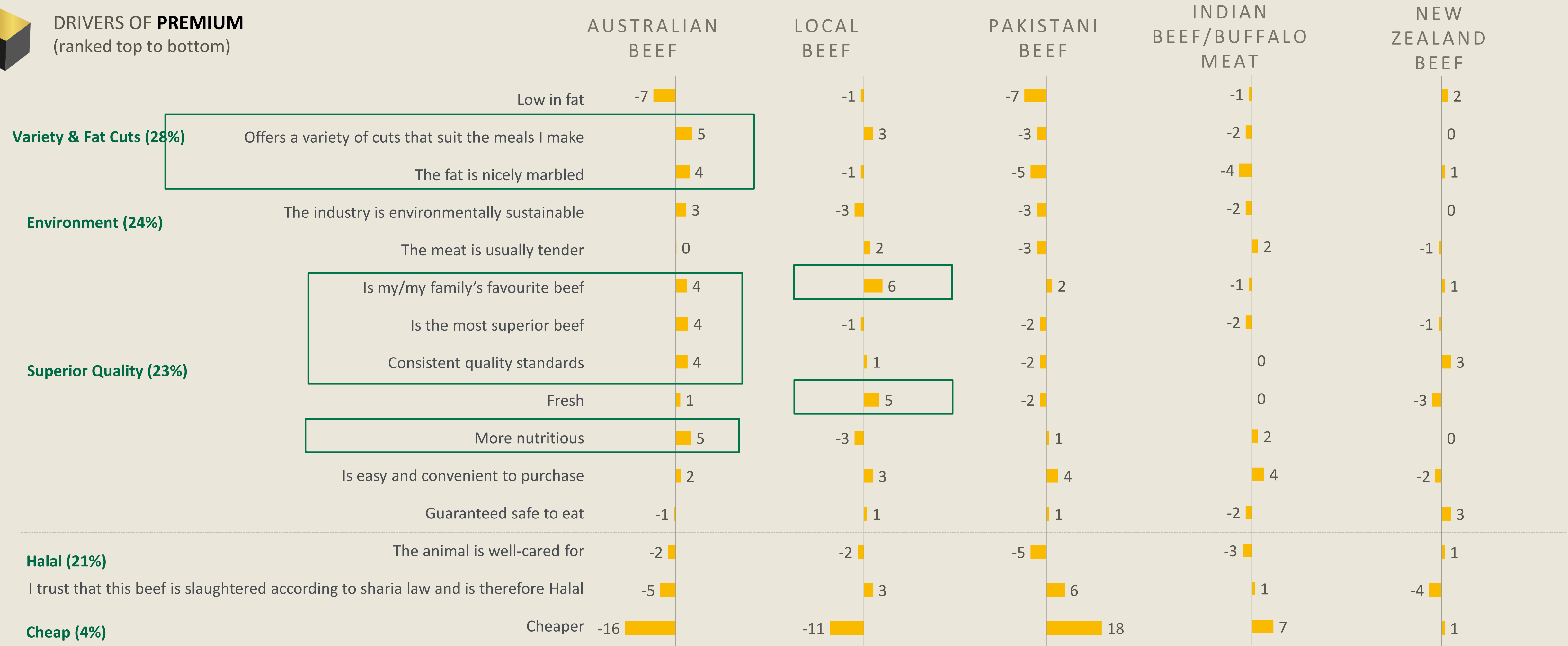




AU Beef's strengths of nutritious, and variety coupled with near strengths in superior such as consistent quality, all contribute to our strong Premium positioning. Family favourite and fresh supporting Local's Premium position.



DRIVERS OF PREMIUM
(ranked top to bottom)

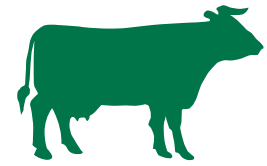


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KANTAR

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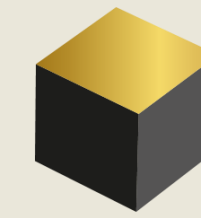
With the change in endorsement of Local and Pakistani Beef AU Beef has lost the definition of Superior and Consistent quality despite strong endorsement for these statements. This image perception can be regained if this is our focus in 2022.

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**

KEY AREAS TO
FOCUS ON WHEN
DRIVING THESE
OBJECTIVES IN
THIS MARKET...

1. Safe to eat

2. Tender Meat

3. Consistent quality

1. Safe to eat

2. Consistent quality

3. Fresh

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, Pakistani has grown

AU and Local are the dominant brands, are on par for all metrics through the funnel from awareness, to penetration, through to claimed consumption. Pakistani beef has improved in the middle of the funnel but not yet at the bottom of funnel metrics.



Now what?

Local and AU now on par, clearly defining our role in KSA consumers red-meat repertoire essential to consolidate our position in light of local softening.

2

Two key associations with a platform of strong associations

AU is seen as having variety and being more nutritious vs. other COO brands, however there are a number of attributes for which are borderline strengths for AU including superior beef, family favourite and consistent quality. These were strengths in 2020.

3

Two attributes to further build our brand equity

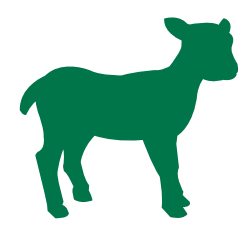
Associations of consistent quality and safe to eat are both in the top 5 attributes that build brand power and premium.

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.

LAMB BRAND HEALTH & PERCEPTIONS

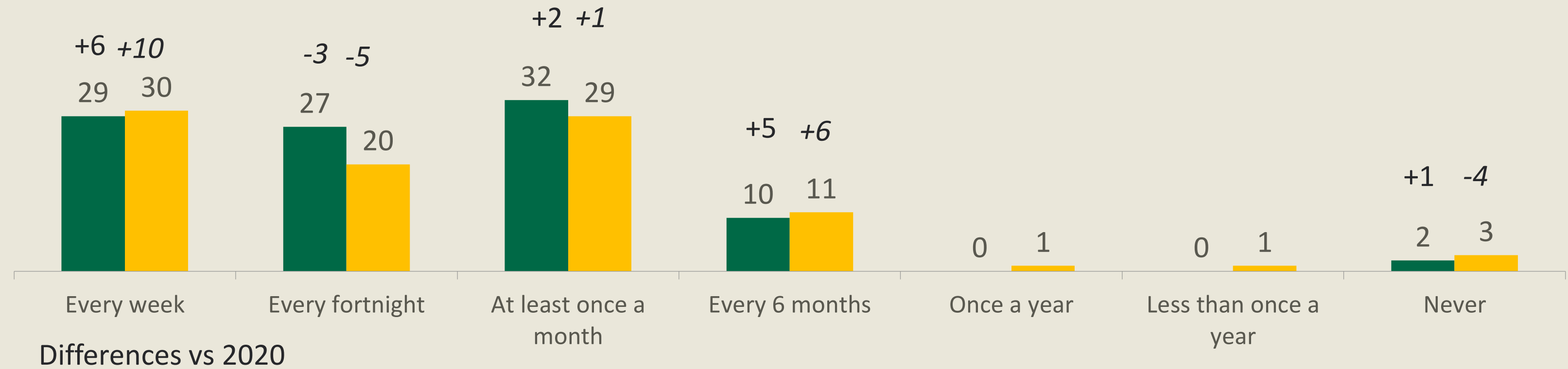
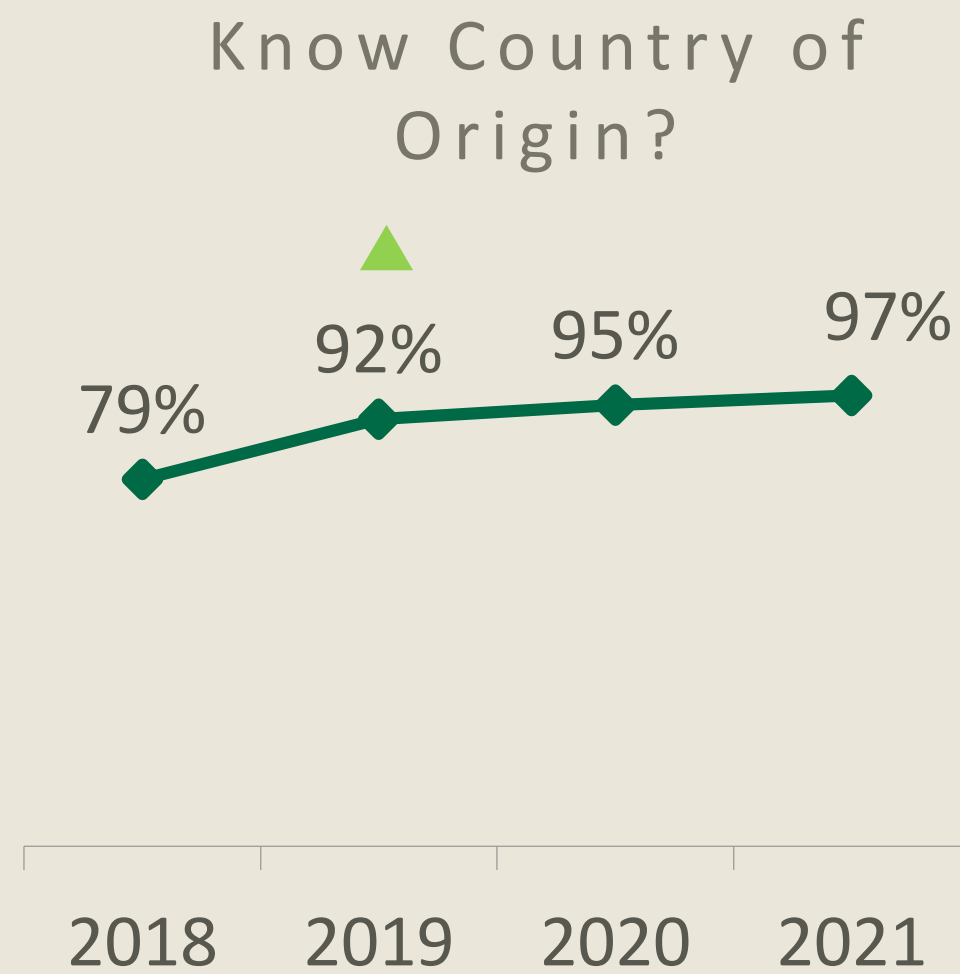


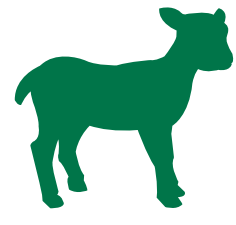
All questions in this section were asked of lamb buyers only (must have ever bought lamb). They also must have previously bought, or would consider buying, imported lamb.



Almost all of our sample (MGBs and imported meat purchasers) claim to know the COO of the lamb they purchase. In 2021, we've seen a significant increase in the claimed weekly consumption of imported lamb is now in line with local lamb purchase.

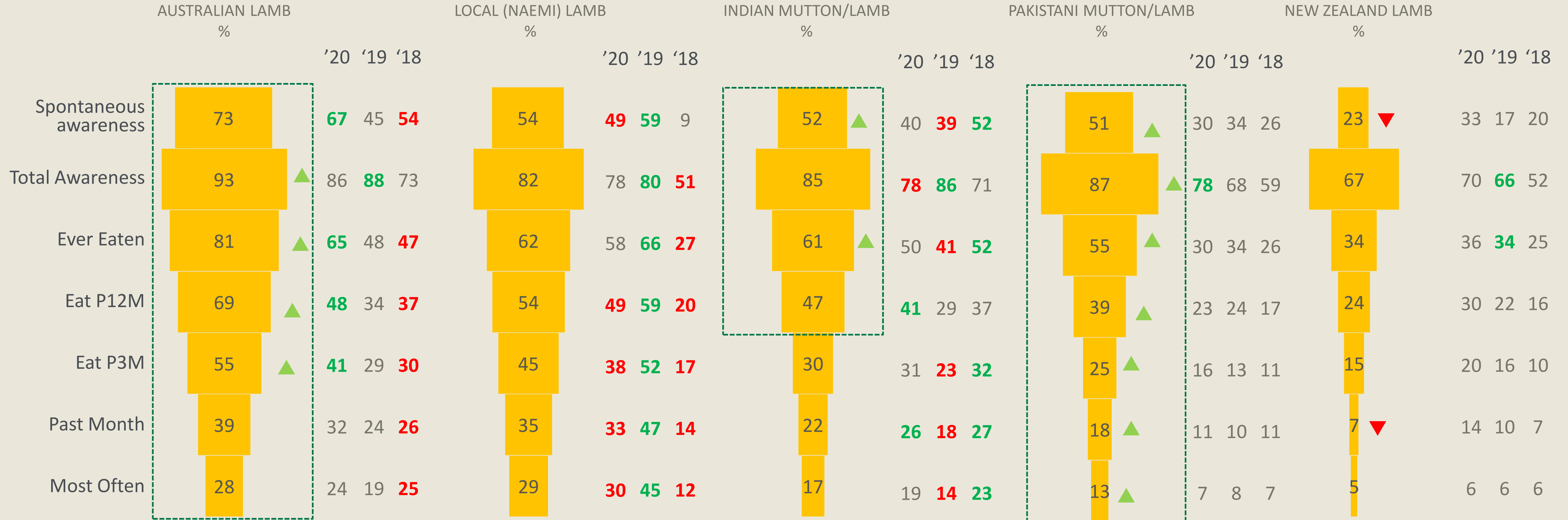
FREQUENCY OF BUYING
LOCAL AND IMPORTED LAMB

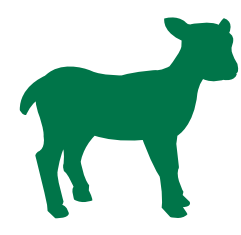




Similar to what we see for Beef, we see AU Lamb and Pakistani Lamb increasing across the brand health measures. Local Lamb, has maintained the stability through the funnel in spite of competitor increases and has not seen the declines that Local Beef saw.

BRAND HEALTH – LAMB

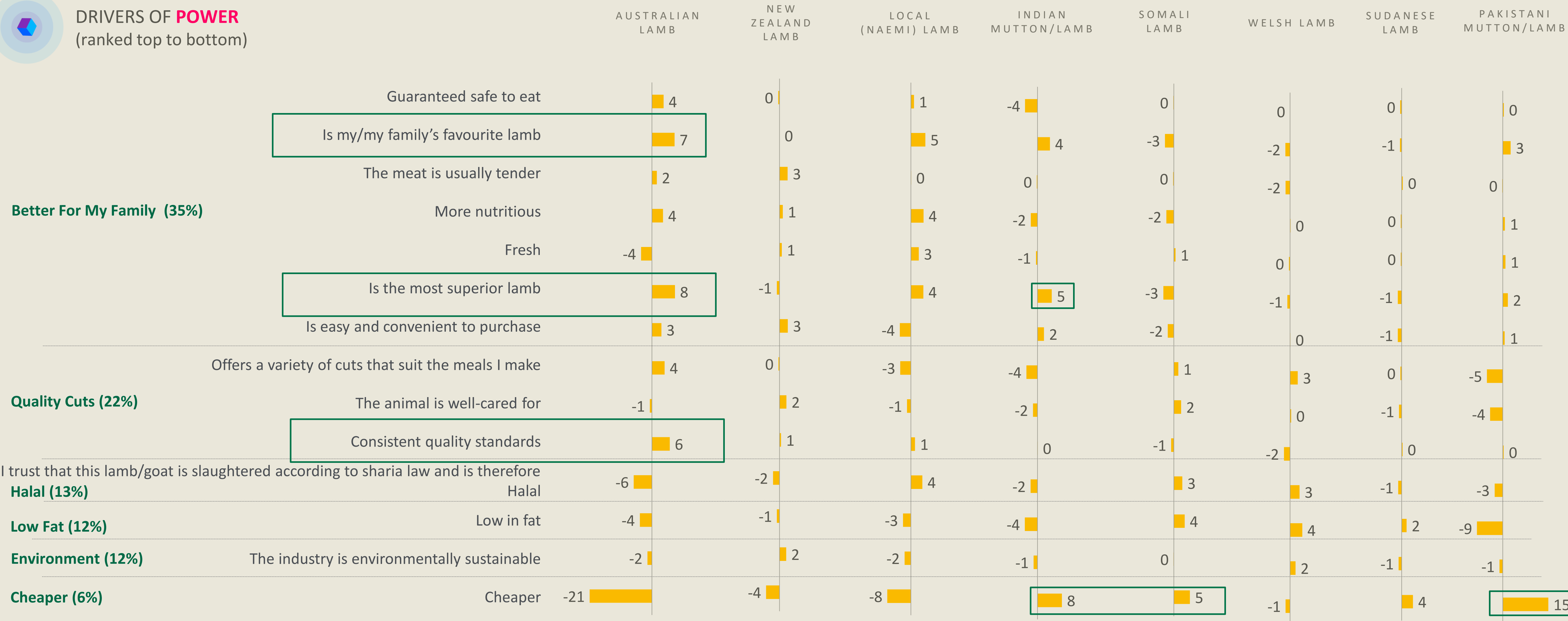


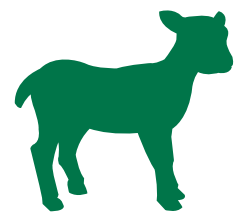


AU Lamb is well positioned on the biggest drivers to equity – being seen as superior and a family favourite, as well as of consistent quality. Local Lamb is also seen as a family favourite while Somali and Pakistani Lamb are seen as the cheaper lamb in the market

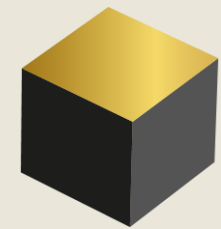


DRIVERS OF POWER (ranked top to bottom)





AU Lamb's strengths across key attributes in better for my family (family's favourite and superior lamb) coupled with a strength in consistent quality driving AU's lead on brand Premium.



DRIVERS OF PREMIUM
(ranked top to bottom)

AUSTRALIAN LAMB

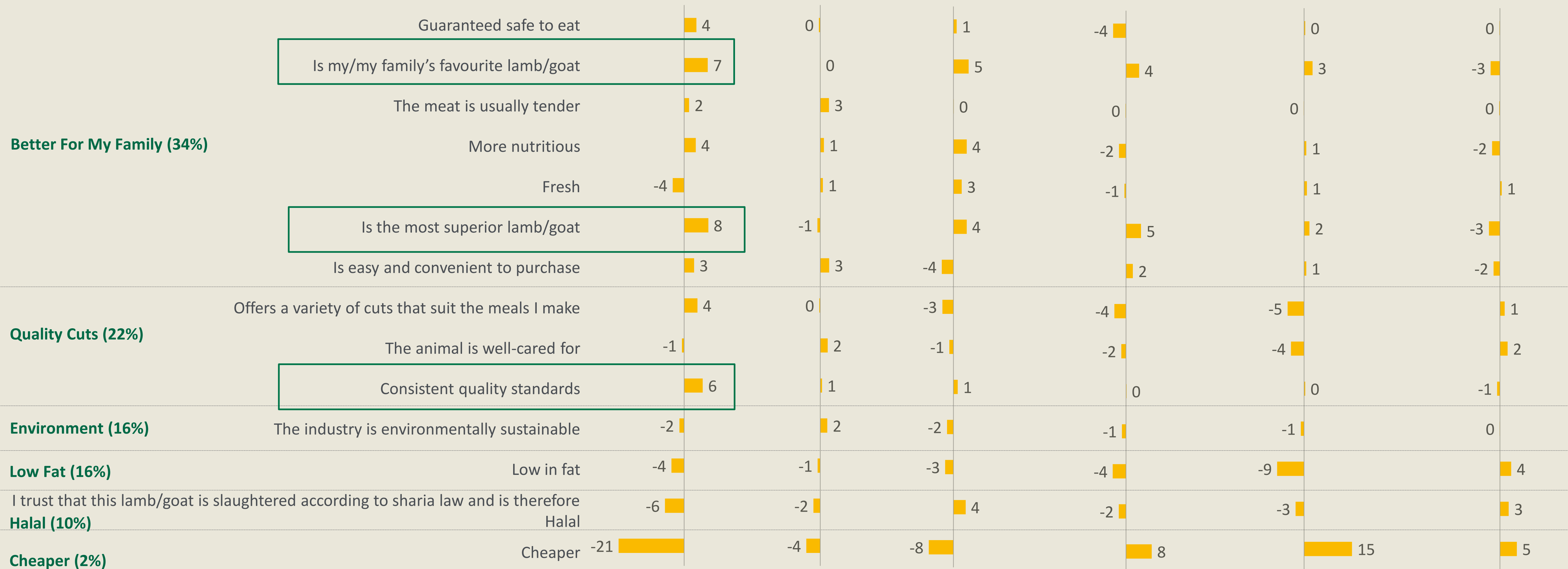
NEW ZEALAND LAMB

LOCAL (NAEMI) LAMB

INDIAN MUTTON/LA MB

PAKISTANI MUTTON/LA MB

SOMALI LAMB

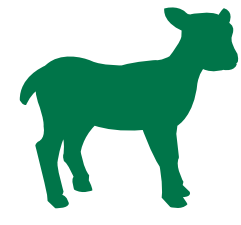


LBH9. Here are some things which people have said about lamb. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=242). 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.

KANTAR

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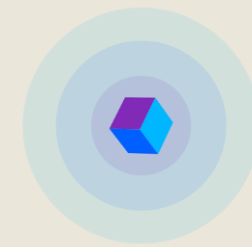




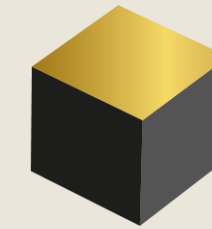
Australia should continue to support its positioning on safety as this is a top contributor to growing the COO's equity and justified premium.

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**

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

1. Safe to eat

2. Fresh

3. Convenient purchase

1. Safe to eat

2. Fresh

3. Convenient purchase

LAMB BRAND HEALTH & PERCEPTIONS- IMPLICATIONS:

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

What do we see?

1

AU Lamb consolidated brand health and key strengths, Pakistani lamb a big improver

AU Lamb and Pakistani Lamb have increased their strength through the brand funnel and this is reflected in improved brand equity for both.

AU is known for being the family's favourite, superior and having consistent quality standards.

Now what?

AU Lamb has a clear positioning to protect. The associations that drive brand equity and brand premium are the same, and we own a number of these strengths.

2

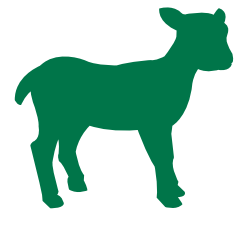
Safety and convenience the two opportunities to further grow

There are three key attributes that will further do the job of driving both Power and Premium: Being seen as safe to eat, being convenient to purchase, and being seen as fresh. Safe and convenient are two associations that are borderline strengths for AU.

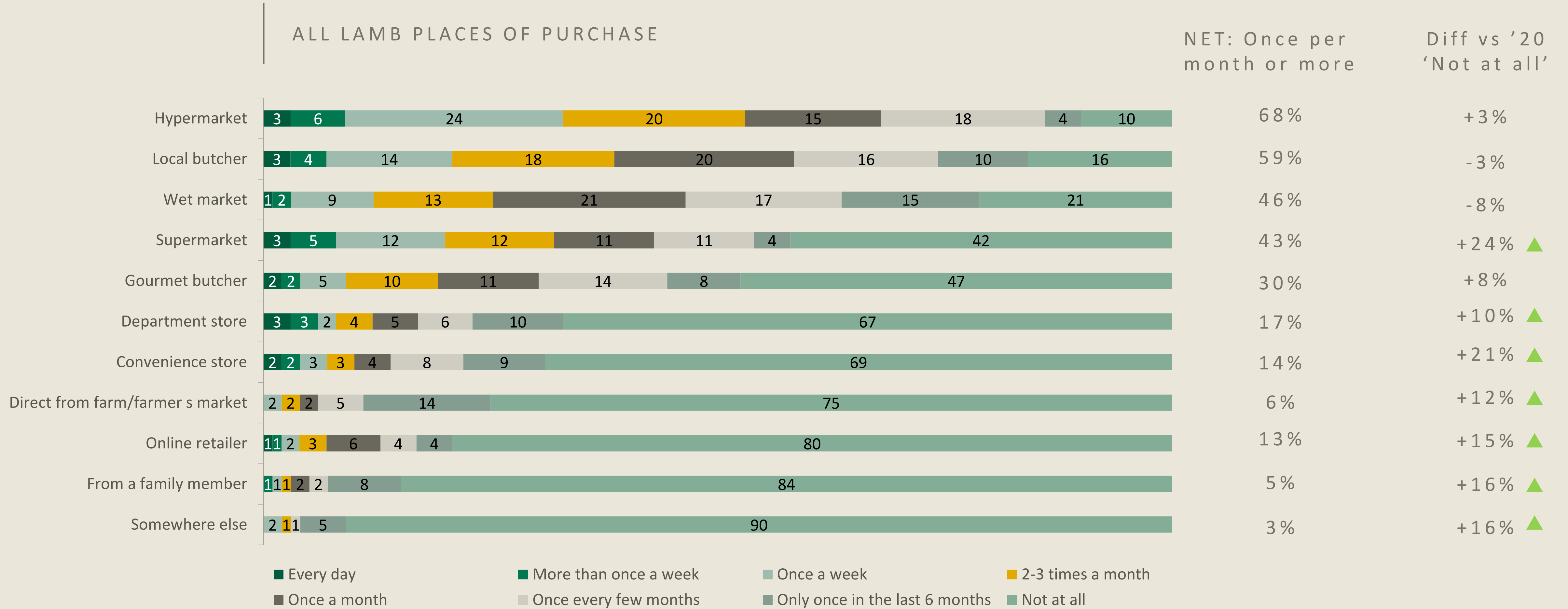
How can we continue to leverage communications and the systems/distribution relationships we have in place to communicate the safety of AU lamb and support the ease and convenience of access to our product?

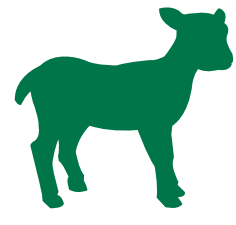
LAMB DEEP DIVE





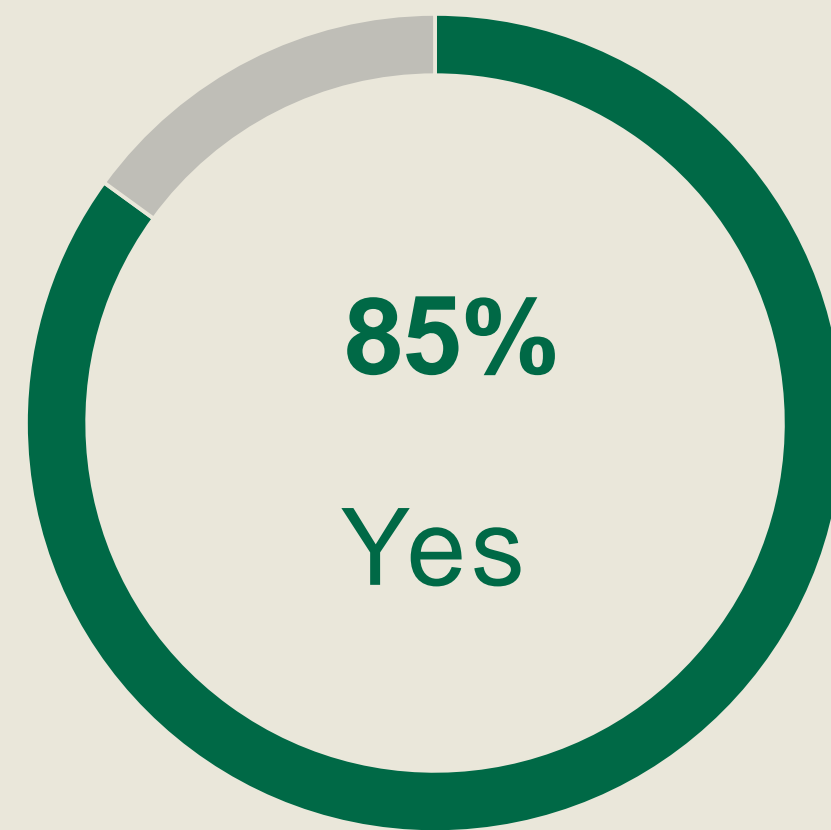
There appears to have been a significant reduction in the number of channels used to buy lamb in 2021, with all but the three primary channels increasing on proportion who are not using them at all.



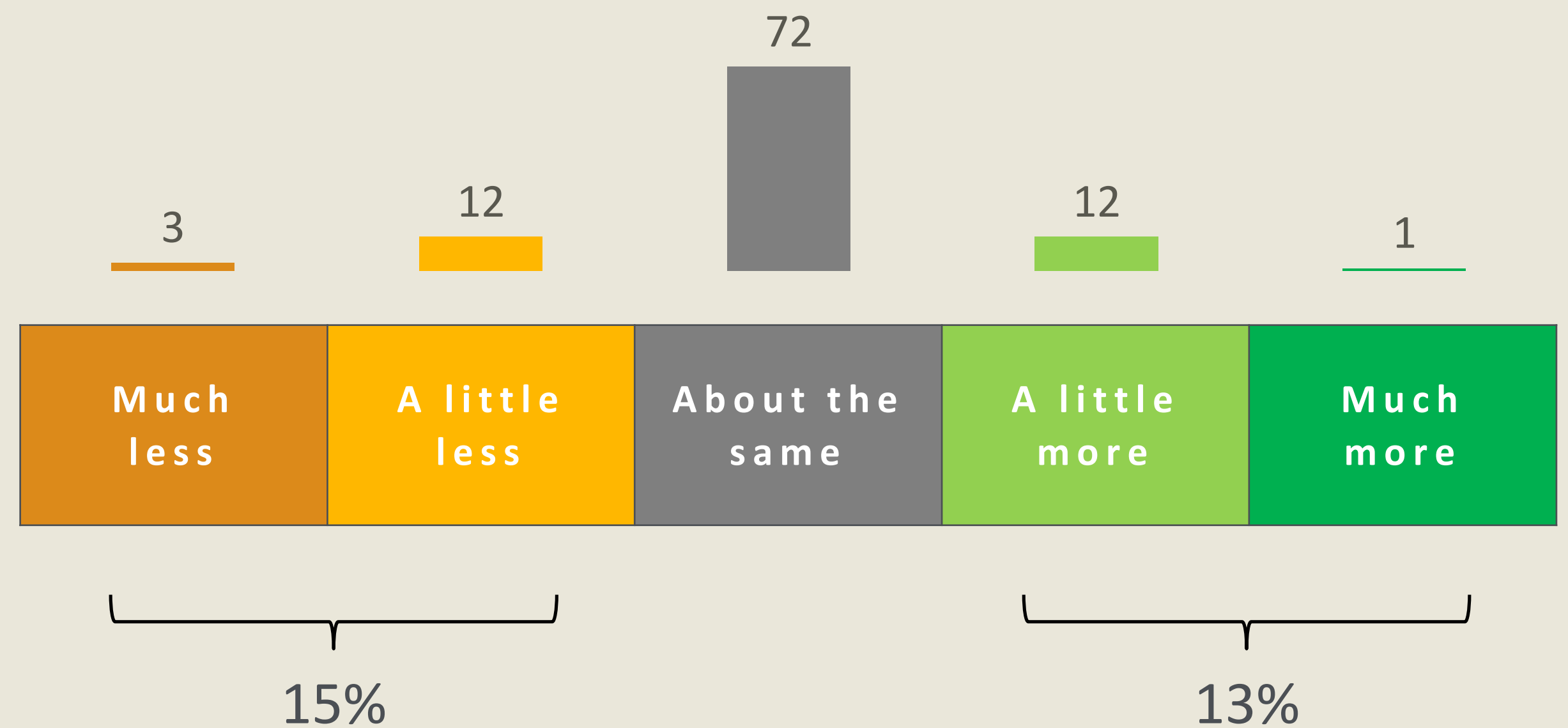


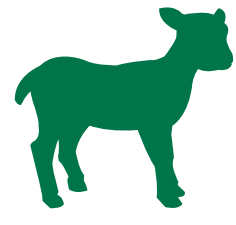
Of those who have bought Lamb (the majority of our red meat purchasers), the amount they were purchasing remained stable with no net movement overall in the amount purchased YoY.

EVER BOUGHT LAMB:

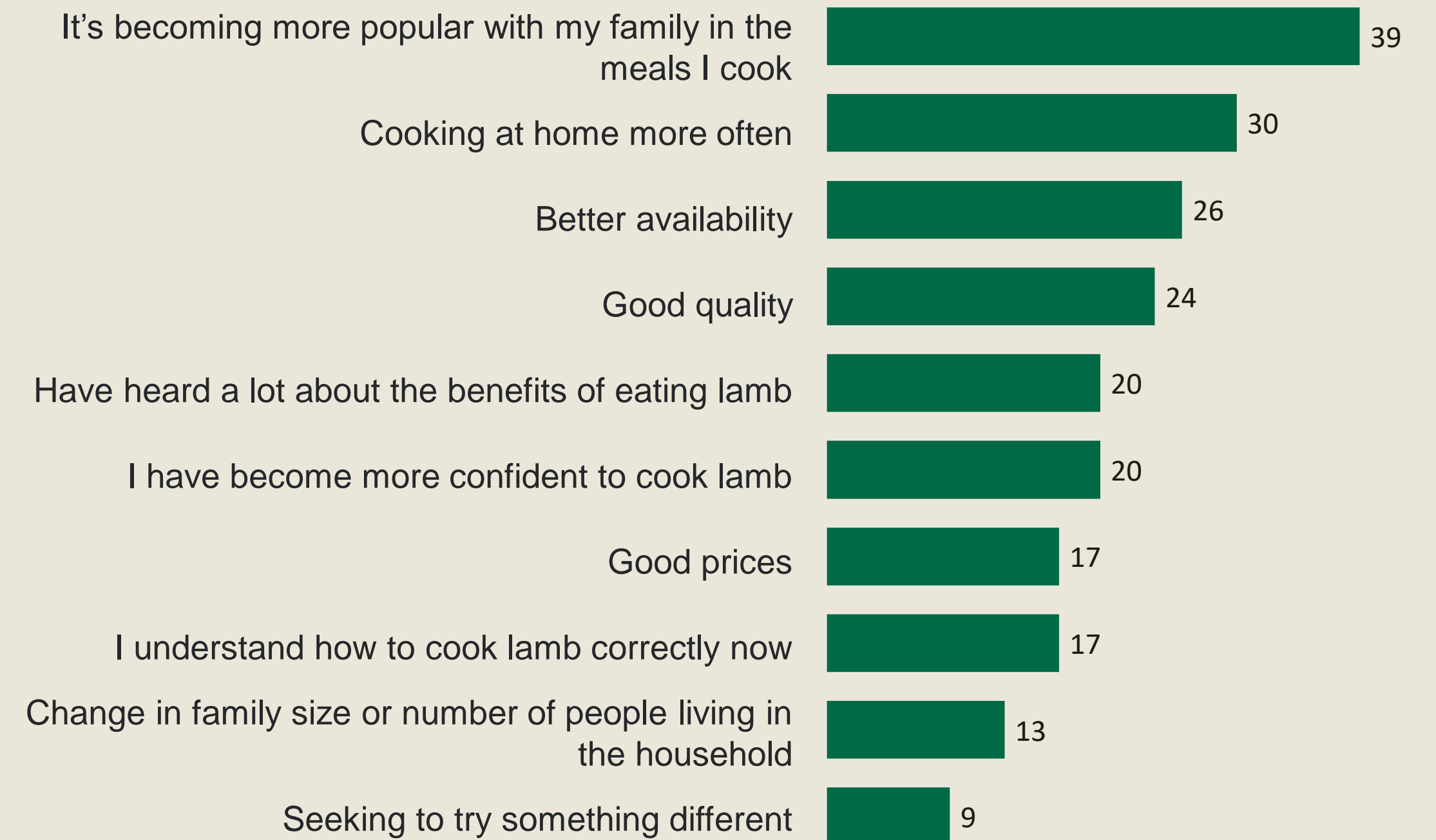
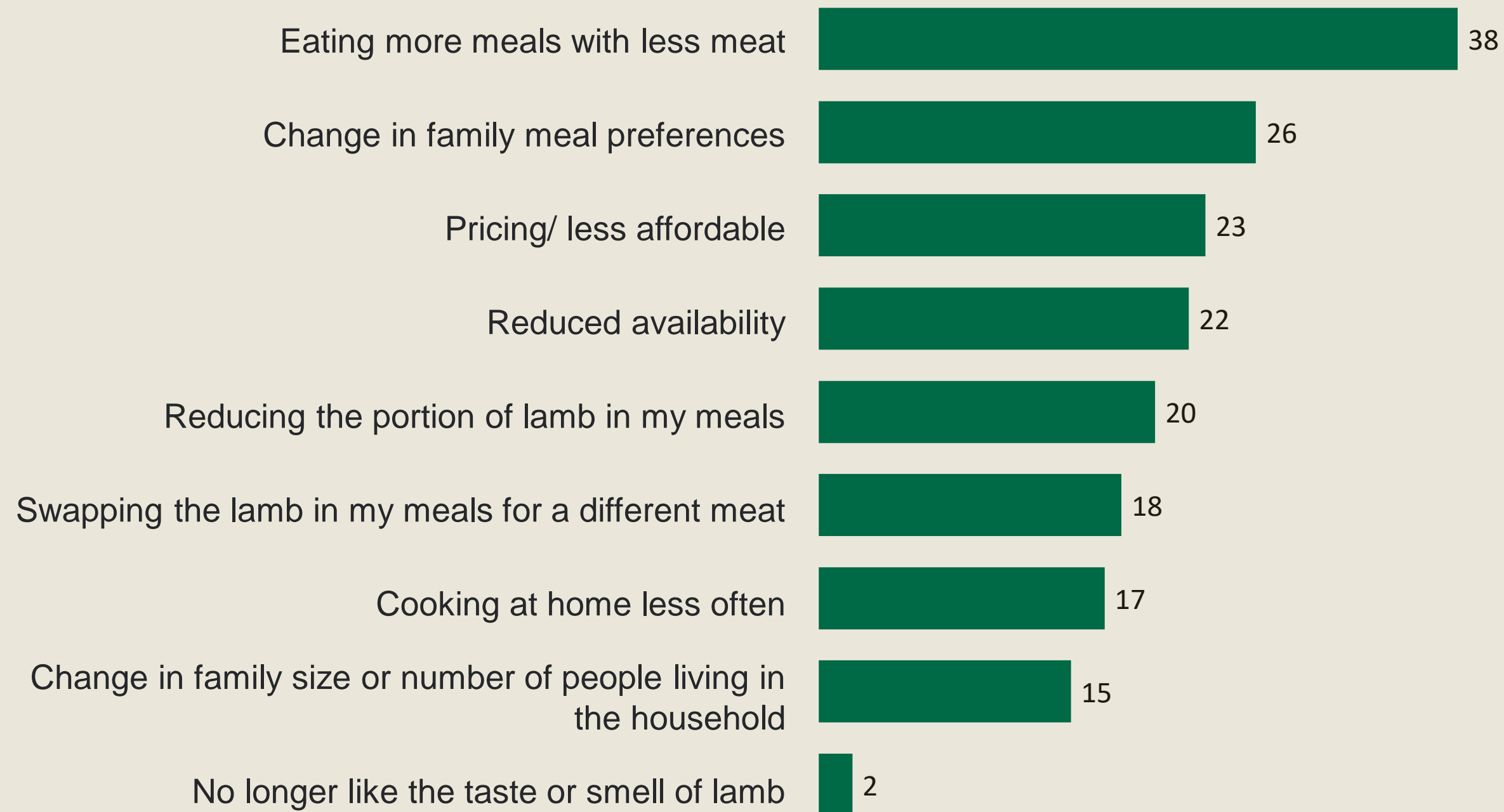
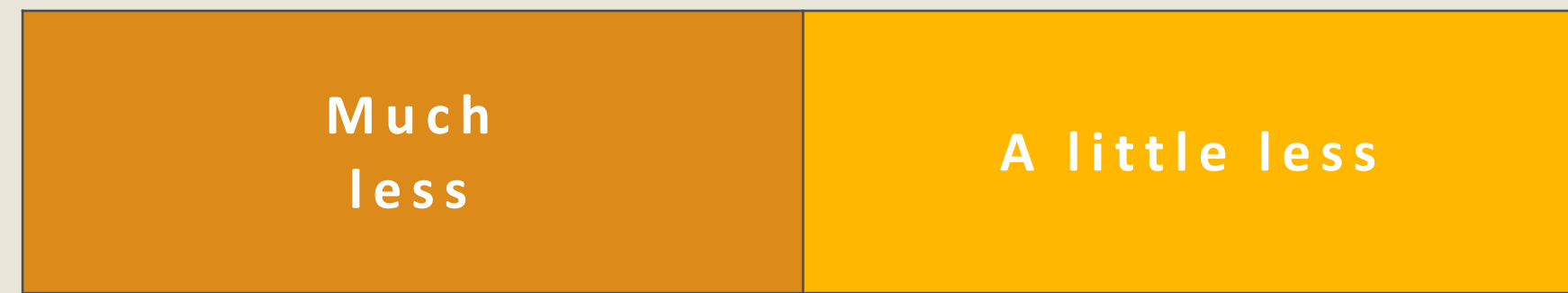


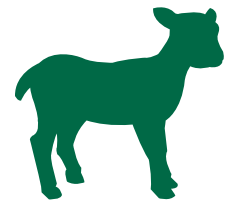
VS LAST YEAR, I AM BUYING...





Of the few UAE consumers that are buying less lamb, the main reason is limitation of meat in general. Of those that are buying more lamb, the reason is that it is becoming more popular with their family.





1 in 6 in the UAE are not buying lamb, this is down vs. 2019 and 2020. For this group taste, fattiness and a lack of familiarity are the key barriers.

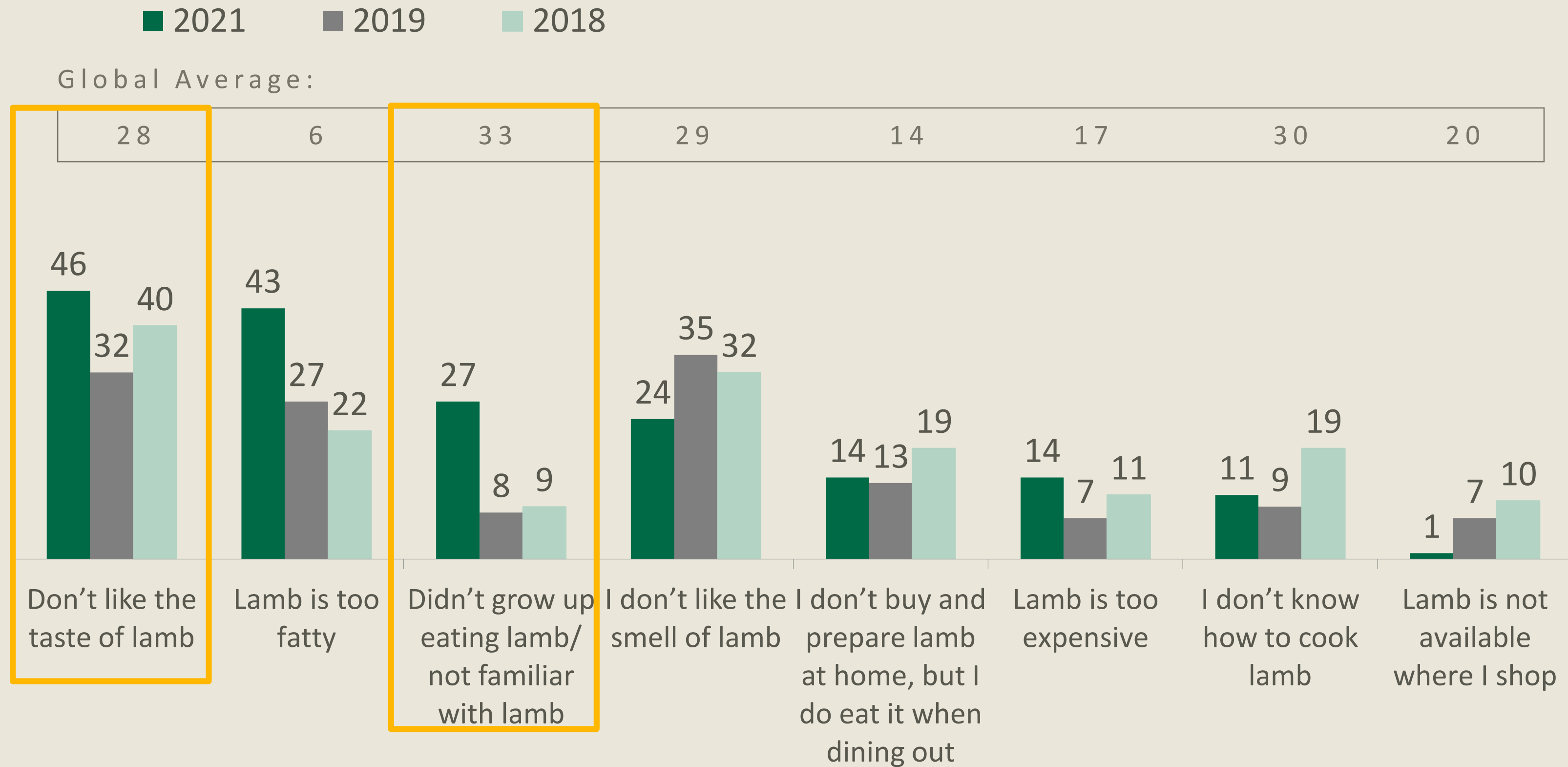
NEVER BOUGHT LAMB

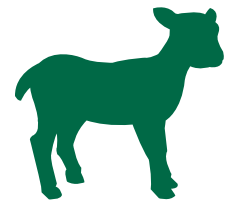
15%

Of the sample have never bought lamb

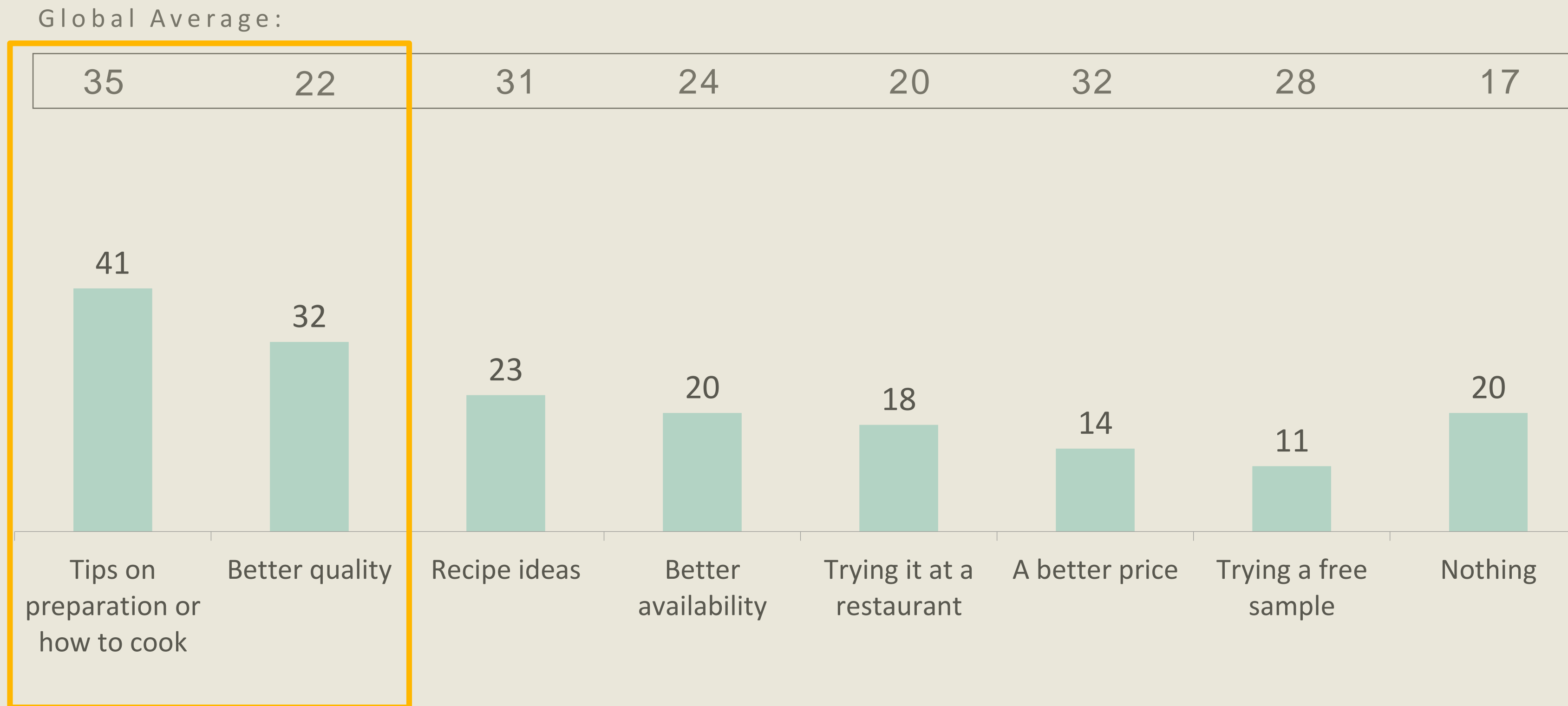
2020: 21%

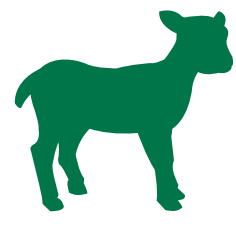
2019: 18%





This lack of familiarity presents an opportunity to provide information on how to use/cook lamb. Allaying quality concerns also seems to be more of an opportunity to drive lamb purchase in UAE vs. other markets.





Amongst rejectors in the UAE the taste and smell are in the top 3 unprompted reasons for rejection of lamb and are more prevalent for those over 35

UMPROMPTED BARRIERS TO BUYING LAMB:



	18-34	35+
Better taste /deliciousness	19%	30%
Improve the smell (no/better smell, clean meat to reduce smell, not fishy...)	14%	22%
I do not like lamb / do not I eat lamb / mutton	14%	16%
Creamy	11%	5%
Difficult to cook / Easy to cook / easy to prepare / difficult to cook at home	11%	5%
Have never eaten lamb/mutton / unfamiliar	11%	5%
Red meat is not healthy	5%	11%

LAMB DEEP DIVE - IMPLICATIONS:

Most in the UAE 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

What do we see?

1

Narrowing of channel options in 2021

With the exception of the three most frequently used channels (Hypermarket, wet market and local/gourmet butchers) frequency of use of all other channels has fallen this year for lamb.

2

A small proportion not eating, their reasons in line with global reasons

Apart from taste, two key barriers stand out with fattiness of lamb significantly above the global average, and a lack of familiarity the other key barrier for those still not eating lamb.

3

Smell is a barrier, more for older consumers

As a prompted reason for rejecting lamb about 1 in 4 mention the smell, which is lower than the global average. It is the #2 unprompted barrier, mentioned more often by those over 35.

Now what?

Does this shift in claimed behaviour reflect what we have seen in the market from a distribution perspective? Is it an opportunity for our more premium proposition to leverage?

Can we provide access to information through pack, online channels or collateral to retailers on how to use/prepare lamb?

With functional barriers of taste and smell standing in the way of greater consumption, guidance on how to cook lamb in ways that will mask or improve to their tastes are an option for improving uptake.

BEEF & LAMB

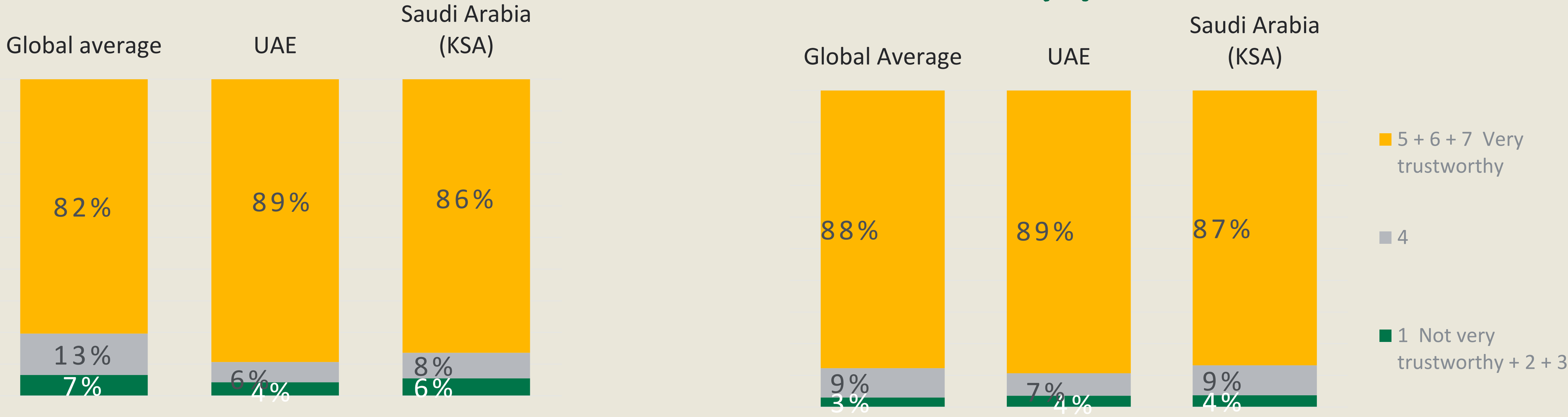
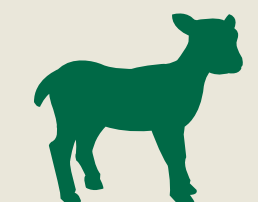
COO TRUST

PERCEPTIONS



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





In comparison to other COOs, AU and Local Beef stand out as the most Trusted COO brands, but Local has the most (over 2 in 5) saying that is 'very trustworthy', which is predominantly Emirati and over 40s

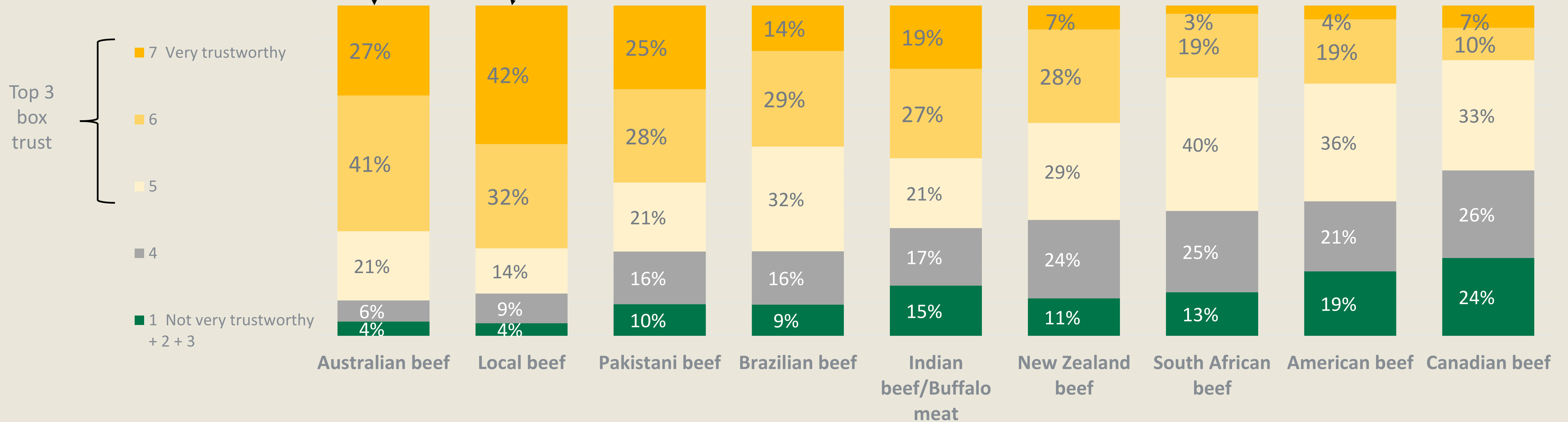
Trustworthy - COO BEEF (UAE)

Australian Beef
Under 40s driving Trust

Expat Asians top 3 box significantly lower than other nationalities at 72%

Local Beef
Over 40s & Emirati driving high Trust

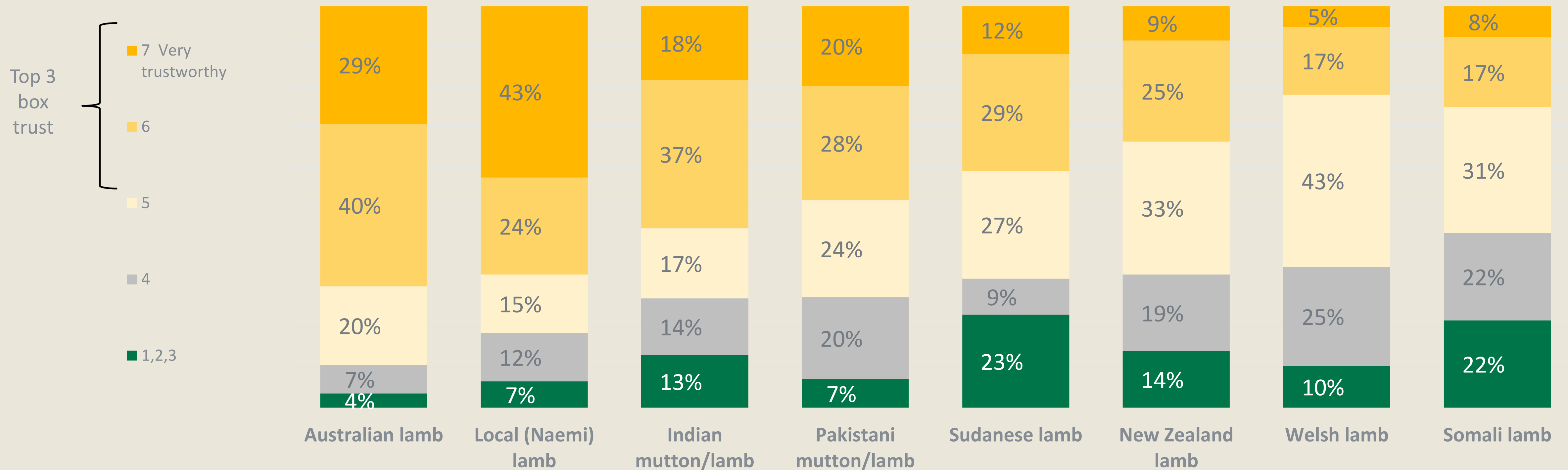
Western Expats top 3 box significantly lower at 55%



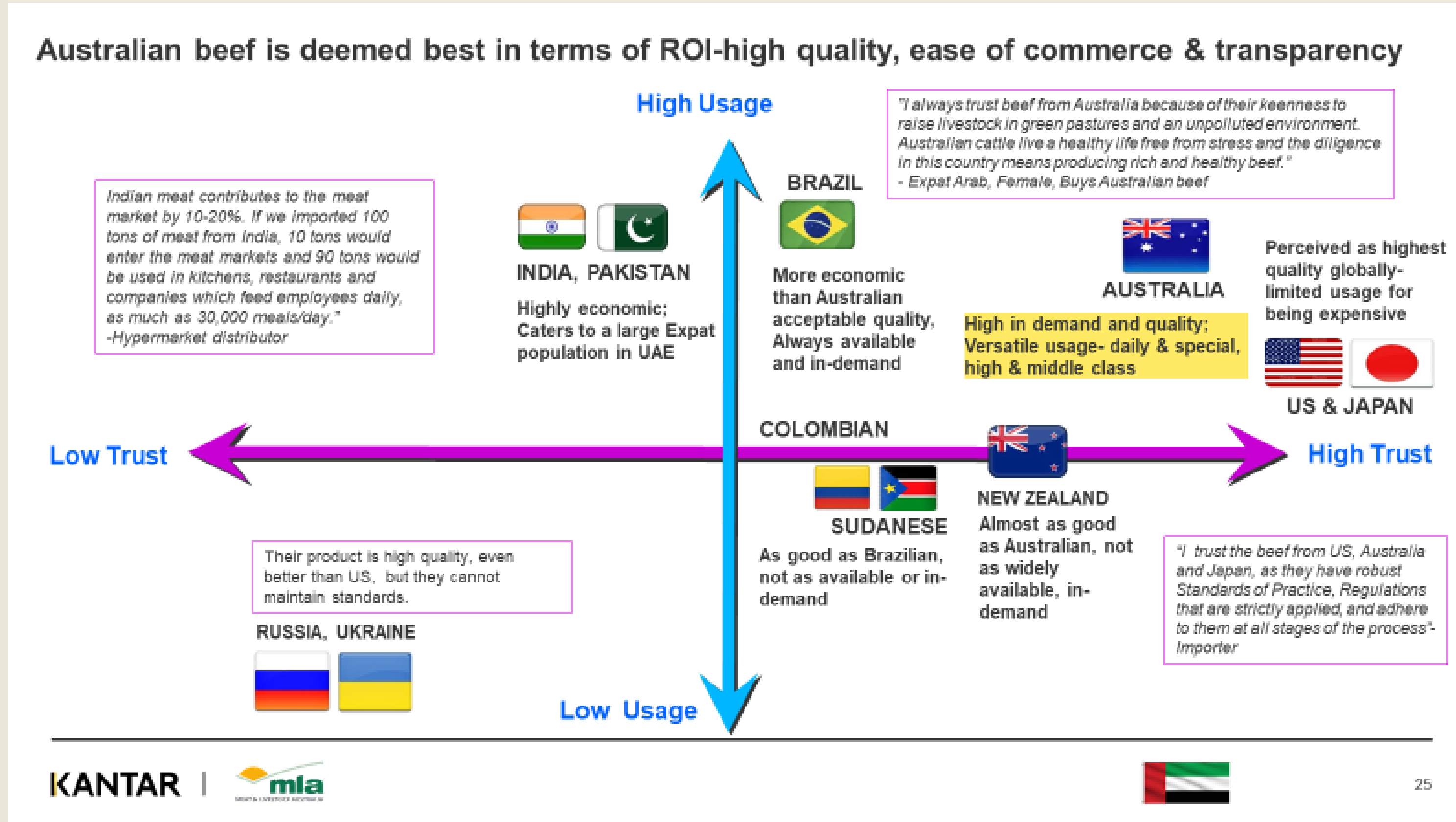


A similar pattern to Beef, AU and Local product clearly the most trusted, and the local lamb with over 40% rating it as 'very trustworthy'. Again it is Emirati driving the very high trust for local, and westerners for AU. However with lamb, expat Asians have lower trust for both.

Trustworthy – COO Lamb (UAE)



And this was largely reflected in the recent qualitative work we ran on trust and traceability in the UAE, with AU



What the UAE consumers said

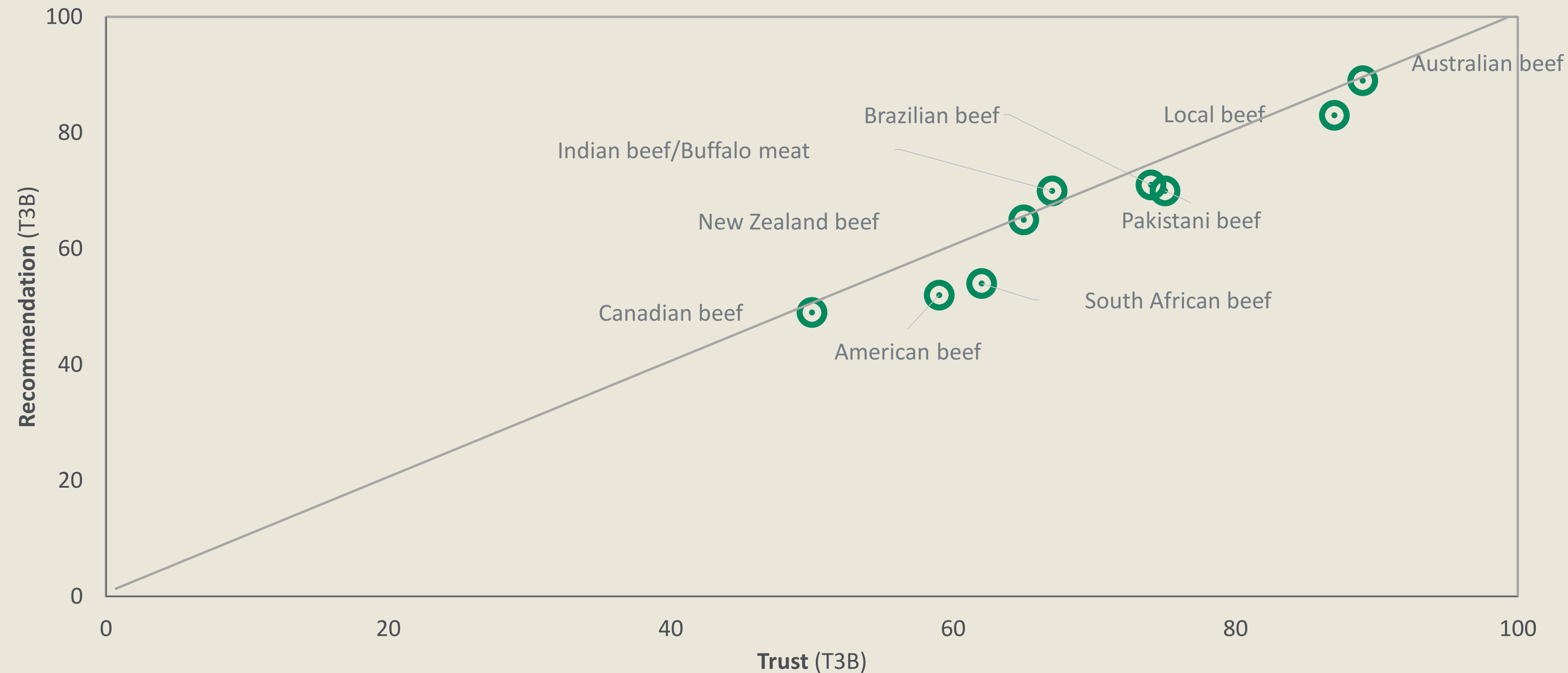
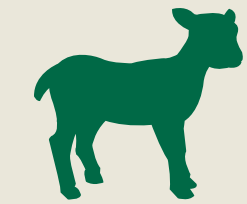
"I just know that the cows are raised in a clean environment, fed organic grass to be raised healthy. They are checked before slaughter which is done in an Islamic way."

"No I'm not aware of how imported beef is made. It is important to know why, the reason I don't research how it is made is because I trust the quality of the beef that I purchase from the local store for many years now." - Expat Arab, Male, buys Australian Beef

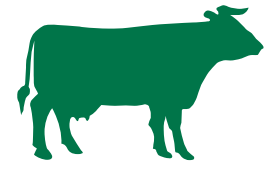
In general there is strong correlation between Trust and Recommendation, with Australian Beef equally recommended as trusted. This pattern is consistent with Lamb COO brands.



Top 3 Box - Trustworthy vs. Recommendation
COO Beef
(UAE)



This same pattern holds true for lamb with AU and Local considerably ahead of other COO brands, and likely to be recommended once trusted.



Consumers of AU Beef in the UAE looking for the functional proof points of great taste and healthiness to build Trust in AU Beef. Process transparency and quality are also important and seen similarly across all the developing markets in SEA as well.

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.

What do we see?

1

AU and Local most trusted, ahead of the rest

AU and Local stand apart from other COO on Trust for both beef and Lamb with between 8 and 9 in 10 saying they trust each. The trust does come from different groups, with over 40s driving trust of local and under 40s more Trusting of AU. And Emirati in particular driving Trust for Local. It is expat Asians who are less Trusting of AU beef and Lamb vs other nationalities.

Now what?

That AU product is more trusted by younger consumers is positive as it offers a strong platform for an ongoing customer base into the future. Is there an opportunity to build trust amongst expat Asian consumers through communications or distribution?

2

Protect associations, showcase process standards to build trust further

For the most part AU product is known for the things that build trust, being taste and healthy as a functional proof points, transparency in the process. The one area for potential development is communicating the high process standards of AU product.

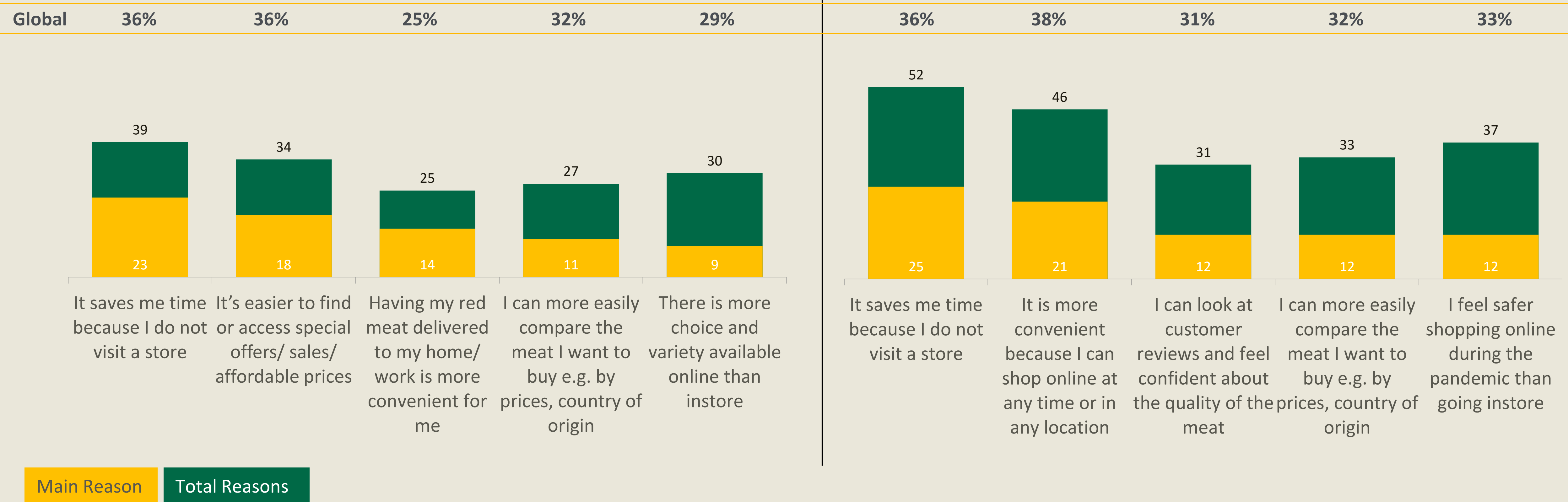
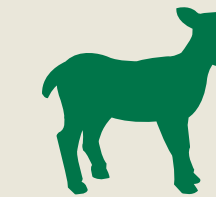
Where feasible can we dial up the transparency of process (opportunity for ISC?) and showcase the high processing and quality standards adhered to through the production process.

RED MEAT ONLINE



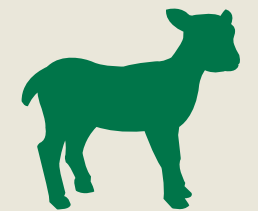
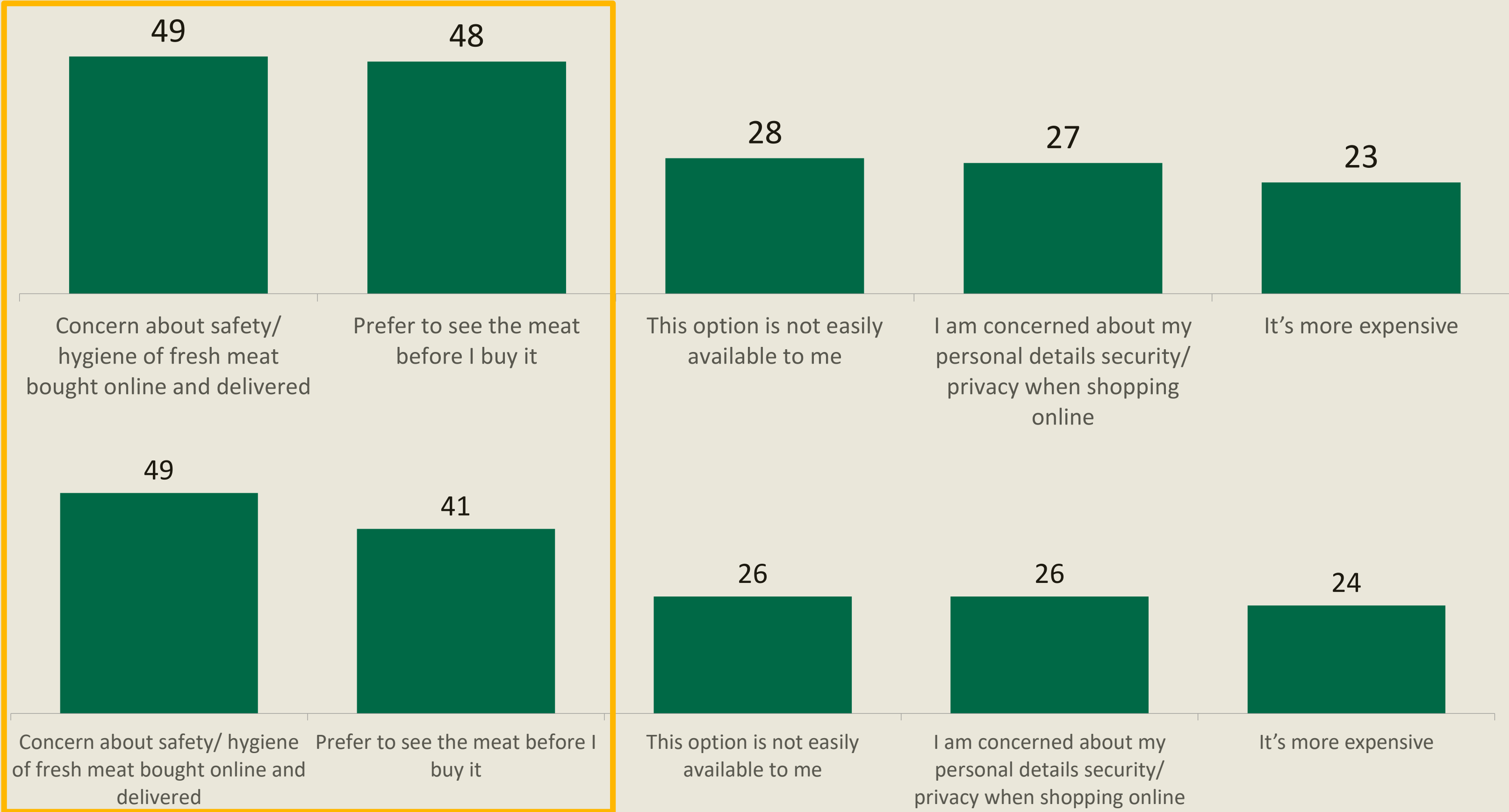
For both Beef and Lamb the primary driver for those who shop online is saving time, however of the remaining top reasons there are differences between beef and lamb with promotions and variety important for beef, compared to convenience and safety for buyers of lamb.

FACILITATORS OF BUYING BEEF & LAMB ONLINE:



For both beef and lamb the barriers to online purchase are the same – the primary concerns for about half are the safety and freshness, followed by wanting to see the meat they are buying.

BARRIERS TO BUYING BEEF & LAMB ONLINE (TOP 5):



No differences in order or magnitude of barriers

- Next 5 reasons**
- I prefer to have the meat immediately, without waiting for shipment
 - Online retailers don't tend to have what I want
 - I'm concerned that what I see and buy online will be different to what is delivered
 - I don't trust the seller's sites
 - There are no/ not enough reviews from other shoppers

CHANNEL, ONLINE FACILITATORS & BARRIERS - IMPLICATIONS:

Safety of meat purchased online remains the key barrier, as seen in other markets. Finding ways to reassure the freshness and safety will be essential to growing online.

What do we see?

1

The reasons they don't shop online focus on the safety of the meat...

The top 10 barriers to buying beef and lamb online are the same, in the same order, and of similar magnitude. Two barriers stand out and are related: concerned about safety of the meat they buy, and wanting to see the meat they buy.



Now what?

The job then, whether for beef or lamb, is to alleviate that concern for the safety and need to see the actual product when purchasing. Potential for a transparent/traceable view of supply chain journey to comfort the end consumer?

2

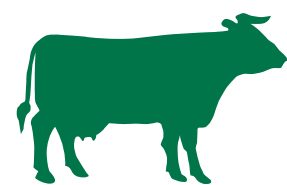
...the reasons they do reflect a need for convenience, with some reassurance

For reasons they do buy online convenience (or some version of it) is the key driver. They are also using online platforms to provide reassurance and comparison on key attributes.



Supporting distributors or retailers to facilitate this convenience and provide the information to reassure customers could help to increase the frequency of use amongst those already comfortable that they are receiving safe product online.

LAMB & BEEF TRUE AUSSIE

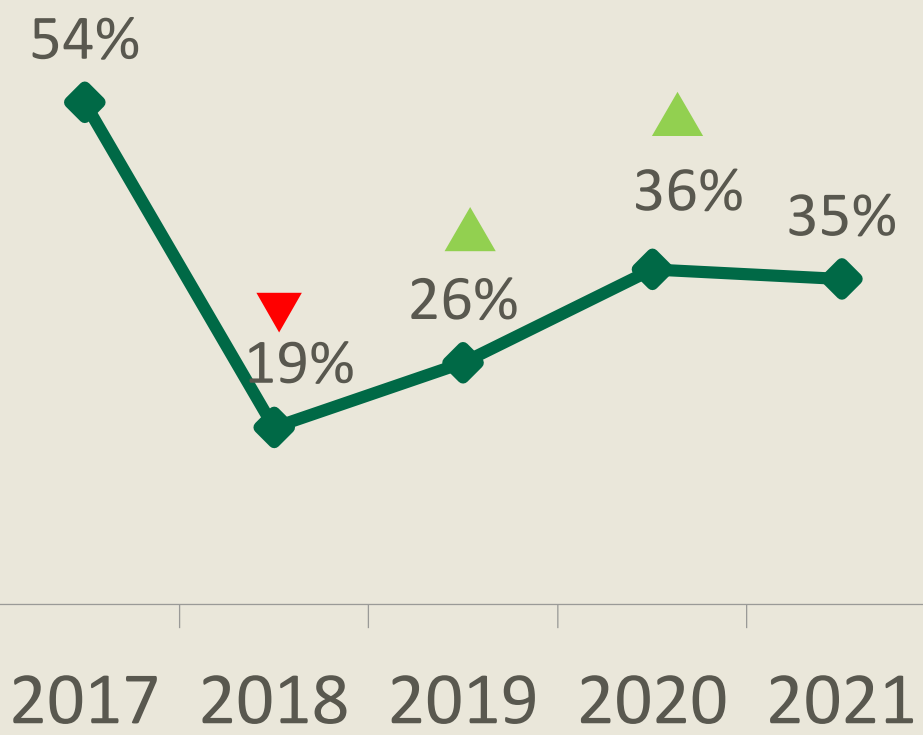


All questions in this section were asked of beef buyers only (must have ever bought beef). They also must have previously bought, or would consider buying, imported beef.

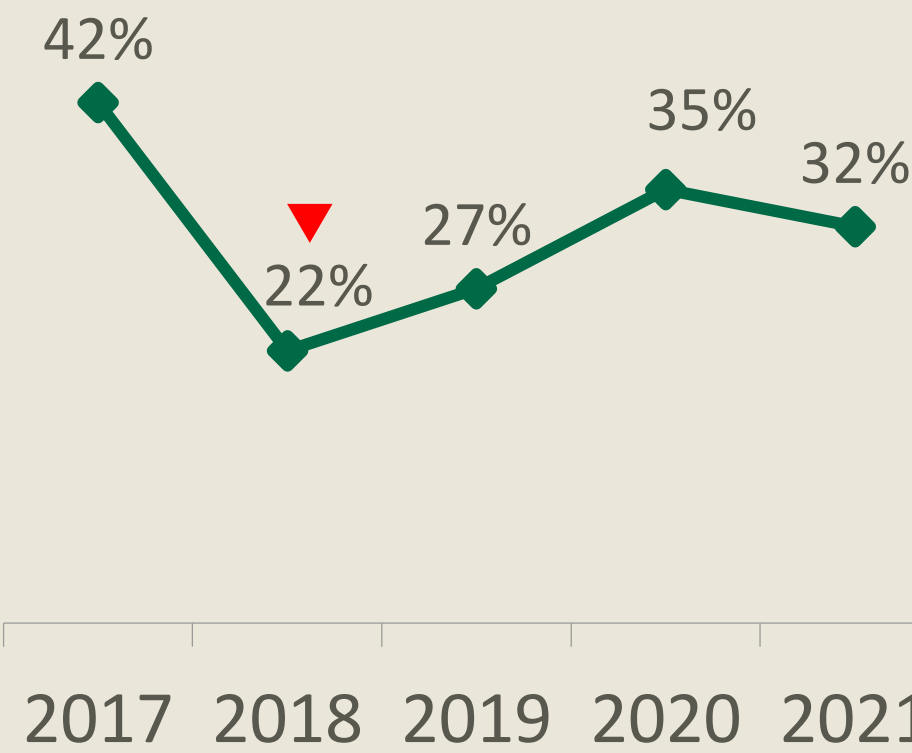


True Aussie awareness is stable this year. There is still some work to do to get the awareness of the term and logo back up to 2017 levels.

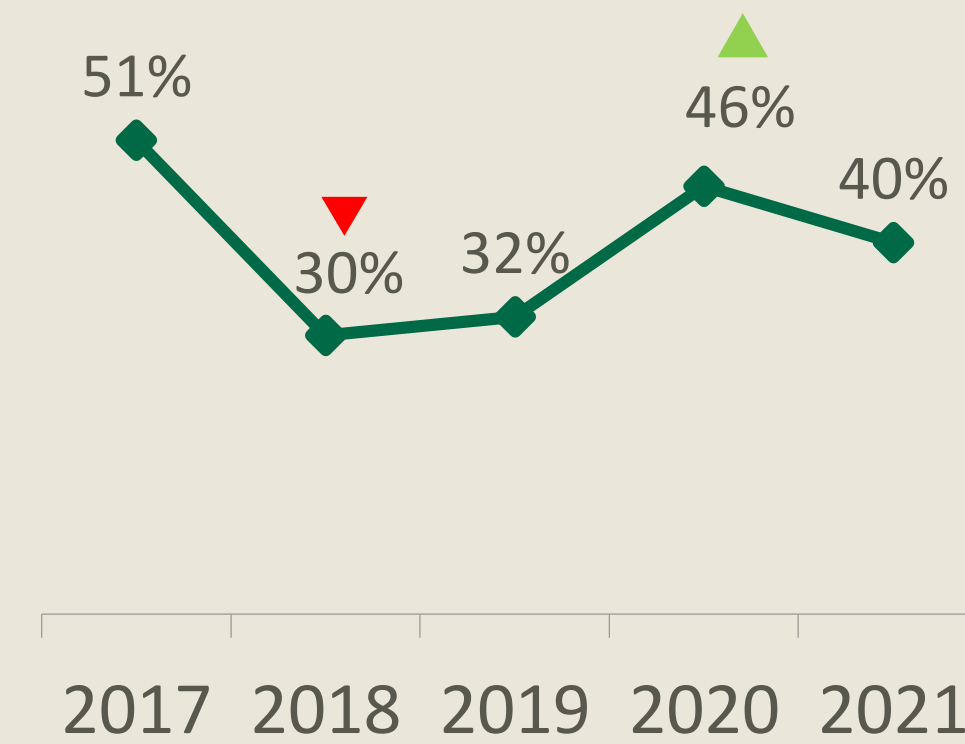
AWARE OF TRUE AUSSIE?



 AWARE OF LOGO



 AWARE OF LOGO



True Aussie without Halal Logo: 36%

True Aussie without Halal Logo: 35%

Term: 'True Aussie'

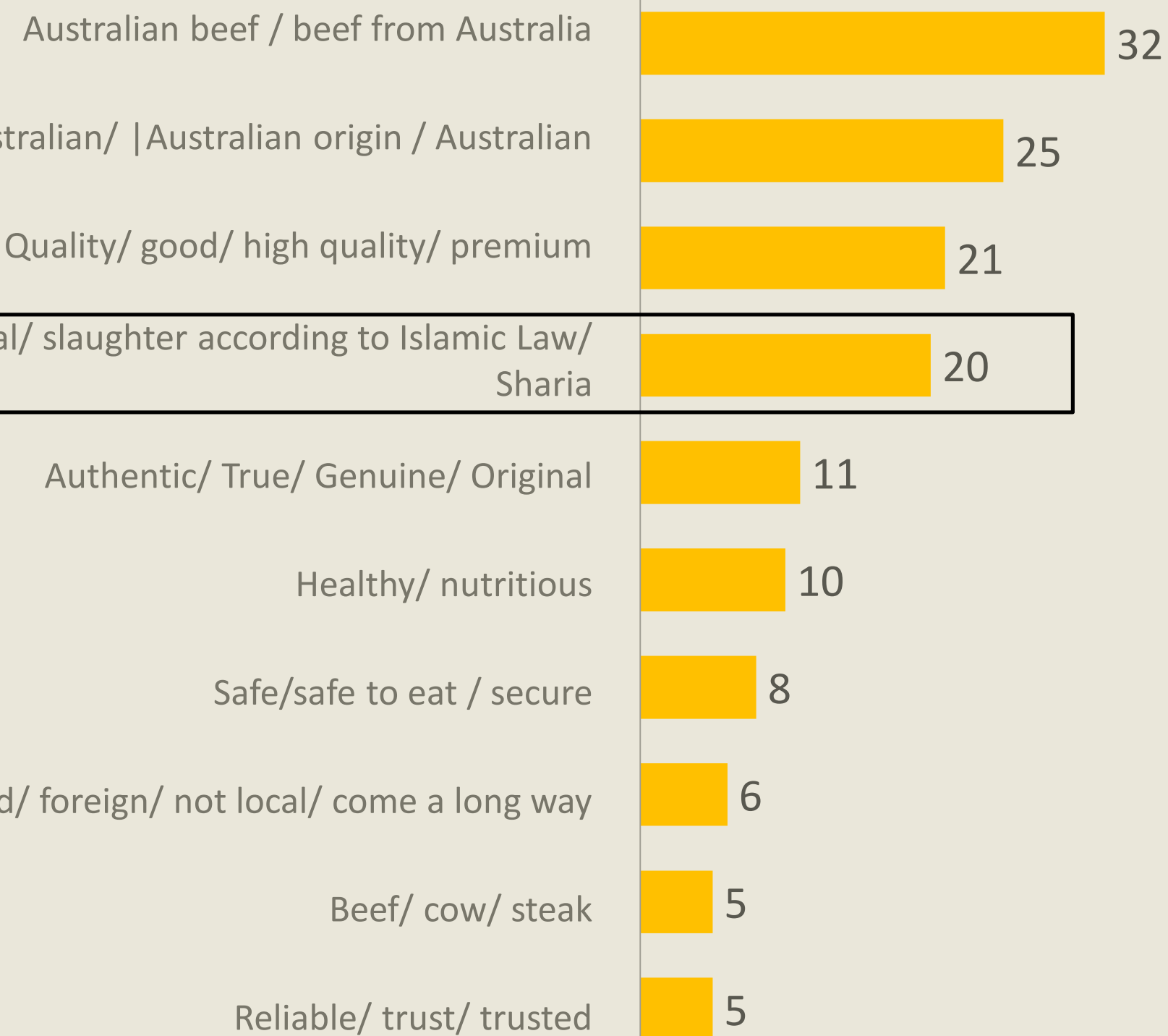




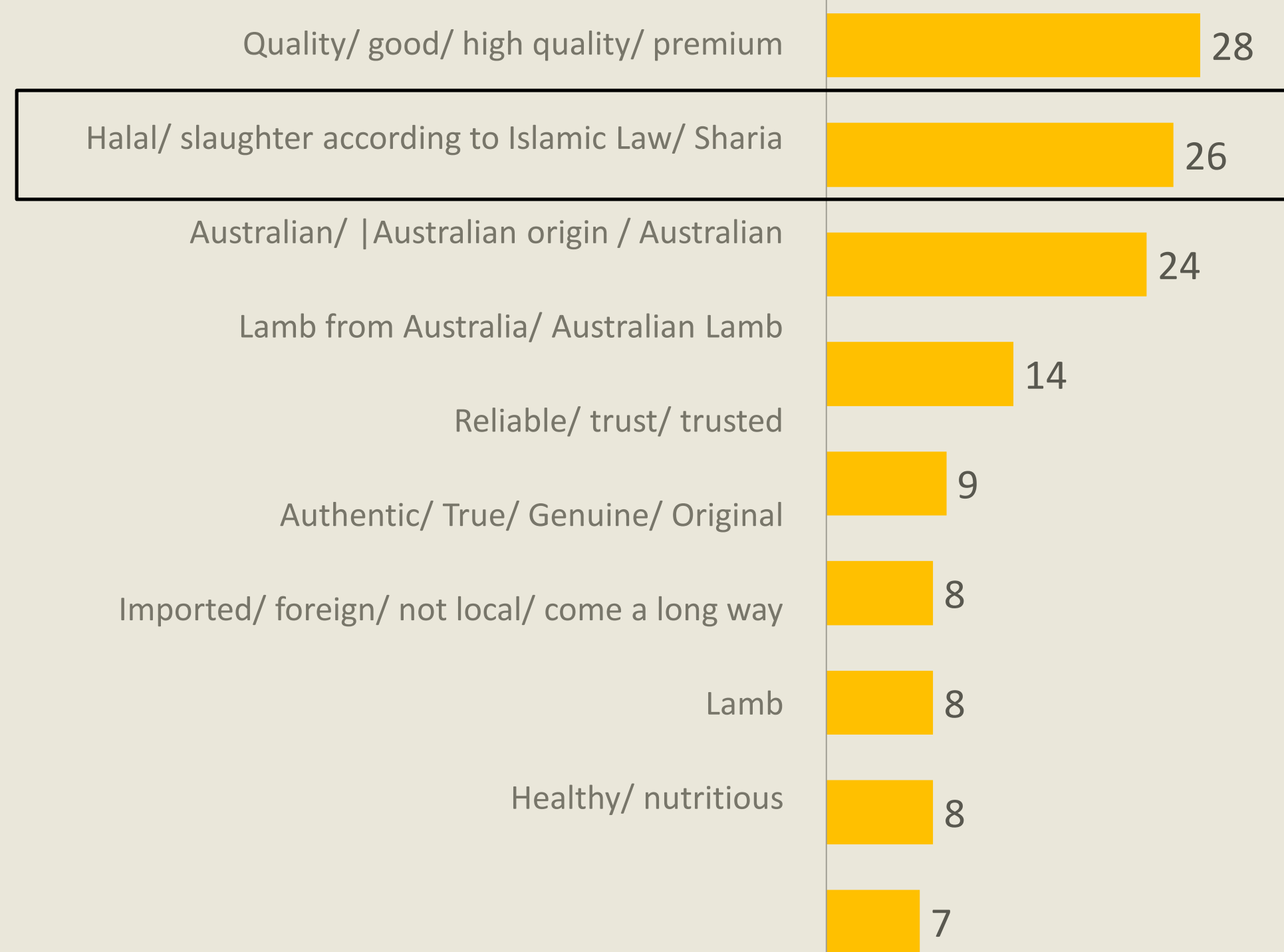
Australian is the key association communicate for True Aussie Beef, where quality the primary association for lamb. The Halal certification component to the True Aussie logo in UAE is a key part of consumers understanding of the brand.



% of respondents who spontaneously mention:



% of respondents who spontaneously mention:



FINAL THOUGHTS & DISCUSSION



FINAL THOUGHTS

1

Defined roles in protein repertoire of UAE consumers for beef, lamb and chicken. Beef losing some definition vs other proteins, a potential watchout for beef overall and presents need for imported to begin to reinforce quality associations that are near to being a strength.

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 (through process) and delivering against expectations to grow premium equity and drive consumer choice.

3

AU Lamb has a clear positioning to protect. The associations that drive brand equity and brand premium are the same, and we own a number of these strengths, continue to communicate these.

4

Lack of familiarity the other key barrier for those still not eating lamb. Can we provide access to information through pack, online channels or collateral to retailers on how to use/prepare lamb?

5

That AU product is more trusted by younger consumers is positive as it offers a strong platform for an ongoing customer base into the future. Showcase the high process standards of AU product, to support quality and underpinned by functional proof points of taste and

6

The job for online channel, whether for beef or lamb, is to alleviate that concern for the safety and need to see the actual product when purchasing. Potential for a transparent or traceable view of supply chain journey to comfort the end consumer?

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