



SPRING 2025

Insights, Assets +
Information



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How are people shopping?

Australia 52wks ending 15.06.25

TOTAL FMCG:

 **+5.8%**
Value Growth
+12.1% vs 2YA

 **+5.3%**
Volume Growth
+9.8% vs 2YA

Amid stabilising inflation, grocery growth remains steady, driven by more shoppers making more trips, although with smaller basket sizes.



Average Trips
+4.2% vs YA
+6.5% vs 2YA



Spend per trip
-0.7% vs YA
+1.2% vs 2YA



Buying Households
+2.2% vs YA
+4.0% vs 2YA



Vol Per Trip
-1.2% vs YA
-0.9% vs 2YA

Reference: NielsenIQ Homescan | 52 weeks to 15/06/2025 vs Year Ago (YA) & 2YA

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Stability

Consumers are feeling more confident in their financial position.

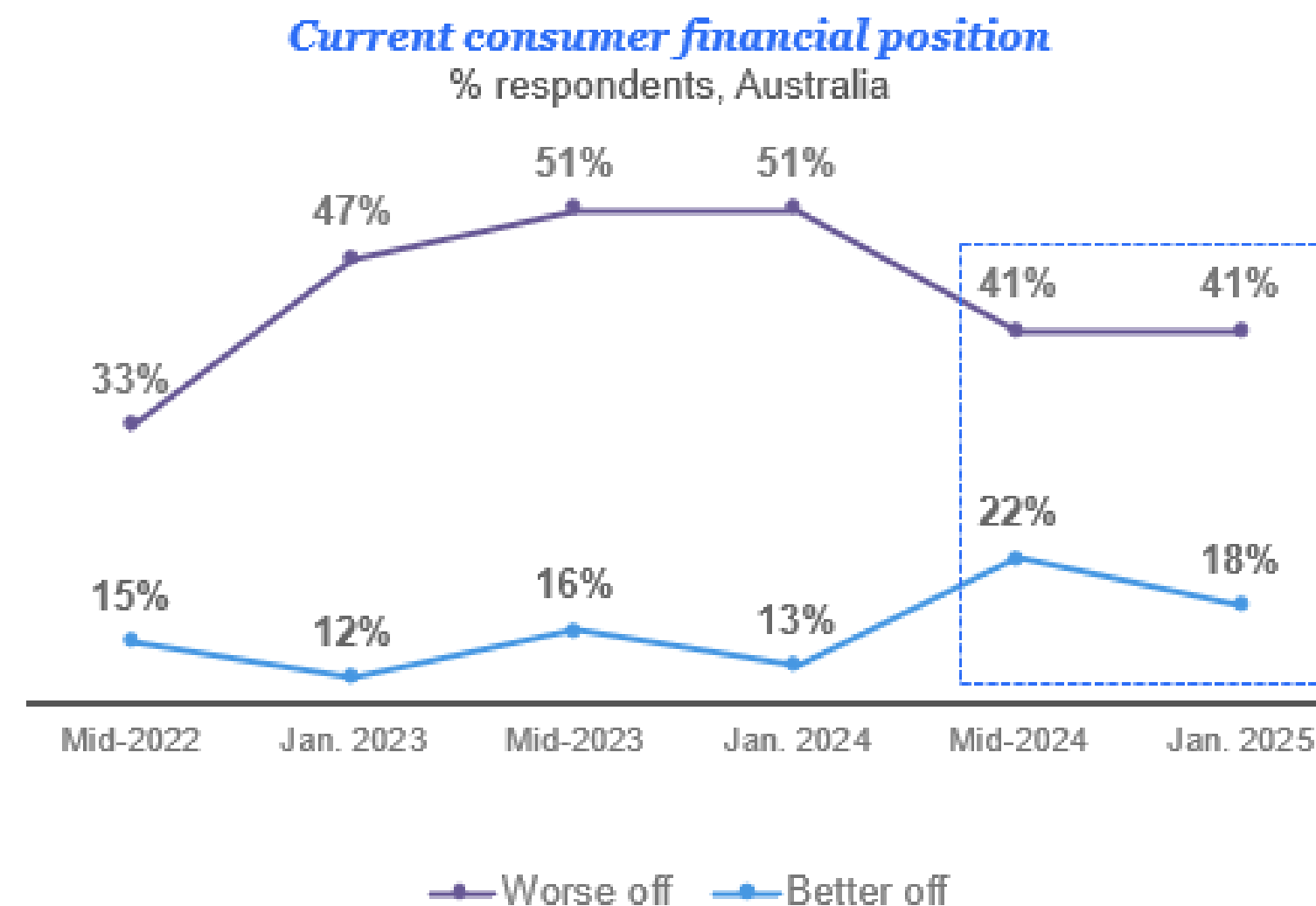
1. 10% less people saying they are worse off than YA
2. 5% more people saying they are better off than YA
3. 6% more people saying they are living comfortably
4. 6% less people saying they can only afford the basics

Latest available data to end Q2

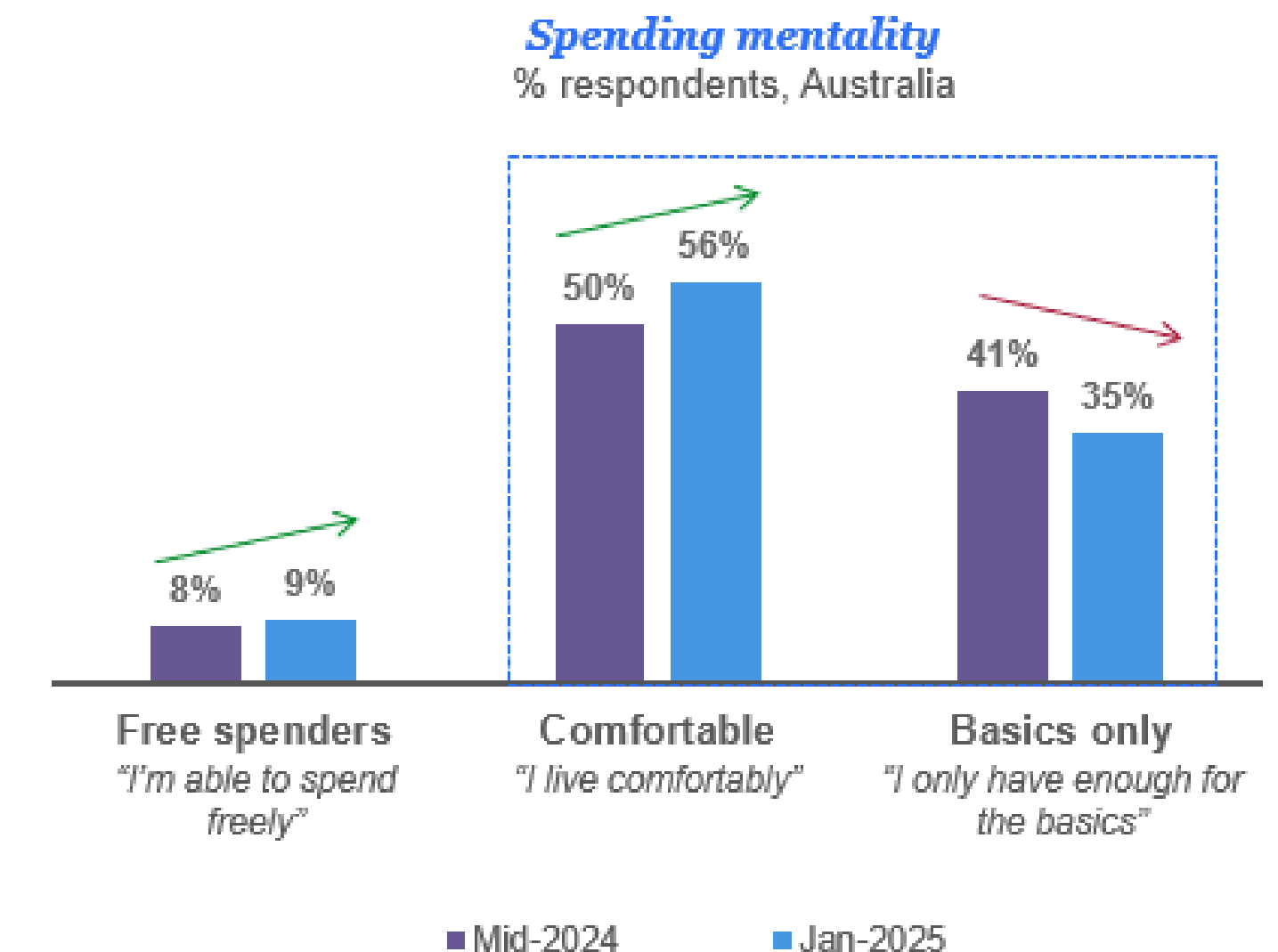


Reference: NIQ 2025 Private Label & Branded Products report global survey

Stability in Australian consumer financial position during past six months



Spending flexibility has increased



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Loyalty

Shoppers are continuing to spread their shopping dollars between retailers.

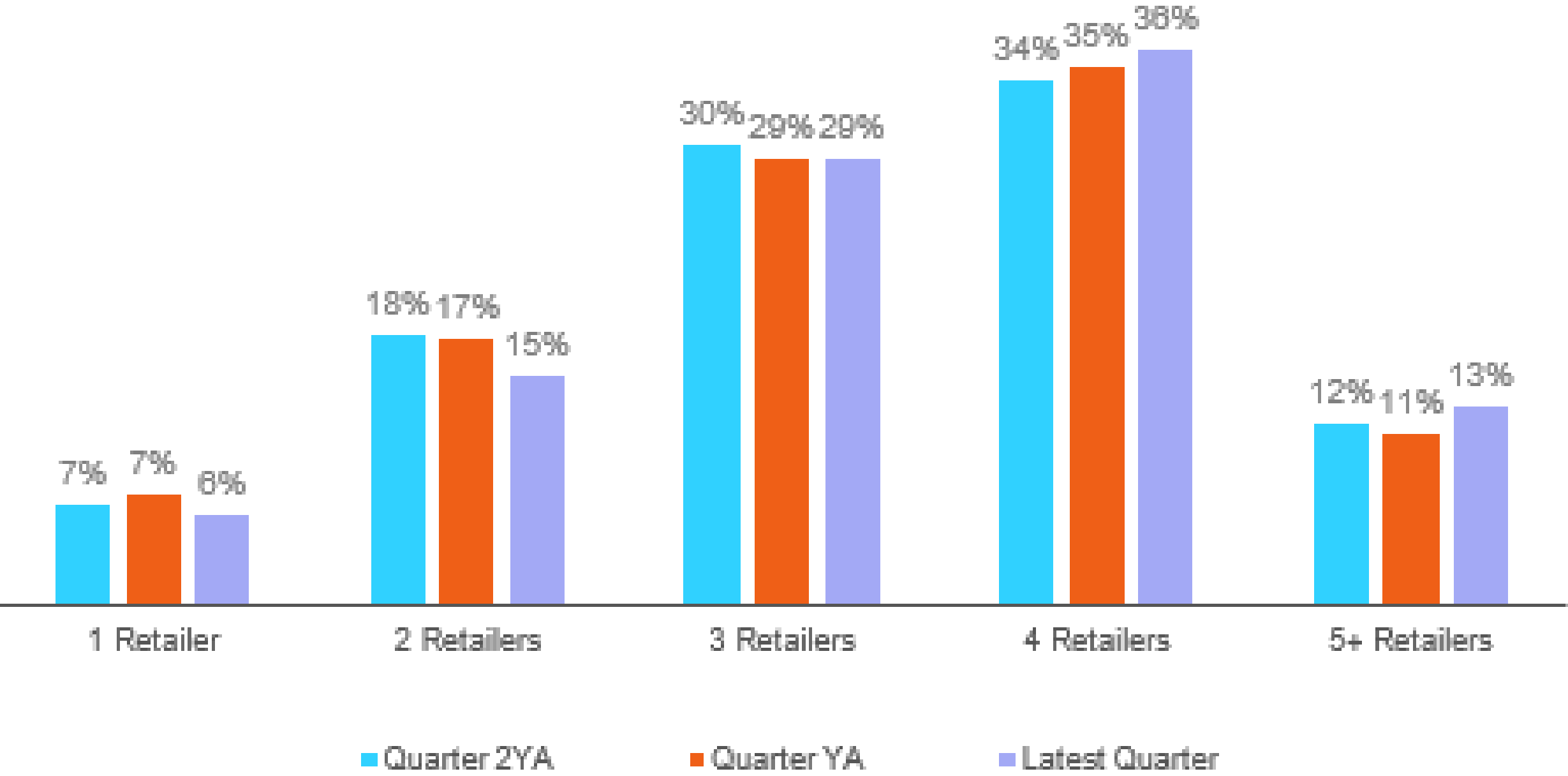
79% of shoppers are shopping in 3+ retailers, and nearly half are shopping in 4+ retailers.

Latest available data to end Q2



Reference: NielsenIQ Homescan™ / 13 weeks to 15/06/2025 vs Year Ago (YA) & 2YA

% of Buying Households shopped at



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Market shifts

Consumers continue to focus on cost-of-living pressures, followed by personal health and then sustainability.

Latest available data to end Q2



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Health

Beyond affordability, education and awareness play a large role in healthier diets.

Latest available data to end Q2



Reference: NIQ November 2024 BASES Survey (n=318)

Q. How can manufacturers/retailers drive healthier diets?



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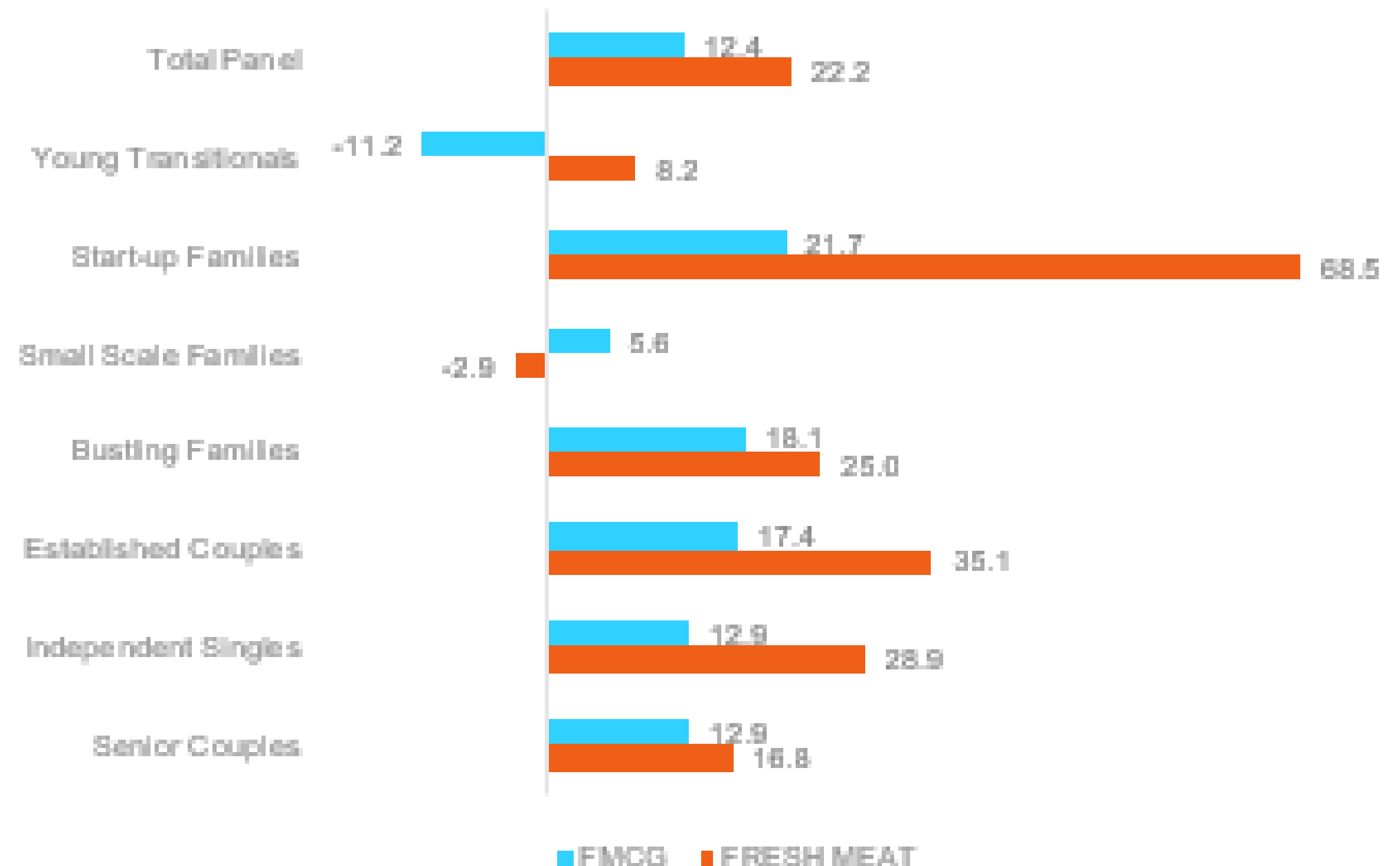
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Online growth

Online growth has predominantly been driven by start-up families, with them greatly accelerating online fresh meat purchases.

Latest available data to end Q2

Value % growth Online, MAT vs YA



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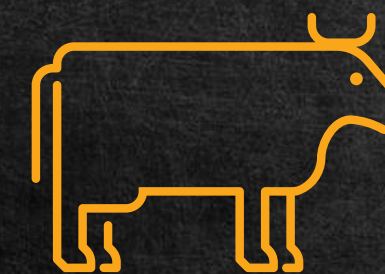
Retail performance

Australia 12wks ending 13.07.25



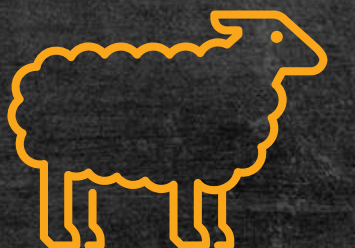
Total grocery continued momentum increasing +7.1% on account of more trips and rising prices

Fresh meat growing slightly faster at +7.2% with pork (+9.5%) and beef (9.3%) driving value gains



Strong performance from beef steaks and winter favourites such as chuck and soup bones

With prices reverting to 2YA levels, purchase frequency and volume also returning to similar patterns



Summary

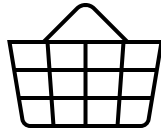
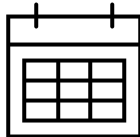
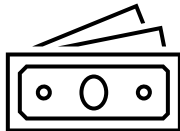
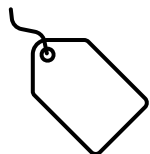
Australia 12wks ending 13.07.25

Whilst penetration, frequency, and volume per shop are down marginally across beef and lamb, both have seen positive gains in purchase value.

Reach out for more information



Reference: NielsenIQ Aus Homescan

Household KPIs					Category KPIs		
							
1 year ago	Penetration	Penetration vs YA	Frequency vs YA	Vol per Shop vs YA	Purchase Volume Vs YA	Purchase Value vs YA	Price/KG Vs YA
Fresh Meat	93.3%	(1.2)	0.7%	0.7%	2.4%	7.2%	4.6%
Beef	81.9%	(0.5)	(0.7)%	(0.8)%	0.2%	9.3%	9.1%
Lamb	47.2%	(2.9)	(1.5)%	(5.3)%	(10.2)%	4.1%	15.9%

2 years ago	Penetration	Penetration vs 2YA	Frequency vs 2YA	Vol per Shop vs 2YA	Purchase Volume Vs 2YA	Purchase Value vs 2YA	Price/KG Vs 2YA
Fresh Meat		(1.2)	3.3%	3.6%	10.2%	10.5%	0.3%
Beef		(0.9)	2.8%	1.8%	7.9%	12.2%	3.9%
Lamb		(1.7)	2.0%	(2.0)%	0.6%	2.3%	1.7%

FY26 Activity

Make the most out of your programs by leveraging activities with our calendar

FY26	2025						2026					
	QUARTER 1			QUARTER 2			QUARTER 3			QUARTER 4		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
BEEF				AUSSIE BEEF. THE GREATEST.						THE GREATEST		
		YOU'RE THINKING BEEF						YOU'RE THINKING BEEF				
LAMB												
	RECRUITMENT						SUMMER LAMB		RECRUITMENT			



Lamb Recruitment

Widen Lamb’s appeal to younger consumers by increasing their consideration and affinity for the protein.

Summer Lamb

Drive mass reach and consideration for Lamb by strengthening its ties to Australian culture.



Aussie Beef. The Greatest.

Build superiority by inspiring Australians to choose beef as their #1 choice when they want the best protein.

You’re Thinking Beef

Build up the mid-week meal by increasing beef consideration through desire and inspiration.

Midweek Meals: You're Thinking Beef

Back for another pulse in market is the Midweek Meals campaign – You're thinking beef – actively boasting the flexibility of beef and its role in midweek meals.

Check out the link below to make sure that you have the latest campaign visuals.

[Click for assets](#)

TACO TUESDAY?



**YOU'RE
THINKING
BEEF**





Aussie Beef. The Greatest.

“Aussie Beef. The Greatest.” continues to showcase beef as the superior protein, reinforcing why consumers are willing to pay more.

The next phase of the campaign is set to air October – December this year.



Volume sales
+5.1% vs YA



Penetration
+2.5% vs YA



Value sales
+11.9% vs YA



Willingness to pay more
reached 33%

4 weeks to 23/03/25

[Click for assets](#)

Technical Videos

Elevate your expertise – continuous learning through technical tutorials

Go beyond theory and dive into actionable techniques. Our technical videos offer step-by-step demonstrations, expert tips, and real-world examples to empower your team with the skills they need to excel.

Share these videos with your team to further their expertise!

Glowing up an undervalued cut
With Mark Best



[Watch video here](#)

Beef Recipe Inspiration

Cuts that count:

Rump
T-bone
Scotch

Inspiring recipes and still images to share on socials or with customers.

Click images for recipes

Click here for downloadable assets



Classic steak sandwich



Bistecca alla Fiorentina, radicchio & pear salad



Spiced beef shawarma

Beef Recipe Inspiration

From quick to classic:

Rump
Tomahawk

Inspiring recipes and still images to share on
socials or with customers.

Click images for recipes

Click here for downloadable assets

Stir fried beef in XO sauce



Perfect for: Takeaway shops, pubs, clubs, casual dining, and hotels

Reverse seared tomahawk



Perfect for: Fine dining, steakhouses, and hotels

Lamb Recipe Inspiration

Grillin' season:

Forequarter chop
Midloin
Leg steaks
Mince

Inspiring recipes and still images to share on socials or with customers.

Click images for recipes

Click here for downloadable assets



BBQ forequarter chop with asparagus & lemon risoni



Lamb mince, eggplant and rocket salad



Lamb souvlaki

Lamb Recipe Inspiration

Flavour journeys:

Ribs
Leg
Shoulder

Inspiring recipes and still images to share on socials or with customers.

Click images for recipes

Click here for downloadable assets

Braised Korean lamb ribs



Perfect for: Pubs, clubs, fine dining, casual dining, and hotels

BBQ Turkish lamb adana skewers



Perfect for: Pubs, clubs, casual dining, and takeaway shops

Goat Recipe Inspiration

Low and slow:
Shoulder

Inspiring recipes and still images to share on
socials or with customers.

Click images for recipes

Click here for downloadable assets

Goat paella



Perfect for: Takeaway, pubs, clubs, casual dining, and hotels

Rare Medium: Trend Spotlight

The rise of third-culture cuisine

Australia's diverse culinary landscape is a melting pot of cultures, cuisines, and unique ingredients. This has given rise to Third-Culture Cuisine, where chefs push the boundaries of traditional cooking to create modern, hybrid dishes. It's a celebration of multicultural identities, blending familiar food memories with entirely new flavour experiences.

The results are a unique blend of familiarity and discovery. Chefs are tapping into core food memories to generate feelings of nostalgia while rewarding diners with an entirely new, sophisticated experience.



Rare Medium: Reels

A bold and unique flavour

Our short, engaging stories, recipes and flashes of inspiration, give you a direct line to the people, passion and places that are shaping our industry.

Ready to explore a world of recipes and excitement? Visit us on Instagram @_raremedium and share our reels.

Click images for reels



Lamb belly dumplings



Slow-braised beef cheeks
on Paris mash



Garlic Koji Kushiyanke
with onion & bush tomato

Rare Medium: Foodservice Inspiration

Where do the hottest food trends start? In foodservice kitchens!

The world's best steak city – Down Under, On Top

Sydney, Australia has been crowned the 2025 World's Best Steak City with 11 venues listed on the World's 101 Best Steak Restaurants list - and a remarkable five restaurants ranked in the top 20.

[Watch video here](#)

Glowing up an undervalued cut with Mark Best

Chef Mark Best demonstrates how to take a lesser-valued cut – like the lamb breast – and turn it into something special.

[Watch video here](#)



Rare Medium: Paddock to plate

Life on a Northern Territory cattle station

Newcastle Waters is a remote station, shaping your food long before it reaches the plate. Our journey offers a window into this dynamic world, giving you a direct line to its rugged realities, offering practical insights into cattle management and outback living.

Want to know what life looks like out there? Head on over to Rare Medium to find out.

[Watch video here](#)



Aussie Beef & Lamb: Upcycled Flavours

Bite-Sized Inspiration for Bold Menus

It's not about following the same old rules; it's a bold challenge to traditional flavor pairings. Aussie Beef & Lamb, in collaboration with Flashpoint Innovation, is pushing the boundaries, introducing "upcycled flavors."

Get ready to elevate your dishes with fun new combinations, like a savory caramel sauce made from roasted eggplant or a hot sauce from kimchi juice. It's all about culinary innovation and creating unexpected flavours.

[Click to find out more](#)



RARE MEDIUM
THE RED MEAT EXPERTS



Complementing Aussie red meats with **UPCYCLED FLAVORS**

RECIPE INSPIRATION BY FLASHPOINT INNOVATION



aussiebeefandlamb.com



Packaging

Understanding shopper needs

We partnered with Nature to conduct packaging research, aiming to better understand consumer behavior and test new design hypotheses.

This study involved a survey of over 3,000 Australians who had recently purchased beef or lamb, along with qualitative video analysis.

The findings from this research provide valuable insights into shopper needs.

[Click here for more information](#)



Packaging: Meat Visibility

A key driver of preference

Maximising meat visibility on pack is a powerful way to boost consumer preference and perceived quality.

Packaging that makes the meat an undeniable focal point, such as high product visibility and vacuum packs with cardboard trays, garners preference from consumers and drives purchase intent.

[Click here for more information](#)

Packaging design

Mid visibility pack



58%
Preference for this pack

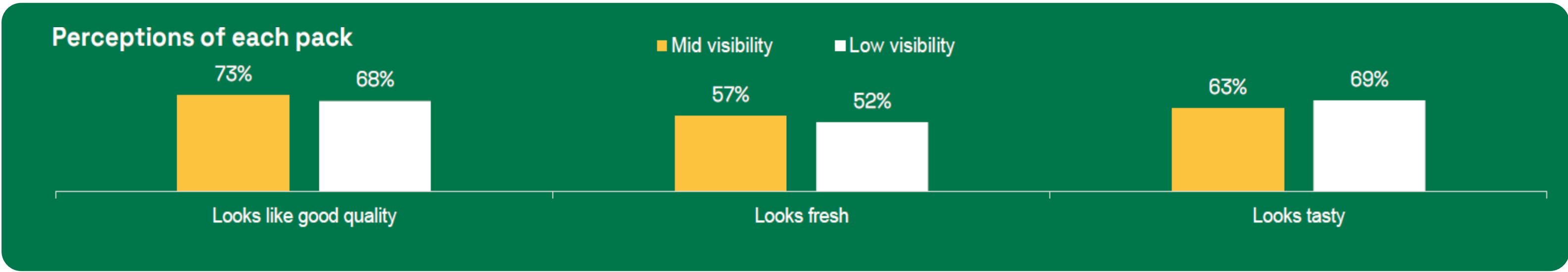
89%
Likely to buy

Low visibility pack



42%
Preference for this pack

86%
Likely to buy



Packaging type

Top 3 packaging preferences



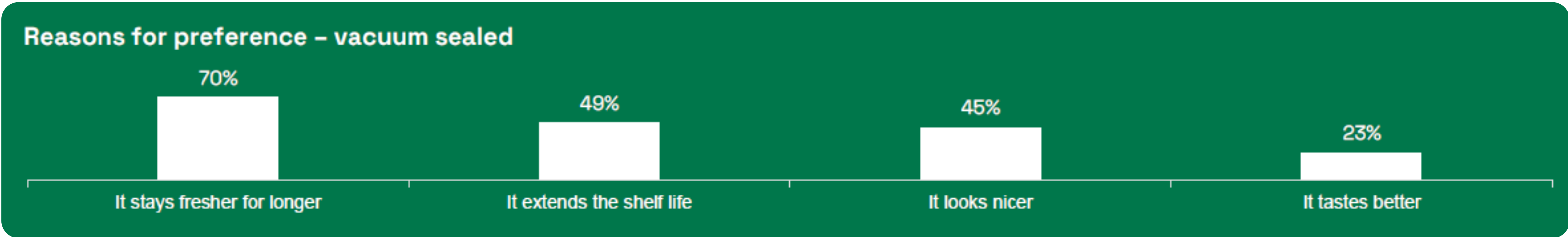
34%
Vacuum pack with
cardboard tray



24%
Vacuum pack with
plastic tray



23%
Vacuum pack with
no tray



THANK YOU!

Meat & Livestock Australia

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