



KANTAR

MLA Global Tracker 2025

A Global Overview of Findings

Sally Kennedy, Carolina Ferrando and Heather Buys
Kantar Australia
August 2025

Introducing MLA's Global Consumer Tracker

A 20-minute survey among 18-64 yr. old grocery buyers, affluent household skew, buy/ open to buying imported beef/ lamb.

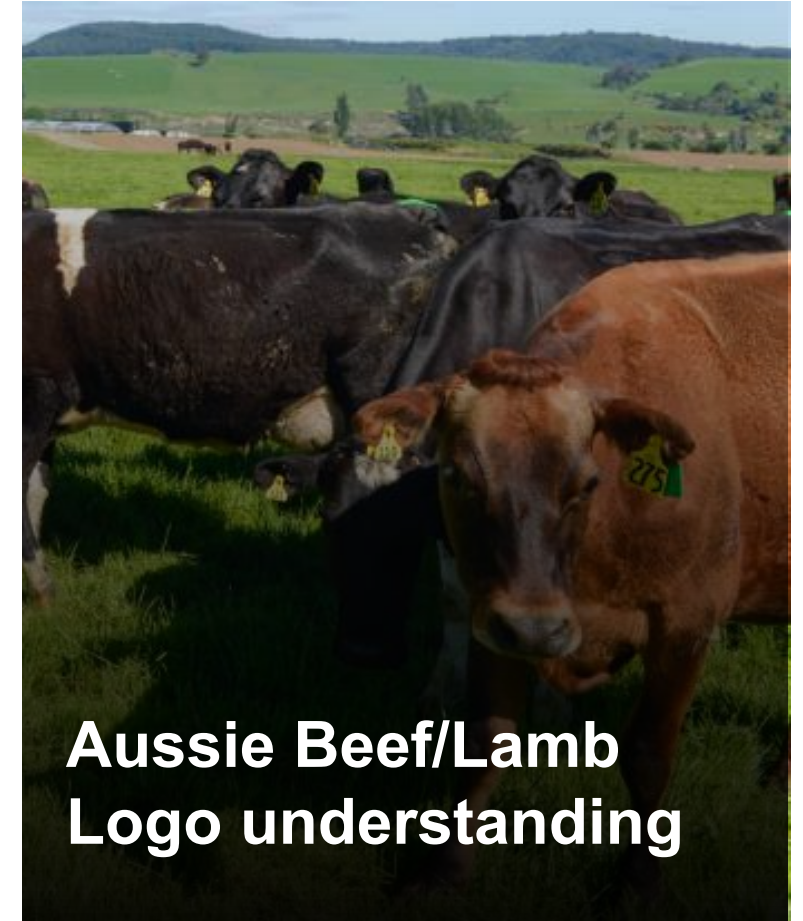
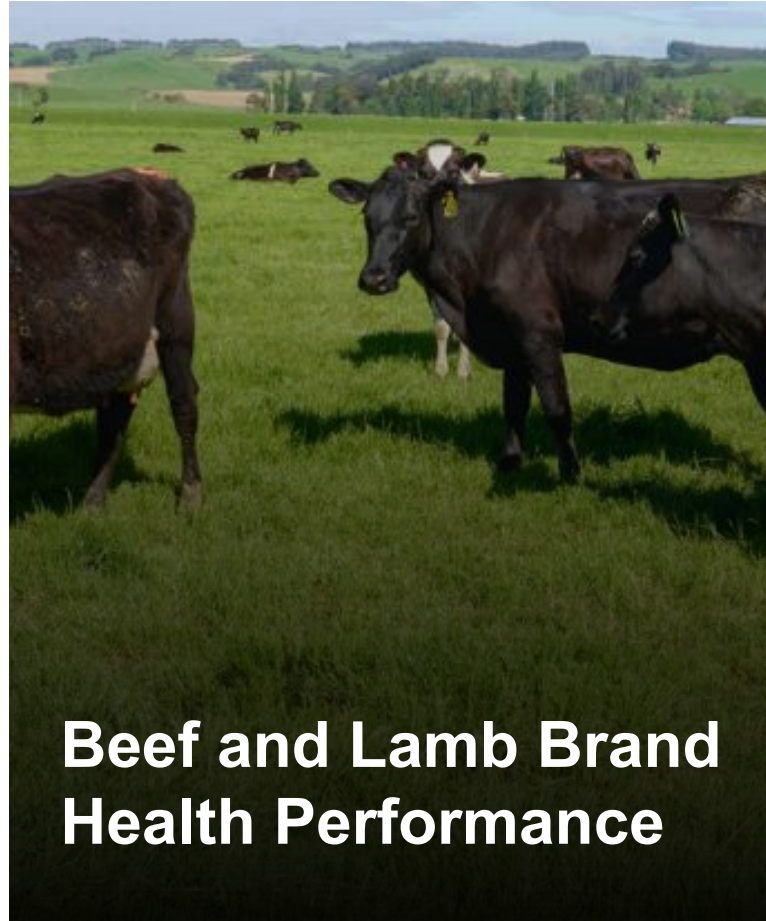
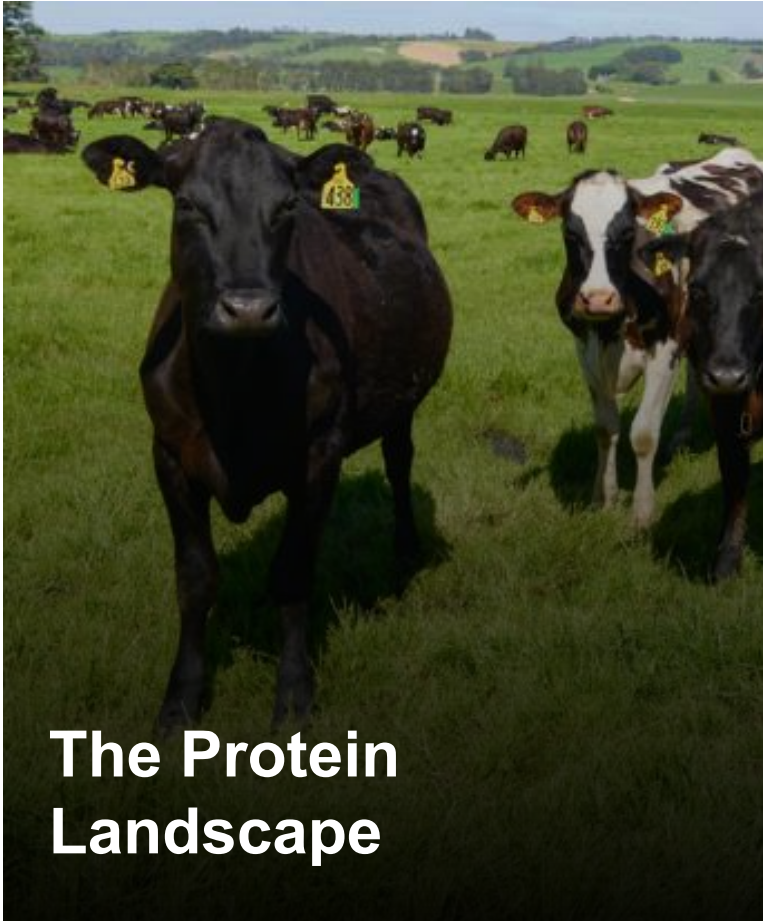
22 Markets
covered over the
last **11 years**



Japan
South Korea
China
Indonesia
USA
UAE
UK
KSA
Singapore
Malaysia
Philippines
Taiwan
Thailand
Vietnam
Canada
Oman
Jordan
Kuwait
Qatar
Hong Kong
Mexico
Chile
2025 markets
All other markets

What will we cover today?

A global overview of:





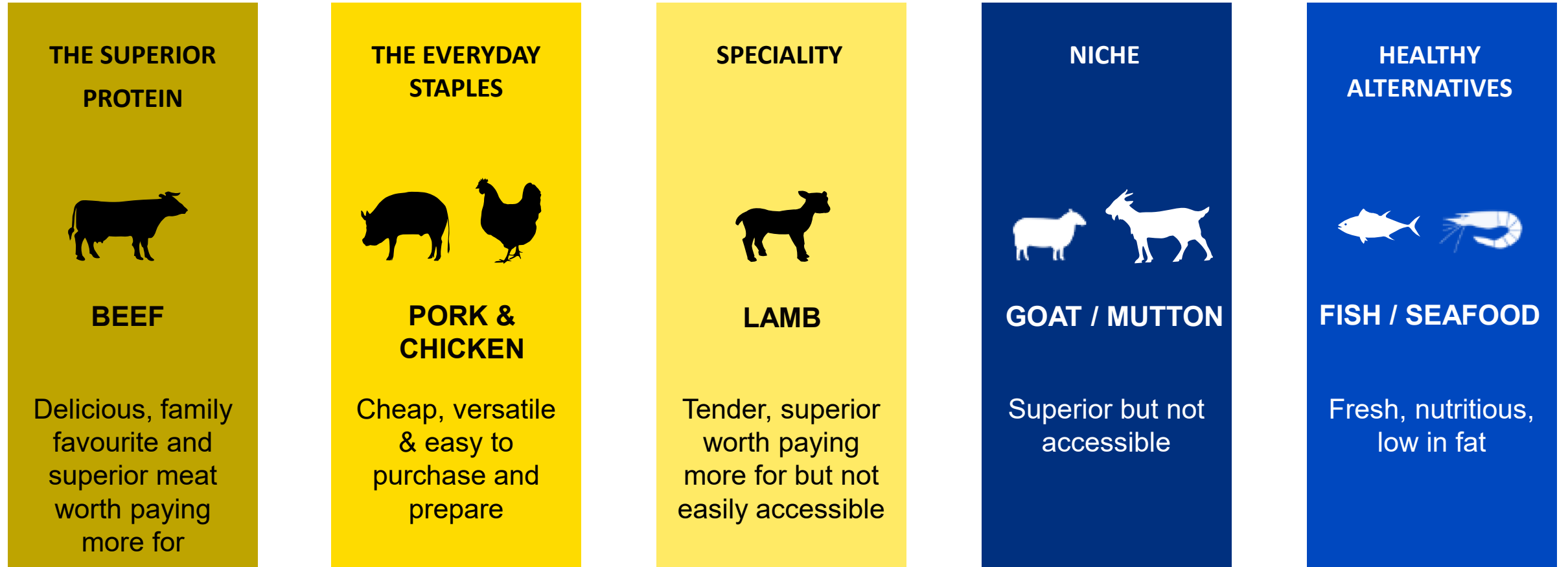
Protein Landscape

Understanding

- Protein perceptions
- Protein consumption and how it varies across markets

There are clear themes regarding what different proteins stand for across all our markets. These themes have also remained broadly consistent over time

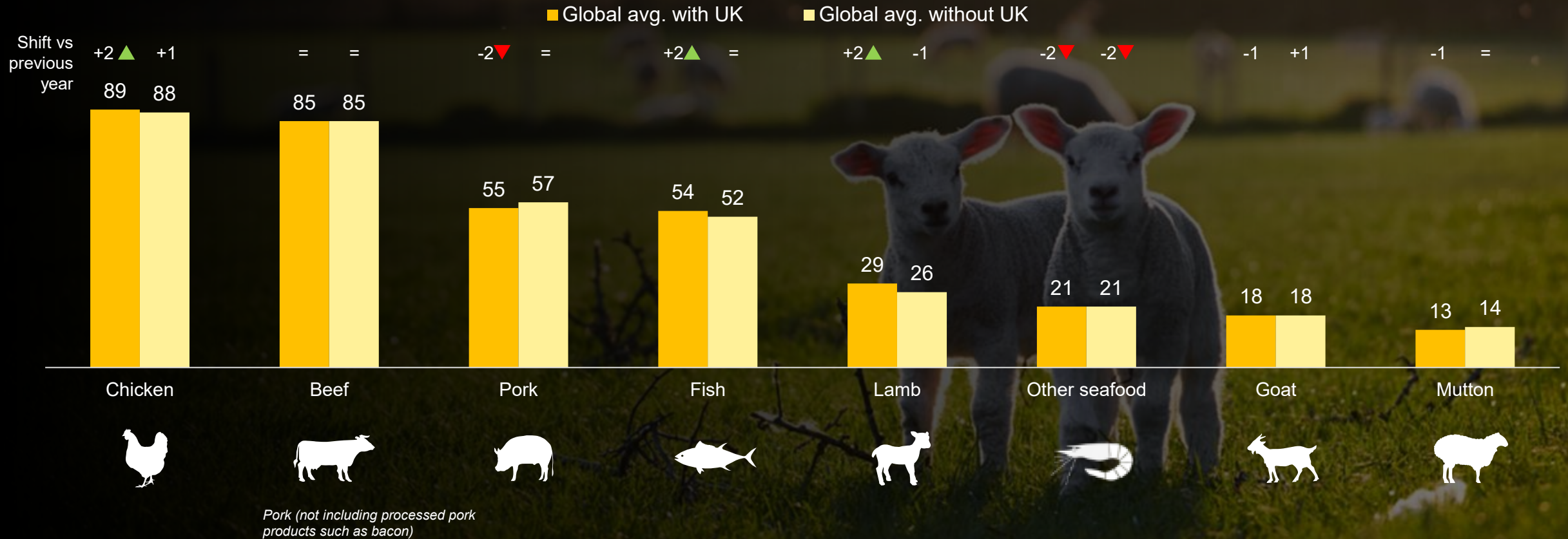
Protein perceptions - Global average



Chicken is a key competitor to Beef across markets while Pork mainly challenges Beef in East Asia. Global demand for lamb has experienced growth, while beef consumption has remained stable, showing resilience amid shifting market dynamics

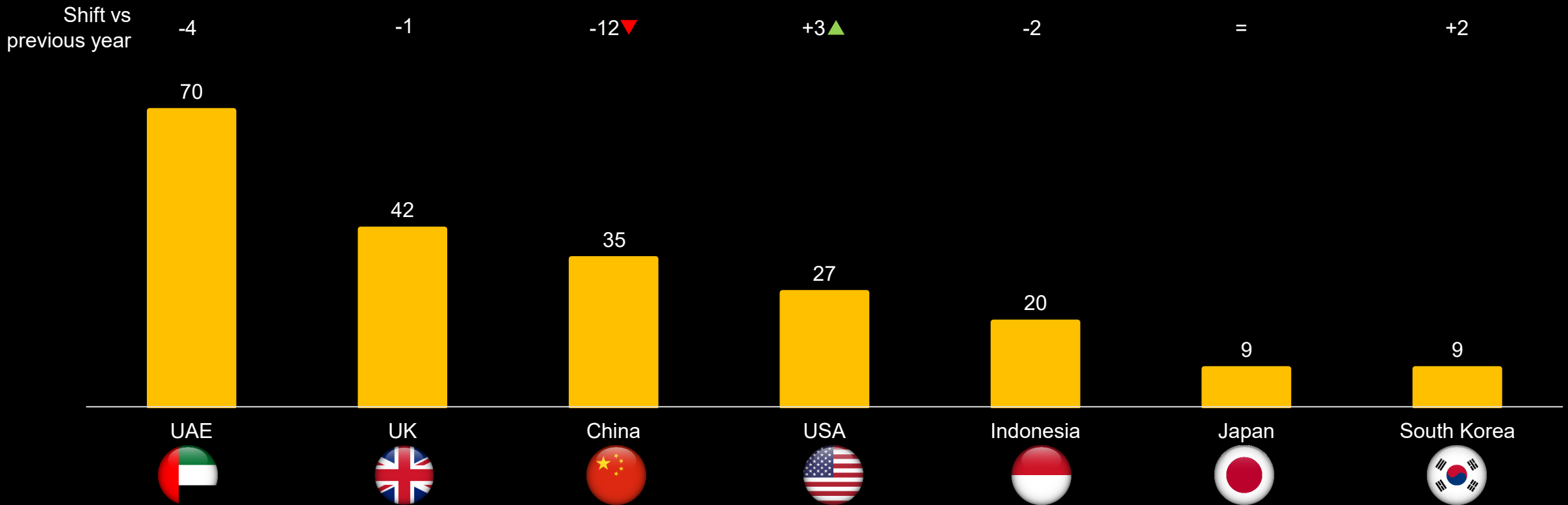
Protein consumption - Global Average

All proteins | Last 1 month consumption



Lamb consumption varies significantly across markets, with the UAE leading, followed by the UK. PM consumption in the US has increased while China stands out for its sharp drop in demand, reflecting a shift in consumer behaviour or market conditions

Lamb | Last 1 month consumption

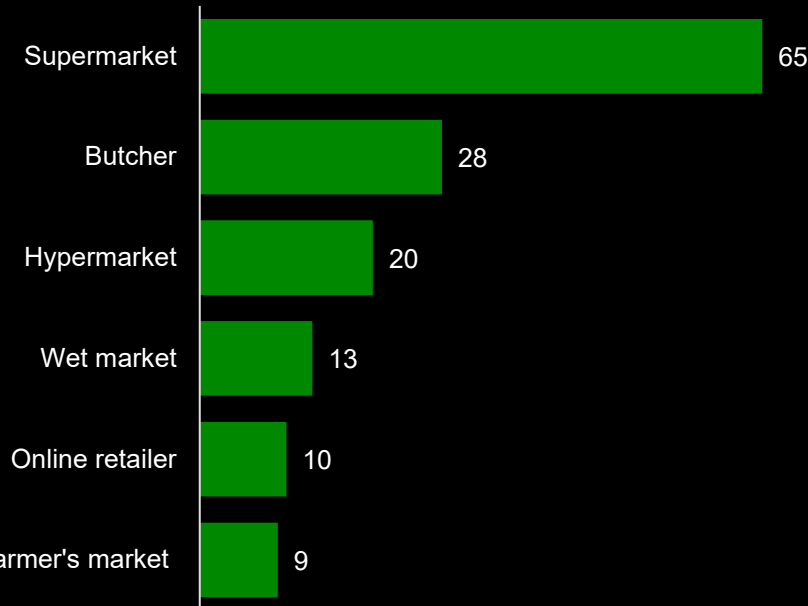


Physical stores remain the top source for both beef and lamb. However, lamb is purchased across a wider variety of channels, giving it a broader market footprint

Top 6 channels of purchase - Beef & Lamb

% of consumers that buy **beef/lamb** at least once a month from location

Beef



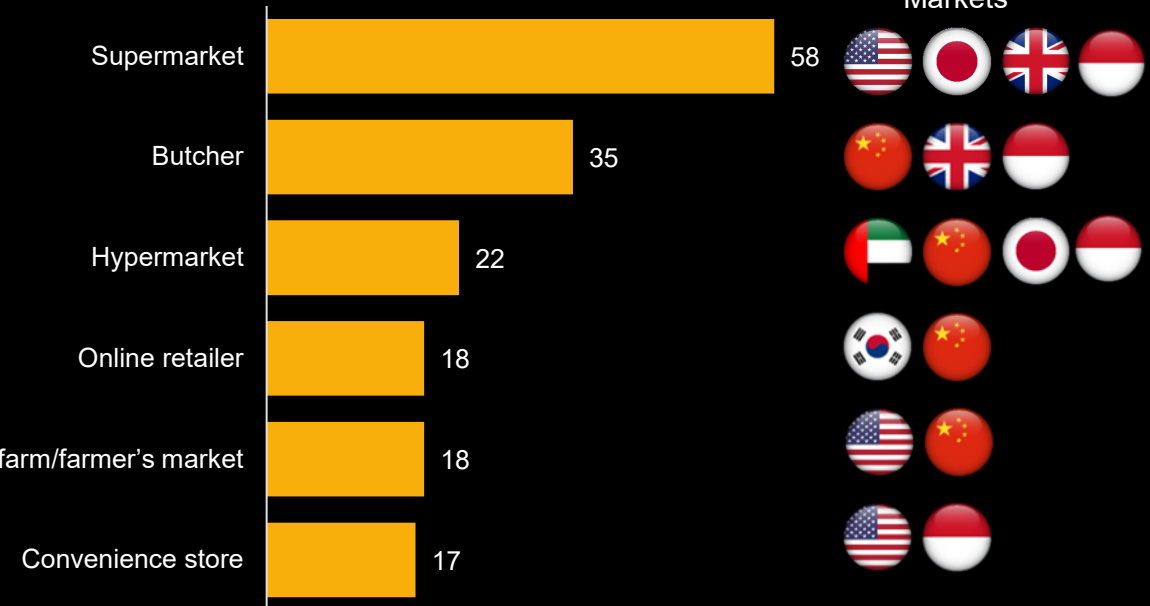
Over-indexing Markets



Direct from farm/farmer's market



Lamb



Over-indexing Markets



R3a&b. Which of these locations do you buy beef from at least once a month?
Base: Beef (n=3777), Lamb (n=2716)

Top barriers to lamb consumption are consistent across most markets.

The order of importance of each barrier has shifted vs. a year ago.

Taste and smell have shot to 1st and 2nd place.

Familiarity dropped from 1st to 4th place.

Not preparing it but eating it when out, and availability are tied in 5th place.



Barriers to consuming Lamb - Global average

(Global average excluding UK)

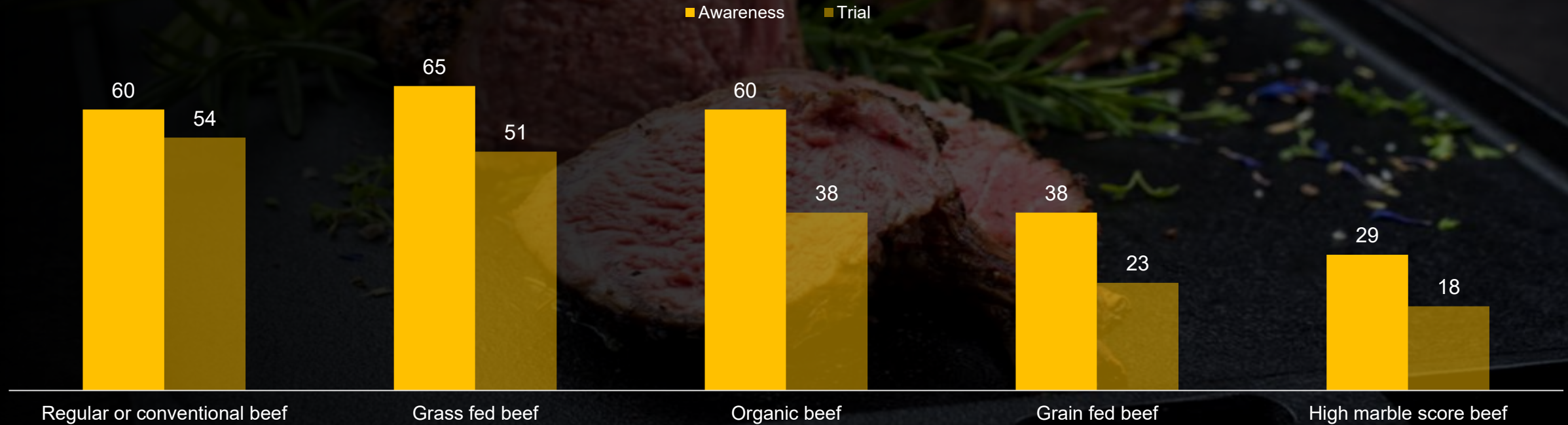
Shift vs 2024 – Driven by

Do not like the taste of lamb	30%	▲ +7%	
I do not like the smell of lamb	28%	▲ +7%	
I don't know how to cook lamb	26%	+2%	
Didn't grow up eating lamb/ not familiar with lamb	25%	▼ -5%	
Don't prepare it at home but I eat it when dining out/Lamb is not available where I shop/	15%		

Being unfamiliar is a top barrier in all markets other than MENA

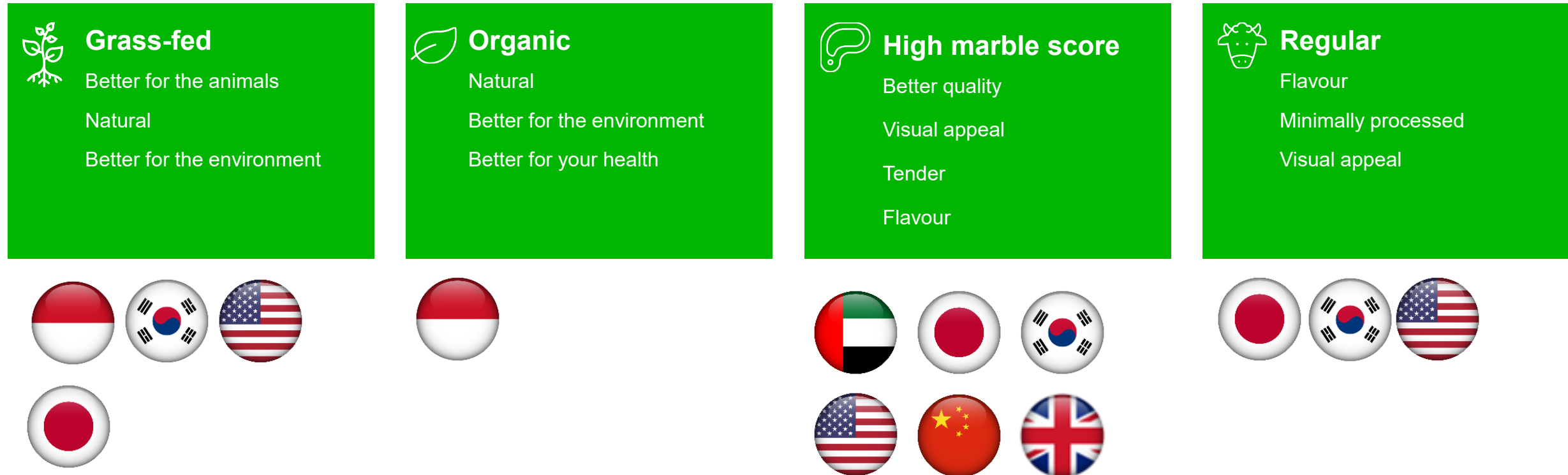
Consumers are increasingly aware of natural, ethical, and health-conscious beef. But conventional beef still dominates, signalling a need for better education, clearer value, and easier access

Awareness & trial of different types of beef | Top 5



HMS benefits has the greatest understanding across markets, Grass-fed is the 2nd most understood beef type. Organic is the least understood beef type. The UK and the UAE are the countries with the least understanding of the different beef types

Which markets recognise the benefit of the different beef types?



Protein Landscape | Summary

Beef remains a resilient protein across markets, while lamb is experiencing modest growth, in the US and South Korea

Beef

Stable consumption across markets despite shifting dynamics

Conventional beef still dominates, but there's high awareness of ethical and health-conscious options, however these don't yet translate into trial

Lamb

Experiencing modest growth, especially in the US and South Korea

Purchased through diverse channels, but faces consistent barriers, particularly taste and smell

Chicken & Pork

Chicken is a strong competitor to beef globally
Pork is declining except in China, where it's growing

Consumer trend

Low familiarity with beef subtypes highlight opportunities for repositioning and clearer communication of the benefits

Beef Brand Health

Understanding:

- Beef buying behaviour and
- Brand Health Performance of Beef from different Country of Origin

AU Beef leads in key markets and shows promise in others but faces challenges where it lags. To grow its premium position, it must defend leadership, sharpen branding, and rebuild equity where needed



Strong markets



AU Beef leads importers in brand health, Demand Power, and Premium positioning, showing distinct strengths in consumer-relevant attributes like convenience, nutrition, and quality.



Maintaining leadership here is critical, but there's also an opportunity to strengthen brand loyalty by reinforcing the attributes that resonate most locally.



Opportunity markets



AU Beef holds strong brand health and Demand Power but lacks clear differentiation - owning only limited attributes like tenderness.



These markets present a strategic opportunity to sharpen AU's brand positioning and storytelling to convert equity into stronger sales and long-term preference.



Markets needing resolution



AU Beef faces brand confusion, limited equity, and lacks clear positioning - despite some preference strength and premium aspirations.

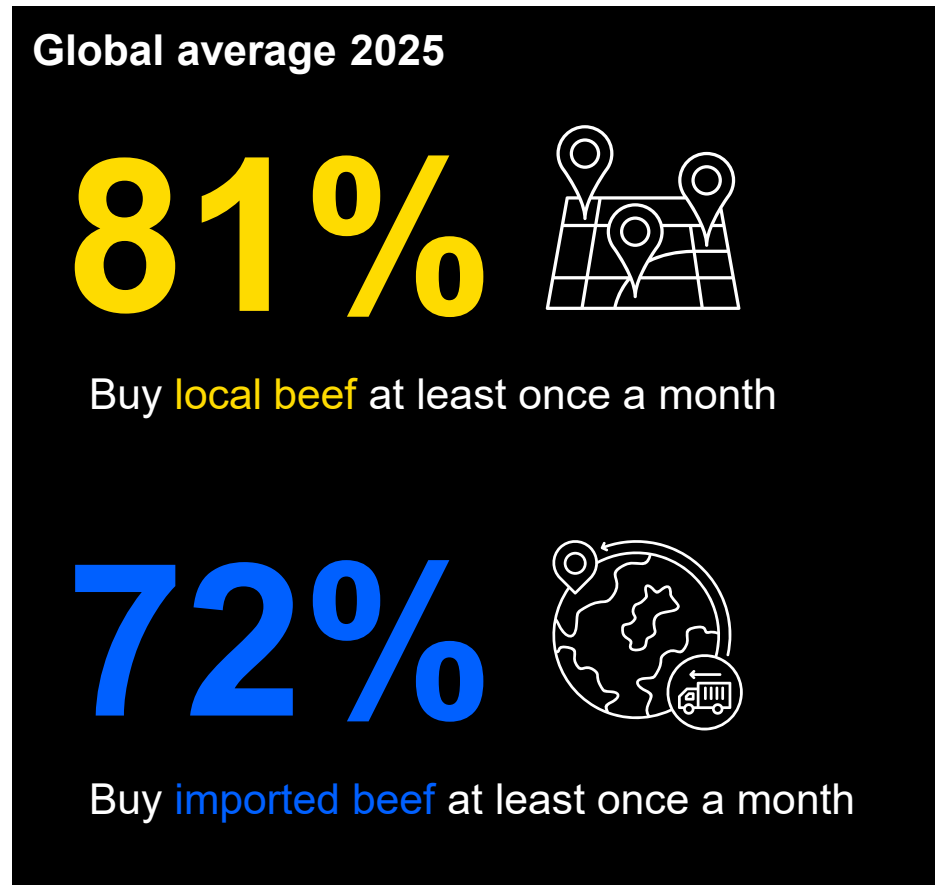


These markets require targeted brand differentiation and equity-building strategies to justify premium pricing and stand out against dominant local and competitor brands.

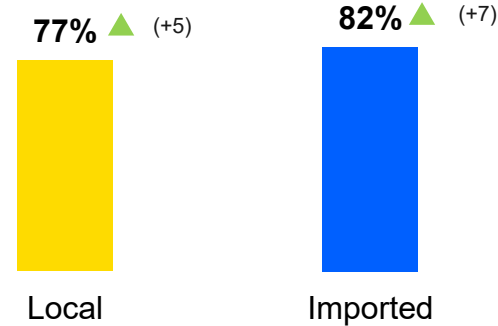
The challenge to differentiation lies on country of origin labelling not being mandatory.

Local beef is bought more frequently compared to imported beef in all markets other than South Korea and Japan, where there is higher preference for imported beef

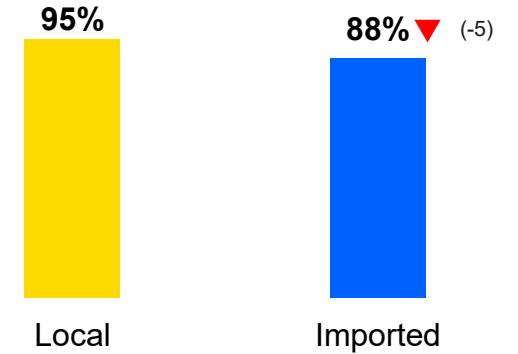
Beef Buying Behaviour- Local vs. Imported | 2025



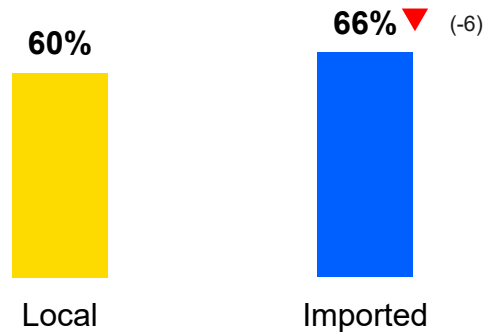
 **South Korea**



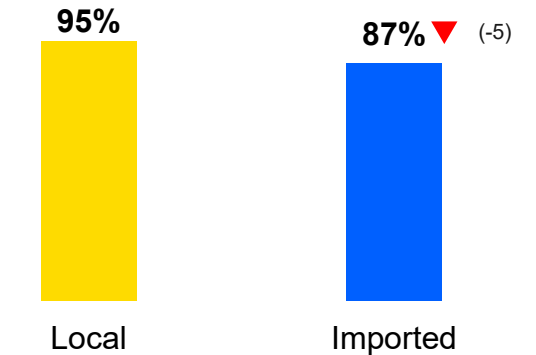
 **China**



 **Japan**



 **Indonesia**



When buying beef, consumers prioritize freshness, typically judging it by the meat's colour and the packing date. Natural cues are becoming more influential, and freshness has made its way into the top three cues

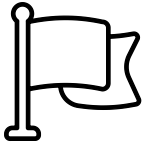
What do consumers look for when buying beef? | Top 4



Colour of meat

53%

-1 vs. 2024



Freshness

46%

+ 2 vs. 2024



Date packed

41%

-5 vs. 2024



All natural/100% natural

40%

+2 vs 2025

COO has dropped in importance, falling from a top 3 top cue to #5 position.

All Natural/100% Natural in the top 3 for all markets except for Japan and South Korea. It saw notable growth in Indonesia, the US and China.

COO awareness levels vary around the world; impacted by local legislation related to packaging/ labelling – and sometimes by religious factors relating to slaughtering processes such as Halal.

Awareness of COO



UK

67%



USA

57%

○ ○ ○ All other markets

+82%



AU Beef enjoys strong awareness in SK, UAE, and Indonesia, indicating solid brand presence and recall. However, low top-of-mind awareness in high-value markets signals the need for brand-building to unlock growth

Australian Beef – Spontaneous awareness across markets (2025)

Markets with **high Awareness** for Australian Beef

Markets with **lower Awareness** for Australian Beef

77%

75%

66%

64%

36%

13%

6%



South Korea



UAE



Indonesia



Japan



China



USA



UK



Kantar firmly believes in
the power of **strong brands**



There are two paths to brand growth

By increasing **volume share**

By increasing **value share**

We call this Demand Power

We call this Pricing Power



Demand Power

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



Pricing Power

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
























Demand Power

Is a measure of consumer demand for the brand, which gives us a prediction of the brand's volume share, based purely on perceptions.



AU Beef continues to be the lead export across most global markets, except in China and the UK. Outside of domestic competition, its key competitors are US and NZ beef, highlighting the need for continued brand distinction and market-specific strategies.

Demand Power performance across markets | 2025

RANKING TOP 3	SOUTH KOREA	JAPAN	INDONESIA	UAE	CHINA	USA	UK
1	 AU BEEF	 AU BEEF	 LOCAL	 LOCAL	 LOCAL	 LOCAL	 LOCAL
2	 US BEEF	 US BEEF	 AU BEEF	 AU BEEF	 NZ BEEF	 AU BEEF	 SCOTTISH BEEF
3	 NZ BEEF	 NZ BEEF	 US BEEF	 PAKISTANI BEEF	 AU BEEF	 NZ BEEF	 IRISH BEEF

AU'S BEEF EQUITY JOB TO BE DONE 1: Defend against NZ by dialling up AU Beef sustainability credentials and highlight differences to NZ

Australian Beef vs. key competitor perceptions



AU BEEF



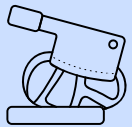
Guaranteed safe to eat



Consistent quality standards



The meat is usually tender



Offers a variety of cuts that suit the meals I make



NZ BEEF



Consistent quality standards



The animal is well-cared for



The industry is environmentally sustainable



Guaranteed safe to eat

We share consistent quality standards and guaranteed safe to eat with NZ.

AU does well to own tender. But NZ is capitalising on consumers' lack of ability to easily differentiate us from them by owning more sustainable associations.

AU should amplify its 'Aussiness' to differentiate from NZ and demonstrate to consumers the sustainability credentials we know we own.

AU'S BEEF EQUITY JOB TO BE DONE 2: Leverage the opportunity to steal share from the US while its facing tariff turmoil and supply constraints

Australian Beef vs. key competitor perceptions



AU BEEF



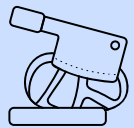
Guaranteed safe to eat



Consistent quality standards



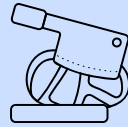
The meat is usually tender



Offers a variety of cuts that suit the meals I make



US BEEF



Offers a variety of cuts that suit the meals I make



Is easy and convenient to purchase



Consistent quality standards



The animal is well-cared for

US Beef has traditionally been a tough competitor for AU (particularly SK, JPN and Indonesia) as it has been able to deliver on easy and convenient to purchase as well as sharing variety of cuts and quality standards with AU.

However, Globally 84%* of consumers are aware of the tariff changes turmoil and most list it as a top 3 concern for them. Additionally, supply constraints in the US has across markets called the safety of their Beef into question – a perception where we perform strongest.

This highly fluid time for the US market in general and declining perceptions of US beef gives AU an opportunity to get a 'leg up' on them with the positive perceptions we own.



Pricing Power

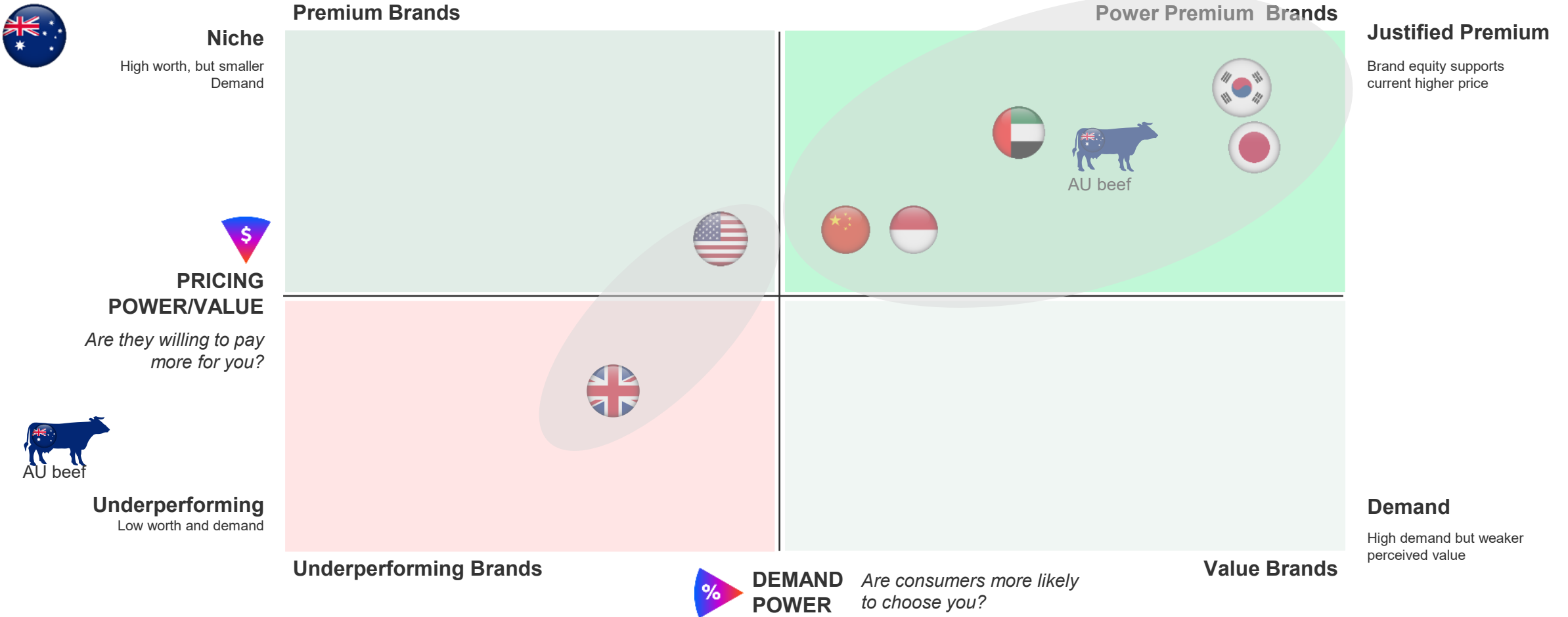
Is the ability of a brand to command a premium relative to the category average, based purely on perceptions.

Strong equity helps brands command a premium price



AU beef holds a premium reputation in most global markets, reflecting strong consumer preference and a high willingness to pay more for it. In the US and UK, not mandatory COO labelling limits its visibility, making it harder to differentiate and capitalize on its value

Australian Beef Equity positioning - across markets (2025)



NZ beef holds strong brand equity in China, but its overall demand remains limited across markets. It continues to occupy a niche position globally, valued for quality but lacking broad market traction

NZ Beef Equity positioning - across markets (2025)



Niche

High worth, but smaller Demand

Premium Brands

Power Premium Brands

Justified Premium

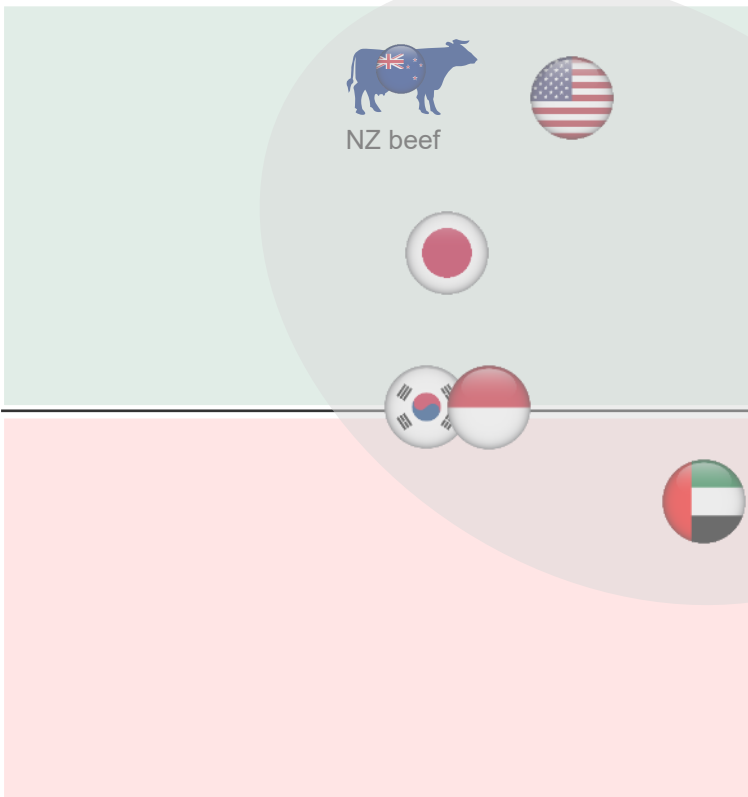
Brand equity supports current higher price



PRICING

POWER/VALUE

Are they willing to pay more for you?



Underperforming

Low worth and demand

Underperforming Brands



DEMAND POWER

Are consumers more likely to choose you?

Value Brands

Demand

High demand but weaker perceived value



USA



South Korea



Indonesia



Japan



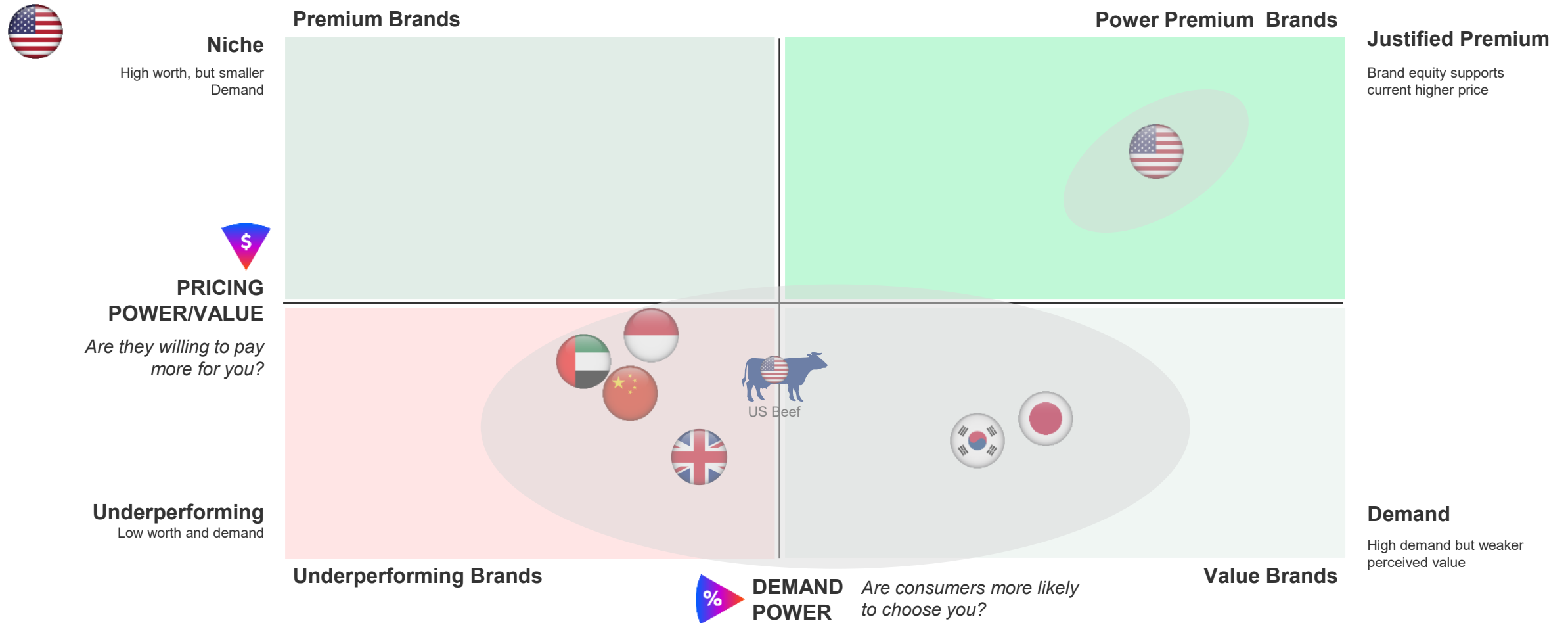
China



UAE

AU beef maintains a premium position across most markets, while US Beef holds a premium position mainly within its market. In Japan and South Korea, its appeal is largely price-driven, while in other regions, it faces low perceived value and limited demand

US Beef Equity positioning - across markets (2025)



While AU Beef is gaining traction in some markets, it has softened in others, highlighting the need to remain vigilant and not complacent even in markets where we are strong

Australian Beef - Equity performance (2025)

Markets where Equity for AU Beef has **strengthened** vs 2024

Markets where Equity for AU Beef has **softened** vs 2024 (UK vs 2021)

11.2

(+2.2) ▲

24

(+2)

37.8

(+0.6)

45

(-1.2)

27

(-1)

13.9

(-2.1)

4.4

(-0.6)



USA



UAE



Japan



South Korea



Indonesia



China










UK





Top 3 recommendations per market | Beef

							
	US	UK	Indonesia	UAE	China	South Korea	Japan
1	<p>Leverage US beef weaknesses Focus comms with customers on AU's green and clean credentials.</p>	<p>Leverage our salience Invest in building the AU Beef brand with UK consumers leveraging iconic assets.</p>	<p>Build our meaning to challenge local Focus comms with customers on our Superiority and Cheap factor where we are weak</p>	<p>Maintain salience to stay top of mind Ensure AU Beef is front of mind with retailers and customers. Dial up on-pack COO and use of Aussie Beef logo</p>	<p>Build on our growing Equity for the future Focus on Goodness and Superiority factors to grow our equity</p>	<p>Build our Meaningful Difference Focus comms on flavour and freshness. Illustrate how we are a family favourite and reinforce our consistent quality</p>	<p>Dial up Easy Everyday Focus comms on Easy Everyday components: convenience, price and the right cuts</p>
2	<p>Create a clear distinction between AU & NZ Focus trade conversations on AU governance and traceability to demonstrate our quality and superiority</p>	<p>Build meaning through UK ties with AU Drive affinity for AU Beef with relevant cultural associations.</p>	<p>Drive our difference to challenge local Focus trade conversations on AU Environment credentials and amplify our variety of cuts</p>	<p>Differentiate AU beef from Local beef Dial up Superior Quality strengths as this factor is the greatest driver of both Demand and Pricing Power</p>	<p>Create a clear distinction between AU & NZ Focus trade conversations on AU animal welfare and nutrition to demonstrate our Goodness</p>	<p>Protect our positioning Leverage our strong positioning to demonstrate value to our customers to win with more cuts on more shelves</p>	<p>Maintain Premium perceptions With the trade reinforce our quality differences over US Beef: tenderness, marbling superior quality</p>
3	<p>Find new space for our brand Consider new distribution channels for our sustainable products</p>	<p>Build our high-quality credentials Reinforce AU's High-Quality associations in trade conversations.</p>	<p>Safeguard our future against other imports Dial up our sustainability credentials in trade conversations.</p>	<p>Establish a clearer positioning to defend from NZ Dial up AU's endorsement in both environmental provenance while also highlighting our taste and tenderness associations</p>	<p>Combat Japan's growing differentiation Dial up AU flavour and tenderness credentials to demonstrate our Superiority and limit Japan's marbling difference</p>	<p>Find new space for our brand Consider new distribution channels for our sustainable products</p>	<p>Find new space for our brand Consider new distribution channels for our sustainable products</p>

Consistent recommendations across markets



Create a clear distinction between AU & NZ



Build our meaning to challenge Local Beef



Find new spaces for our AU Beef



Build our high-quality credentials



Leverage competitors' weaknesses

Australian Beef | Summary

Local beef dominates consumer preference globally, but imported beef, especially Australian, holds strong premium appeal and brand equity in key markets. AU Beef must reinforce its strengths in quality, sustainability, and versatility while rebuilding relevance in competitive and high-value regions

Local vs. Imported

Local beef is more frequently purchased, except in South Korea and Japan.

Imported beef is still widely bought, with AU Beef leading in most markets.

AU Beef strengths

Strong brand awareness in Asia and the Middle East.

Premium reputation tied to safety, quality, and tenderness.

Challenges

Lower equity in high-value markets like the UK and US

Need to reassert brand relevance and defend leadership

Consumer drivers

Freshness is now a top global priority.

Natural cues and clean-label preferences are rising.

Strategic implications

AU Beef must amplify what matters, sustainability, quality, nutrition, and taste.

Tailored strategies are needed to maintain premium status and grow Demand Power.

Lamb Brand Health

Understanding:

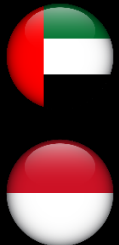
- Lamb buying behaviour and
- Brand Health Performance of Lamb from different Country of Origin



AU Lamb performs strongly in the UAE and Indonesia, shows growth potential in USA and China, and faces challenges in the UK. To expand its global appeal, it must defend strengths, refine branding, and resolve weaknesses



Strong markets



AU Lamb shows high Demand Power, dominant Brand Health, justified Premium Positioning, and strong positioning vs importers.

Maintaining focus on these strengths and reinforcing attributes such as nutrition, convenience, and quality will defend their superior market positions.



Opportunity markets



AU Lamb has a strong brand health and Brand Equity but lacks clear differentiation and sales conversion.

Sharpening brand positioning and enhancing storytelling around quality, safety, and premium attributes can help convert equity into stronger sales.



Markets needing resolution

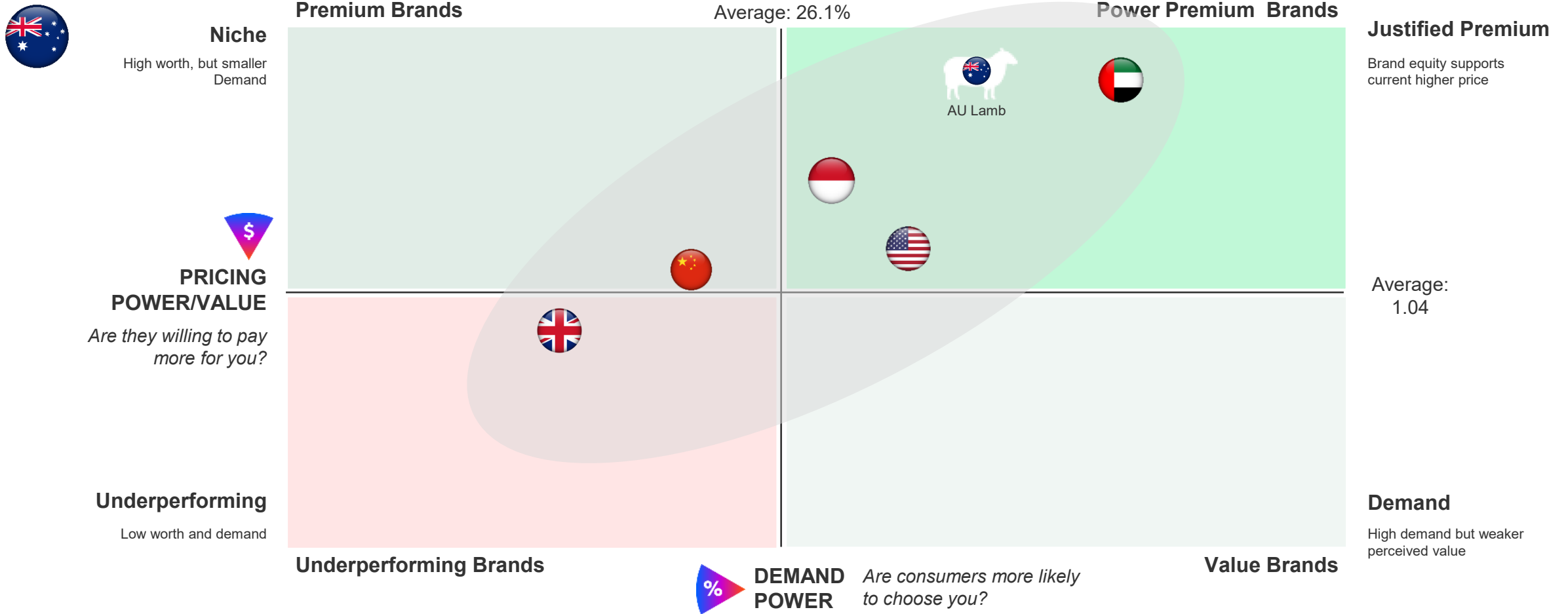


AU Lamb has weaker brand health, limited Brand Equity, and lacks differentiation unlike local British competitors.

Targeted strategies for brand building, clear positioning, and competitive differentiation are necessary to build equity.

AU lamb maintains strong equity in most markets, supporting its premium pricing. However, it underperforms in the UK and remains a niche brand in China

Australian Lamb Equity positioning - across markets (2025)



While Equity has been broadly stable across most markets, we have seen some softening. It is important to maintain our strong position with continued investment

Australian Lamb - Equity performance (2025)

Markets where Equity for AU Lamb has **strengthened** vs 2024 (UK vs 2021)

34

(+1)

21

(+0.5)

7.9

(+0.9)



Indonesia



USA



UK

Markets where Equity for AU Lamb has **softened** vs 2024

25.5

(-0.5)

21.1

(-3.9)



UAE

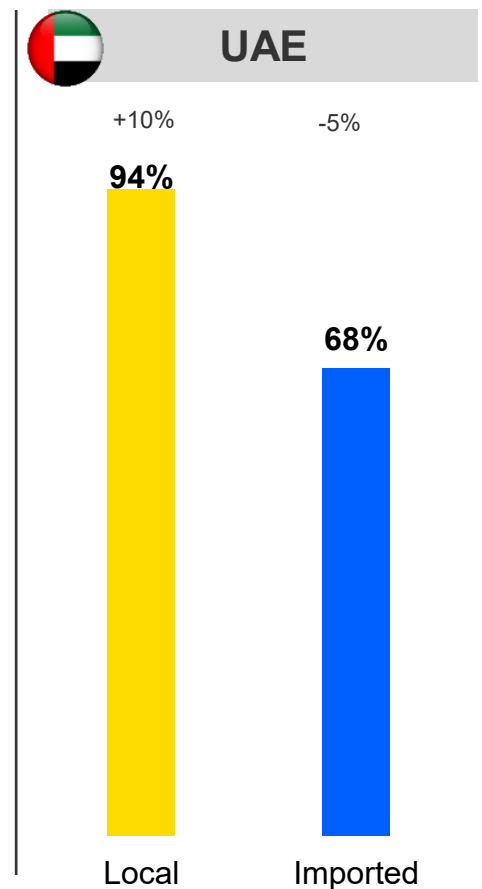
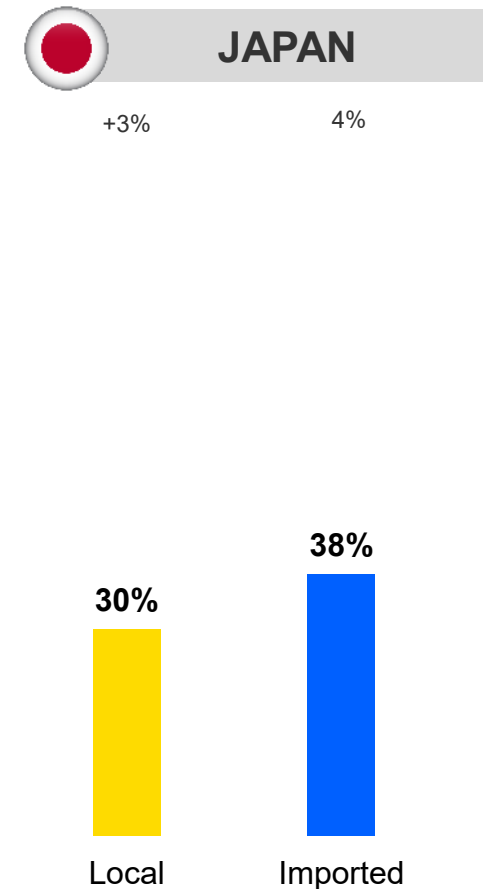
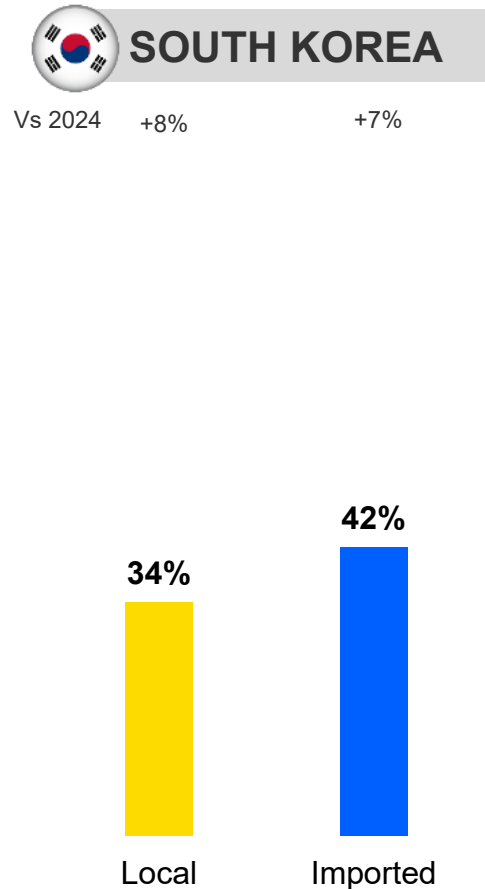
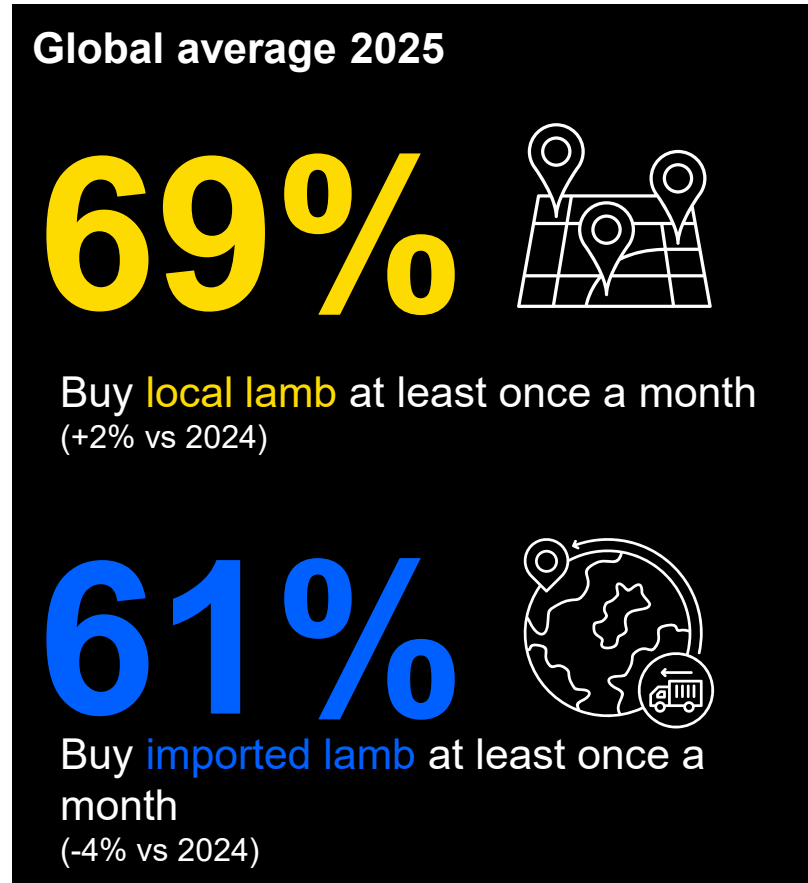


China



Purchase frequency remains broadly similar for local and imported lamb, with local lamb slightly favoured - especially in the UAE. Imported lamb sees higher consumption in SK and Japan

Lamb Buying Behaviour- Local vs. Imported



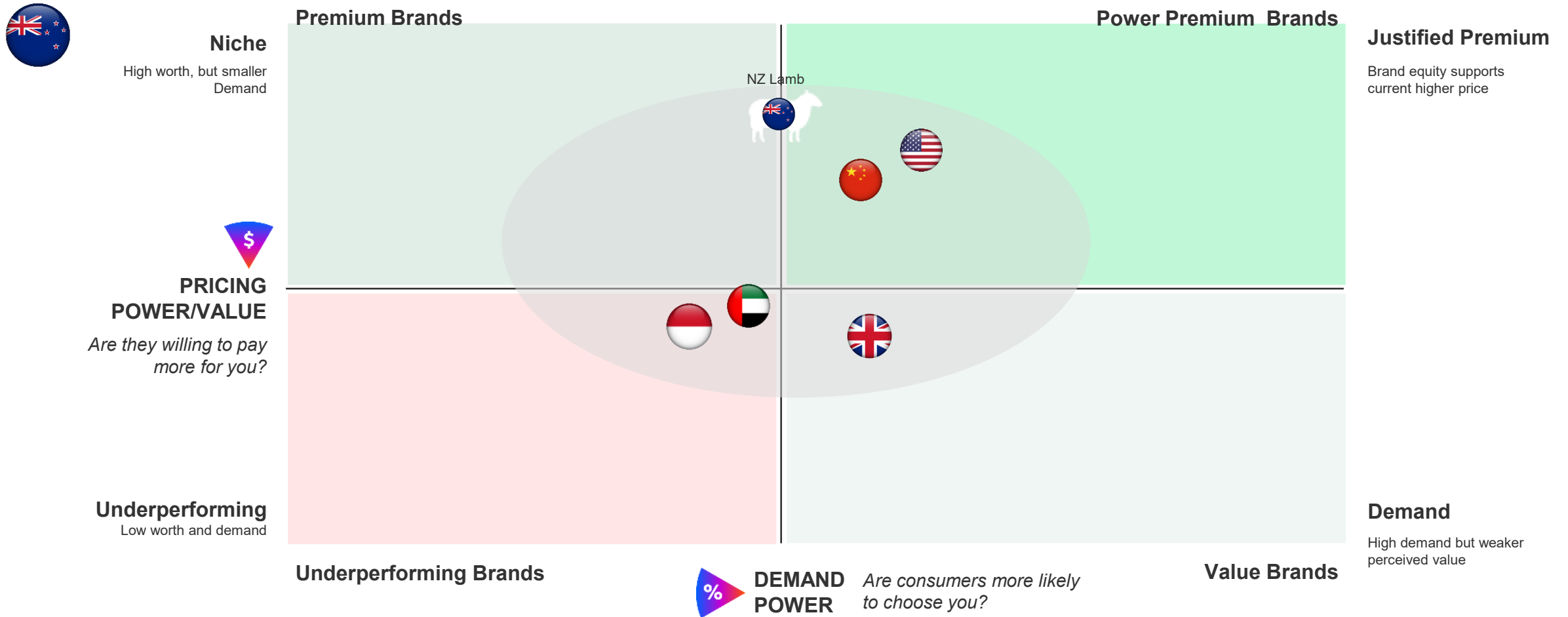
While AU Lamb has a clear dominance in terms of equity, NZ lamb strongly challenges AU lamb with stronger equity across most markets. AU only outperforms NZ in Indonesia

Australian Lamb - Equity performance across markets | 2025

RANKING TOP 3	INDONESIA	UAE	CHINA	USA	UK
1	LOCAL	AU LAMB	LOCAL	LOCAL	LOCAL
2	AU LAMB	LOCAL	NZ LAMB	NZ LAMB	NZ LAMB
3	NZ LAMB	INDIAN LAMB	AU LAMB	AU LAMB	WELSH LAMB

NZ Lamb is seen as a premium brand with strong demand and value perception in the US, China, Thailand, and Hong Kong. In other markets it has a more niche or underperforming position but could pose a threat to AU Lamb with the right brand support

NZ Lamb Equity positioning - across markets (2025)



AU and NZ lamb are perceived similarly, with AU lamb seen as more nutritious and NZ lamb as more tender. This highlights the need for AU lamb to clearly differentiate itself to maintain a competitive edge

Australian Lamb and key competitor perceptions - across most markets

 **AU LAMB**

 **NZ LAMB**

	Guaranteed safe to eat
	The animal is well-cared for
	Consistent quality standards
	More nutritious

	The meat is usually tender
	The animal is well-cared for
	Guaranteed safe to eat
	Consistent quality standards



Top 3 recommendations | Lamb



US



UK



Indonesia



UAE



China

1

Leverage US lamb weaknesses
Focus trade conversations on how AU Lamb meets consumer needs for nutrition, animal welfare and sustainability

Combat NZ's legacy
Invest in building the AU Lamb brand with UK consumers leveraging iconic assets

Build our meaning to challenge local
Focus comms with Better for my family factor where we are weak and dial up our strengths

Maintain salience to stay top of mind
Ensure AU Lamb is top of mind with retailers and customers. Dial up on-pack COO and use of Aussie Lamb logo

Safeguard our Equity to build into the future
Focus on Goodness and Superiority factors to grow our equity

2

Create a clear distinction between AU & NZ
Focus trade conversations on AU governance and traceability to demonstrate our quality and superiority

Build meaning through UK ties with AU
Drive affinity for AU Lamb with relevant cultural associations

Drive our difference to challenge local
Focus trade conversations on AU Quality cuts credentials and amplify our variety of cuts and potentially leaner lamb

Protect declining associations
Dial up marketing activations and strengths in trade conversations to address declines

Combat NZ's leadership as an importer
Focus trade conversations on how AU Lamb can better meet consumer needs with its Goodness

3

Find new space for your brand
Consider new distribution channels for our sustainable products

Build our superiority credentials
Reinforce AU's superiority associations in trade conversations

Safeguard our future against potential NZ entry
Keep our Aussie Lamb Logo front and centre and dial up our Aussie assets

Establish a clearer positioning to defend from NZ
Dial up our Aussie assets to maintain dominance on provenance and take back animal welfare

Capitalise on local lamb's weaknesses
Dial up AU Goodness credentials to capitalise where Local Lamb does poorly

Consistent recommendations across markets




Establish a clearer positioning to defend from NZ



Build our Meaningful Difference to challenge Local Lamb



Build our Superiority credentials to Safeguard our Equity to build into the future

A photograph of a herd of sheep in a lush green field. The sheep are white and fluffy, grazing on the grass. The background is slightly blurred, showing more sheep and the natural landscape.

Australia's Lamb benefits from a strong reputation for natural farming practices and reliable quality.

Emphasizing these attributes can help **elevate performance** and **sharpen our edge**, especially in standing firm against New Zealand

Lamb's Landscape | Summary

AU Lamb holds strong Equity and premium positioning in many markets but faces growing competition from NZ Lamb, and challenges in key regions like China and the UK. **AU Lamb must work on its brand differentiation, reinforce its strengths, and align with evolving consumer values around quality, family appeal, and sustainability**

Market performance

Strong in UAE and Indonesia
Growth potential in USA and China (Niche in China)
Underperforming in UK

Competitive landscape

NZ Lamb is a strong challenger, outperforming AU in most markets except Indonesia.
NZ is seen as more tender; AU as more nutritious, highlighting a need for clearer brand differentiation.

Consumer perceptions

High quality, superiority, and family-friendly attributes drive both Demand and Pricing Power.
Sustainability, versatility, and leanness are key to expanding appeal.

Strategic needs

Defend equity in strong markets.
Rebuild relevance in stagnant or declining ones.
Invest in branding to maintain premium status and respond to competitive threats.



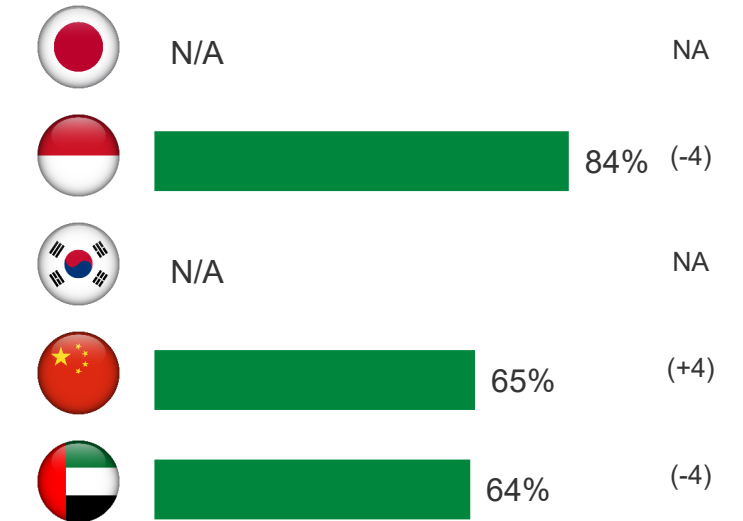
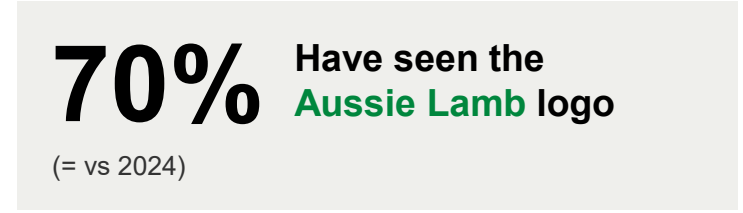
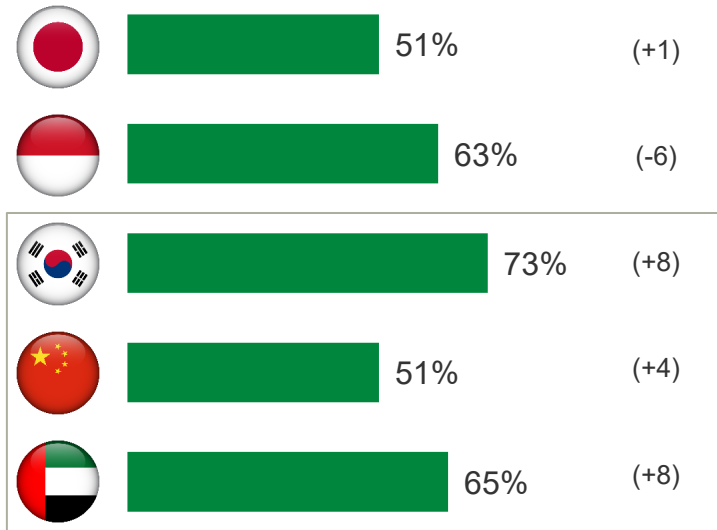
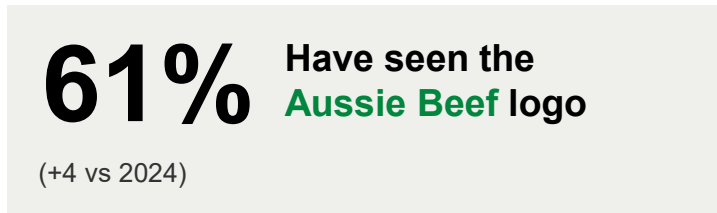
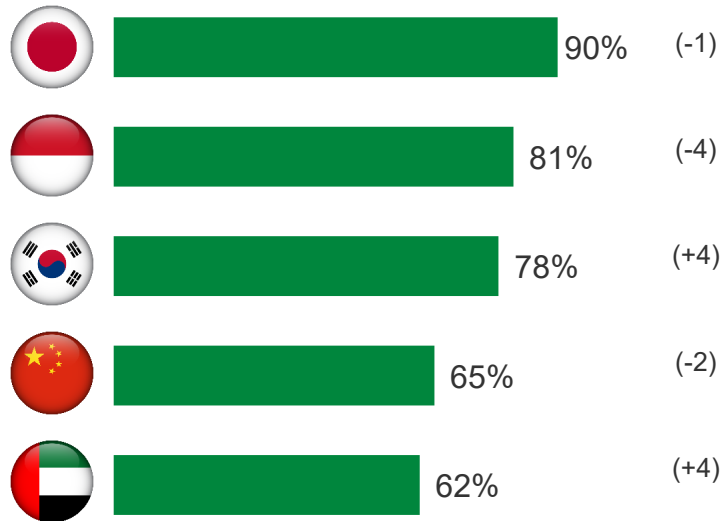
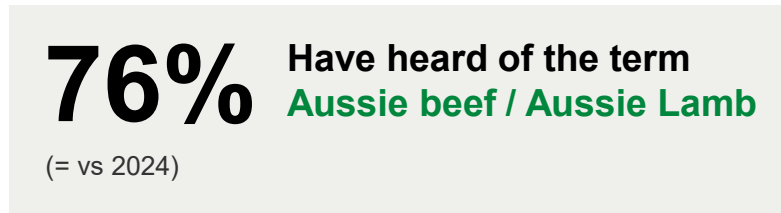
Aussie Beef/Aussie Lamb

Understanding

- Awareness & Logo recognition
- Brand perceptions

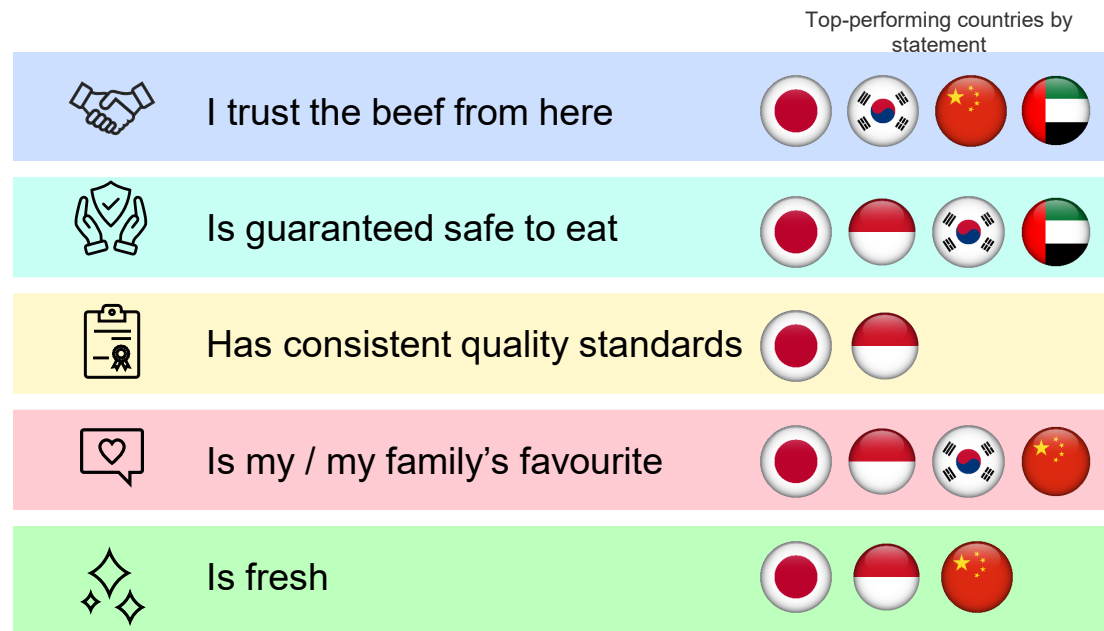
Awareness of Aussie Beef/Lamb is high, with logo recognition showing positive movement for beef in most markets. However, lamb logo visibility has declined in Indonesia and the UAE, signalling a need for visibility efforts

Aussie Beef/Aussie Lamb – Awareness (Global average)



Aussie Beef is most strongly associated with trust, safety, and family preference, while Aussie Lamb is linked to freshness, ethical farming, and origin pride. These distinct positionings highlight opportunities to tailor messaging and reinforce each protein's unique strengths

Top 5 associations to Aussie Beef



Top 5 associations to Aussie Lamb



Overall, brand associations are stronger in Indonesia, while the UAE shows the strongest alignment with perceptions of sustainability & welfare

Aussie Beef and Lamb perform strongly in JP, Indonesia, and SK due to high trust, safety, and animal welfare perceptions. China and the UAE present growth opportunities through rising logo recognition and quality associations



Strong markets



Aussie Beef and/or Lamb are strong in Japan, Indonesia, and South Korea due to strong brand recognition and visual presence in these markets.



In Japan and South Korea, Aussie Beef strongly evokes trust.



In Indonesia, Aussie Beef conveys safety while Aussie Lamb is recognized for high animal welfare standards.



Opportunity markets



China shows growth in logo recognition for Aussie beef and lamb, making it a high-potential market despite moderate overall awareness.



In the UAE, rising awareness and beef logo visibility signal opportunity, though lamb visibility needs improvement.

In the UAE, Aussie Beef and Lamb are known for consistent quality and animal welfare, with lamb also seen as environmentally sustainable.

In China, Aussie Beef is viewed as fresh and a family favourite, while Aussie Lamb stands out for safety and quality.



Markets for discussion

(Labelling constraints limit our ability to measure brand impact)



To cut through, we need to lean harder into brand storytelling, highlighting Australia's clean, green credentials and trusted quality to build recognition without relying on on-pack claims.



Visual cues matter. While kangaroos and koalas are iconic, they risk confusion about the product itself.

Leveraging unmistakable Aussie symbols can evoke provenance, pride, and premium positioning, without misinterpretation.



KANTAR

THANK YOU!

Sally Kennedy, Carolina Ferrando and Heather Buys

Kantar Australia

August 2025

Terms of use: MLA data, reports and information

Meat & Livestock Australia Limited | ABN 39 081 678 364 | Level 1, 40 Mount Street, North Sydney NSW 2060 Postal address: Locked Bag 991, North Sydney NSW 2059 | Ph +61 2 9463 9333 | Fax +61 2 9463 9393 | mla.com.au

Important: These Terms of Use include terms that limit MLA's liability in connection the Reports and APIs and allow MLA to disclose Your personal information to third parties in accordance with MLA's Privacy Policy.

1 General

1.1 The market reports, data and information provided to you or accessed by you (Reports) are owned by Meat & Livestock Australia Limited (ABN 39 081 678 364) ("MLA", "We", "Us" or "Our").

1.2 MLA may provide or make available Application Programming Interfaces (APIs) to facilitate the extraction of information and data from the Reports.

1.3 "You" or "Your" means the person or entity that is provided with a copy of the Reports.

1.4 Your access to and use of the Reports and any APIs is subject to these Terms of Use and any additional terms, notices and disclaimers which appear in the Reports or the APIs. If You do not agree with these Terms of Use or any additional terms, notices and disclaimers, You must not access or use the Reports or the APIs.

1.5 MLA may amend these Terms of Use from time to time. Please check our Terms of Use regularly before using the Reports or the APIs to ensure You are aware of any changes. MLA will also provide You with notice of any material changes to these Terms of Use at least 7 days before the changes become effective. If You do not agree to our amended Terms of Use, You should not continue to use the Reports or the APIs. Your continued use of the Reports or the APIs after these Terms of Use have been altered constitutes Your acceptance of them.

2 Limited Licence

2.1 MLA grants You a non-exclusive, royalty free licence to use the Reports and any APIs solely for Your personal use and in the case of cattle and sheep producers, for internal business purposes. MLA may revoke this licence at any time by providing You with at least 14 days' notice, in which case You must cease all use of the Reports and any APIs on expiry of the notice period.

2.2 You must not:

- (a) provide or make available the Reports to anyone else;
- (b) commercialise the Reports; or commercialise any information, content or designs contained in any part of the Reports; or
- (c) use the Reports or information, content or designs contained in any part of the Reports for any other business purposes,

("Commercial Use") without the prior written consent of MLA.

2.3 Commercial Use of the Reports is subject to separate terms and conditions. Please contact the Marketing and Insights Team via insights@mla.com.au if you wish to discuss the Commercial Use of the Reports.

3 Copyright

3.1 All rights (including intellectual property rights such as copyright) in the Reports, their content and design and any APIs are owned by or licensed to MLA

3.2 You agree not to remove, alter or obscure any copyright notices that appear on the Reports.

3.3 Where You use or incorporate the Reports (or part of it) into a publication with MLA's written consent You must, at a minimum, clearly attribute the source of the Reports as Meat & Livestock Australia Limited and include the following text:

"Reproduced courtesy of Meat & Livestock Australia Limited – www.mla.com.au"

4 Trade marks, trade names and logos

4.1 All trade marks, trade names, service marks and other names and logos on the Reports are owned by or licensed to MLA and are protected by applicable trade mark and copyright laws.

4.2 You must not remove, alter or obscure any trade marks, trade names and other names or logos that appear on the Reports or any APIs.

5 Collection of information

5.1 If MLA requires You to provide personal information in connection with Your receipt of the Reports, MLA will collect, store, use and disclose this information in accordance with its Privacy Policy and you consent to this.

6 Disclaimer and liability

6.1 You acknowledge that the Reports are provided on an 'as is' basis and MLA makes no representations regarding the completeness or accuracy of the Reports and, to the extent permitted by law, expressly excludes all warranties and guarantees regarding the accuracy, completeness or currency of the information, recommendations and opinions contained in the Reports.

6.2 Information in the Reports may be obtained from a variety of third party sources. To MLA's knowledge the information accurately depicts existing and likely future market demand. However, You acknowledge that MLA has not verified all third party information in relation to accuracy or otherwise. You further acknowledge that: (a) any forecasts and projections are imprecise and subject to a high degree of uncertainty and (b) the Reports provided may be a snapshot of certain markets and not reflect that market as a whole.

6.3 The information, raw data, recommendations and opinions contained in the Reports do not take into account, and may not be appropriate for, Your individual circumstances. You should make Your own enquiries and seek professional advice before making decisions concerning Your interests or otherwise interpreting or relying on the Reports in any way. Any reliance will be at Your own risk and MLA accepts no liability for any loss, damage, cost or expense arising from any use or misuse of the Reports.

6.4 You acknowledge that MLA accepts no liability for any loss, damage, cost or expense arising from any use of the APIs by You, including errors in the automation of the data extraction process using the APIs.

6.5 MLA may make changes to an API at any time without notice. You acknowledge that it is Your responsibility to ensure that that version of the API You use is current. Nothing in these Terms of Use is intended to exclude, restrict or modify rights, guarantees and remedies that may be conferred on You under the Competition and Consumer Act 2010 (Cth) in relation to the provision by MLA of goods and services. All other rights, guarantees and remedies are excluded.

6.6 To the extent permitted by law, MLA's liability for breach of any consumer guarantee, which cannot be excluded, is limited at the option of MLA to:

- (a) in the case of services supplied or offered by MLA, which are not of a kind ordinarily acquired for personal, domestic or household use or consumption, resupplying or paying the cost of resupplying the service; or
- (b) in the case of goods supplied or offered by MLA, which are not of a kind ordinarily acquired for personal, domestic or household use or consumption, replacing the goods, supplying equivalent goods, repairing the goods or paying the cost of replacing the goods or supplying equivalent goods or repairing the goods.

6.7 MLA will not be liable for any loss of profit or for any direct, special, indirect, consequential or economic loss or damage.

7 Governing Law

7.1 These Terms of Use are governed by the law applicable in the State of New South Wales, Australia.