



SUMMER 2025/26

Insights, Assets + Information



Index of Resources

Click image for your section of interest



Industry Projections



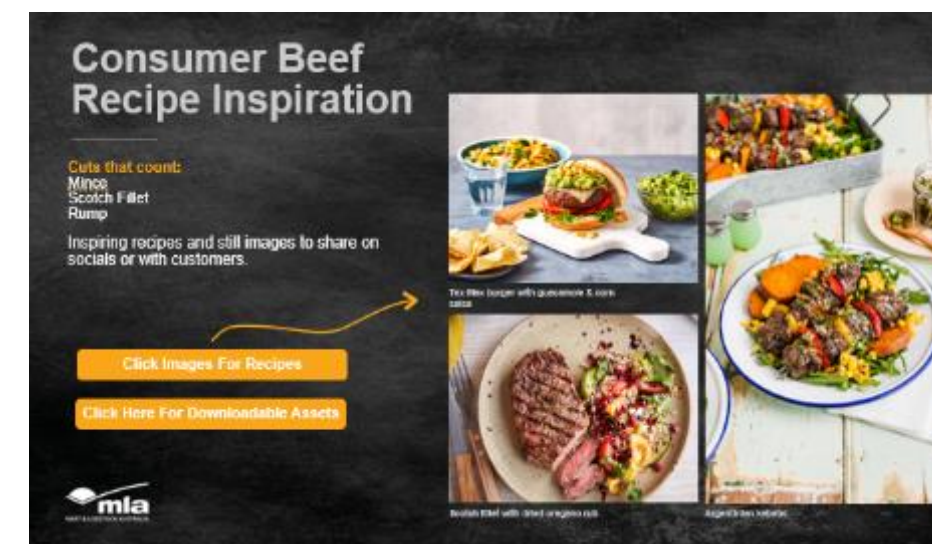
Data & Insights



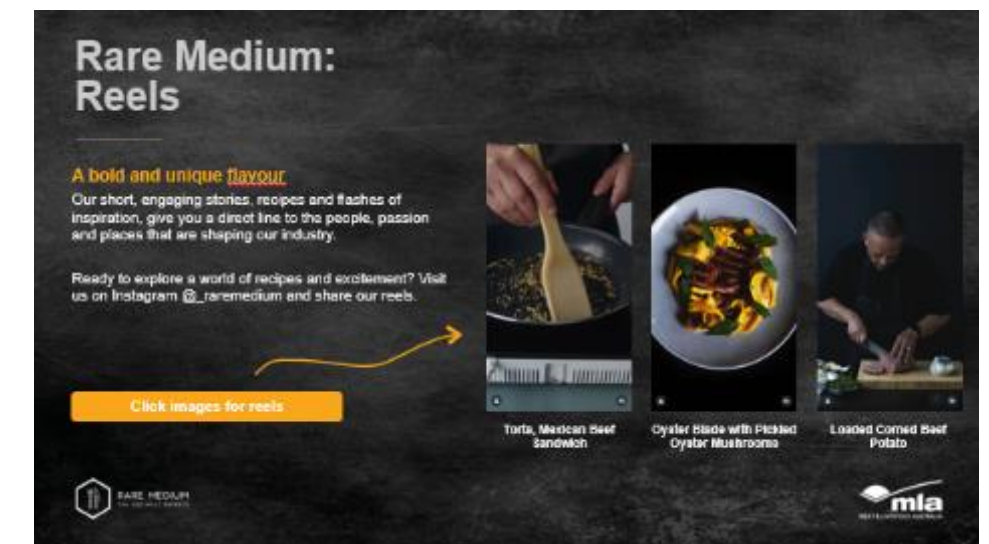
Activity Calendar



Campaign Updates



Recipe Inspiration



Rare Medium Reels & Inspiration



Red Meat Guide



Australian Beef Sustainability Framework



Market Development Partnership

Cattle Industry Projections



- ➔ **Slaughter:** 9.02m
- ➔ **Carcase weights:** 309.5 kg/head
- ➔ **Production:** 2.79m tonnes cwt
- ➔ **Beef exports:** 1.5m tonnes cwt

- Record production is expected once again in 2025, driven by successful production outcomes across much of the country.
- Changes to the composition of the heard have enabled stability in high turn-off periods
- Exports will remain strong as Australia continues to fill the global supply shortage.

[Click to view 2025 September Update Cattle Industry Projections Summary](#)



Sheep Industry Projections



- ➔ **Flock:** 74.2m
- ➔ **Lamb Slaughter:** 24.9m
- ➔ **Lamb Production:** 610,000 tonnes cwt

- The sheep flock has been significantly impacted by poor seasonal conditions over the past two years.
- The flock rebuild will be more considered due to much smaller breeding base.
- Carcase weights will see the influence of grain feeding and weight-based price signals to support production

[Click to view 2025 September Update Sheep Industry Projections Summary](#)



How are people shopping?

Australia 52wks ending 05.10.25

TOTAL FMCG:

 **+6.1%**
Value Growth
+11.9% vs 2YA

 **+4.6%**
Volume Growth
+10.0% vs 2YA

As inflation persists, grocery momentum is sustained through more shoppers and more frequent trips, despite declining basket sizes and lower per-trip spending



Average Trips
+4.5% vs YA
+6.7% vs 2YA



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



Buying Households
+2.2% vs YA
+4.1% vs 2YA



Vol Per Trip
-2.1% vs YA
-1.0% vs 2YA

Reference: NielsenIQ Homescan | 52 weeks to 05/10/2025 vs Year Ago (YA) & 2YA

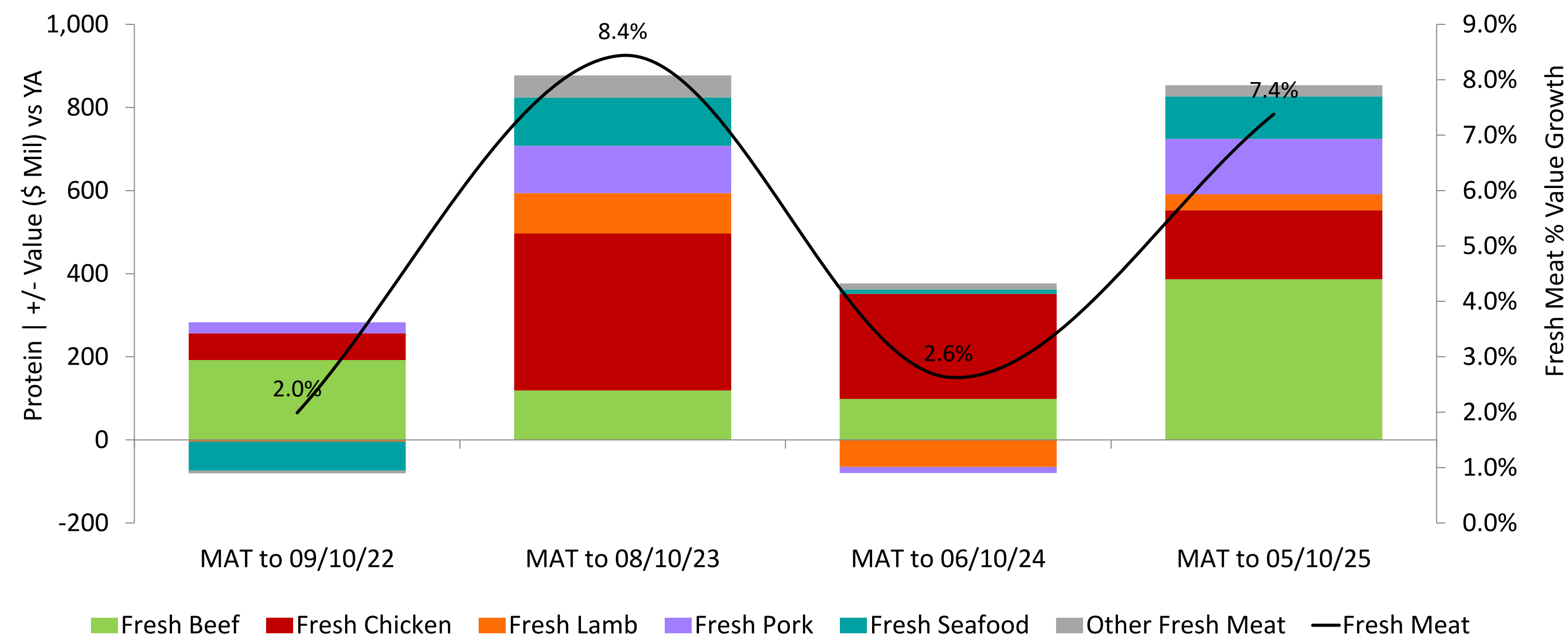
Disclaimer: The Reports represent NIQ's opinion based on its analysis of data and information, including data from sample households and other sources, that may not be under NIQ's control, and are not intended as a substitute for financial, investment, legal, business, or other professional advice. Users of the Reports remain solely responsible for their decisions, actions, and use of the Reports.

Publications Statement: This Report is intended for use by MLA members and levy payers in the context of understanding and diagnosing market performance and shopper behaviour. Any reproduction or wider dissemination of the Report or any part thereof requires prior written permission from NIQ.

The importance of red meat

Red Meat accounts for 50% of fresh meat increase this year.

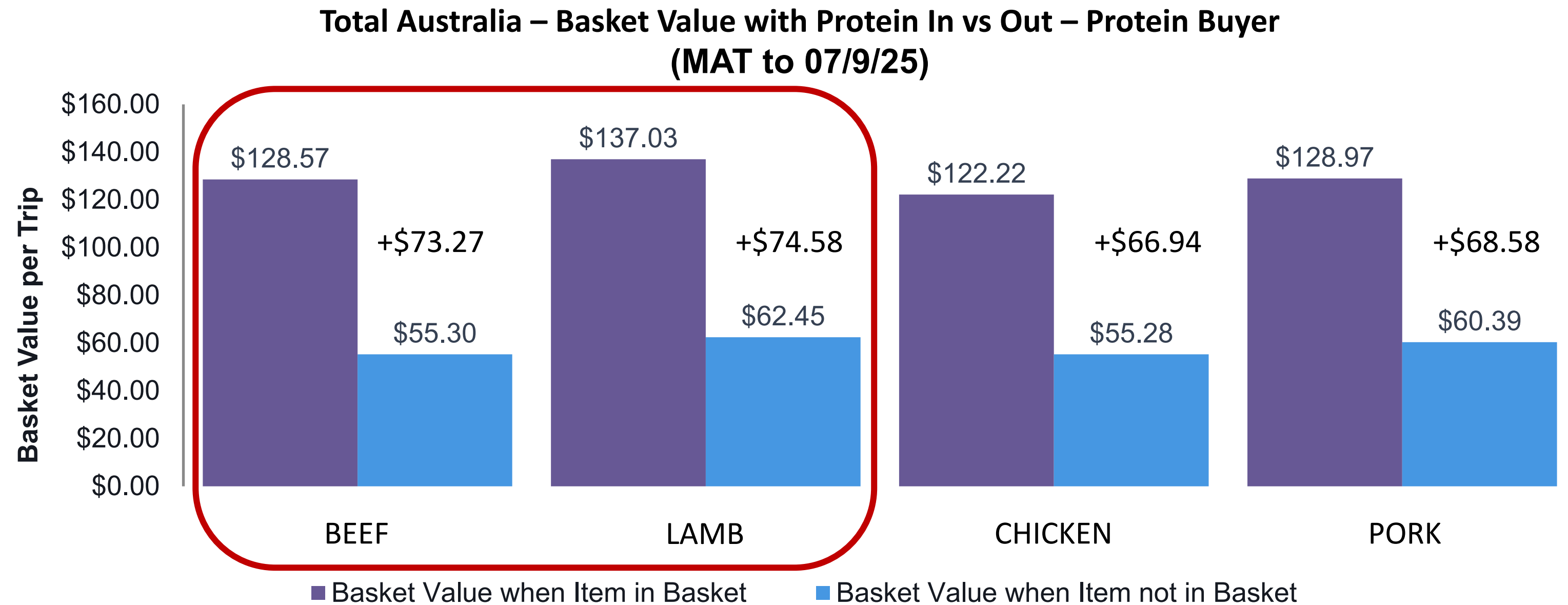
Reach out to us for more information



Red meat & basket size

Lamb and beef drive the highest uplift in basket value, highlighting the strong cross-sell potential of red meat, reinforcing their role in driving greater value for the retailer.

Reach out to us for more information

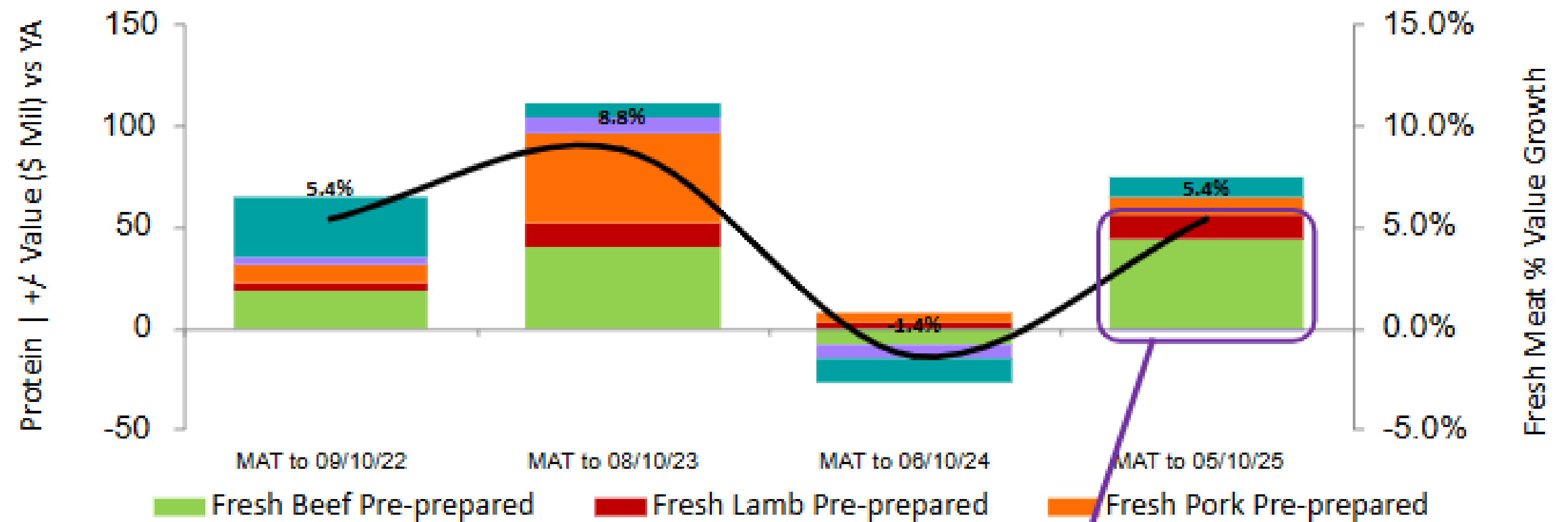


Red meat in pre-prepared

With the total growth of pre-prepared meals sitting at over \$72m for last year, red meat is responsible of 77%.

Reach out to us for more information

Total Fresh Meat Pre-prepared by protein | Value Growth | AUS | Trended MAT to 05/10/25



Beef and lamb represent 77% of growth

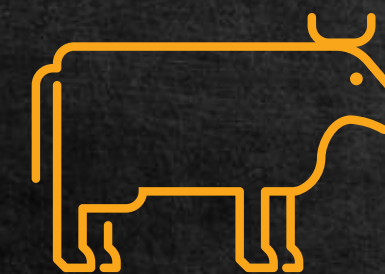
Retail performance

Australia 12wks ending 05.10.25



Total Grocery continued growth momentum increasing +7.8% on account of more trips and higher prices.

Beef (+11.6%) and Pork (10.3%) drive value gains in Fresh Meat (+8.9%).



Mainstream steak fuelling both volume and value growth of beef

Lamb losing volume to beef and chicken, but value holds up as loyal consumers pay more.




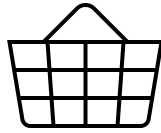
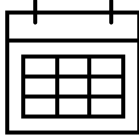


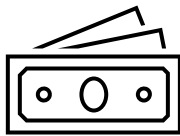
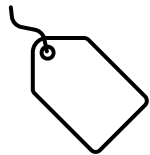
Retail summary

Australia 12wks ending 05.10.25

Beef continues to hold strong, demonstrating solid resilience. Growth is being driven by cut-led performance, with steaks in particular sustaining consumer value and demand.

Lamb, however, is contracting in volume as steep price increases push the category beyond consumer elasticity. While value is being maintained, it's largely a function of higher shelf prices rather than increased purchasing behaviour.

Reach out to us for more information

Household KPIs					Category KPIs		
<div><div></div><div></div><div></div><div></div></div>					<div><div></div><div></div><div></div></div>		
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	93.6%	(0.3)	1.5%	1.1%	4.6%	8.9%	4.2%
Beef	82.3%	0.6	(0.2%)	(0.5%)	2.2%	11.6%	9.2%
Lamb	45.8%	(2.3)	(6.3%)	(4.6%)	(12.9%)	2.0%	17.1%

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 ease and versatility

Beef The Greatest

Back for another year, Beef The Greatest continues to showcase beef in all its glory - desirable, superior flavour and the best choice. As measured through Kantar tracking, this campaign has proven to be the most persuasive beef campaign of the past decade.

To further expand the reach and penetration of this campaign, beef is partnering with the Ashes to make sure that beef is top of mind.

Make sure that you are getting the most from the campaign by aligning your promotional activity.

- Burst 1: Oct – Dec 2025
- Burst 2: Apr – Jun 2026

[Click for assets](#)



Summer Lamb Happiness is Served

The Summer campaign builds on the concept of *happiness* to align with the broader 2026 edition of Australia's favourite Summer campaign – Summer Lamb.

If you have an opportunity during summer to align with our campaign and make the most of the opportunity, below is the key visual to assist.

[Click for assets](#)

HAPPINESS IS SERVED



Share
the
Lamb
100% AUSTRALIAN

Midweek Meals You're Thinking Beef

Back for another pulse over the back-to-school period is the Midweek Meals campaign – You're thinking beef – actively boasting the flexibility of beef and its role in midweek meals.

Align with our activity calendar to make sure your comms are extending campaign reach for maximum effect.

[Click for assets](#)

WHAT'S FOR DINNER?



More than meat Comedians + Butchers

Following a successful launch year, 'Comedians + Butchers talking Meat' will be back for another year.

Highlighting the value of Butchers beyond just meat, in a fun and entertaining way.

- Over 6m views
- 2.5x the benchmark
- Drove increased frequency amongst shoppers

Share some fun and engaging content with your customers to help drive traffic into butcher stores.

[Click for links](#)



Beef: Culturally & Linguistically Diverse

As part of our mission to strengthen consideration of Beef in Australia's weekly meals, we set out to inspire Chinese consumers to choose beef mid-week.

Though beef is well-loved among Chinese, pork and chicken dominate. To shift perceptions, we partnered with a Chinese Chef Influencer to reimagine three classic dishes - traditionally made with pork or chicken - showcasing beef as the superior flavour choice.

Use and share these assets to tap into Chinese markets for your own businesses.



Dongpo Beef Brisket

[Click here for recipe](#)

Yangzhou Beef Fried Rice

[Click here for recipe](#)

Sweet & Sour Short Ribs

[Click here for recipe](#)

Cooking with Danielle

We partnered with chef influencer Danielle Alvarez to create a YouTube recipe series that highlights the versatility of Beef.



Across six episodes airing Spring/Summer '25 and Winter '26, Danielle serves up globally inspired Beef dishes to take you from weeknight to weekend. Fresh flavours perfect for the warmer season ahead.

Bolster your socials using these assets to gain penetration and reach.

[Click for full-length recipe video](#)

[Click for written recipe](#)







CAMPAIGNS RECIPES COOKING |  SEARCH |   

RECIPE

PICANHA STEAKS WITH SALSA CRIOLLA & CREAMED CORN

Bold, juicy and packed with flavour - this Picanha steak recipe from Danielle Alvarez pairs tender Aussie beef with a bright salsa criolla and rich creamed corn. A standout dish that's surprisingly easy to make.

 4  15 mins 



INGREDIENTS 4

- 4 picanha steaks (aka beef rump cap, ~2 cm thick)
- Salt & black pepper
- ½ red onion, peeled and diced small
- ¼ cup + 1 Tbsp red wine vinegar
- 1 tomato, seeds removed and diced
- 1 jalapeno, seeds removed and diced
- 1 garlic clove, minced
- ¼ cup + 1 Tbsp extra virgin olive oil
- 1.5 tsp dried oregano
- ½ cup chopped parsley
- 1 tsp salt
- 4 ears corn, kernels removed (and pulp/milk extracted by grating)
- 1 small white onion, diced
- 20 g butter
- Salt, to taste
- ½ cup pure cream

METHOD

- Remove the steaks from the fridge and let them come to room temperature while you prep the other components.
- Salsa Criolla:** In a bowl, combine onion and red wine vinegar with a pinch of salt. Let it sit briefly, then stir in tomato, jalapeno, garlic, olive oil, oregano, parsley and the rest of the salt. Set aside at room temperature.
- Creamed Corn:** Grate corn kernels (using a box grater) to extract pulp and milk. In a medium-sized saucepan over medium heat, melt butter, add onion and a pinch of salt, cook for ~5 minutes until translucent. Add corn mixture and sauté until thickened (~3-4 min), then stir in cream. Cook another 3-5 minutes, taste and adjust seasoning. Remove from heat and set aside.
- Cook Steaks:** Use a cast-iron pan on high heat. Place steaks fat cap down in a cold pan so the fat renders and helps conduct heat. When the fat begins browning, sear each side for about 2-3 minutes (depending on steak size). You may need to cook in batches. Remove steaks and rest for a few minutes before slicing.
- Serve:** Slice the steaks across the grain. Plate with creamed corn and drizzle with Salsa Criolla over the top.

Consumer Beef Recipe Inspiration

Cuts that count:

Mince
Scotch Fillet
Rump

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

[Click Images For Recipes](#)

[Click Here For Downloadable Assets](#)



Tex Mex burger with guacamole & corn
salsa



Scotch fillet with dried oregano rub



Argentinian kebabs

Consumer Lamb Recipe Inspiration

Cuts that count:

Leg Steaks
Loin Chop
Mince

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

Click Images For Recipes

Click Here For Downloadable Assets



Lamb Sosaties



Cajun spiced loin chops with pineapple salsa



Chipotle lamb tacos

Foodservice Beef Recipe Inspiration

BBQ to braised
Brisket
Flank

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

Click images for recipes

Click here for downloadable assets

Braised brisket stuffed arepa



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

BBQ flank steak



Perfect for: Fine dining, steakhouses, and hotels

Foodservice Lamb Recipe Inspiration

Flavour journeys:

Mince
Chops

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

Click images for recipes

Click here for downloadable assets

Laham bajine and haloumi pizza



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

Grilled tikka masala lamb chops



Perfect for: Pubs, clubs, and casual dining

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



Torta, Mexican Beef
Sandwich



Oyster Blade with Pickled
Oyster Mushrooms



Loaded Corned Beef
Potato

Rare Medium: Foodservice Inspiration

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

What is Modern Australian Cuisine?

We ask four top chefs what Modern Australian cuisine means to them. Thanks to Jean-Paul El Tom from Baba's Place, Ozge Kalvo from Olympus Dining, Khanh Nguyen from King Clarence, and Mark Best from Infinity by Mark Best.

[Watch video here](#)

Olympic Meats? Yes Chef.

We go behind the scenes at buzzing inner-west restaurant Olympic Meats - where Timothy Cassimatis is putting his spin on traditional Greek barbecue.

[Watch video here](#)



Red Meat Guide

Information and content for you to share

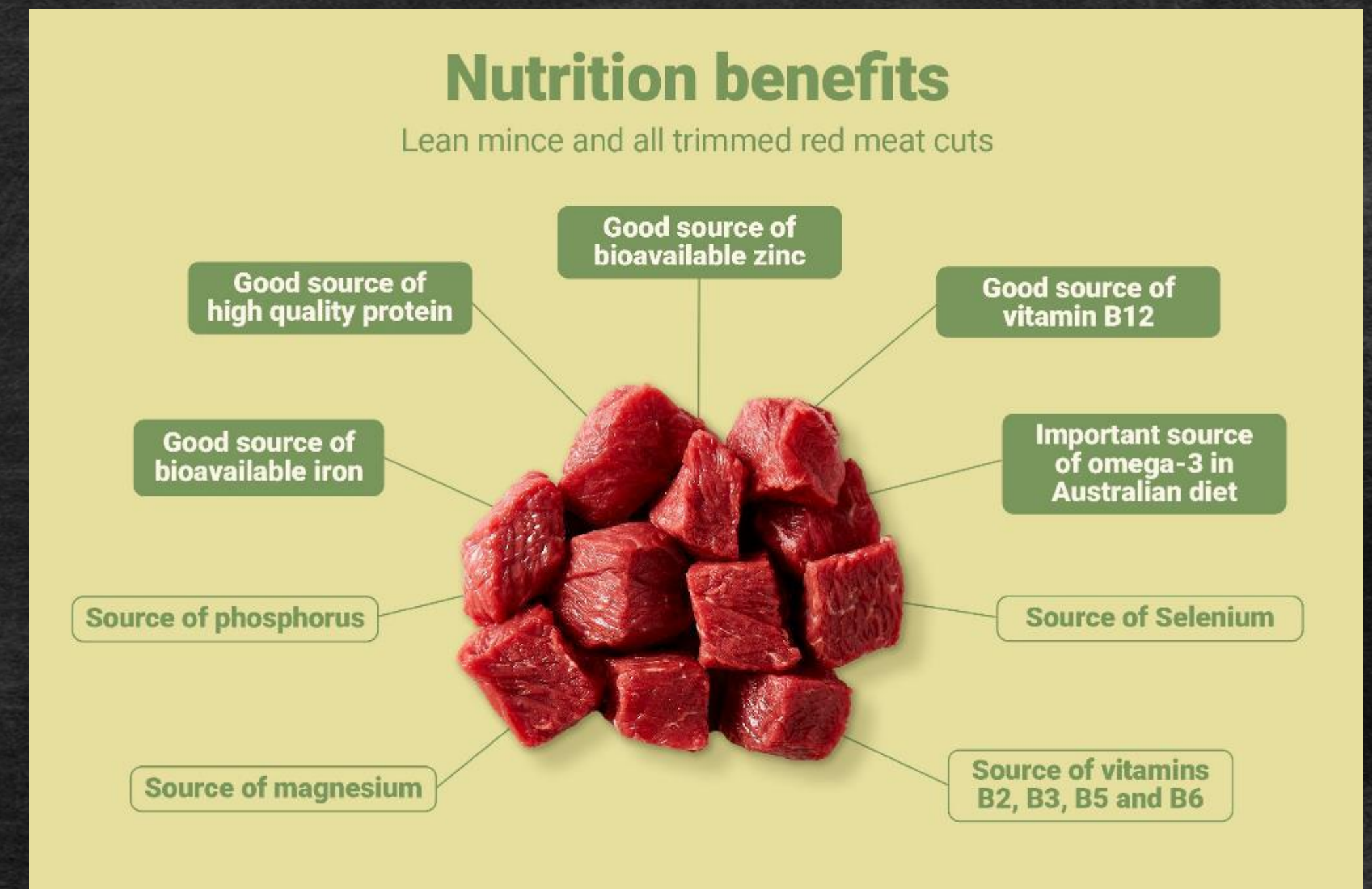
Nutrition questions? Sometimes, finding the facts can be challenging, and with consumers being increasingly interested in it, these resources provide the tools to effectively communicate the advantages of Australian red meat to your audience.

Explore the nutrition resources available in the Red Meat Guide.

Nutritious choices

Popular cuts and cooking tips

Communication resources



Australian Beef Sustainability Framework

Annual Update 2025

Want to know more about the role of sustainability in beef?

The Australian Beef Sustainability Framework is an initiative of the Australian beef industry to set out the key indicators of performance in sustainability for the beef industry.

A few key highlights:

- The European Commission designated Australia as a low-risk country under the EU deforestation Regulation.
- Following adjustments to the national cattle population and feedlot emission equations, the beef industry in 2023 had reduced its net CO2-e by 70.1% since 2005.

Make sure that you download the report to get the latest on sustainability in the beef industry.

[View the full report now](#)



Market Development Partnership (MDP)

Tapping into a new market or launching a new product?

The MDP program aims to collaborate with Australian red meat businesses and their customers to build and promote Australian red meat and educate consumers, customers and trade partners to:

- Build awareness of and preference for Australian beef, lamb, and goat products
- Create customer loyalty and sustainable brand growth
- Align and leverage MLA's Marketing initiatives

[Click to find out more](#)



THANK YOU!

Meat & Livestock Australia

Copyright, Acknowledgement Notices, and Disclaimer Policy

All information contained within this presentation and supplied in connection with it, including any oral commentary and answers to questions, is supplied to recipients for information purposes only. No representation, warranty or other assurance is made as to the currency, fairness, accuracy or completeness of the information contained within this presentation or supplied in connection with it. The information contained within this presentation is in summary form only and is not, and does not purport to be, comprehensive or contain all information that any recipient may require or consider material.

Although all care has been taken in preparing this presentation, viewers of this presentation should not alter their position, or refrain from doing so, relying on this presentation, and should seek independent advice for their own situation. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. Your use of, or reliance on, any content is entirely at your own risk and MLA, MDC and ISC ("MLA Group") accept no liability for any losses or damages incurred by you as a result of that use or reliance.

The views or judgements expressed within this presentation are those of the author and not the MLA Group. These views and judgements do not reflect the views and judgments of the MLA Group, its employees or agents.

Full terms can be found here: [MLA Terms of Use](#). You may not copy, republish, download, transmit, communicate, or otherwise use this content in any way without the prior written consent of Meat & Livestock Australia Limited ABN 39 081 678 364. Any such enquiries should be directed to info@mla.com.au, or the Content Manager, PO Box 1961, North Sydney, NSW 2059.