

# KANTAR

## Global Tracker 2024

UAE Presentation Deck

Brought to you by your Kantar Team:  
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MEAT & LIVESTOCK AUSTRALIA

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## 4 IMPORTED LAMB CONSUMPTION & COUNTRY OF ORIGIN























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## 5 FINAL THOUGHTS & DISCUSSION



We have conducted the global tracker in 22 markets over the last 10 years, with UAE fieldwork run every year.

MARKETS	 Japan	 Korea	 China	 Indonesia	 Singapore	 Malaysia	 Philippines	 Taiwan	 Thailand	 Vietnam	 USA	 Canada	 KSA	 UAE	 Oman	 Jordan	 Kuwait	 Qatar	 UK	 Hong Kong	 Mexico	 Chile	Total # of markets
2015	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	11
2016	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	15
2017	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	11
2018	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	13
2019	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	10
2020	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	9
2021	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	11
2022	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	11
2023	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	11
2024	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	6



# INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

*Diverse markets, with some universal truths.*

## 2024 Study Details:



5,800 interviews globally  
500 interviews in UAE



6 Markets (See right)



20-minute online survey



Consumers aged 18-64  
Grocery buyers, meal planners  
Affluent households (skew)  
Selected based on potential openness and  
ability to buy AU Beef and/or Lamb  
(Not representative of total market)



Captures meat consumption habits,  
attitudes, perceptions of COO Beef and  
Lamb



Conducted annually, this study collects  
historical data allowing the tracking of  
trends overtime



# UAE Sample – a deliberate skew (not Nationally Representative)



Consumers aged 18-64  
 Grocery buyers, meal planners  
 Affluent households (skew)  
 Selected based on potential openness and ability to buy AU Beef and/or Lamb  
 (Not representative of total market)

**Sample is made up of 500 consumers**

		COUNTRY INCIDENCE	SAMPLE STRUCTURE
Gender	Male	70%	45%
	Female	30%	55%
Age	18-34	-	45%
	35-49	-	50%
	50-64	-	5%
Cities	Abu Dhabi	16%	50%
	Dubai	30%	50%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	98%
Children	Households with Children	-	70%
Income	241K - 322K AED	-	67%
	322,001 + AED	-	33%
Religion	Islam	76%	70%

# The Central Question

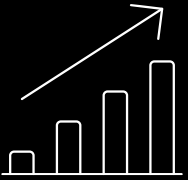
How can Australian red meat maintain its justified premium positioning and further grow its share in the UAE market?



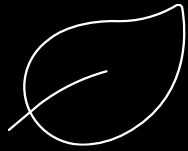
# 1 Macro- market context



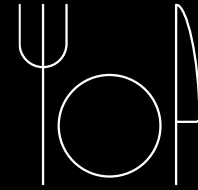
# 3 key trends we see influencing consumer consumption:



**Economic resilience**



**Increased demand of proteins**



**High preference for premium beef**

# 3 key trends we see influencing consumer consumption:



## Economic resilience

UAE's **economy stays resilient**, and it is expected to grow further in 2024.

**Population increase** (particularly coming from India, Pakistan, Bangladesh) encouraging business formation and attracting skilled workers.

**The tourism sector** has rebounded strongly, with international visitor numbers to Dubai exceeding pre-pandemic levels.



## Increased demand of proteins

The rise of the expat population and tourism in the country is driving the **demand for mutton and lamb**.

The region produces small volumes of sheep meat and relies on global imports to meet the increased demand.



## High preference for premium beef

Consumers in the UAE are known for **prioritizing quality over cost** for many products. The food service sector in the UAE is willing to pay a higher price for these imports due to their much higher consumer demand.

Local beef producers are finding it increasingly difficult to compete with the import of premium beef varieties from other countries, which are 150% to 180% priced higher than normal quality.

2

## Protein landscape



# In the context of growing population, overall protein consumption increases except for beef, which remains stable vs 2023.

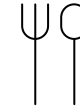
## Key Protein Metrics



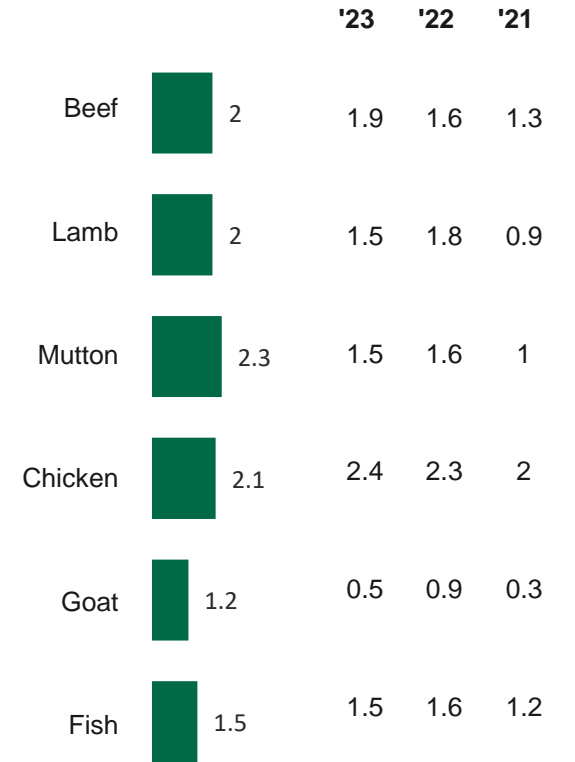
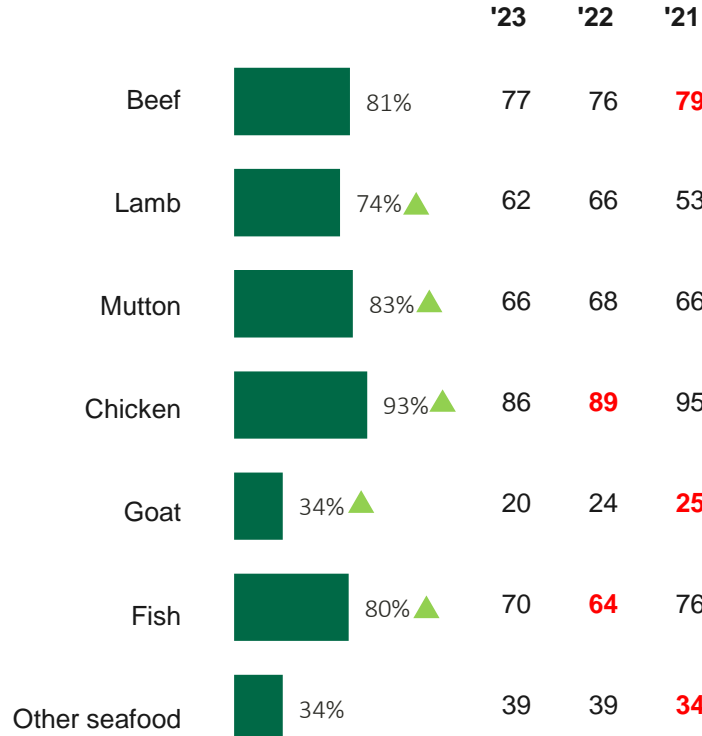
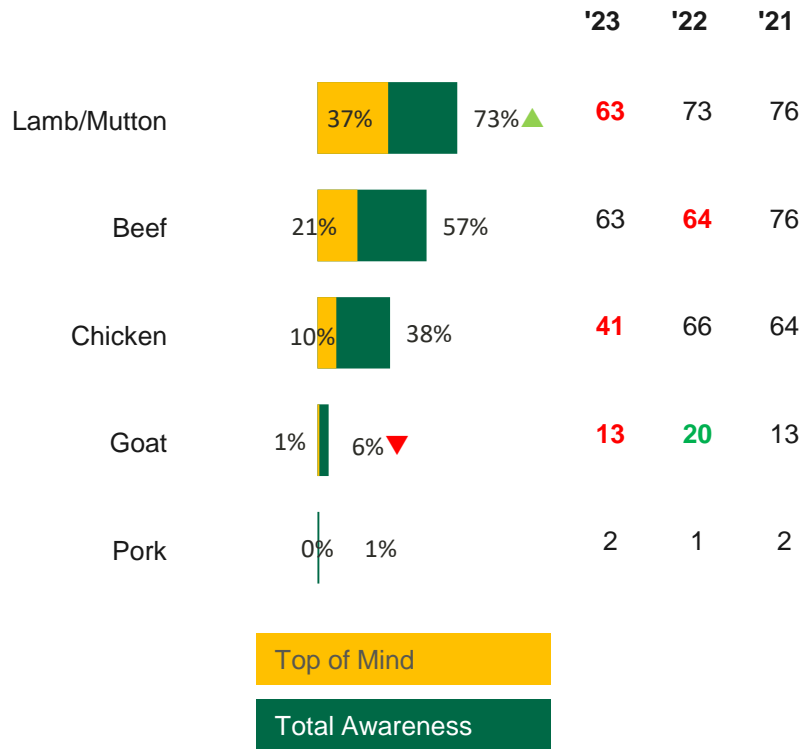
### Spontaneous Awareness



### Bought in last month



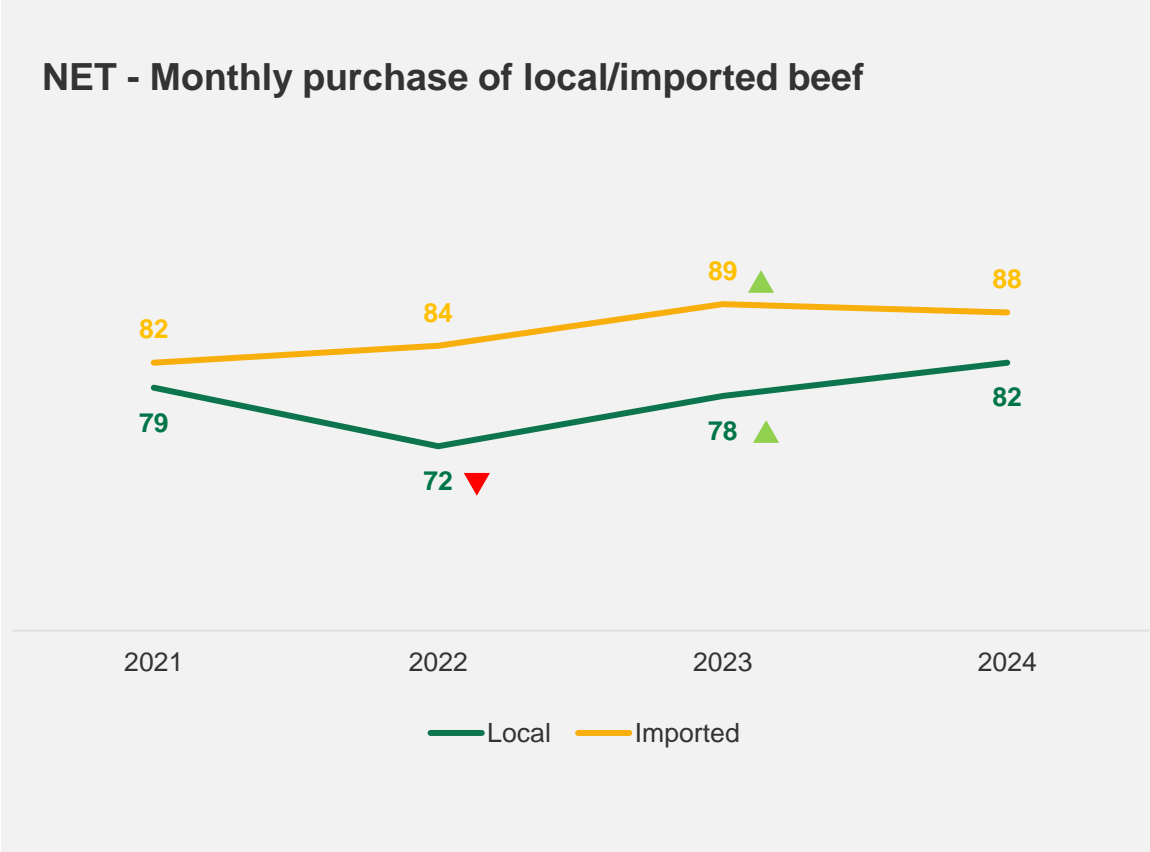
### Average Serves Last 7 Days



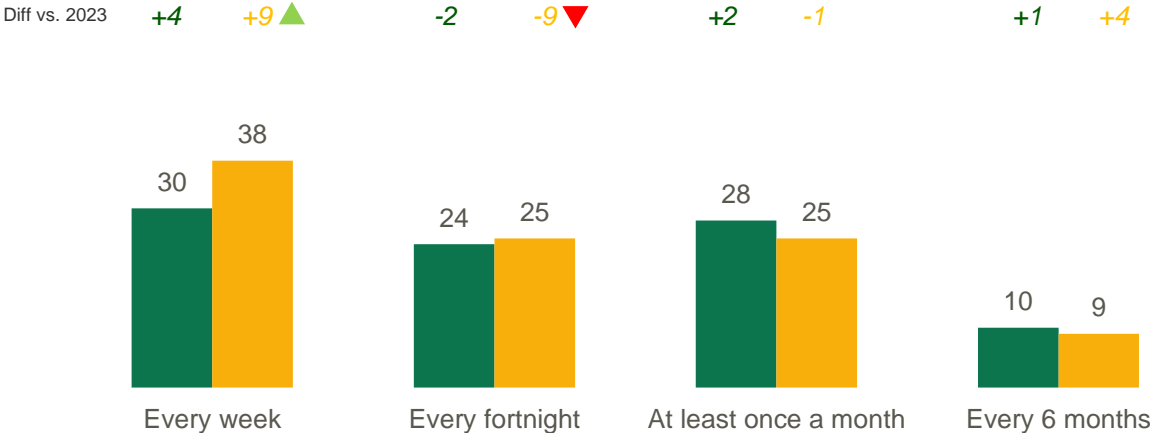
# With consumers in UAE prioritizing quality, imported beef is purchased more frequently than local beef, compared to most other markets where local beef is purchased more frequently.

Frequency of buying local and imported beef

## LOCAL/IMPORTED



## Frequency of purchase of local/imported beef



**Emiratis and Expat Arabs drive the increase in consumption of both local and imported beef. Emirati's, however, continue to highly prefer local beef while Expat Arabs are buying imported beef more than ever.**

Frequency of buying local and imported beef by ethnicity

**NET - Monthly purchase of imported beef**

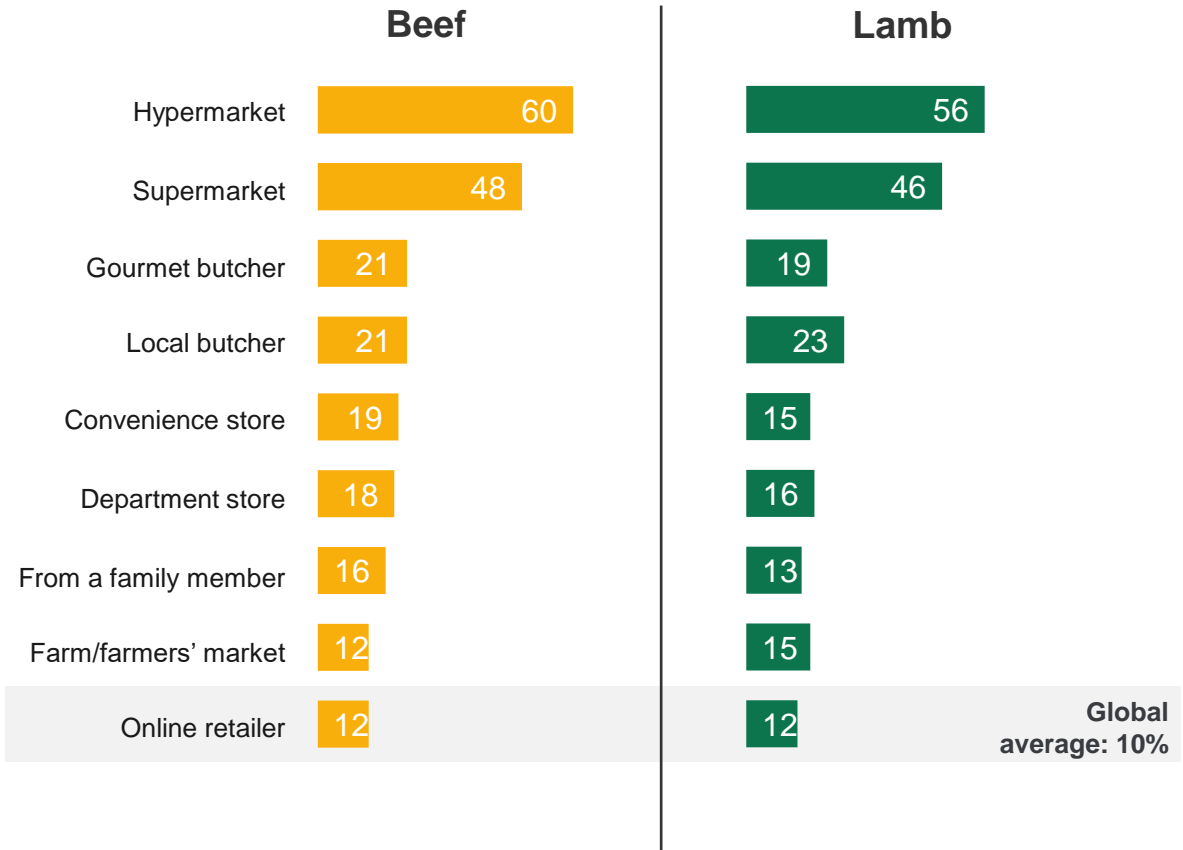
	2024	Diff vs. 2021
Total	88%	+6%
Emirati	81%	+13%
Expat Arabs	99%	+8%
Expat Asian	78%	-7%
Western Expat	86%	0%

**NET - Monthly purchase of local beef**

	2024	Diff vs. 2021
Total	82%	+3%
Emirati	94%	+8%
Expat Arabs	85%	+14%
Expat Asian	76%	-2%
Western Expat	69%	-10%

# While traditional channels remain the preferred channel, online purchases are motivated by convenience and special prices as well as trust, avoiding interaction with others, and the wider variety offered online.

Beef and lamb - places of purchase at least once a month

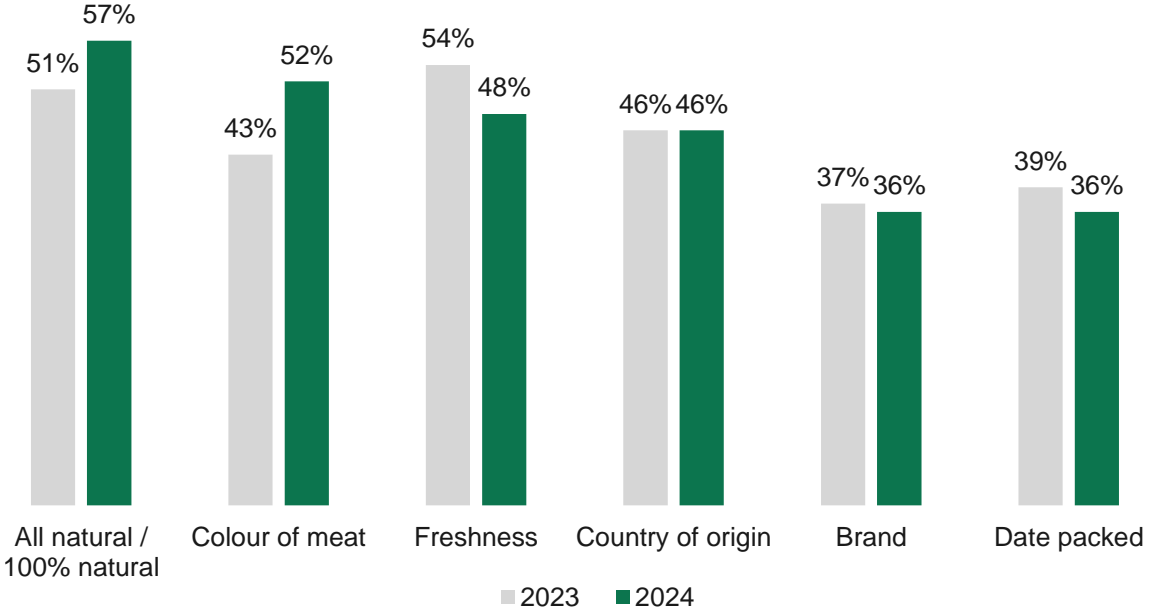


TOP 5 REASONS WHY CONSUMERS BUY BEEF ONLINE	UAE	# Global ranking position
It saves me time because I do not visit a store	57%	#1
It's easier to find or access special offers / sales / affordable prices	43%	#3
I trust the sellers more	43%	#9
I feel safer shopping online after the pandemic than going instore	40%	#8
There is more choice and variety available online than instore	30%	#7

However, lack of confidence and the need to see the meat before buying are barriers to online shopping, as the demand for natural products and a desire to check the colour of meat grows.

Top 5 'cues' when buying beef

Main reasons for not buying beef online	Total
Base	218
Prefer to see the meat before I buy it	43
I don't trust the seller's sites	30
I never thought about it before	28
I'm simply not interested in buying online	25
I've heard of bad experiences with online meat purchasing	22



Fat content is significantly more important among Expat Arabs vs total.

# Summarising the protein landscape in the UAE

## Increased overall protein consumption

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As population and tourism increase, there is a general rise in protein consumption.

With a higher preference for premium beef among UAE consumers, imported beef is bought more frequently compared to local beef.

## Different preferences across different ethnicities

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Emirati, and Expat Arabs are driving the growth of both imported and local beef purchases- there is a potential of imported beef consumption to further increase among Emiratis as overall beef consumption is high among them.

## Beef buying behaviour

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While COO is a key factor in deciding which beef to buy, on-pack cues such as 'Natural' and 'Colour of the meat' are becoming more important.

AU beef is well placed to meet this increasing desire for natural, good-quality meat considering the narrative of its clean and green rearing environment

Online channel, while still emerging, is valued for its convenience, trustworthiness, privacy, and variety. Important for AU beef to be present in all the relevant channels to ensure availability.

3

# Beef- Brand Health By Country of Origin



# The brand list remains consistent with 2023 allowing year on year comparisons.

Beef brands tracked in 2024

Australian  
beef



UAE Local  
beef



Pakistani  
beef



Brazilian beef



Indian beef/  
Buffalo



New Zealand  
beef



American  
beef



South African  
beef



Canadian  
beef





# Western expats and Expat Arabs prefer AU Beef while Expat Asians lean toward PK beef. AU Beef's trial among Emiratis is on par with Western expats, suggesting potential to grow AU beef consumption among them by drawing market share from local beef.



Beef- brand health funnels by country of origin

		AUSTRALIAN BEEF %				UAE LOCAL BEEF %				PAKASTANI BEEF %					
		Emirati	Expat Arabs	Expat Asians	Western Expats	Emirati	Expat Arabs	Expat Asians	Western Expats	Emirati	Expat Arabs	Expat Asians	Western Expats		
<b>Total Awareness</b>	88	87	95	81	88	80	87	97	65	66	77	70	86	92	67
<b>Ever eaten</b>	83	83	88	73	84	70	84	92	44	47	61	65	78	77	22
<b>Eat P12M</b>	72	72	80	63	72	63	84	84	35	33	53	59	69	69	14
<b>Eat P3M</b>	56	49	72	40	64	54	80	67	27	26	39	39	53	60	7
<b>Eat past month</b>	46	39	63	27	53	39	70	39	17	16	28	23	34	54	7
<b>Eat Most often</b>	28	18	44	15	36	28	59	22	6	10	10	4	17	25	-
<b>Base</b>	252	82	64	48	58	252	82	64	48	58	252	82	64	48	58

## There are two paths to brand growth

By increasing the likelihood  
**that a consumer will buy a brand**

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We call this **Demand Power**



**Demand Power**

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

By increasing the likelihood  
**consumers will pay for a brand**

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We call this **Pricing Power**



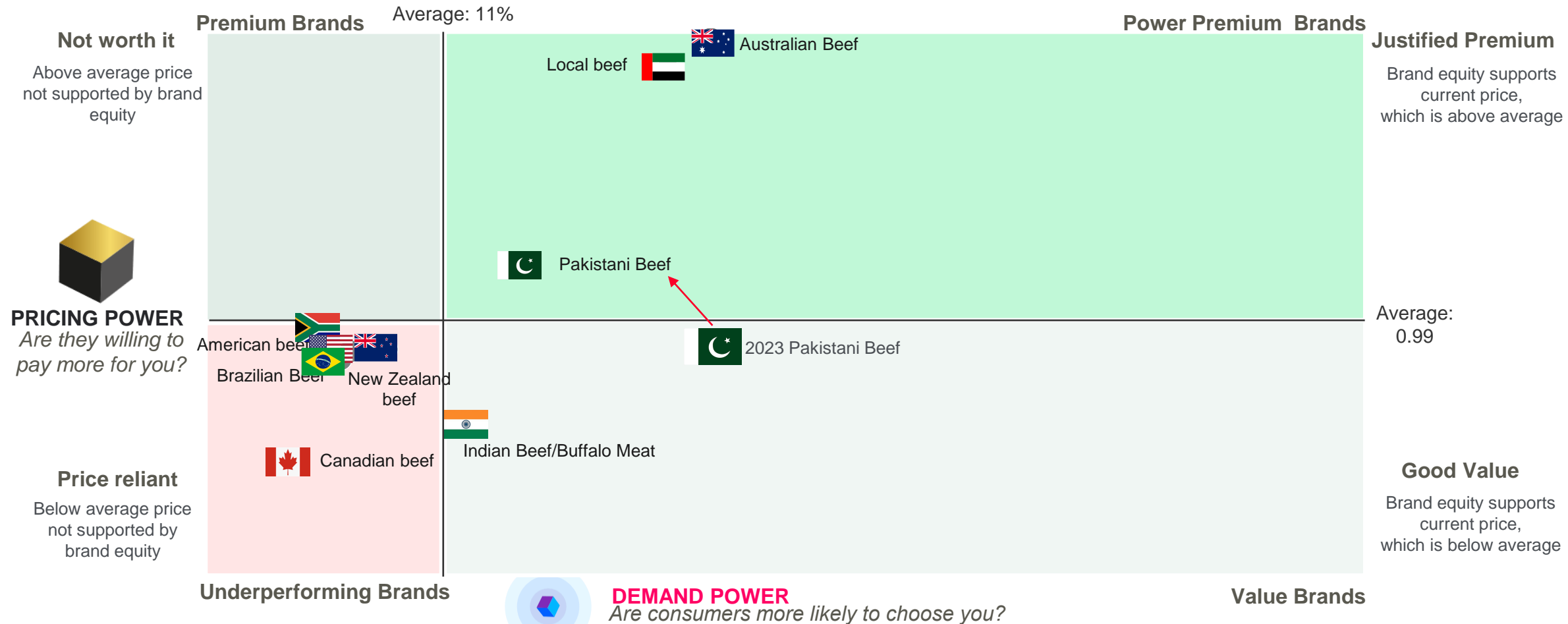
**Pricing Power**

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

# AU and Local Beef are firmly 'Justified Premium' propositions. Pakistani beef also joins this Justified Premium space. The task at hand for AU beef is to continue growing in this space.



## Beef country of origin – equity



# The associations that consumers hold in their minds for beef in UAE break into 5 themes



Importance In Driving Demand Power



## Superior quality

**38%** (31%)

- Is my/my family's favourite beef
- Is the most superior beef
- Guaranteed safe to eat
- Consistent quality standards
- Is easy and convenient to purchase
- More nutritious
- Fresh



## Halal

**20%** (18%)

- I trust that this beef is slaughtered according to sharia law and is therefore Halal
- The animal is well-cared for



## Variety & fat cuts

**18%** (23%)

- Offers a variety of cuts that suit the meals I make
- The fat is nicely marbled
- Low in fat



## Tender

**17%** (18%)

- The industry is environmentally sustainable
- The meat is usually tender



## Cheaper

**8%** (9%)

- Cheaper

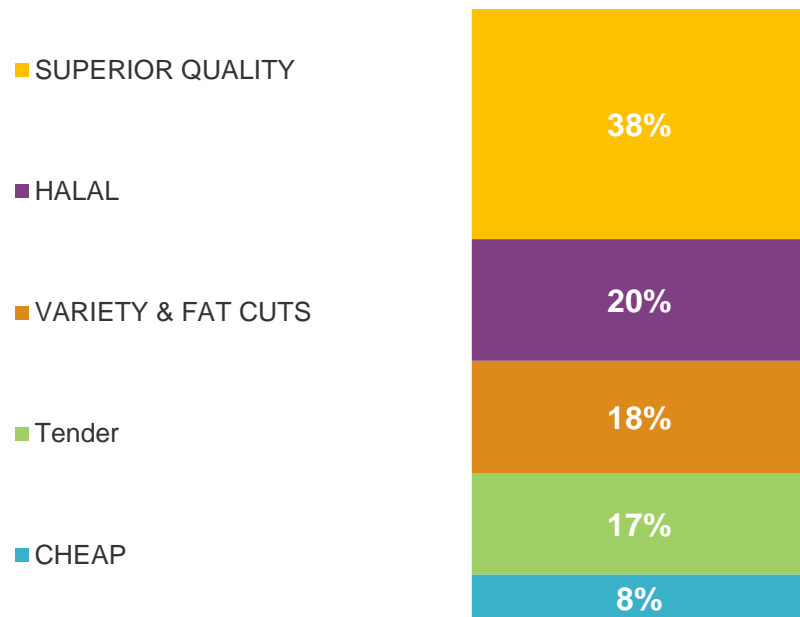
# Unlike other markets, levers to pull for strengthening Demand Power and Pricing Power are similar in UAE- perceptions of *Superior Quality* are key for both



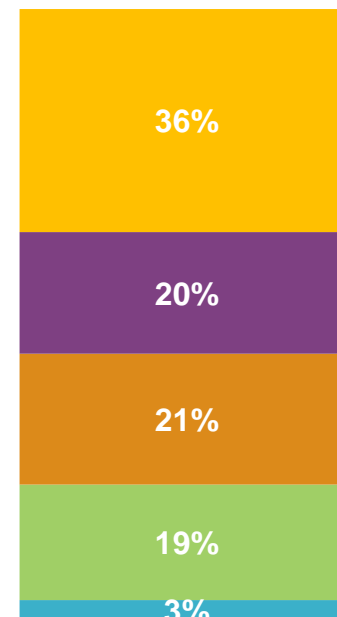
What drivers Demand power and Pricing power



## DEMAND POWER



## PRICING POWER



**SUPERIOR QUALITY**

- Is my/my family's favourite beef
- Is the most superior beef
- Guaranteed safe to eat
- Consistent quality standards
- Is easy and convenient to purchase
- More nutritious
- Fresh

# Big brands naturally attract high endorsement, which can limit insights. But we can run a statistical analysis (BIPS) to strip out size to identify relative strengths and weaknesses.

Bip analysis and why we should look at it?



### Limited Insights:

Big Brand leads on everything, followed by Medium Brand and Small Brand.

### More Insights:

- Big brand's strength is driven by Association 2
- Medium brand's role is clear in consumers' minds – it is known for Association 3, but not for Association 1
- While small, Small Brand is a threat on Association 1

We can then **overlay what drives demand and willingness to pay** to help you pursue what matters most (choice/price driving associations, differentiation/competitive white space)

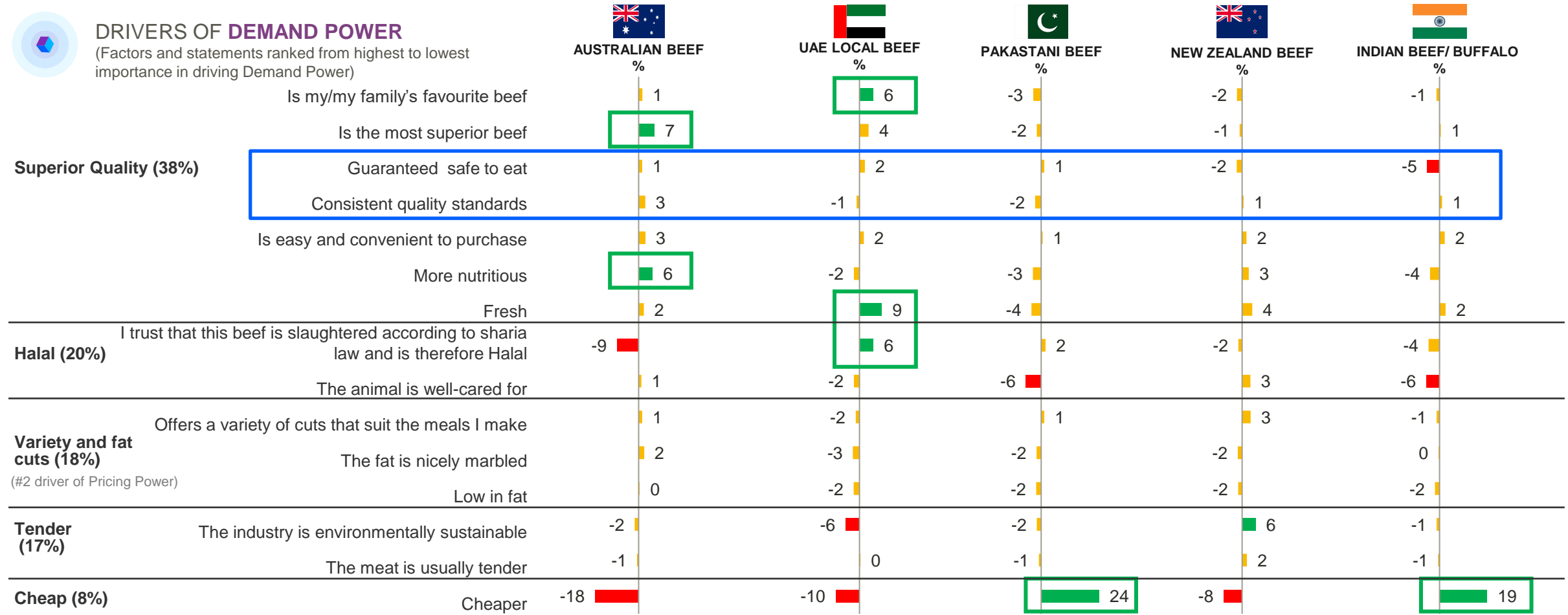
# There is a clear opportunity to own the associations with safety and consistent quality standards (aligning with AU beef positioning) that are key drivers to both demand (volume) and premium (value) and are currently white spaces.

## Drivers of demand power



### DRIVERS OF DEMAND POWER

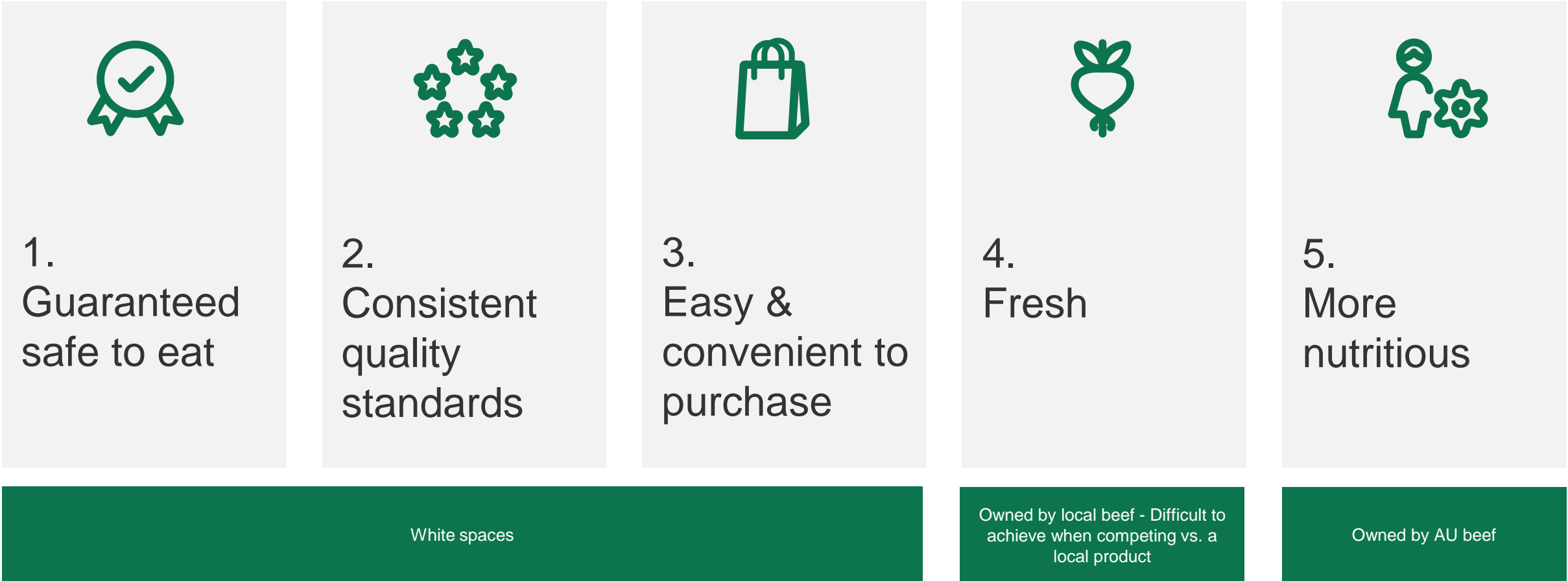
(Factors and statements ranked from highest to lowest importance in driving Demand Power)



# Modelling helps us identify that the strongest returns for AU Beef lie in guaranteeing high quality and safety processes, and ensuring the availability of fresh, nutritious cuts.



Top associations to grow - volume & premium (ordered based on impact on building equity)



# Summarising the Beef landscape in the UAE

## AU beef needs to focus on further strengthening its position in the Justified Premium space.

AU beef enjoys a strong brand health performance and a justified premium position in UAE.

Local beef is also a justified premium brand and strongly challenges AU beef. It is thus important for AU beef to focus on further strengthening its equity and maintain its leadership position.

It currently shows stronger performance among Western Expats and Expat Arabs with the potential to strengthen further among Emiratis.

## Strengthening perceptions of Superior Quality

Perceptions of Superior quality are essential for driving both demand and justifying a premium price.

Emphasizing AU's safety and quality standards while ensuring availability of fresh cuts, will result in the highest returns and support further growth of Australian beef in the UAE market, especially as Pakistani beef emerges as a contender among imports.

4

## Lamb- Brand Health By Country of Origin



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.

# The brand list remains consistent with 2023 allowing year on year comparisons.

## Lamb brands tracked in 2024

Australian  
lamb



New Zealand  
lamb



Indian beef/  
Buffalo lamb



UAE Local  
lamb



Pakistani lamb



Sudanese lamb



Somali lamb



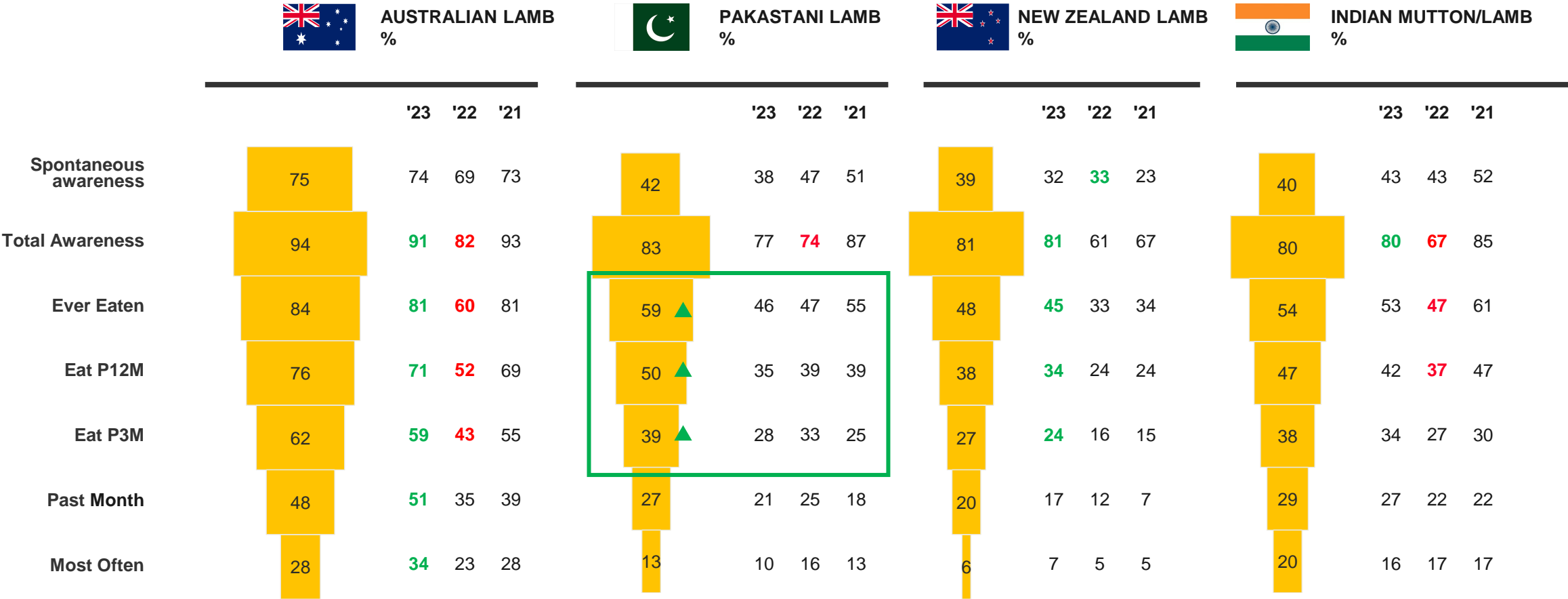
Welsh lamb



# While AU Lamb maintains its dominant position on brand health in UAE, Pakistani Lamb has strengthened across bottom-funnel metrics, narrowing the gap with AU Lamb.



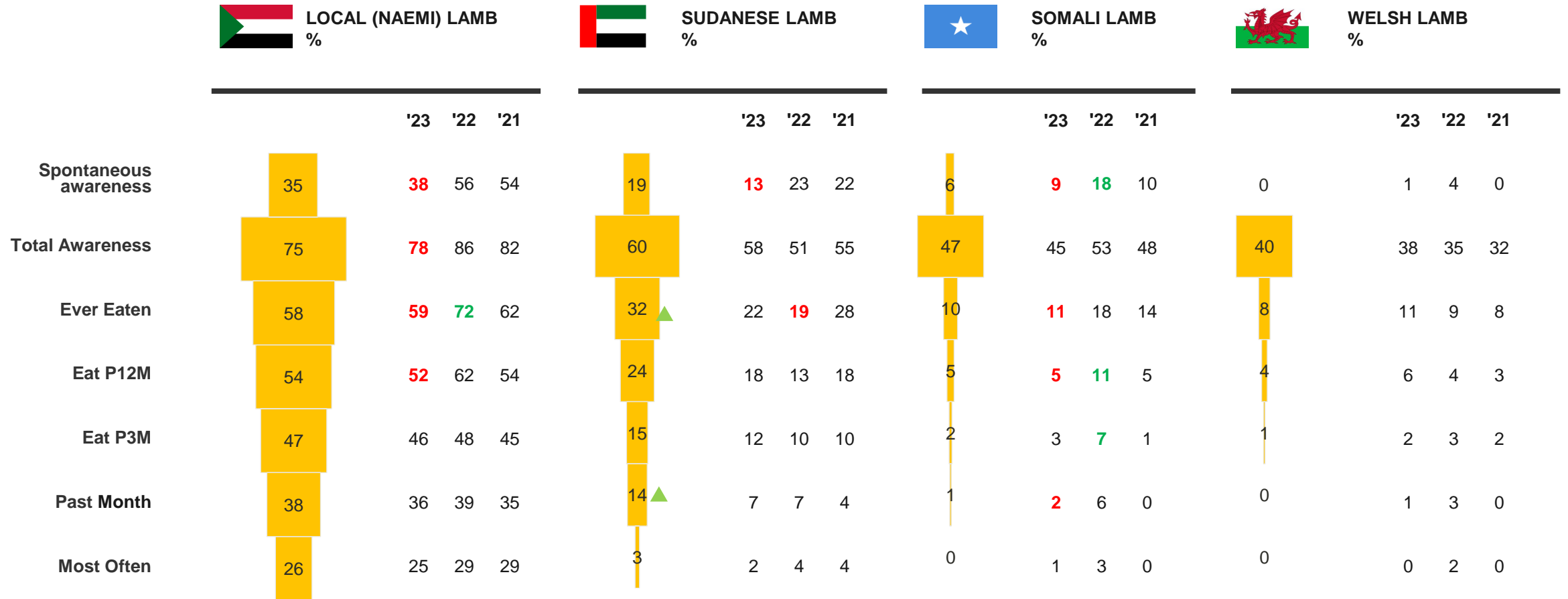
Lamb country of origin – equity



# Local Lamb remains stable across brand health metrics, while Sudanese Lamb increased trial and PM consumption in 2024.



## Lamb country of origin – equity



# Expats Asians favour Pakistani lamb, while Western expats and Arab expats prefer AU lamb. AU Lamb's high awareness and trial among Emiratis suggests potential to further increase frequency of consumption among them.

Lamb - brand health funnels by country of origin



AUSTRALIAN LAMB  
%

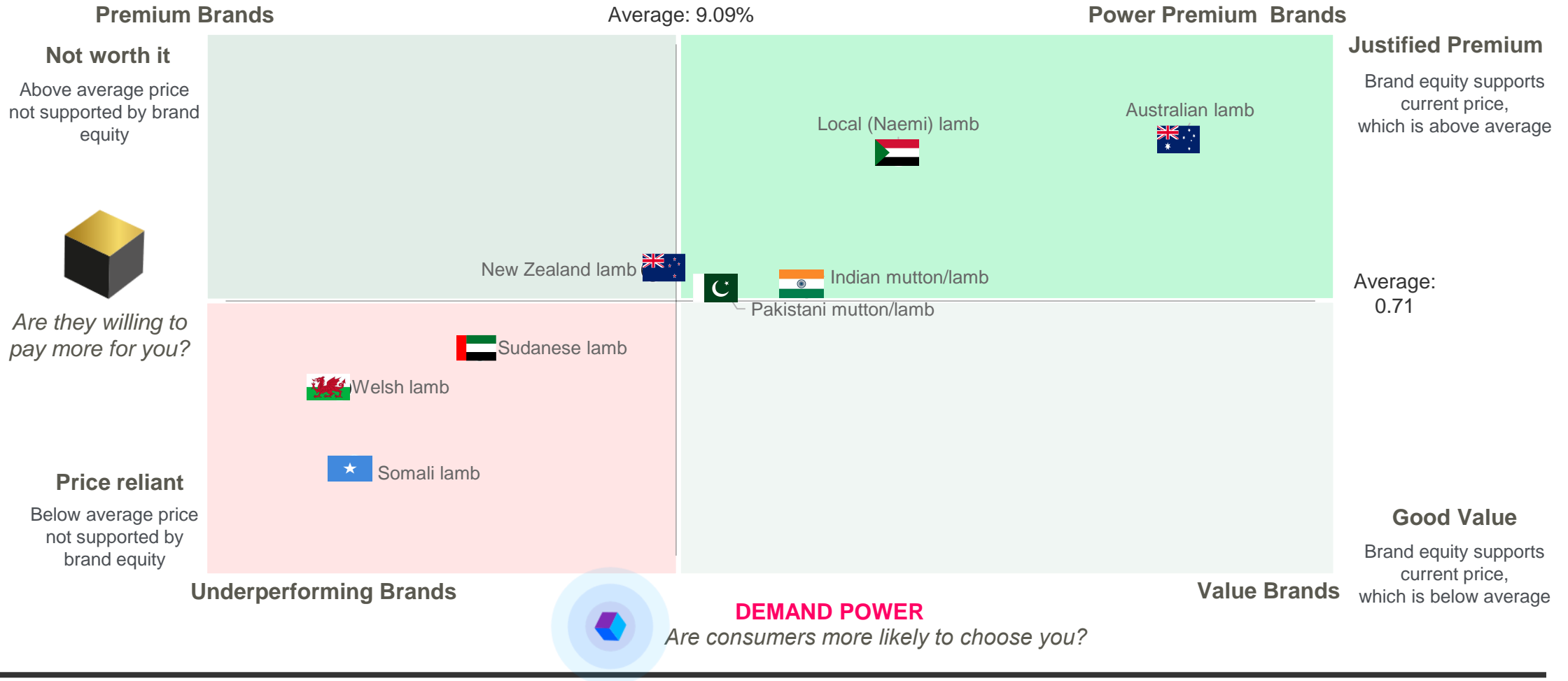


PAKASTANI LAMB  
%

	Total	Emirati	Expat Arabs	Expat Asian	Western Expats		Total	Emirati	Expat Arabs	Expat Asian	Western Expats
<b>Total Awareness</b>	94	98	97	87	95	<b>Total Awareness</b>	83	87	87	95	61
<b>Ever eaten</b>	84	91	90	70	89	<b>Ever eaten</b>	59	70	59	82	25
<b>Eat P12M</b>	76	80	89	56	84	<b>Eat P12M</b>	50	54	49	73	19
<b>Eat P3M</b>	62	67	74	39	75	<b>Eat P3M</b>	39	39	38	60	14
<b>Eat past month</b>	48	48	57	26	67	<b>Eat past month</b>	27	17	21	52	11
<b>Eat Most often</b>	28	15	38	8	53	<b>Eat Most often</b>	13	2	11	29	5
<b>Base</b>	<b>248</b>	<b>46</b>	<b>61</b>	<b>77</b>	<b>64</b>	<b>Base</b>	<b>248</b>	<b>46</b>	<b>61</b>	<b>77</b>	<b>64</b>

# Despite AU and Local lamb being in the 'Justified Premium' space, Local Lamb has relatively lower Demand Power. Like beef, PK Lamb also entered this space, urging AU lamb to focus on strengthening further to protect its leading position.

Lamb country of origin – equity





# The associations that consumers hold in their minds for lamb in UAE break into 6 themes

## Importance In Driving Demand Power



**Better for my family**

**27%** (23%)

- Is the most superior lamb
- Guaranteed safe to eat
- More nutritious
- Is my/my family's favourite lamb
- Fresh
- The meat is usually tender
- Is easy and convenient to purchase



**Quality cuts**

**22%** (28%)

- Consistent quality standards
- Offers a variety of cuts that suit the meals I make
- The animal is well-cared for



**Environment**

**17%** (14%)

- The industry is environmentally sustainable



**Halal**

**17%** (14%)

- I trust that this lamb is slaughtered according to sharia law and is therefore Halal



**Low in fat**

**11%** (14%)

- Low in fat



**Cheaper**

**6%** (7%)

- Cheaper



**Better for my family** and **Quality cuts** are both key factors in driving Demand and supporting a Premium Price for lamb in UAE. Perceptions of low fat have a relatively higher impact on consumers' willingness to pay a premium price.

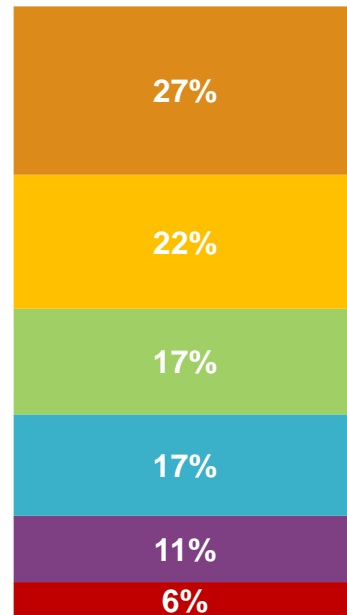
What drivers demand power and pricing power



### DEMAND POWER

#### BETTER FOR MY FAMILY

Is the most superior lamb  
Guaranteed safe to eat  
More nutritious  
Is my/my family's favourite lamb  
Fresh  
The meat is usually tender  
Is easy and convenient to purchase



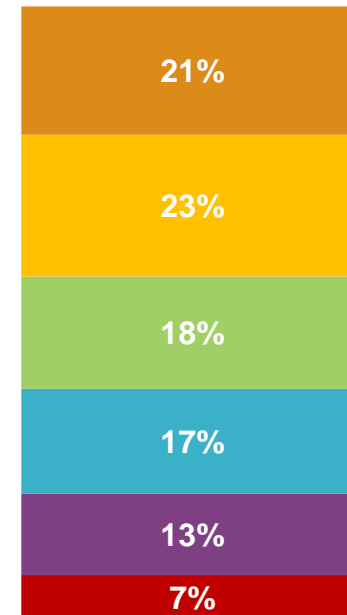
- BETTER FOR MY FAMILY
- QUALITY CUTS
- ENVIRONMENT
- HALAL
- LOW FAT
- CHEAP



### PRICING POWER

#### QUALITY CUTS

Consistent quality standards  
Offers a variety of cuts that suit the meals I make  
The animal is well-cared for

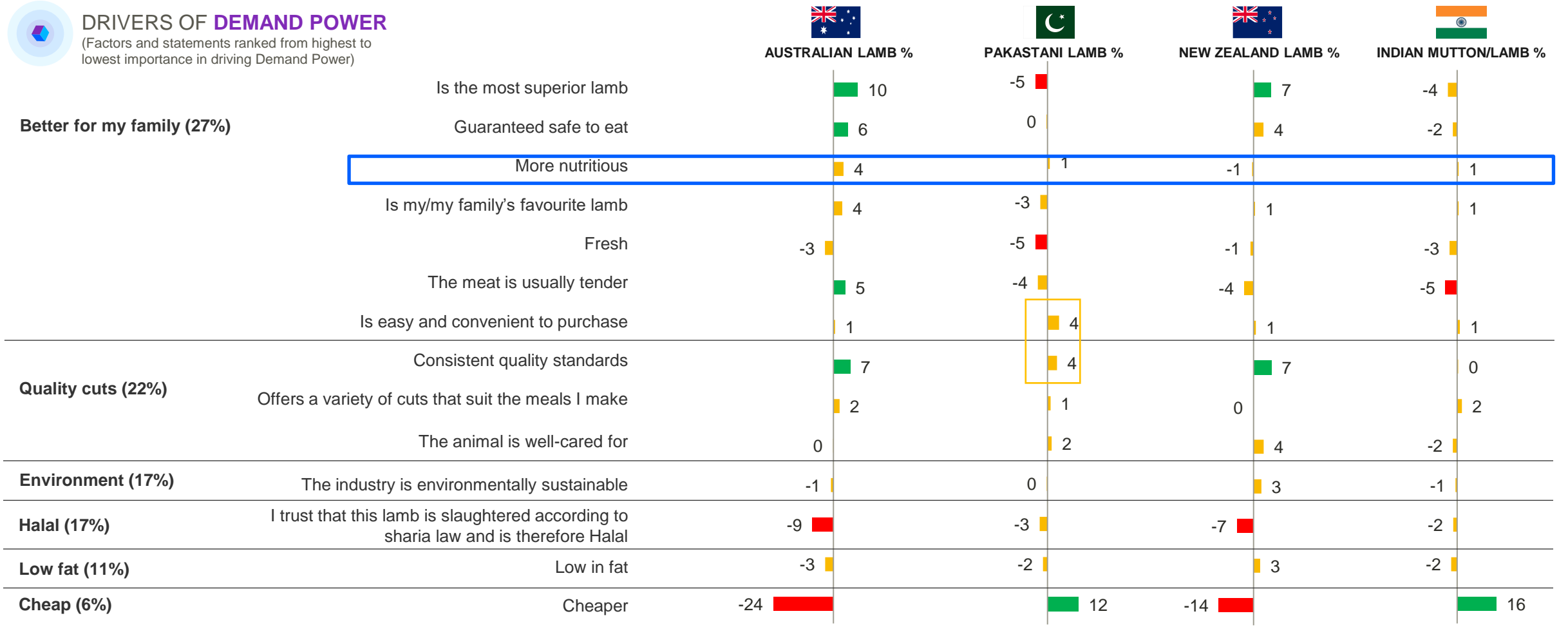


# AU Lamb's strong position comes from its differentiation on perceptions around Better for my Family and Quality cuts. It can further distinguish itself by emphasizing attributes related to Nutrition which is currently a white space



## Drivers Of Demand Power

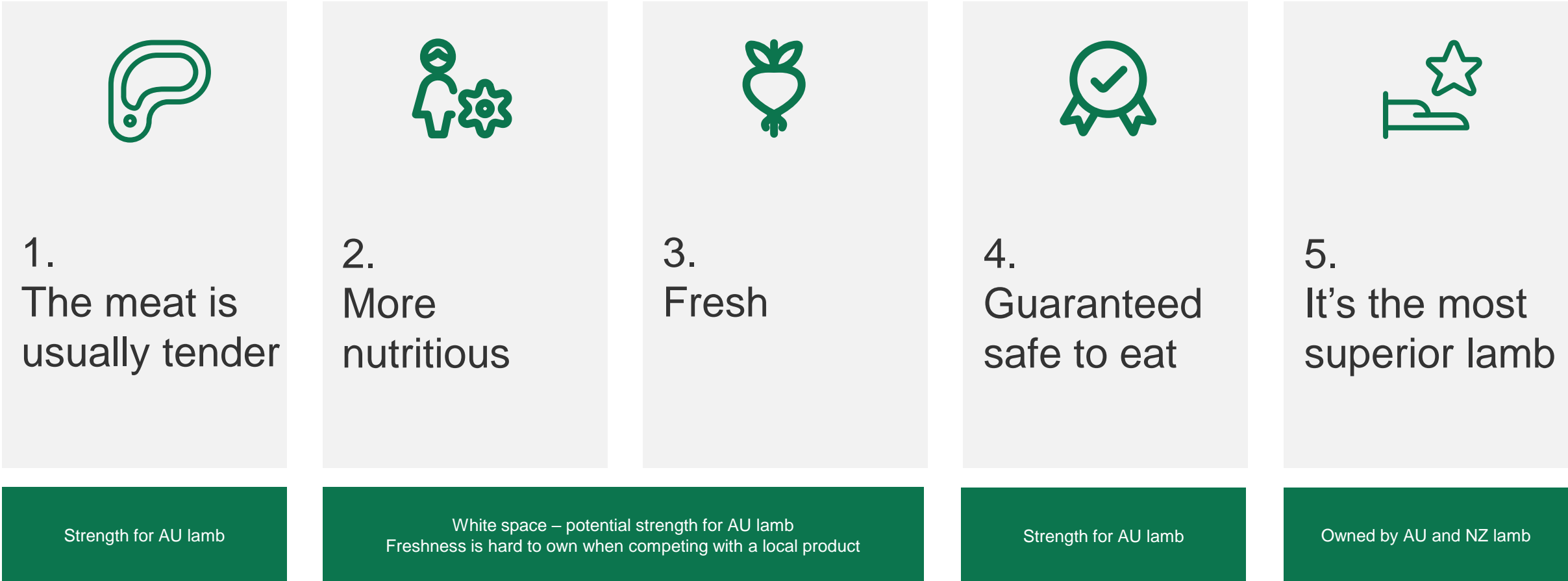
**DRIVERS OF DEMAND POWER**  
 (Factors and statements ranked from highest to lowest importance in driving Demand Power)



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=248). 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.

# Modelling allows us to determine that the strongest returns for AU lamb lie in maintaining its current strengths and strengthening its perceptions of being nutritious.

Top associations to grow - volume & premium (ordered based on impact on building equity)



# Summarising the Lamb landscape in the UAE

## Maintain AU Lamb's leadership

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AU must capitalise on the rise in consumption and strengthen its unique selling points to keep competitors at bay.

Maintaining its leadership in the market is the task at hand as Pakistani Lamb has seen increased consumption among the expat population, narrowing the gap with AU Lamb.

## Focus on perceptions of Better for my Family and Quality

---

*Quality cuts* and *Better for my family* are key factors driving Demand and supporting a Premium price for lamb in the UAE.

Positively, AU Lamb is associated with being better for my family and providing Quality cuts, while Pakistani Lamb's point of differentiation is being cheaper.

Ensure to communicate the offering of tender, nutritious, fresh cuts, leveraging the clean, green rearing conditions in Australia, highlighting its safety processes and promoting itself as the top alternative.

6

# Final thoughts and discussion



# Final thoughts and discussion

## 1. Superior quality is key

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UAE consumers are focusing on freshness and looking for more natural products from trusted sources.

Australia is well positioned to meet the demand for 'natural', 'high quality' and safe meat with its clean, green, natural image. This narrative should be leveraged consistently across consumer touchpoints.

## 2. Different preferences across different ethnicities

---

Meat consumption differs across the key ethnicities in UAE.

Thus, important to understand preferences across diverse groups to be able to build emotional as well as functional relevance and to be present in the right channels of purchase.

Western Expats and Expat Arabs prefer AU beef and lamb while Asians prefer Pakistani beef and lamb. There is potential to grow consumption of both lamb and beef among Emiratis.

## 3. Maintaining Leadership position

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Task at hand for both AU Beef and Lamb is to maintain its leadership position while further strengthening its equity.

Focus on communicating its superiority and consistent quality and safety standards which drive demand and help justify a premium price.

Ensuring availability across all relevant channels is also key.

# KANTAR

## Global Tracker 2024

UAE Presentation Deck

Brought to you by your Kantar Team:  
Sally Kennedy, Poorva Shinde and Carolina Ferrando



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