

KANTAR

Global Tracker 2025

UAE Presentation Deck

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Contents of today's presentation



1 MACRO MARKET CONTEXT



2 PROTEIN LANDSCAPE



3 IMPORTED BEEF CONSUMPTION & COUNTRY OF ORIGIN

























4 IMPORTED LAMB CONSUMPTION & COUNTRY OF ORIGIN



5 AUSSIE BEEF/AUSSIE LAMB



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	█	█	█	█		█	█	█			█	█	█	█									11	
2016	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█									15
2017	█	█	█	█	█	█					█	█	█	█		█							11	
2018	█	█	█	█		█			█		█		█	█					█	█	█	█	13	
2019	█	█	█	█		█					█		█	█			█	█					10	
2020	█	█	█	█		█		█			█		█	█									9	
2021	█	█	█	█		█			█	█	█		█	█					█				11	
2022	█	█	█		█		█			█	█	█	█	█				█					11	
2023	█	█	█	█		█			█	█	█		█	█						█			11	
2024	█	█	█	█							█			█									6	
2025	█	█	█	█							█			█					█				7	

INTRODUCING MLA'S GLOBAL CONSUMER TRACKER

Diverse markets, with some universal truths.

2025 Study Details: FW May 2nd – June 10th
(Liberation Day – US Tariffs April 2nd)



6,800 interviews globally
500 interviews in UAE



7 Markets (See right)



20-minute online survey
(supported by interviewer in MENA)



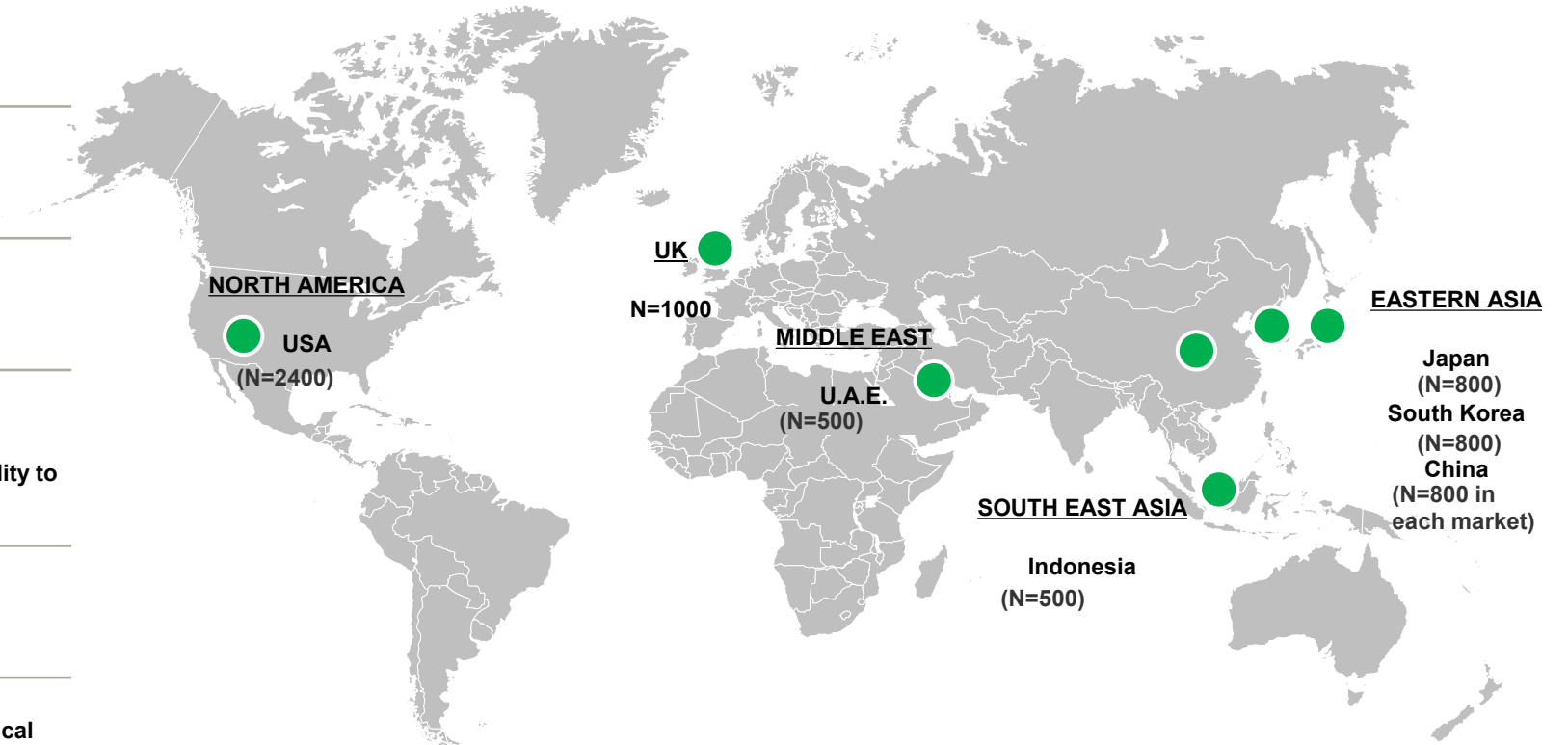
Consumers aged 18-64
Grocery buyers, meal planners
Affluent households (skew)
Selected based on potential openness and ability to buy AU Beef and/or Lamb
(Not representative of total market)



Captures meat consumption habits, attitudes,
perceptions of COO Beef.



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



UAE Sample – a deliberate skew (not Nationally Representative)



FW May 2nd – June 10th
(Liberation Day – US Tariffs April 2nd)

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%	53%
	Dubai	30%	47%
Consumption	Buy Fresh Meat at Least Occasionally	-	100%
MGBs	Main Grocery Buyers	-	94%
Children	Households with Children	-	70%
Income	241K - 322K AED	-	65%
	322,001 + AED	-	35%
Religion	Islam	76%	67%

The Central Question

How can AU Beef leverage its strong equity to realise our untapped potential while safeguarding AU Lamb's dominant equity in market?

1
Macro-market context



3 key trends we see influencing meat consumption in UAE



Slow Rise of Local Meat

UAE domestic meat output is rising and live imports dropping, yet premium foreign imports still remain the bedrock of red meat demand.



Health-Driven demand for premium beef

Modern consumers in the UAE are increasingly aware of the health, ethical, and halal compliance of their meat. UAE consumers are increasingly aiming to purchase proteins with health benefits.



Regulatory & Food Security Focus

Government-led investment in sustainable livestock capacity, cold-chain infrastructure, and halal standards supports market stability while encouraging quality and traceability.

2 Protein Landscape



Chicken is the dominant protein; however, Mutton plays an important role within the UAE, whilst beef remains as prevalent. Majority of proteins have remained relatively stable in 2025

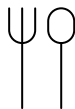
Key Protein Metrics



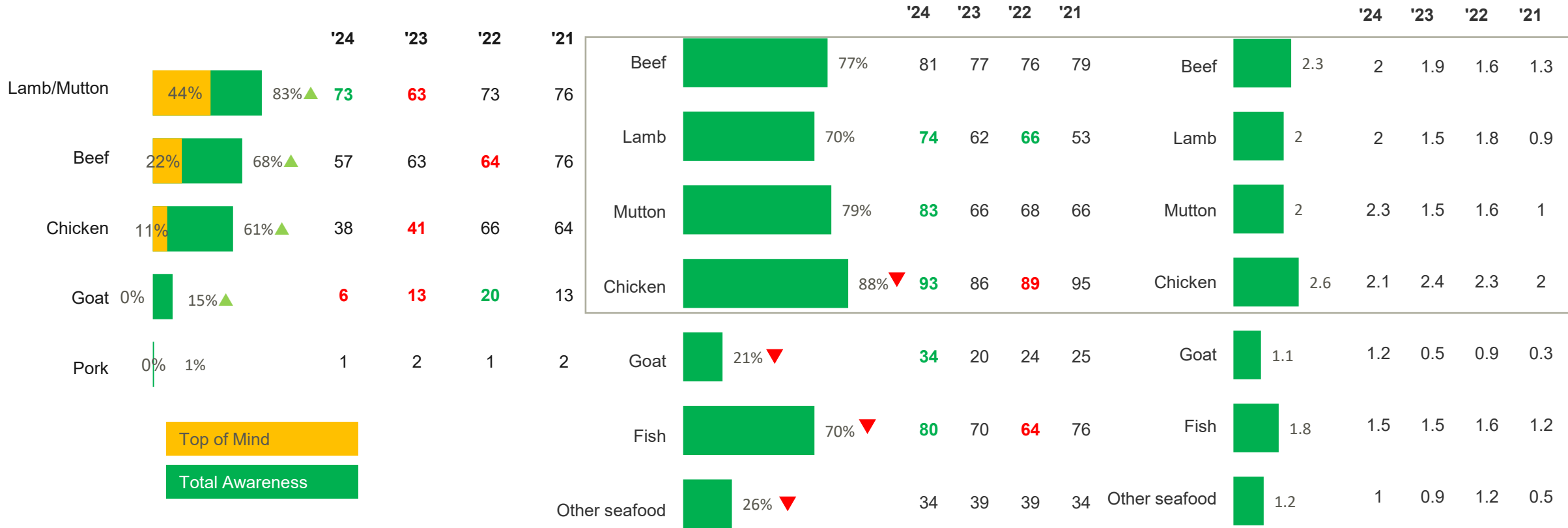
Spontaneous Awareness



Bought in last month



Average Serves Last 7 Days



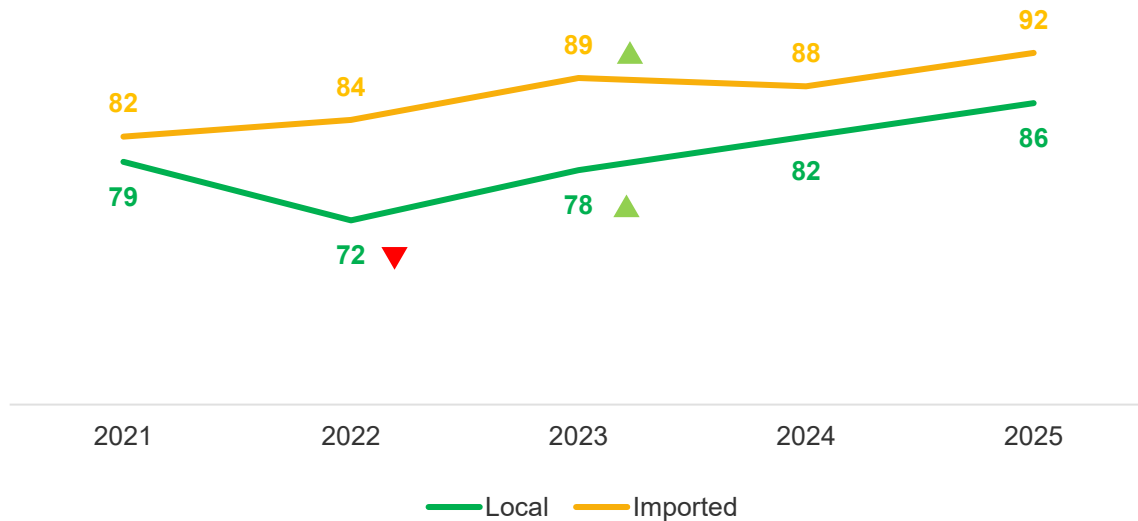
Local and imported beef continues to see uplifts since 2022, as consumers are purchasing beef on a more frequent basis



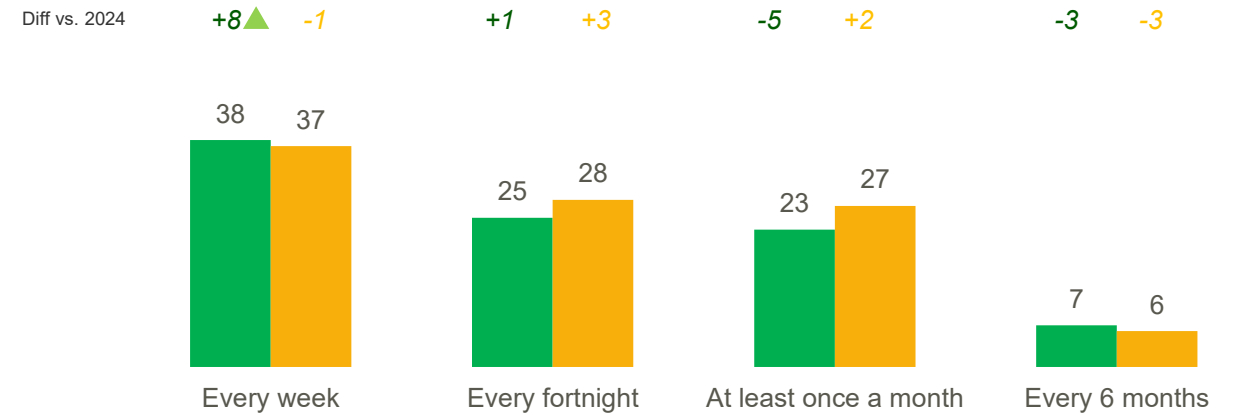
Frequency of buying local and imported beef

LOCAL/IMPORTED

NET - Monthly purchase of local/imported beef



Frequency of purchase of local/imported beef

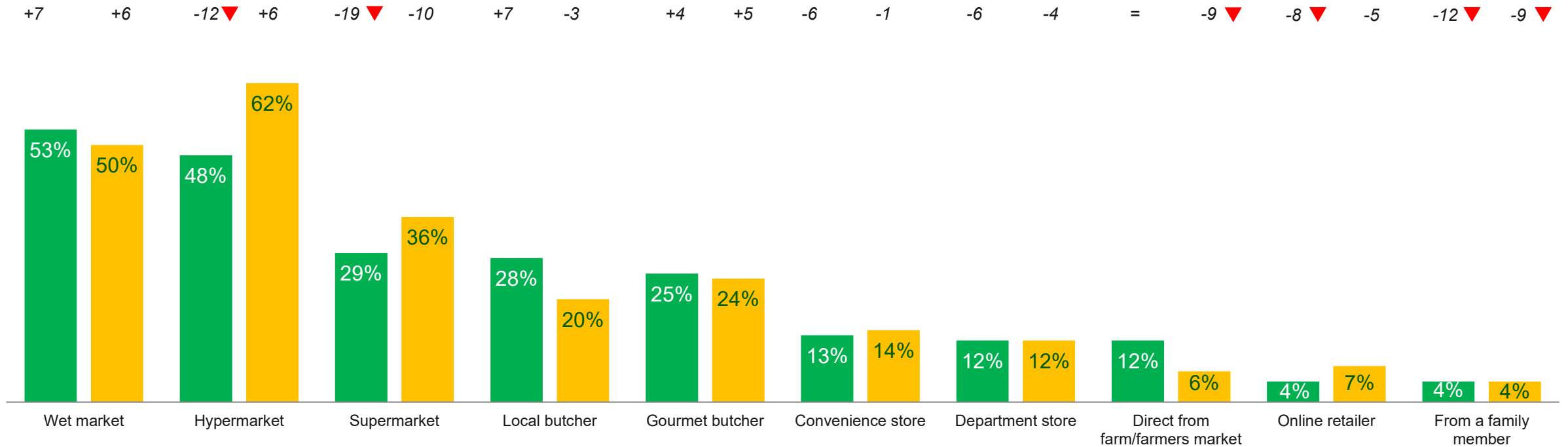


In the UAE, the different distribution channels have similar footprints by protein type, with smaller outlets playing a role. Supermarkets for both beef and lamb had significant declines

Places of purchase at least once a month - Beef and Lamb



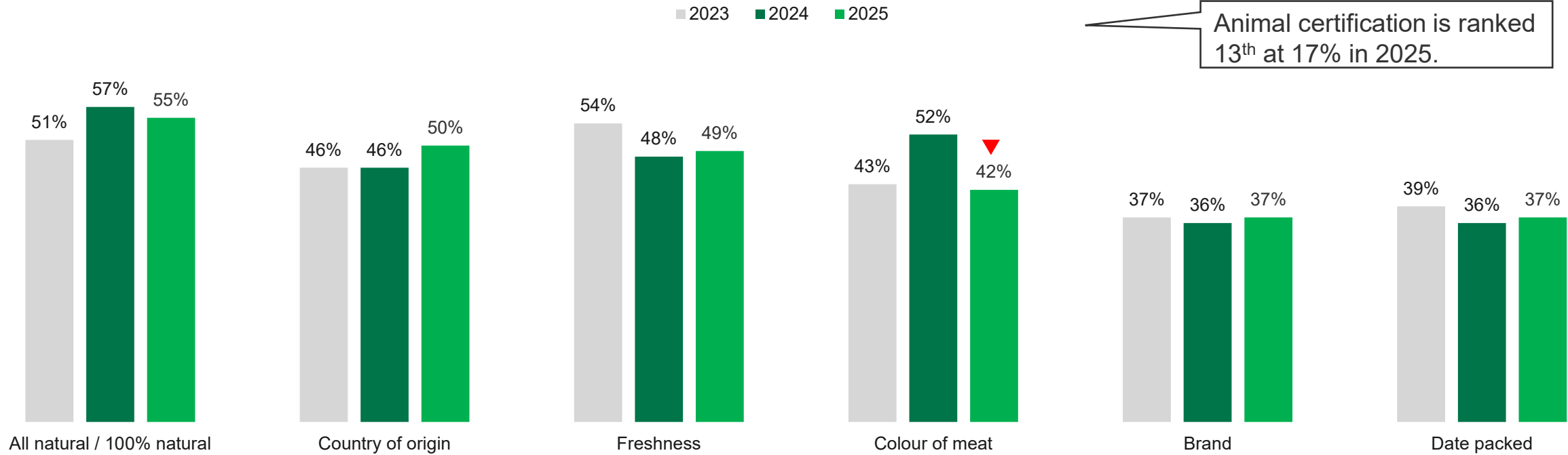
Differences vs 2024



Being 100% natural is the top cue when buying beef, followed by COO which speaks to the importance of COO branding in this market. Freshness and colour of meat are still of importance to UAE consumers



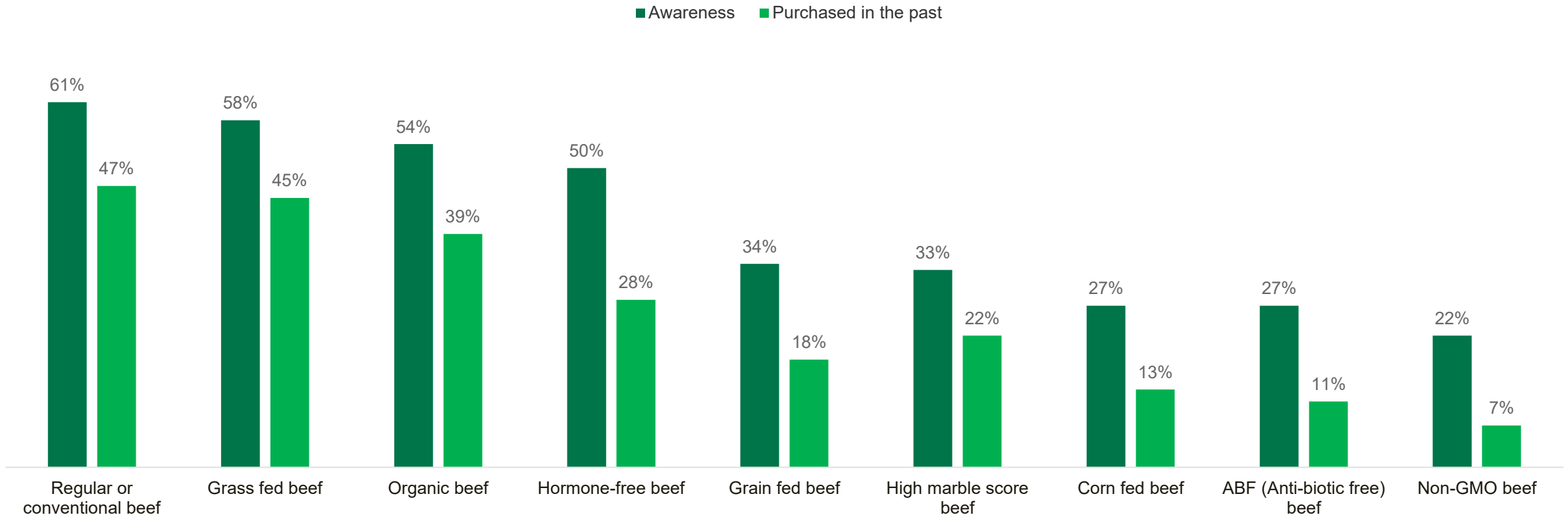
Top 6 'cues' when buying beef



There is high awareness of different types of premium beef, however purchase lags suggesting other barriers besides awareness

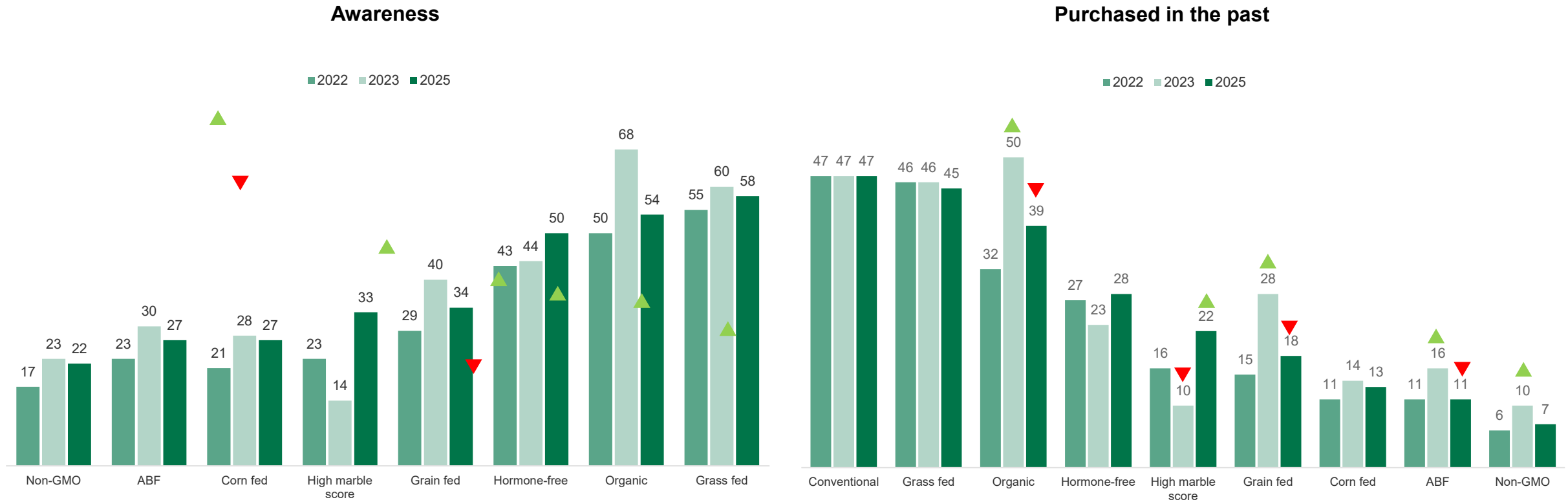


Premium beef type awareness and purchase



Conventional, grass-fed, and organic beef remain the most familiar and purchased. HMB beef saw rising awareness in 2023, with that momentum translating into stronger purchases by 2025

Premium beef type awareness and purchase | Trended overtime



UAE consumers do not associate the core attributes of the different premium beef types – they are less familiar with the benefits of health offerings that they are looking for. However, they are aware of the benefits of HMS Beef



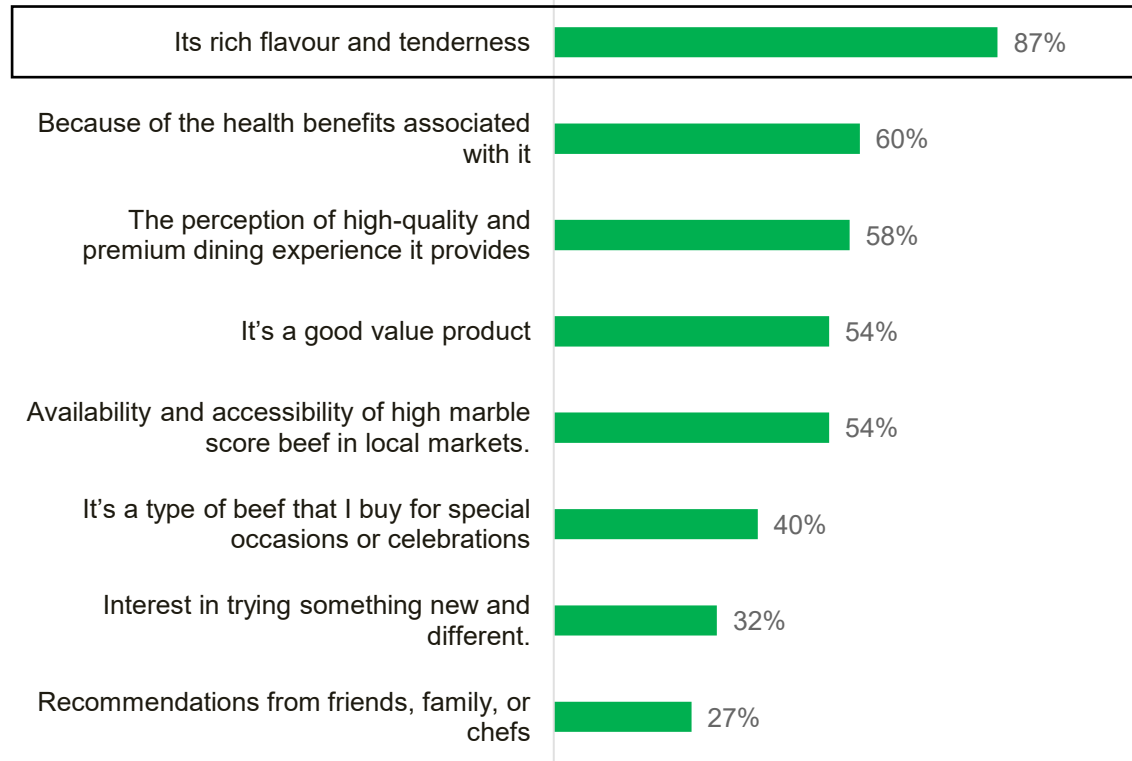
Beef types | Brand Image Profiles (BIPs)

	Grass fed beef	Grain fed beef	Organic beef	Hormone-free beef	ABF (antibiotic free beef)	NON-GMO beef	Corn fed beef	Regular beef	High marble score beef
Natural	Yellow	Green	Yellow	Red	Red	Red	Yellow	Green	Yellow
Better for the environment	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Better for my health	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Better for the animals	Yellow	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Red
Less food safety risks	Yellow	Red	Green	Yellow	Red	Green	Red	Yellow	Yellow
Minimally processed	Yellow	Green	Yellow	Yellow	Yellow	Green	Green	Red	Red
Better quality beef	Yellow	Yellow	Yellow	Red	Yellow	Yellow	Yellow	Yellow	Yellow
More tender beef	Green	Red	Yellow	Yellow	Red	Red	Yellow	Yellow	Green
More flavourful beef	Yellow	Yellow	Yellow	Yellow	Yellow	Red	Yellow	Green	Green
More visually appealing	Yellow	Yellow	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Green
Just a marketing gimmick	Red	Yellow	Green	Yellow	Green	Green	Yellow	Red	Red

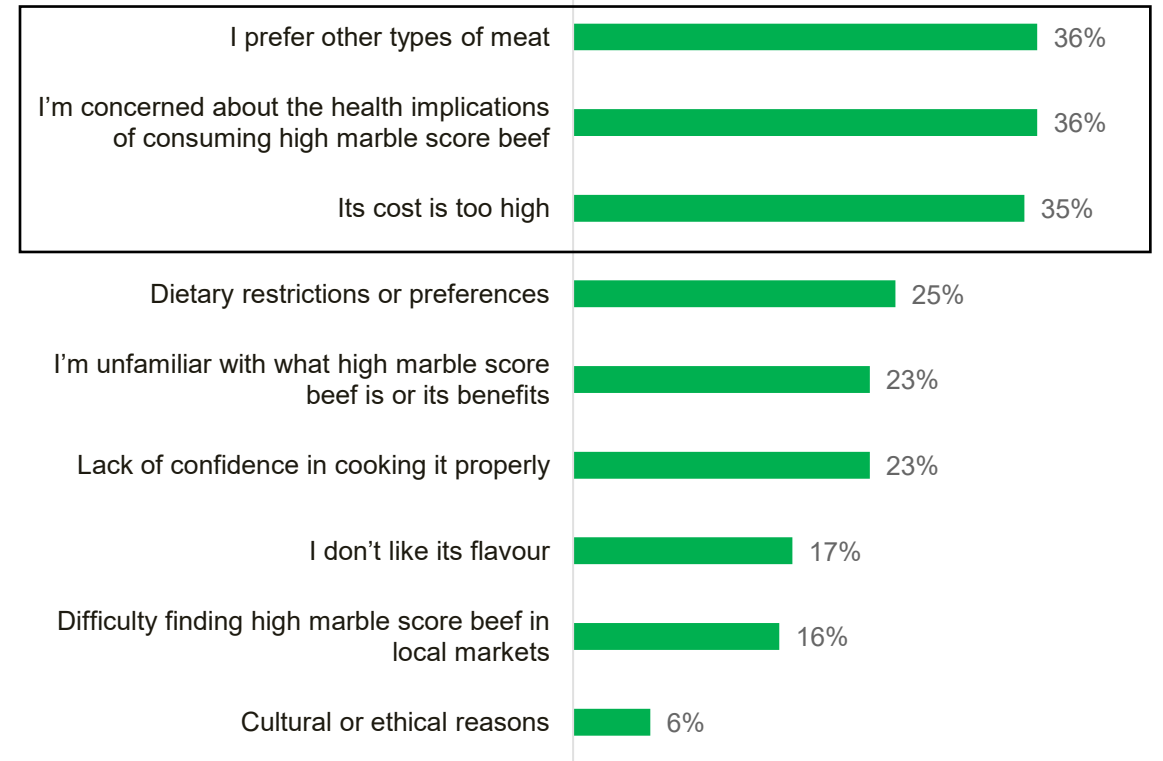
UAE HMS beef consumers understand the drivers of purchase include flavour and tenderness. However, high proportion also believe it has health benefits. In contrast, barriers to purchase include negative health implications, suggesting confusion. Additionally, preferences for other meat types create a barrier for HMS beef

High marble score beef | Purchase drivers and barriers

Purchase drivers (prompted)



Purchase barriers (prompted)



Summarising the Protein Landscape in the UAE:

Protein preferences & market dynamics

- **Chicken** remains the dominant protein in the UAE, with **mutton** playing a significant role and **beef** maintaining steady prevalence. Overall protein consumption has remained stable in 2025.
- **Lamb** is more prominent in the UAE than in other markets, with higher purchase rates among older consumers and those in **Dubai**. **Western expats** also contribute notably to lamb consumption.
- Both **local and imported beef** have seen consistent growth in purchase frequency since 2022.
- **Beef** is purchased broadly across all ethnic groups.

Retail channels & consumer trends

- **Protein distribution channels** in the UAE show similar footprints across types, with **smaller outlets** playing a role. **Supermarket purchases** for beef and lamb have declined.
- “**100% natural**” is the top purchase cue for beef, followed by **Country of Origin (COO)**, highlighting the importance of COO branding. **Freshness** and **meat colour** remain key considerations.
- Awareness of **premium beef types** is high, but **purchase rates lag**, indicating barriers beyond awareness.
- UAE consumers are **unfamiliar with the core benefits** of premium beef types, particularly health-related attributes. However, they are aware of the benefits of **HMS Beef**.
- **HMS Beef purchasers** value *flavour* and *tenderness*, with many also perceiving *health benefits*. Yet, confusion persists due to perceived *negative health implications* and *preference for other meats*, which act as barriers.

3
Beef- Brand Health
By Country of Origin



The brand list remains consistent with 2024 allowing year on year comparisons...

Beef brands tracked in 2025

Australian beef



UAE Local beef



Pakistani beef



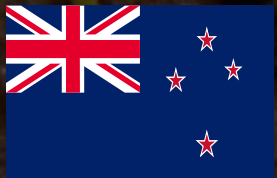
Brazilian beef



Indian beef/ Buffalo



New Zealand beef



American beef



South African beef



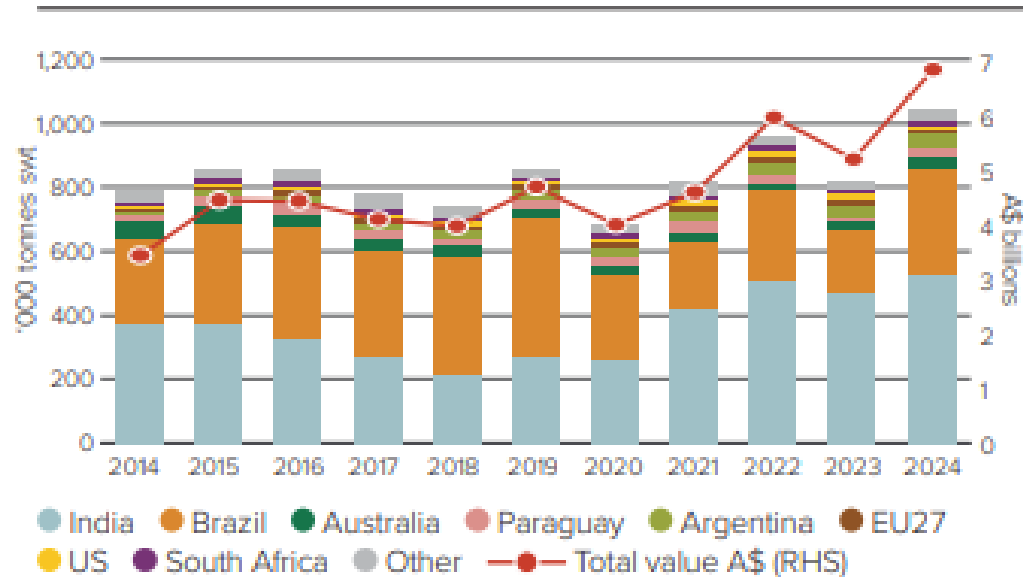
Canadian beef



Imports make up the majority of beef consumed in UAE with India and Brazil dominating. AU is a smaller importer in this market



MENA-12 beef imports by supplier*



Source: Trade Data Monitor (TDM). *Exporter reported totals, **MAT year ending September

MENA beef imports

- In some Gulf countries like the UAE, Kuwait, Oman, Qatar and Bahrain, almost all beef consumed is imported.
- The bulk of the region’s beef imports come from India and Brazil.
- Competition for Australian grainfed beef comes mostly from the US and, to some extent, Canada, Japan and South Africa.
- MENA imported around 17% more volume of beef in 2023–24 year-on-year, reflecting strong demand and favourable global prices.
- Japan exports small but increasing volumes of Wagyu to the Gulf.
- Most key MENA markets are forecast to increase beef imports over the next several years

It appears the strongest imported beef brands comprise of AU, Pakistan and India. Local Beef is also strong but could be misattribution from live import processing done locally. AU sees uplifts in total awareness and Local sees uplifts at the bottom of the funnel. India has a moderate funnel, despite being the biggest importer



Beef country of origin - Brand Health Funnels



AUSTRALIAN BEEF %



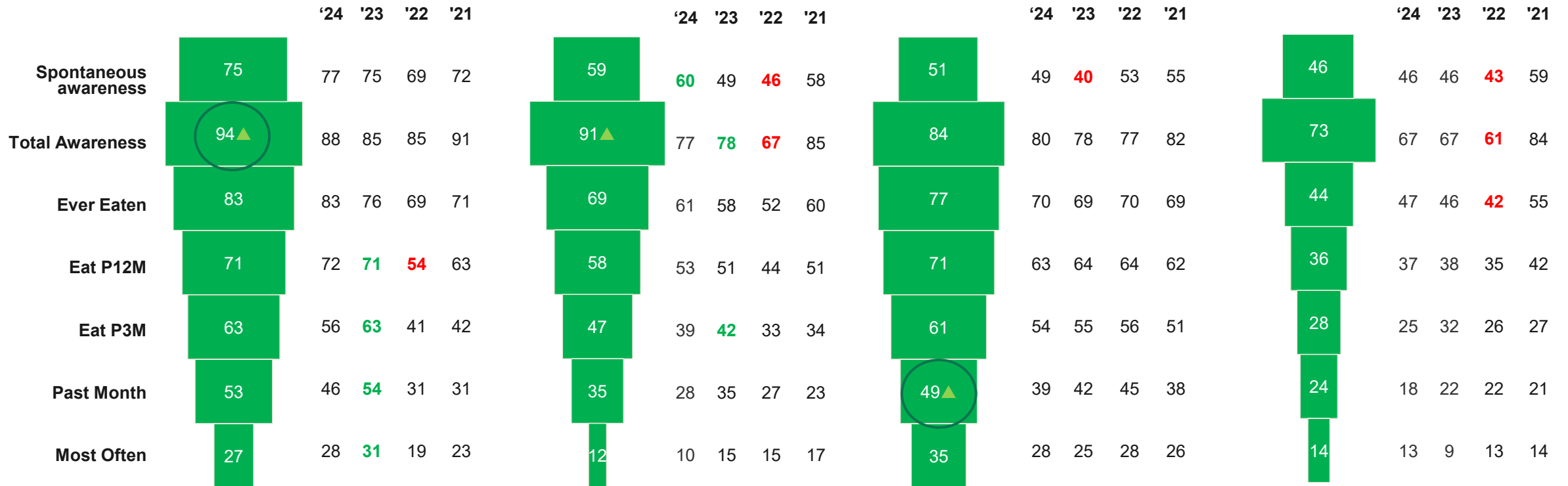
PAKISTANI BEEF %



UAE LOCAL BEEF %



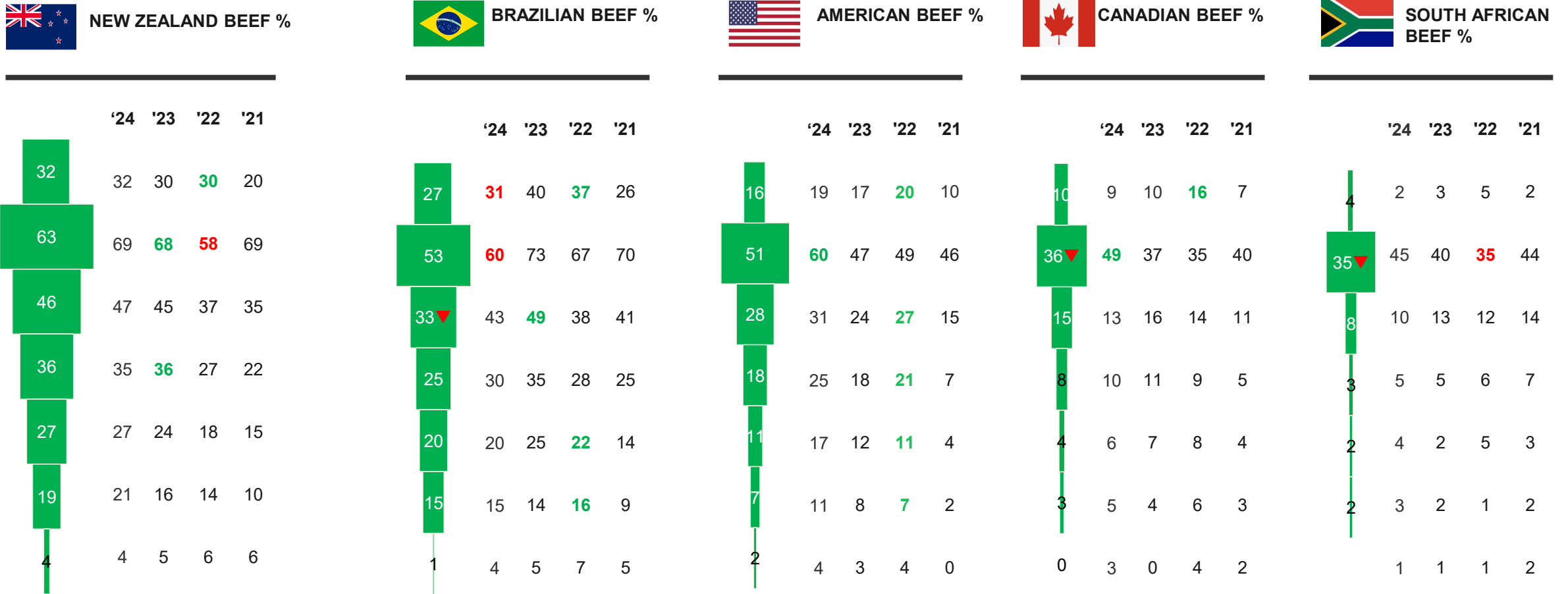
INDIAN BEEF/BUFFALO MEAT %



Brazil, as the second largest importer has a modest funnel, trailing NZ but ahead of the remaining imported brands. Despite limited market volumes, NZ does well to have a moderate funnel in the UAE market



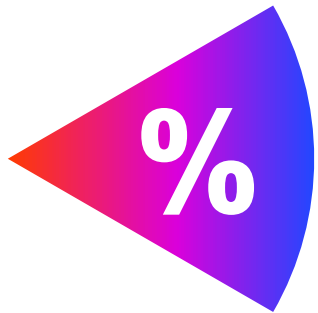
Beef country of origin - Brand Health Funnel



There are two paths to brand growth

By increasing the likelihood
that a consumer will buy a brand

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

We call this **Pricing Power**



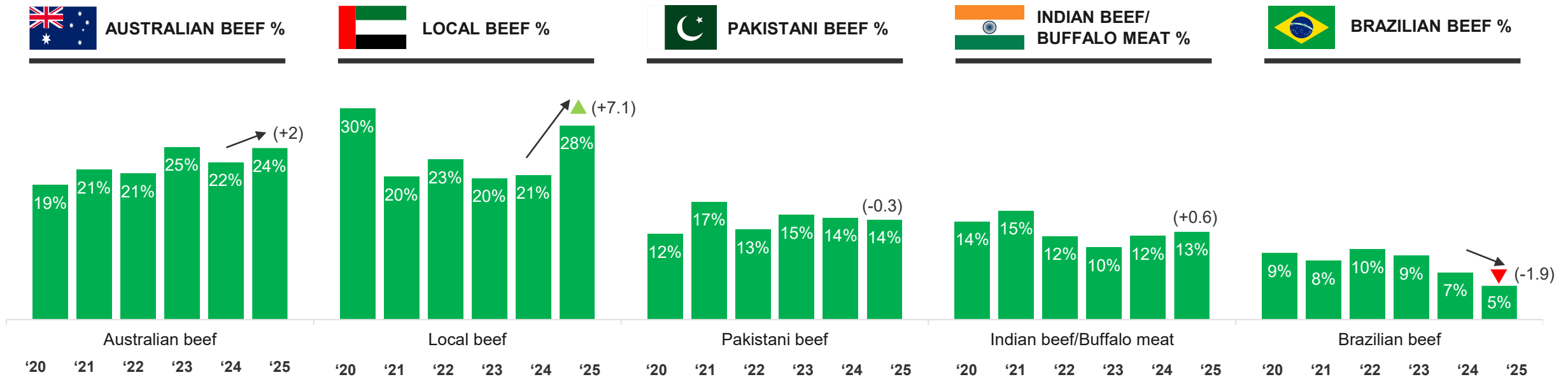
Pricing Power

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



AU has the strongest Demand Power and preference amongst all importers, punching well above its weight relative to import volumes. India and Brazil have weaker equity despite being the two biggest importers. Local Beef, again, may be misattributed to live import local processing – seeing strong Demand Power with significant uplifts YoY

Beef Country Of Origin – Demand Power



PREFERENCE (based on trial) – My most preferred type of beef

58%

65%

49%

40%

50%

Preference does not add up to 100 as consumers can select more than one brand as their most preferred.

Smaller importers have minimal equity, declines for all YoY



Beef Country Of Origin – Demand Power



NEW ZEALAND BEEF %



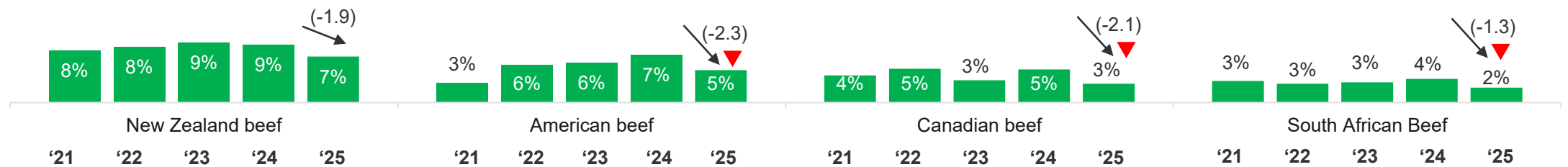
AMERICAN BEEF %



CANADIAN BEEF %



SOUTH AFRICAN BEEF %



PREFERENCE (based on trial) – My most preferred type of beef

41%

39%

26%

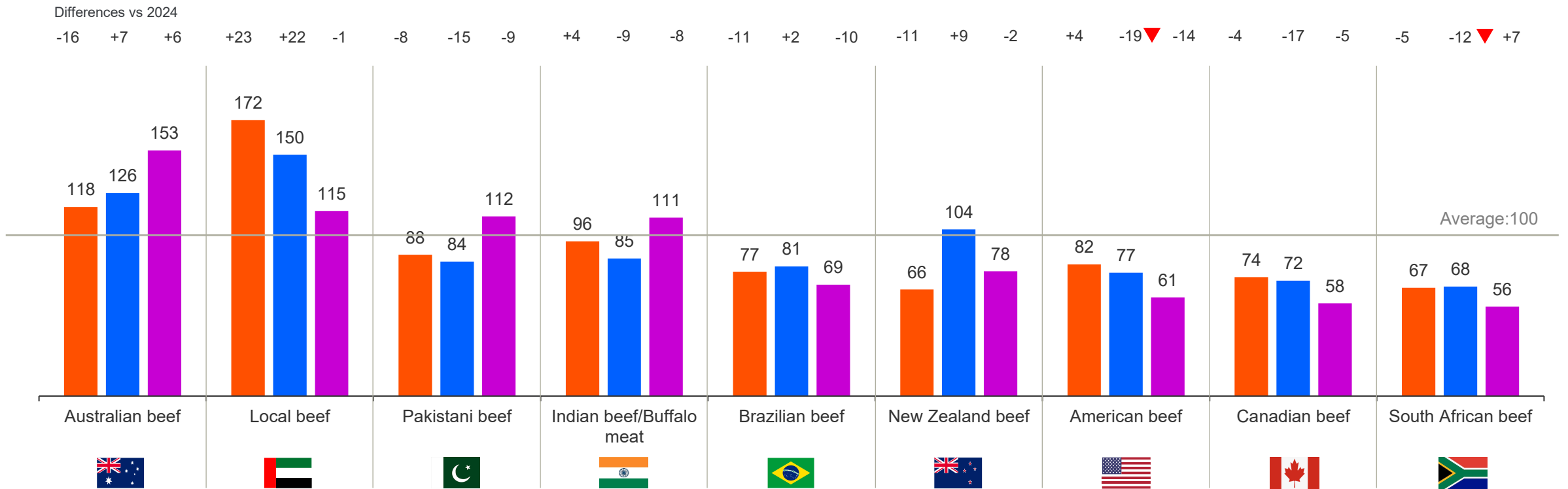
10%

Preference does not add up to 100 as consumers can select more than one brand as their most preferred.

AU's strong Demand Power stems from excellent Salience – the highest of any beef brand with 2nd highest Meaning and Difference, indicating very strong presence in market. Local Beef wins on Meaning and Difference. In contrast, India and Brazil, the biggest importers, have mediocre presence with below average results, similar to Pakistan. NZ stands out for its Differentiation, a characteristic of a challenger brand



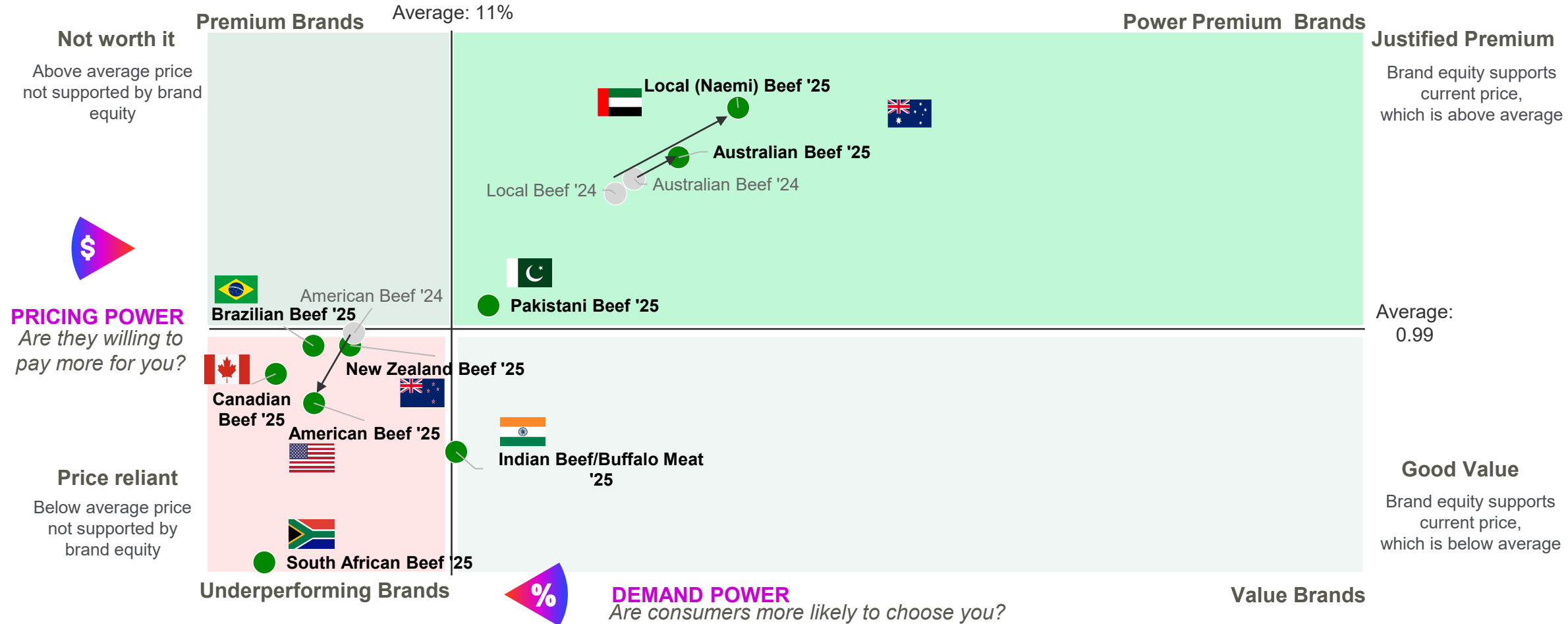
Beef Country Of Origin – Demand Power Levers



Looking at Pricing Power Local Beef wins, closely followed by AU Beef – both sitting in the justified premium quadrant. Pakistan does well to also sit in this quadrant. The rest of the importers are price reliant, with Indian Beef sitting on the fringe of good value



Beef country of origin – equity

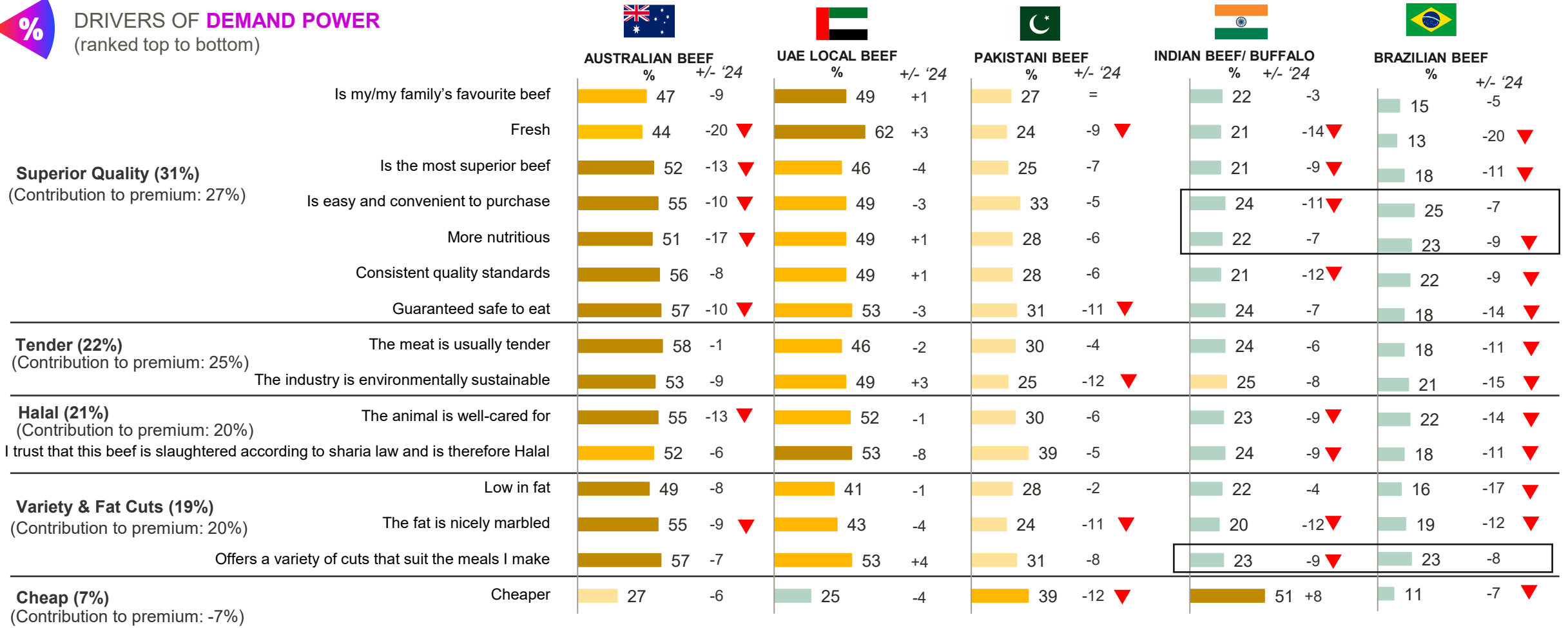


AU's strong Demand Power is supported by typically the strongest associations across the board, followed by Local Beef who own freshness. Indian and Pakistani Beef stand out for being cheap. While Brazil associations are similar to India's, it's strongest on convenience



Drivers of demand power

DRIVERS OF DEMAND POWER (ranked top to bottom)



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)

Despite, strong absolute endorsement across associations, AU lacks a clear positioning – only owning tenderness. Similarly, Local Beef only stands for freshness and family favourite.



Brand Image Profiles



DRIVERS OF DEMAND POWER

(ranked top to bottom)

Is my/my family's favourite beef

Fresh

Is the most superior beef

Is easy and convenient to purchase

More nutritious

Consistent quality standards

Guaranteed safe to eat

Tender (22%)

(Contribution to premium: 25%)

The meat is usually tender

The industry is environmentally sustainable

Halal (21%)

(Contribution to premium: 20%)

The animal is well-cared for

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

Low in fat

Variety & Fat Cuts (19%)

(Contribution to premium: 20%)

The fat is nicely marbled

Offers a variety of cuts that suit the meals I make

Cheap (7%)

(Contribution to premium: -7%)

Cheaper



AUSTRALIAN BEEF

%

0

-3

3

0

0

4

4

6

2

0

-3

1

4

3

-19



UAE LOCAL BEEF

%

6

19

0

-3

1

0

3

-3

1

0

2

-4

-5

2

-18



PAKISTANI BEEF

%

1

-2

-3

0

-1

-2

0

0

-5

-3

7

1

-5

-1

14



INDIAN BEEF/ BUFFALO

%

1

0

-2

-3

-2

-4

-1

-1

1

-4

-3

0

-4

-3

30



BRAZILIAN BEEF

%

-1

-3

1

4

5

3

-2

-1

2

1

-3

-1

1

3

-5

Pakistani Beef is clearly positioned for Halal certification. It shares a strength with India on cheapness. Brazilian Beef has credentials for being nutritious. With some much white space in the category, AU has the opportunity to carve out a clear positioning

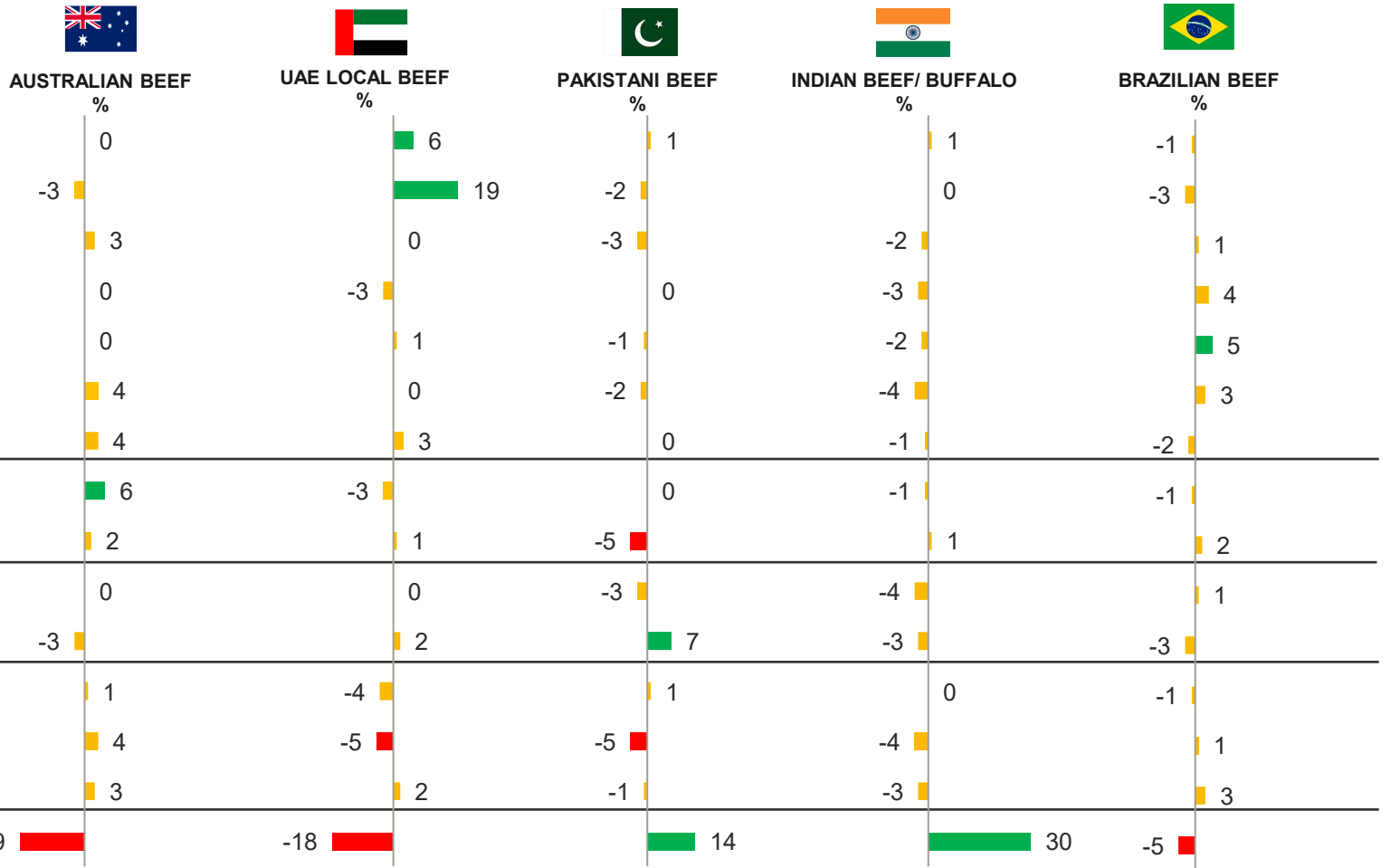


Brand Image Profiles



DRIVERS OF DEMAND POWER
(ranked top to bottom)

Driver	Statement
Superior Quality (31%) (Contribution to premium: 27%)	Is my/my family's favourite beef
	Fresh
	Is the most superior beef
	Is easy and convenient to purchase
	More nutritious
	Consistent quality standards
Tender (22%) (Contribution to premium: 25%)	Guaranteed safe to eat
	The meat is usually tender
	The industry is environmentally sustainable
Halal (21%) (Contribution to premium: 20%)	The animal is well-cared for
	I trust that this beef is slaughtered according to sharia law and is therefore Halal
Variety & Fat Cuts (19%) (Contribution to premium: 20%)	Low in fat
	The fat is nicely marbled
	Offers a variety of cuts that suit the meals I make
Cheap (7%) (Contribution to premium: -7%)	Cheaper



BBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like. Base: (n=251). Attributes are grouped according to level of co-endorsement i.e. when respondents endorse one attribute for a brand, they are likely to endorse the others in the group. In this way the attributes are linked, then the groups are given an appropriate, summary name.

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

AU has done well to gain a strength in tenderness and is on the cusp of further strengths in consistent quality standards, guaranteed safe to eat and fat is nicely marbled. Dialling these associations up would help AU cement positioning clarity that we are lacking, especially given we have lost 2 strengths this year



Brand Image Profiles



DRIVERS OF DEMAND POWER

(ranked top to bottom)

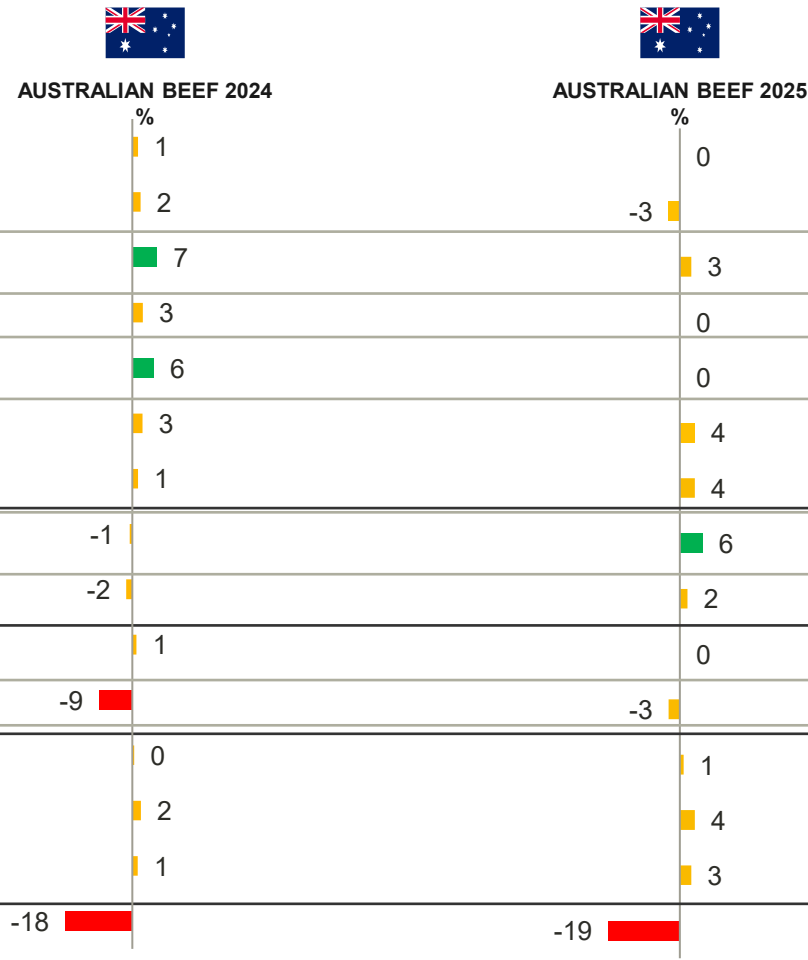
Superior Quality (31%)
(Contribution to premium: 27%)

Tender (22%)
(Contribution to premium: 25%)

Halal (21%)
(Contribution to premium: 20%)

Variety & Fat Cuts (19%)
(Contribution to premium: 20%)

Cheap (7%)
(Contribution to premium: -7%)



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

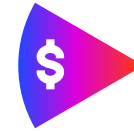
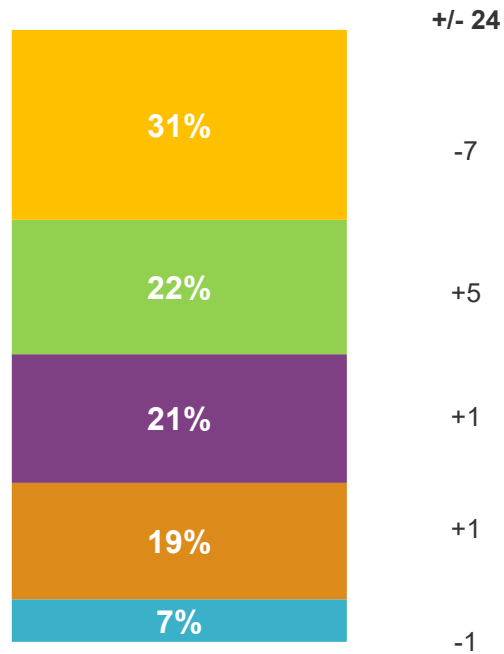


What drivers Demand power and Pricing power

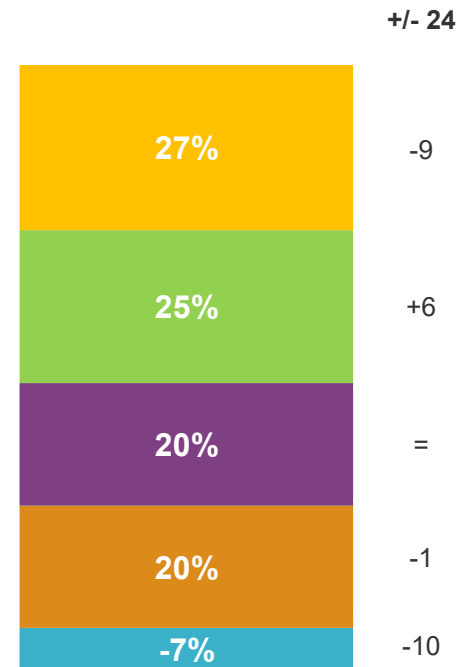


DEMAND POWER

- SUPERIOR QUALITY
- TENDER
- HALAL
- VARIETY & FAT CUTS
- CHEAP



PRICING POWER



SUPERIOR QUALITY

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

Summarising the Beef Landscape in the UAE

AU has high equity despite being a small importer:

- Imports dominate beef consumption in the UAE, with **India** and **Brazil** leading. **AU** is a smaller player in volume but shows strong brand performance.
- **AU, Pakistan, and India** are the strongest imported beef brands. **Local Beef** also performs well, though brand strength may reflect misattribution from live import processing. **AU** shows uplifts in awareness; **Local Beef** improves lower-funnel metrics. **India**, despite volume, has only a moderate funnel.
- **Brazil** has a modest funnel, trailing **NZ** but ahead of other importers. **NZ**, despite limited volume, maintains a moderate funnel.
- **AU Beef** leads on **Demand Power** and **preference** among importers, outperforming its volume share. **India** and **Brazil** show weaker equity despite scale. **Local Beef** shows strong Demand Power, likely influenced by processing attribution.
- **AU's Demand Power** is driven by top-tier *Salience*, with second-highest *Meaning* and *Difference*. **Local Beef** leads on *Meaning* and *Difference*. **India, Brazil, and Pakistan** show below-average presence. **NZ** stands out on *Difference*, positioning it as a challenger brand.
- On **Pricing Power**, **Local Beef** leads, followed by **AU** and **Pakistan**, all positioned in the justified premium quadrant. Other importers remain price-driven, with **India** on the fringe of value.

Superior Quality and Tenderness:

- **AU Beef** leads on associations, followed by **Local Beef**, which is strongest on *freshness*. **Indian** and **Pakistani Beef** are associated with *affordability*, while **Brazil** is strongest on *convenience*. Smaller importers show weak associations overall.
- Despite broad endorsement, **AU** lacks a clear brand position, owning only *tenderness*. Similarly, **Local Beef** is defined by *freshness* and *family favourite*.
- **Pakistani Beef** is clearly positioned on *Halal certification*, sharing *affordability* with **India**. **Brazil** is recognised for *nutrition*. With white space in the category, **AU** has an opportunity to define a stronger position.
- **AU** has gained strength in *tenderness* and is close to owning *consistent quality, safety, and marbling*. Strengthening these associations would help clarify AU's positioning, especially after losing two strengths this year. Smaller importers lack clear brand identity.
- In the UAE, both **Demand** and **Pricing Power** are driven by perceptions of *Superior Quality and Tenderness*.

RECOMMENDATIONS: How AU Beef can leverage its strong equity to realise our untapped potential

1.

MAINTAIN SALIENCE TO STAY TOP OF MIND

AU Beef Saliency is driving our strong Demand Power in the UAE. Given the importance of this, it is critical we maintain this to stay relevant in the minds of consumers.

Key Action 1:

Ensure AU Beef is front of mind with retailers and customers. Dial up on-pack COO and use of Aussie Beef logo.

2.

DIFFERENTIATE AU BEEF FROM LOCAL BEEF

Our closest competitor in terms of predisposition is locally processed beef – it is seen as fresher and more of a family favourite. AU Beef should dial up credential in the Superior Quality factor. We are close to achieving a BIP in superiority, quality and safety. These could be an area of focus.

Key Action 2:

Dial up Superior Quality strengths as this factor is the greatest driver of both Demand and Pricing Power.

3.

ESTABLISH A CLEARER POSITIONING TO DEFEND FROM NZ

Within the UAE Beef category, there is a lot of white space – with AU and Local Beef competing on strongest associations, but neither have clear ownership of them. NZ has lower associations but similar positioning strengths to AU – thereby, posing a future potential threat.

Key Action 3:

Dial up AU's endorsement in both environmental provenance while also highlighting our taste and tenderness associations.



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.

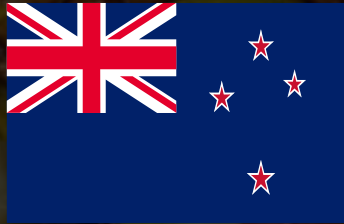
The brand list remains consistent with 2024 allowing year on year comparisons.

Lamb brands tracked in 2025

Australian lamb



New Zealand lamb



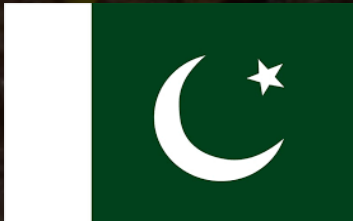
Indian beef / Buffalo lamb



UAE Local lamb



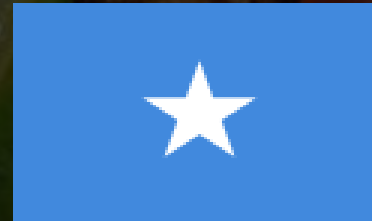
Pakistani lamb



Sudanese lamb



Somali lamb



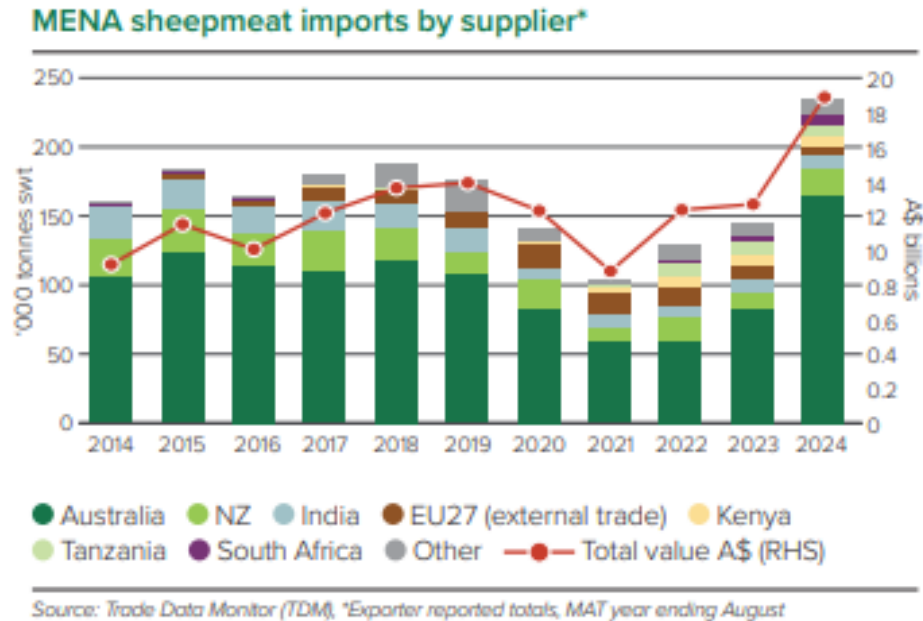
Welsh lamb





AU dominates sheepmeat imports into the UAE with two-thirds volume share. NZ is the second biggest importer but significantly behind AU

MENA sheepmeat imports

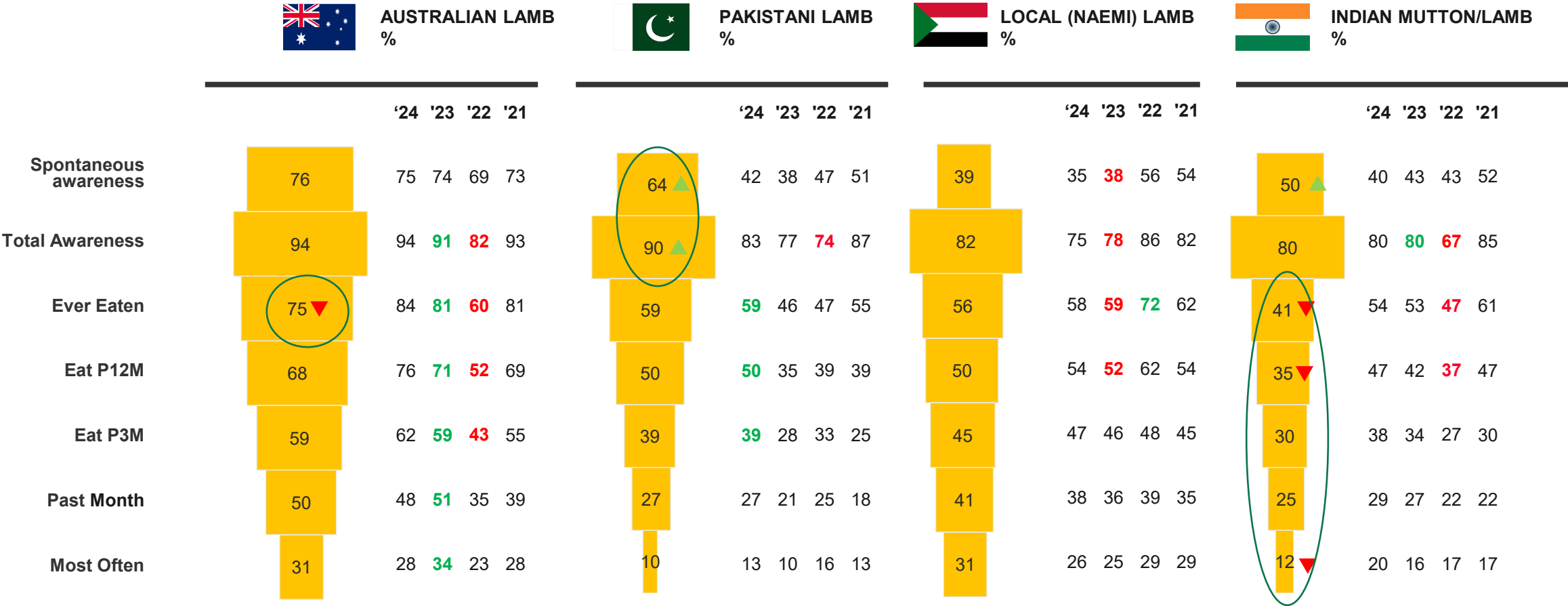


- Australia is the region’s largest and most consistent sheepmeat supplier with around two-thirds volume share in 2023–24.
- New Zealand, India and the EU are also important suppliers.
- Small and ad hoc but growing volumes are coming from African countries such as South Africa, Tanzania, Kenya and Ethiopia.
- In recent years, some European countries such as Romania, Georgia and Spain have become more significant suppliers, particularly of mutton (chilled and frozen bone-in).
- For the foreseeable future, there will remain a gap that imports will need to fill as production growth is limited due to various environmental constraints. Hence, both boxed and live imports will need to rise to fully meet demand.

AU's brand health dominates in line with this premier import status. Local Lamb, unlike Beef, has weaker brand health. India has seen softening at the bottom of the funnel, while Pakistan is growing at the top



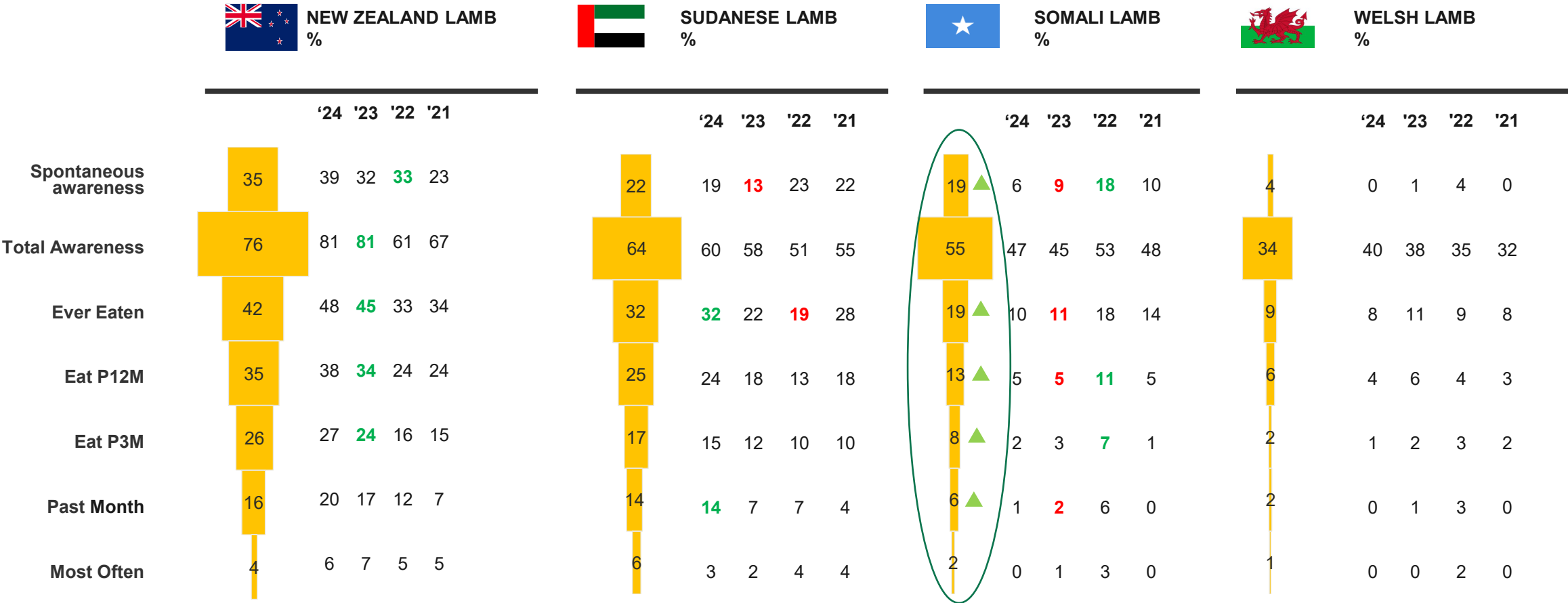
Lamb country of origin – equity



NZ, the 2nd largest importer, lags behind in brand health, along with other importers – all with modest funnels. However, Somalia has seen significant uplifts



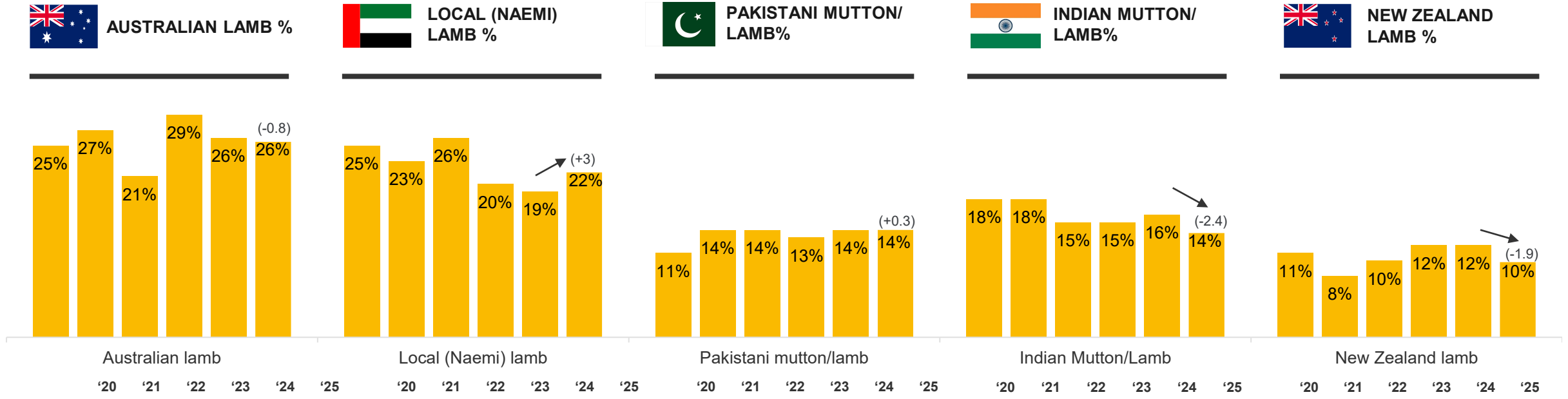
Lamb country of origin – equity





AU dominates in Demand Power, having made in roads against Local Lamb, however sits behind Local Lamb in preference. Pakistan's brand funnel does not translate into equity. NZ equity lags despite its 2nd place importer ranking. India's declining importer presence in the market has started to reflect with recent YoY declines

Lamb Country Of Origin – Equity



PREFERENCE (based on trial) – My most preferred type of lamb

64%

70%

47%

47%

42%


Preference does not add up to 100 as consumers can select more than one brand as their most preferred.



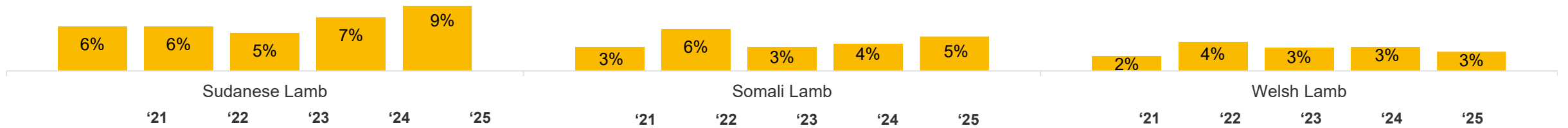
Smaller importers have weak Demand Power reflecting potential commodity status.

Lamb Country Of Origin – Equity

 SUDANESE LAMB
%

 SOMALI LAMB
%

 WELSH LAMB
%



PREFERENCE (based on trial) – My most preferred type of lamb

64%

29%

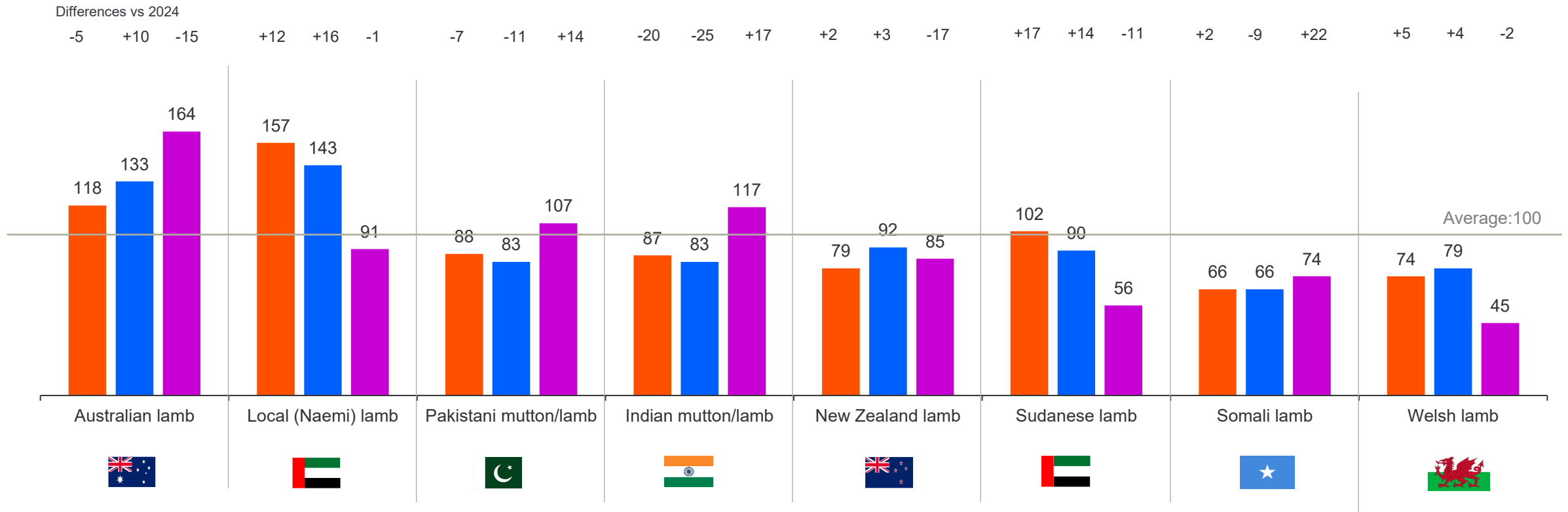
21%

Preference does not add up to 100 as consumers can select more than one brand as their most preferred.

AU's Demand Power is reliant on high levels of awareness supported by strong Meaning and Difference. The reverse is true for Local Lamb, reliant on Meaning and less well known. Whereas Pakistan and India are more solely reliant on Salience. All other importers levers are below average except Sudan with stronger Meaning



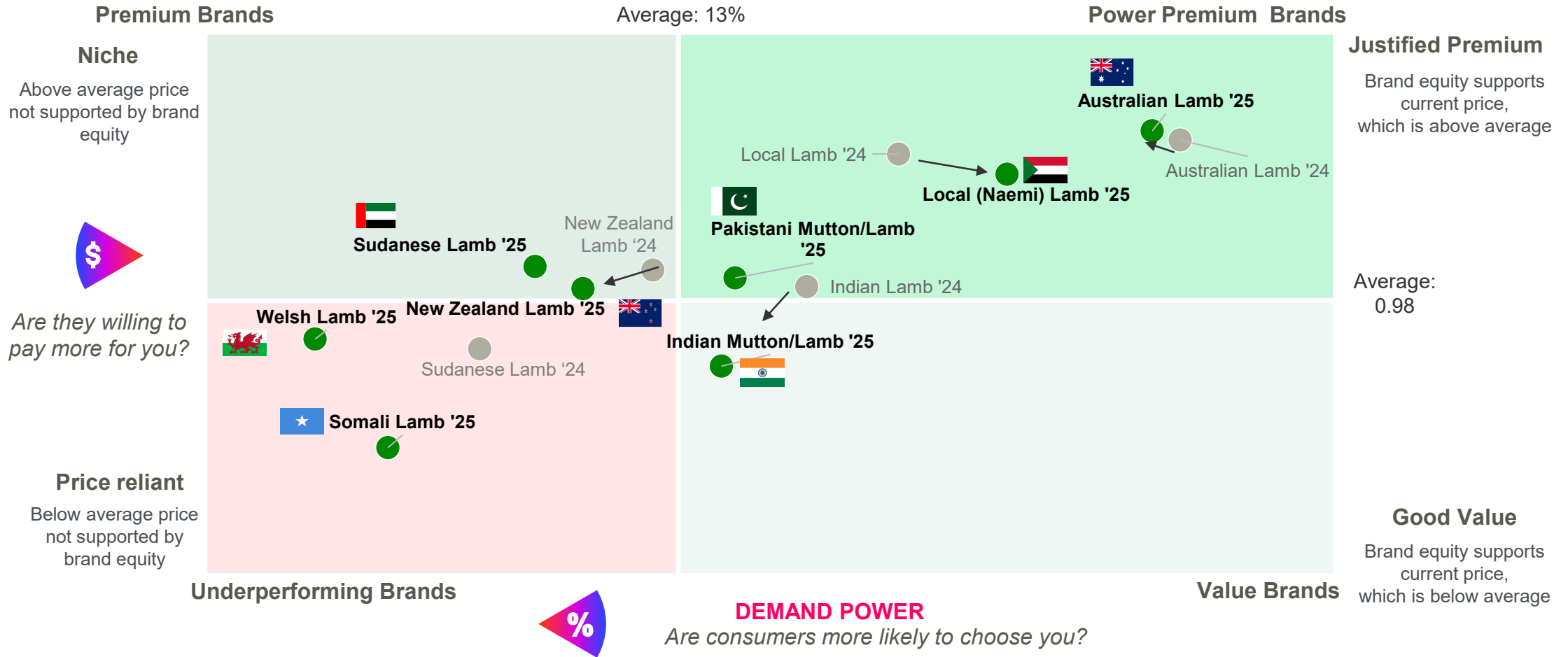
Lamb Country Of Origin – Demand Power Levers



Looking at Pricing Power we see small players such as Somalia are price reliant, while AU and Local Lamb, with high equity sit in the Justified Price Premium space. NZ is a niche player with weaker equity



Lamb country of origin – Equity



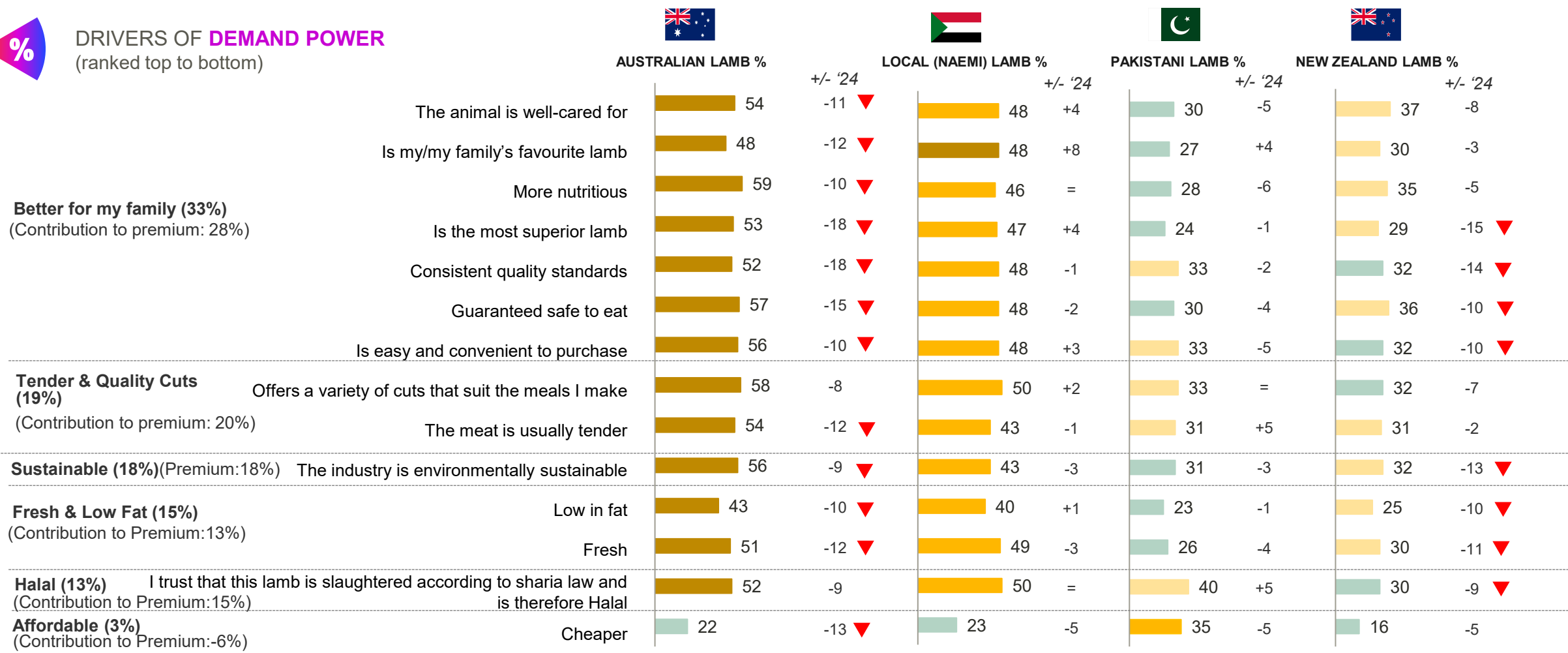
AU dominates across the board with Local Lamb in second place, reinforcing the reason for AU's strong equity. However, significant declines are noted. NZ typically sits in 3rd place with lower associations than would be expected of the 2nd rank importer. Pakistan is seen as cheap



Drivers Of Demand Power



DRIVERS OF DEMAND POWER (ranked top to bottom)









Indian Lamb is also seen to be cheap as is Somalia but otherwise these smaller importers have weak associations overall

Drivers Of Demand Power



DRIVERS OF DEMAND POWER (ranked top to bottom)

							
		INDIAN MUTTON/LAMB %	SUDANESE LAMB %	SOMALI LAMB %	WELSH LAMB %		
		+/- '24	+/- '24	+/- '24	+/- '24		
Better for my family (33%) (Contribution to premium: 28%)	The animal is well-cared for	27	-10 ▼	21	-4	10	+3
	Is my/my family's favourite lamb	25	-6	14	-9 ▼	8	+3
	More nutritious	27	-12 ▼	19	-3	8	-1
	Is the most superior lamb	29	-2	13	-6	6	=
	Consistent quality standards	33	-4	18	-5	11	+7 ▲
	Guaranteed safe to eat	30	-8	20	-3	9	+2
	Is easy and convenient to purchase	33	-7	17	-7	8	-2
Tender & Quality Cuts (19%) (Contribution to premium: 20%)	Offers a variety of cuts that suit the meals I make	28	-11 ▼	20	-4	8	+2
	The meat is usually tender	29	-1	19	-3	7	-1
Sustainable (18%)(Premium:18%)	The industry is environmentally sustainable	30	-9 ▼	18	-6	8	-1
Fresh & Low Fat (15%) (Contribution to Premium:13%)	Low in fat	24	-4	17	-4	6	=
	Fresh	28	-9 ▼	11	-12 ▼	7	-2
Halal (13%) (Contribution to Premium:15%)	I trust that this lamb is slaughtered according to sharia law and is therefore Halal	29	-13 ▼	35	+3	22	+9 ▲
Affordable (3%) (Contribution to Premium:-6%)	Cheaper	46	-3	22	+4	25	+6

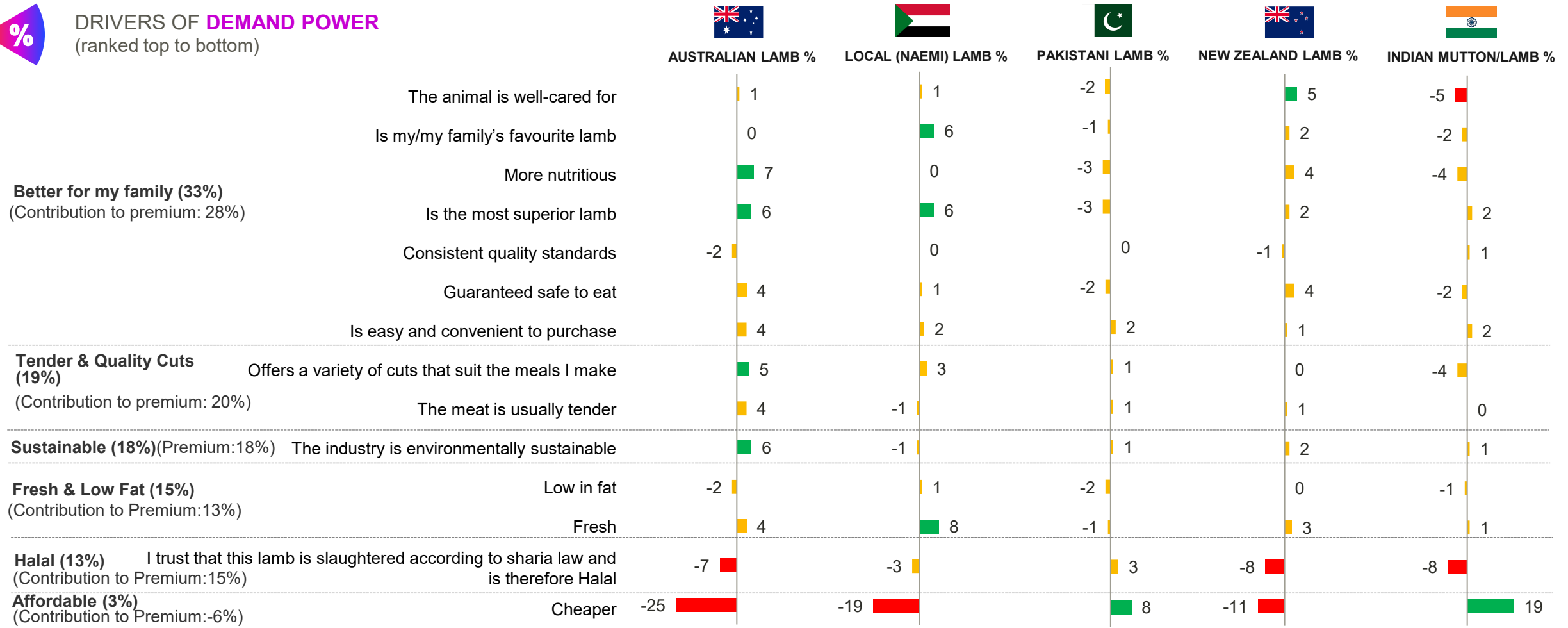
Looking at BIPS, AU has the strongest positioning. NZ has a similar although weaker position to AU. India is seen to be cheaper followed by Pakistan. Local stands out for its freshness as would be expected



Brand Image Profiles



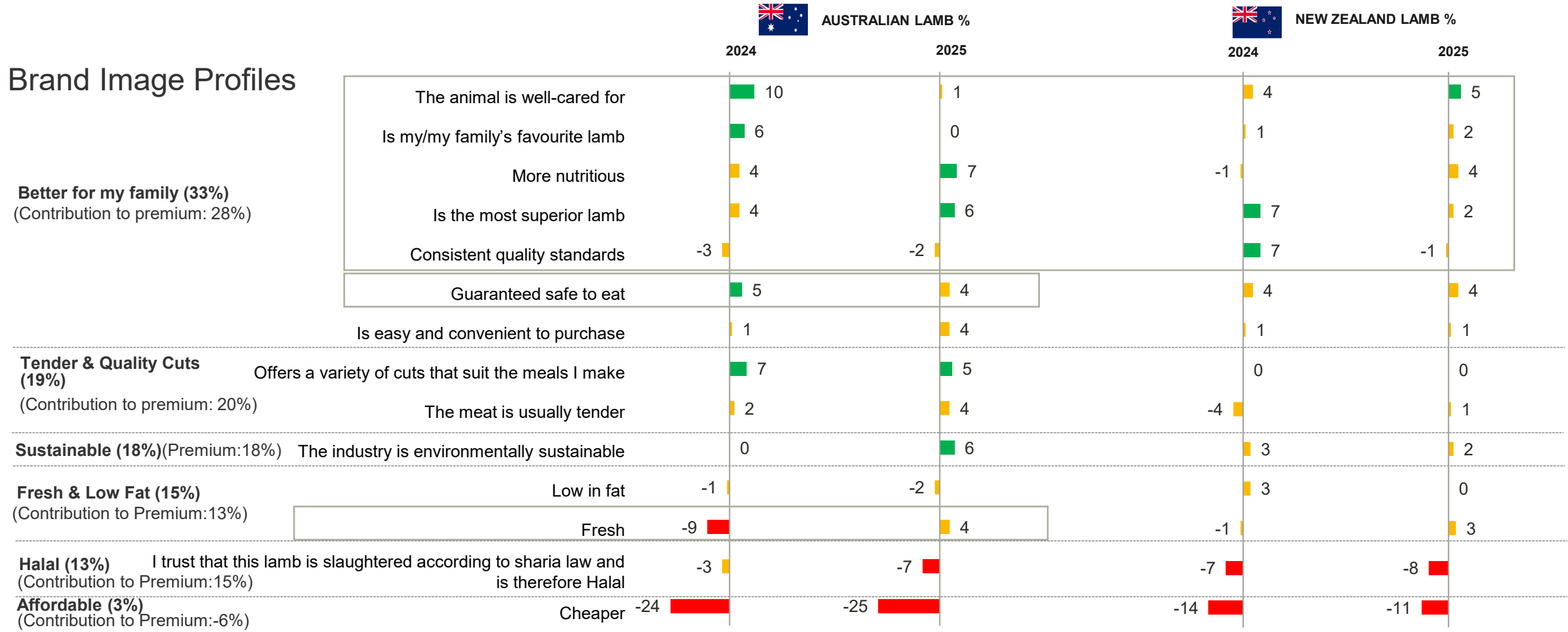
DRIVERS OF DEMAND POWER
(ranked top to bottom)





AU Lamb's strong position in the UAE comes from its differentiation on nutrition, superiority, suitable cuts and the environment, key drivers of Demand Power. AU is close to achieving strengths on safe, convenient and tender a potential area of focus. NZ competes with AU on key attributes, a watch out

Brand Image Profiles



Interestingly the African importers are associated with being Halal certified perhaps due to their high Muslim populations and familiarity with Sharia Law. They are also associated with being cheap



Brand Image Profiles



DRIVERS OF DEMAND POWER
(ranked top to bottom)

Better for my family (33%)
(Contribution to premium: 28%)

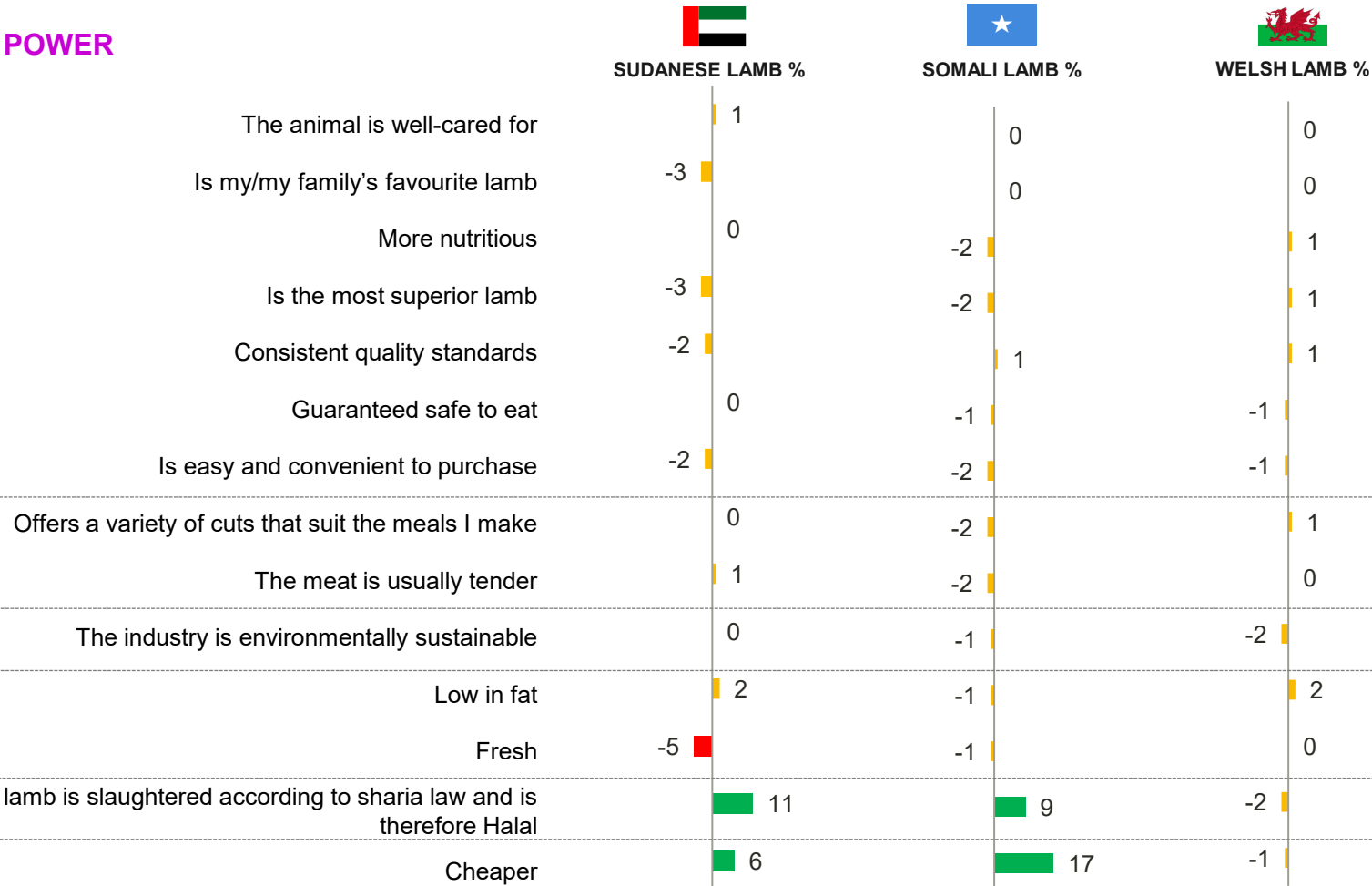
Tender & Quality Cuts (19%)
(Contribution to premium: 20%)

Sustainable (18%) (Premium: 18%)

Fresh & Low Fat (15%)
(Contribution to Premium: 13%)

Halal (13%)
(Contribution to Premium: 15%)

Affordable (3%)
(Contribution to Premium: -6%)





Better for your Family is the leading factor contributing to Demand and Pricing Power, with Tender and Quality Cuts sitting second for both as well.

What drivers demand power and pricing power



DEMAND POWER

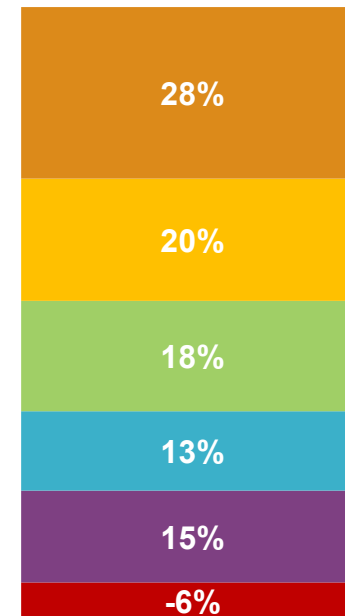
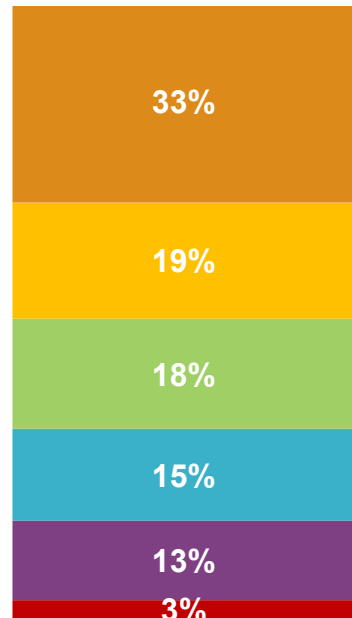


PRICING POWER

BETTER FOR MY FAMILY

The animal is well-cared for
Is my/my family's favourite lamb
More nutritious
Is the most superior lamb
Consistent quality standards
Guaranteed safe to eat
Is easy and convenient to purchase

- BETTER FOR MY FAMILY
- TENDER & QUALITY CUTS
- SUSTAINABLE
- FRESH & LOW FAT
- HALAL
- AFFORDABLE



TENDER & QUALITY CUTS

Offers a variety of cuts that suit the meals I make
The meat is usually tender

Summarising the Beef Landscape

AU has high equity as the largest importer:

- **AU** leads sheepmeat imports into the UAE with a two-thirds volume share, followed by **NZ**, which trails significantly.
- **AU's brand health** reflects its dominant import status. **Local Lamb** shows weaker brand health compared to beef. **India** has softened at the lower funnel, while **Pakistan** is gaining traction at the top.
- **NZ**, despite being the second-largest importer, lags in brand health alongside other importers. **Somalia** has shown notable improvement.
- **AU** leads in **Demand Power**, making gains against **Local Lamb**, though it still trails in **preference**. **Pakistan's** funnel strength does not translate into equity. **NZ** underperforms despite its import rank, and **India's** declining presence is reflected in recent equity drops. Smaller importers show weak Demand Power, indicating commodity status.
- **AU's Demand Power** is driven by high awareness and strong *Meaning* and *Difference*. **Local Lamb** relies on *Meaning* but lacks awareness. **Pakistan** and **India** depend on *Salience*, while other importers perform below average—except **Sudan**, which shows strength in *Meaning*.
- On **Pricing Power**, **AU** and **Local Lamb** sit in the justified premium quadrant. **Pakistan** also performs well. Smaller players like **Somalia** remain price-driven, and **NZ** is positioned as a niche brand with weaker equity.

AU associations drive its differentiation through nutrition, superiority, suitable cuts, and environment:

- **AU Lamb** leads across all metrics, reinforcing its strong equity despite recent declines. **Local Lamb** ranks second, followed by **NZ**, which underperforms relative to its import volume. **Pakistan**, **India**, and **Somalia** are primarily associated with affordability, but show weak overall associations.
- On **BIPS**, **AU** holds the strongest positioning, with **NZ** showing similar but weaker attributes. **India** and **Pakistan** are positioned as low-cost options, while **Local Lamb** stands out for *freshness*.
- **AU's equity** is driven by differentiation in *nutrition*, *superiority*, *suitable cuts*, and *environmental credentials*—key drivers of Demand Power. AU is close to gaining strengths in *safety*, *convenience*, and *tenderness*, which present opportunities for further positioning clarity. **NZ** competes closely on these attributes.
- **African importers** are strongly associated with *Halal certification*, likely due to cultural familiarity and religious alignment.
- *Better for your family* is the leading driver of both **Demand** and **Pricing Power**, followed by *Tenderness* and *Quality Cuts*.

RECOMMENDATIONS: safeguard AU Lamb's dominant equity in market

1.

MAINTAIN SALIENCE TO STAY TOP OF MIND

AU Lamb Saliency is driving our strong Demand Power in the UAE. Given the importance of this, it is critical we maintain this to stay relevant in the minds of consumers.

Key Action 1:

Ensure AU Lamb is front of mind with retailers and customers. Dial up on-pack COO and use of Aussie Beef logo.

2.

PROTECT DECLINING ASSOCIATIONS

It is noticeable that associations across the board have declined YOY. Re-evaluate marketing initiatives and activations to address this

Key Action 2:

Dial up marketing activations and strengths in trade conversations to address declines.

3.

ESTABLISH A CLEARER POSITIONING TO DEFEND FROM NZ

NZ are the closest imported competitor with similar although weaker associations to us. Consider how to dial up our differentiation. Can we take back our animal well cared for positioning and dial up our environmental credentials to protect our lead in this area.

Key Action 3:

Dial up our Aussie assets to maintain dominance on provenance and take back animal welfare .

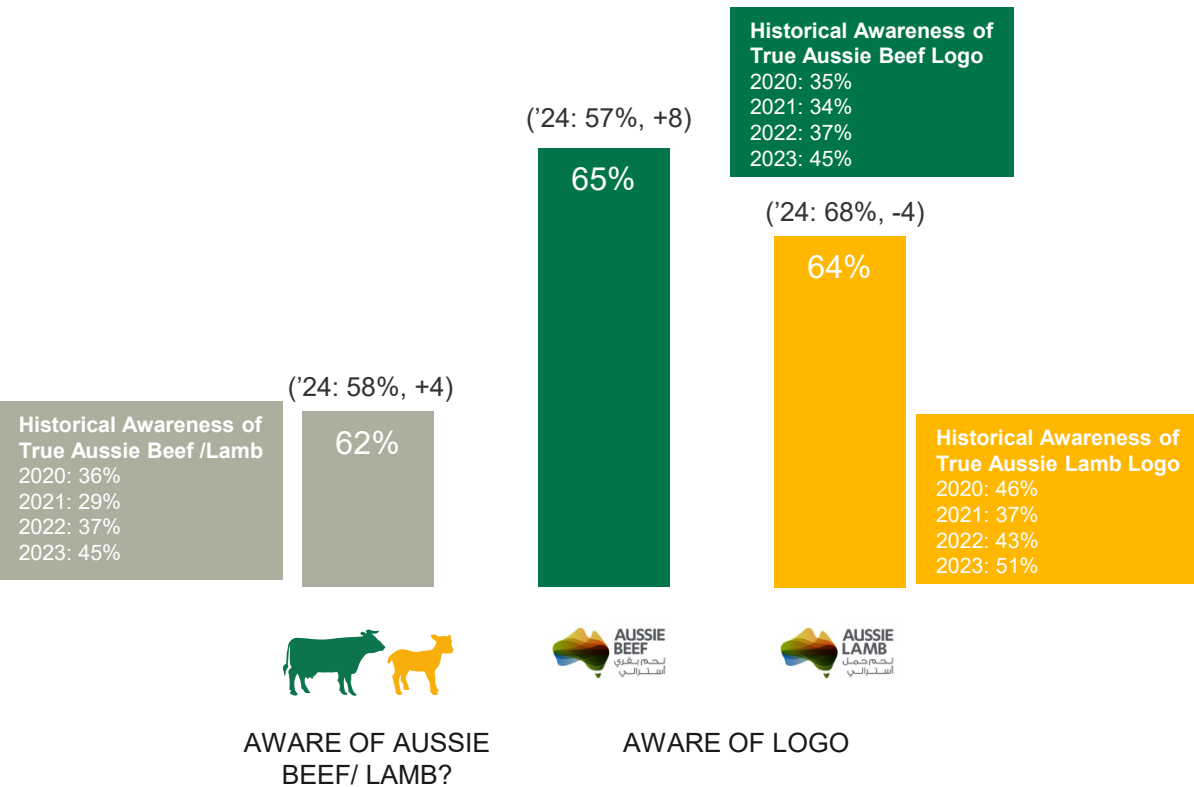


5 Aussie Beef & Aussie Lamb



Aussie Beef/Lamb is a valuable asset with a continued strong presence. These assets generating positive associations for AU meat, particularly on consistent quality

Aussie Beef - Awareness And Perception



*2024: True Aussie changed to Aussie Beef/Lamb

Top 5 impressions of the logo:



1. Has consistent quality standards
2. Comes from the perfect place to produce beef/lamb
3. Is more nutritious
4. They care for their animals when raising them
5. Is guaranteed safe to eat

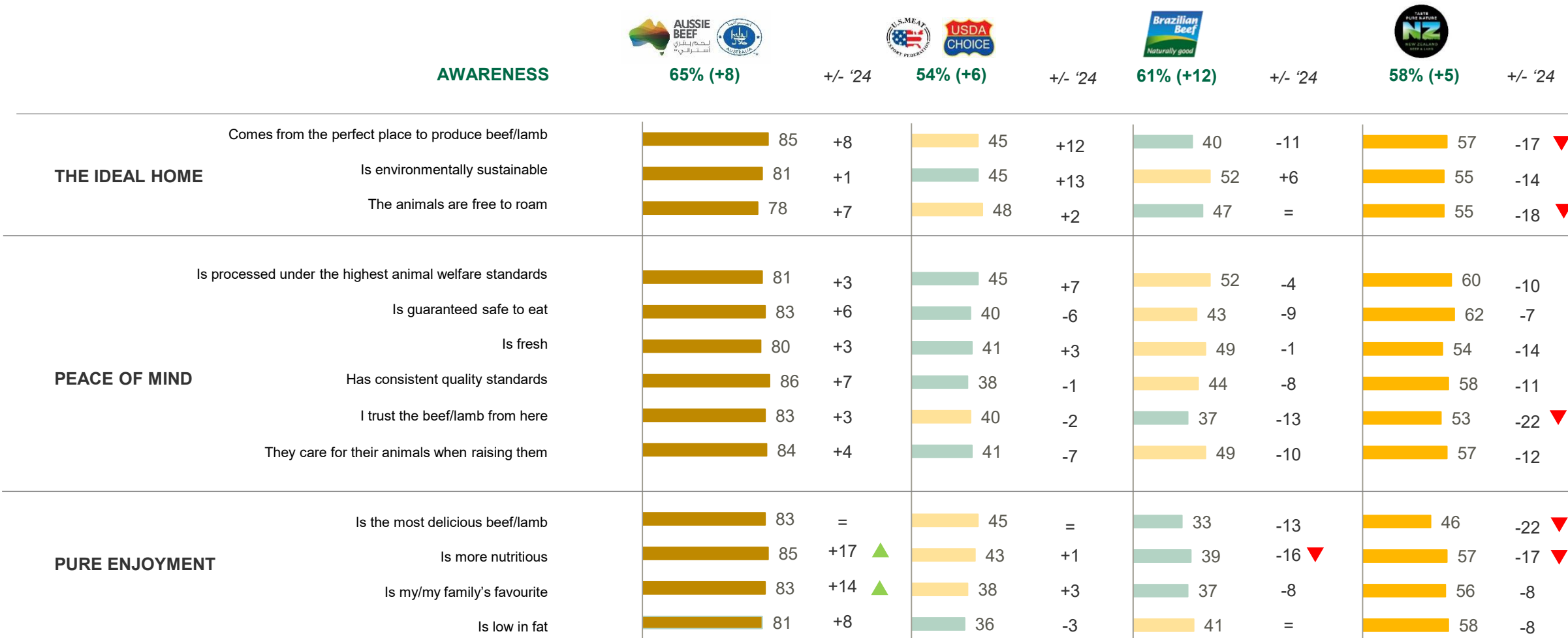


1. Has consistent quality standards
2. Is environmentally sustainable
3. They care for their animals when raising them
4. I trust the beef/lamb from here
5. Comes from the perfect place to produce/lamb

Aussie Beef logo dominates on all perceptions with strong uplifts across the board. NZ comes in second place, speaking to its potential as a threat despite low import volumes



Aussie Beef - Awareness And Perception





Aussie Lamb logo dominates on all perceptions with strong uplifts across the board. NZ again comes in second place, speaking to its competitiveness

Aussie Lamb - Awareness And Perception

AWARENESS



64% (-4)

+/- '24

59% (+15)

+/- '24

51% (-17)

+/- '24

58% (+5)

+/- '24

Category	Statement	Aussie Lamb	Change	US Meat	Change	Brazilian Beef	Change	NZ Beef & Lamb	Change
THE IDEAL HOME	Comes from the perfect place to produce beef/lamb	81	+2	48	+3	58	+7	68	-7
	Is environmentally sustainable	83	+7	52	+12	64	+10	62	-8
	The animals are free to roam	78	+1	44	+3	55	+6	60	-12
PEACE OF MIND	Is processed under the highest animal welfare standards	81	+7	44	+7	52	-8	63	-10
	Is guaranteed safe to eat	79	+2	51	+5	46	-8	64	-11
	Is fresh	77	+1	40	+9	58	+6	57	-10
	Has consistent quality standards	83	+7	42	+7	55	+1	59	-13
	I trust the beef/lamb from here	82	+6	43	+1	61	+4	64	-15 ▼
	They care for their animals when raising them	83	+4	40	-10	52	-4	60	-10
PURE ENJOYMENT	Is the most delicious beef/lamb	76	-7	42	-2	51	-2	57	-15 ▼
	Is more nutritious	77	-5	39	-1	49	+4	59	-15 ▼
	Is my/my family's favourite	72	=	46	+8	49	=	55	-20 ▼

KANTAR

Global Tracker 2025

UAE Presentation Deck

Brought to you by your Kantar Team:
Sally Kennedy, Carolina Ferrando and Heather Buys



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