



WINTER 2025

Insights, Assets +
Information



Index of Resources

Click image for your section of interest

How are people shopping?

Australia 52wks ending 23-03-25

TOTAL FMCG: **+5.2%** Value Growth +12.3% vs 2YA **+6.3%** Volume Growth +9.5% vs 2YA

With inflationary pressure easing, grocery consumption continues to accelerate.

Average Trips +2.2% vs YA +3.8% vs 2YA
Spend per trip +3.6% vs YA +6.5% vs 2YA
Buying Households -0.6% vs YA +1.6% vs 2YA
Vol Per Trip +0.5% vs YA -0.9% vs 2YA

Shopper Insights

Key Headlines

Australia 12wks ending 20.04.25

Total grocery continued growth momentum increasing +8.7% on account of more trips and rising prices

Fresh meat growing faster at +10.7% with beef driving value gains (+11.5%)

Fresh beef sustained growth as buyers continue to purchase more despite higher prices

Costsamba buyers' willingness to pay more in the face of rising prices has driven a rebound in value

Market Updates

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	QUARTER 1	QUARTER 2	QUARTER 3	QUARTER 4	QUARTER 1			
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
BEF			THE GREATEST						THE GREATEST			
			MEWEEK MEALS						MEWEEK MEALS			
LAMB												

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

Beef Midweek Meals: Build up the mid-week meal by increasing beef consideration through desire and inspiration

Activity Calendar

Technical Videos

Elevate your expertise – continuous learning through technical tutorials

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

Share these videos with your team to further their expertise!

Ageing Beef - The Best Way

Watch Video Here

Technical Videos

Aussie Beef. The Greatest.

With the second pulse now complete, "Aussie Beef. The Greatest.", continues to showcase beef as the superior protein, reinforcing why consumers are willing to pay more.

The third pulse is set to air September/October.

Volume sales +5.1% vs YA
Penetration +2.5% vs YA
Value sales +11.9% vs YA
Willingness to pay more reached 33%

Find assets here

Campaign Updates

Beef Recipe Inspiration

Low and slow: Chuck Casserole, Steak Bolar Blade, Beef Cheeks

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

Click images for recipes

Click here for downloadable assets

Recipe Inspiration

Rare Medium: Foodservice Trends

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

Chefs are innovators, shaping what we eat long before it filters through to home cooks. Rare Medium offers a window into this dynamic world, giving you a direct line to these trends, offering practical inspiration for product development and innovation, as well as staff training.

Want to see what's cooking? Head over to Rare Medium to explore the latest in foodservice trends.

Steak? Yes Chef With Neil Perry
Tongue Tonnato? Yes Chef.

Watch Video Here

Rare Medium Trends

2025 Nestlé Golden Chef's Hat Award

Entries for the 2025 Nestlé Golden Chef's Hat Award are now open!

Rare Medium is proud to sponsor the 2025 Nestlé Golden Chef's Hat Award as it celebrates 60 years in Australia. In this episode, we catch up with regional contestants to see where they are now and how Golden Chef's Hat helped shape their careers.

Watch Video Here

Click Here To Enter The 2025 Nestlé Golden Chef's Hat Award

SHAPE YOUR FUTURE

DEVELOPING CULINARY CAREERS SINCE 1966

Presented by **Wooliji**

2025 Nestlé Golden Chef's Hat Award

Australian Good Meat

Infographics, videos, and articles for you to share

Today's consumers are increasingly interested in the ethical treatment of livestock. Understanding the robust animal welfare practices in Australia is becoming increasingly important for you to build trust and confidently communicate the quality and values behind Australian red meat.

Want to understand more about the commitment of Australian farmers to animal wellbeing? Check out Australian Good Meat today.

Does the red meat industry use antibiotics?

5 domains of animal welfare

Hormone use and livestock

Australian red meat is: Ethically raised, High quality, Safe

The Australian beef industry is tracking animal welfare performance

Australian Good Meat

How are people shopping?

Australia 52wks ending 23.03.25

TOTAL FMCG:

 **+5.2%**
Value Growth
+12.3% vs 2YA

 **+6.3%**
Volume Growth
+9.5% vs 2YA

With inflationary pressure easing, grocery consumption continues to accelerate.



Average Trips
+2.2% vs YA
+3.8% vs 2YA



Spend per trip
+3.6% vs YA
+6.5% vs 2YA



Buying Households
-0.6% vs YA
+1.6% vs 2YA



Vol Per Trip
+0.5% vs YA
-0.9% vs 2YA

Reference: NielsenIQ Homescan | 52 weeks to 23.03.2025 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.

Market share

Australia 52wks ending 23.03.25

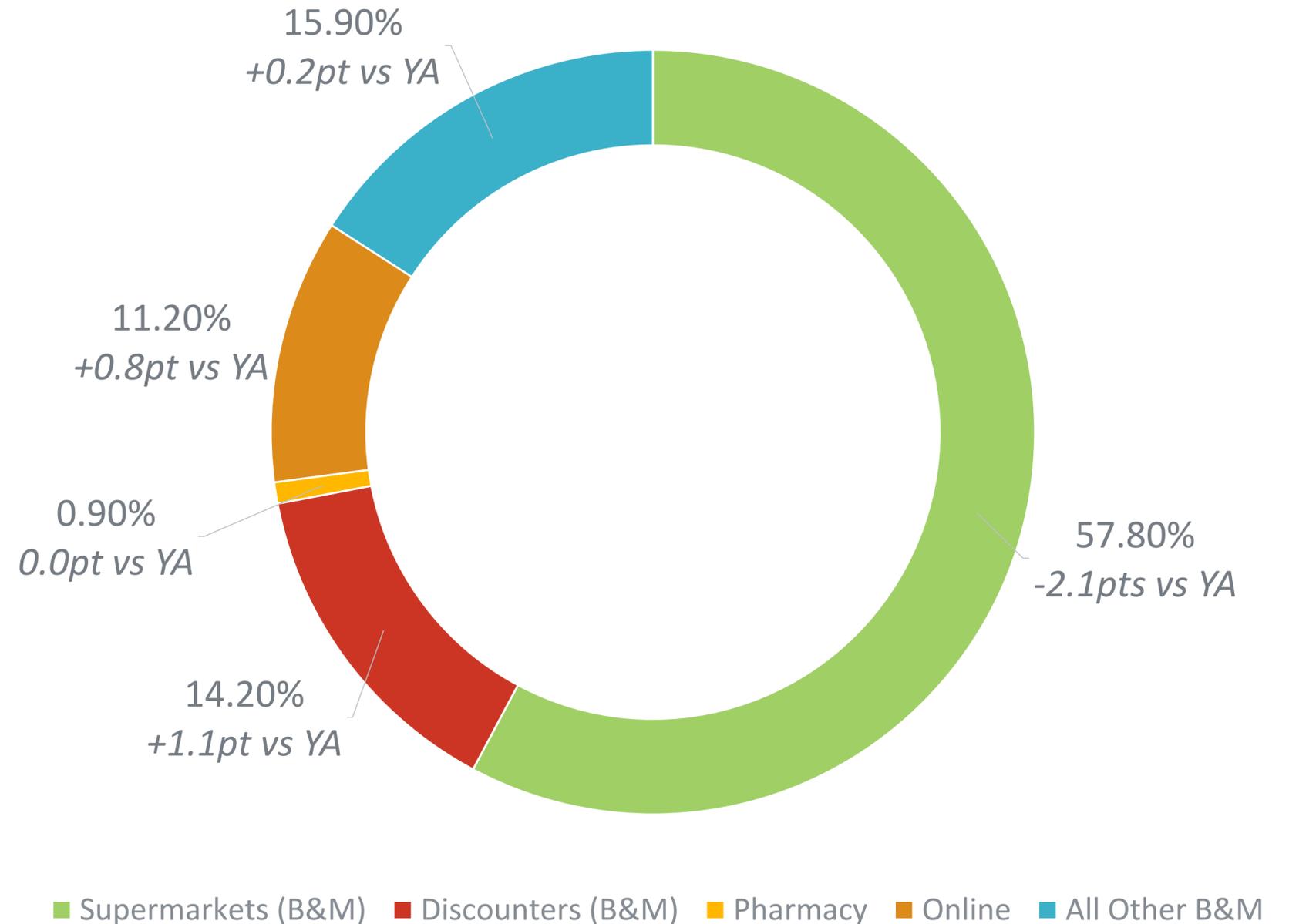
Whilst traditional supermarkets retain the lion's share of trade, their channel was the only one to experience shrinkage vs YA.

Discounters and Online benefited the most from this.



Reference: NielsenIQ Homescan | 13 weeks to 23/03/25 Vs Year Ago (YA) & 2YA

Value Share of Trade & PT Change vs YA



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.

Value growth

Australia 52wks ending 23.03.25

Discounters and Online have seen significant growth vs YA, outstripping all other channels.

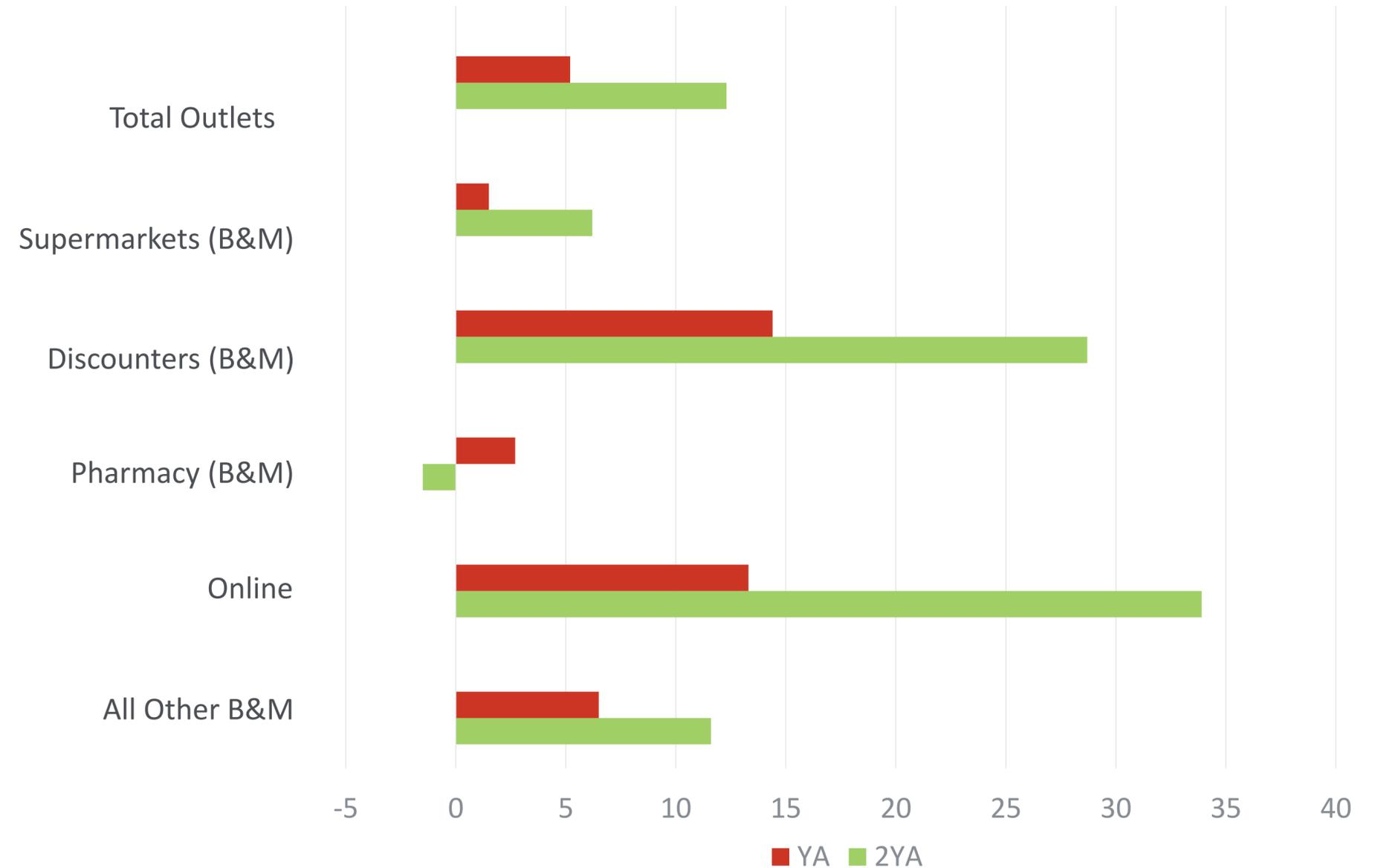
62% of households are cross-shopping online and brick & mortar, up 2.7pts vs YA

72% of Online growth is driven by new shoppers and increased spend amongst existing shoppers.



Reference: NielsenIQ Homescan | 13 weeks to 23/03/25 Vs Year Ago (YA) & 2YA

Value Growth by Channel



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.

Loyalty

Australia 52wks ending 23.03.25

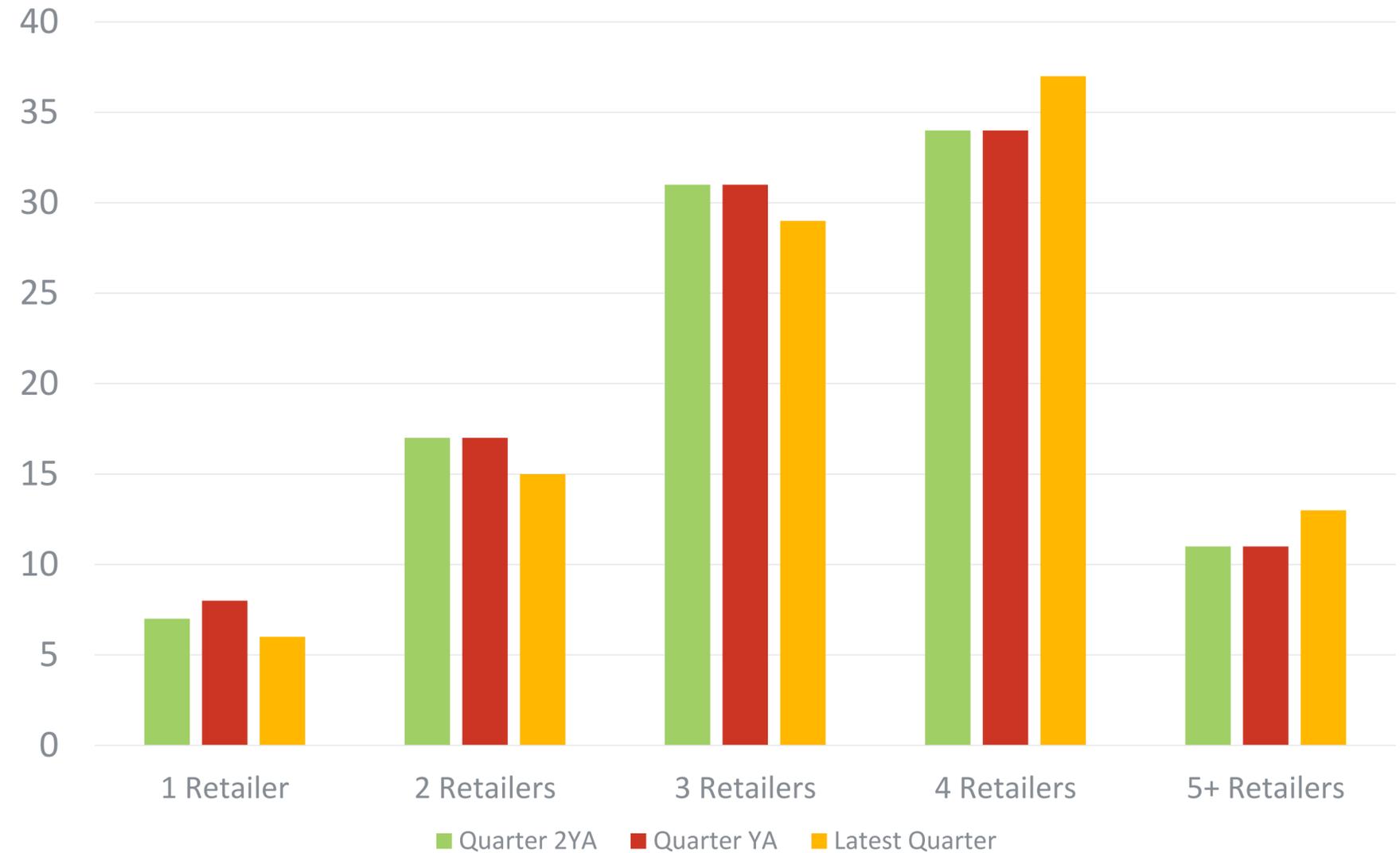
More shoppers are shopping around for their grocery needs.

79% of shoppers shop in 3+ retailers, up +3.2pts vs YA.



Reference: NielsenIQ Homescan | 13 weeks to 23/03/25 Vs Year Ago (YA) & 2YA

% of Buying Households Shop At:



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.

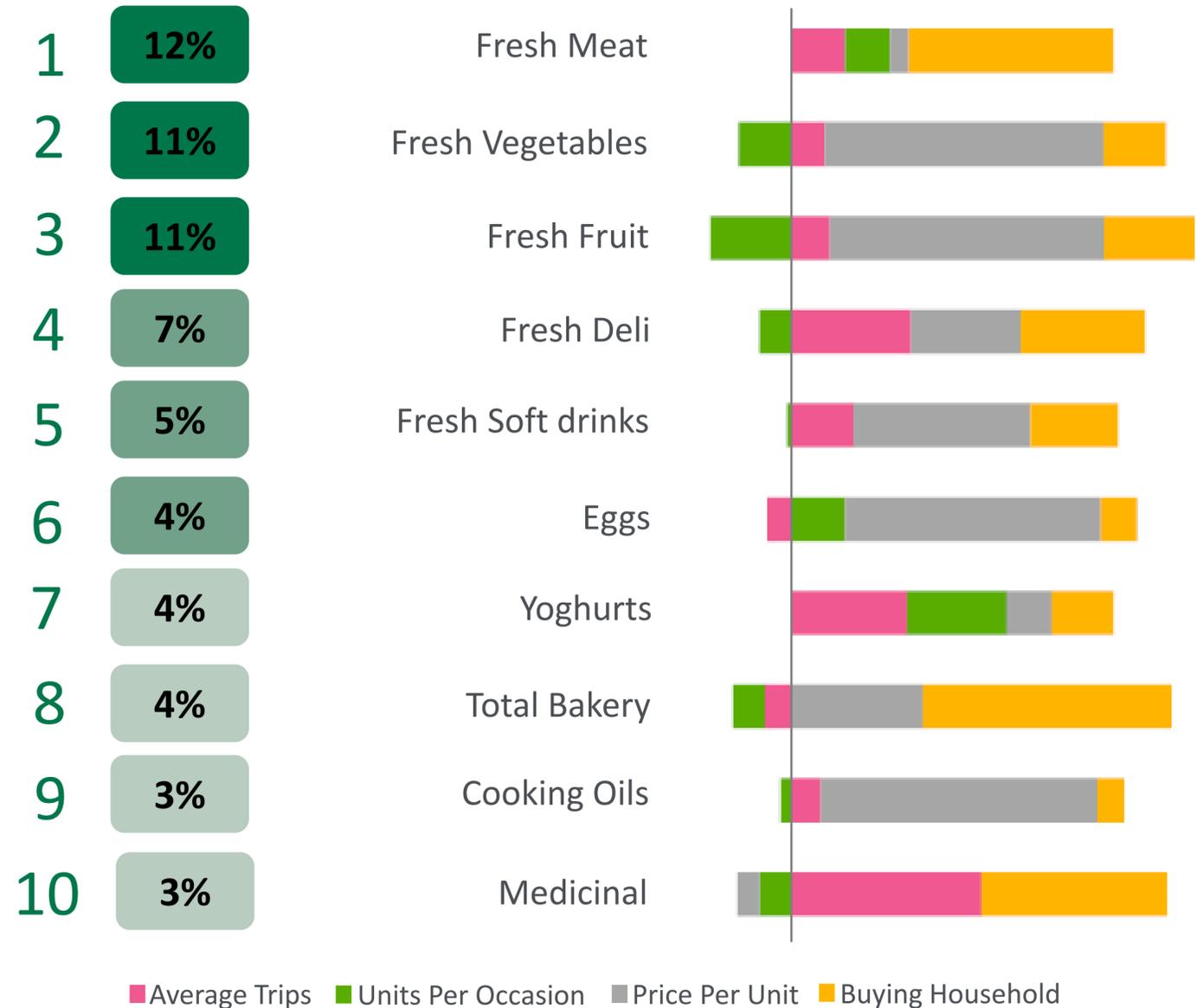
Publications Statement: This Report is intended for use by MLA members and levy payers in the context of understanding and diagnosing market performance and shopper behaviour. Any reproduction or wider dissemination of the Report or any part thereof requires prior written permission from NIQ.

Freshness

Australia 52wks ending 23.03.25

Fresh categories continue to contribute to market growth, mainly driven by higher prices, more frequent purchases, larger baskets, and increased spend.

% Category Contribution to FMCG Value Growth & Drivers vs YA (Top 10)



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.



Reference: NielsenIQ Homescan | 13 weeks to 23/03/25 Vs Year Ago (YA) & 2YA



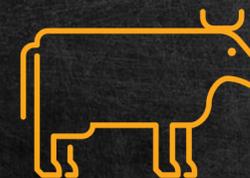
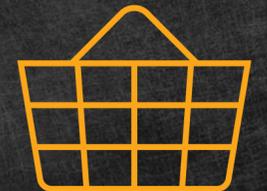
Retail performance

Australia 12wks ending 20.04.25*



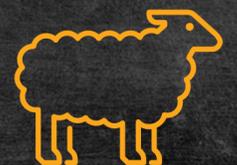
Total grocery continued growth momentum increasing +8.7% on account of more trips and rising prices

Fresh meat growing faster at +10.7% with beef driving value gains at +11.5%



Fresh beef sustained growth as buyers continue to purchase more despite higher prices

After a period of heavy discounting, lamb prices are correcting to trends and prices seen 2YA



* Awaiting retail updates for 18.05.25

Reference: *NielsenIQ Home Scan Data*

Summary

Australia 12wks ending 18.05.25

1. BEEF has shown good growth in purchase volume and purchase value despite increasing prices.
2. LAMB figures are reflecting the correction back to longer term trends, evident in the changes from 2YA, after the period of heavy discounting 12 months ago.

Reach out for more information



Household KPIs				Category KPIs			
1 Year Ago	Penetration	Penetration vs YA	Frequency vs YA	Vol per Shop vs YA	Purchase Volume Vs YA	Purchase Value vs YA	Price/KG Vs YA
Fresh Meat	94.1%	(0.6)	0.5%	2.7%	4.9%	8.6%	3.5%
Beef	81.5%	(0.9)	0.0%	1.1%	2.4%	9.3%	6.8%
Lamb	47.9%	(3.1)	(4.4)%	(3.7)%	(11.6)%	4.8%	18.6%

2 Years Ago	Penetration	Penetration vs 2YA	Frequency vs 2YA	Vol per Shop vs 2YA	Purchase Volume Vs 2YA	Purchase Value vs 2YA	Price/KG Vs 2YA
Fresh Meat		(0.5)	2.8%	5.0%	11.9%	10.8%	(1.0)%
Beef		(0.5)	3.5%	2.4%	9.7%	11.9%	2.0%
Lamb		(1.5)	1.0%	0.0%	0.1%	0.3%	0.2%

Reference: NielsenIQ Aus Homescan

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			THE GREATEST						THE GREATEST			
	MIDWEEK MEALS						MIDWEEK MEALS			MIDWEEK MEALS		
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

Beef Midweek Meals

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

Technical Videos

Elevate your expertise – continuous learning through technical tutorials

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

Share these videos with your team to further their expertise!

Ageing Beef - The Best Way



[Watch video here](#)



Aussie Beef. The Greatest.

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

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



Volume sales
+5.1% vs YA



Penetration
+2.5% vs YA



Value sales
+11.9% vs YA



Willingness to pay more
reached 33%

4 weeks to 23/03/25

[Click for assets](#)

Midweek Meals You're Thinking Beef

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

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

[Click for assets](#)

ONE POT WONDER?



**YOU'RE
THINKING
BEEF**



© SCAN HERE FOR
YOUR WINTER WARMER
RECIPE AND MORE
INSPIRATION



Beef Recipe Inspiration

Low and slow:
Chuck Casserole
Steak
Bolar Blade
Beef Cheeks

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

Click images for recipes

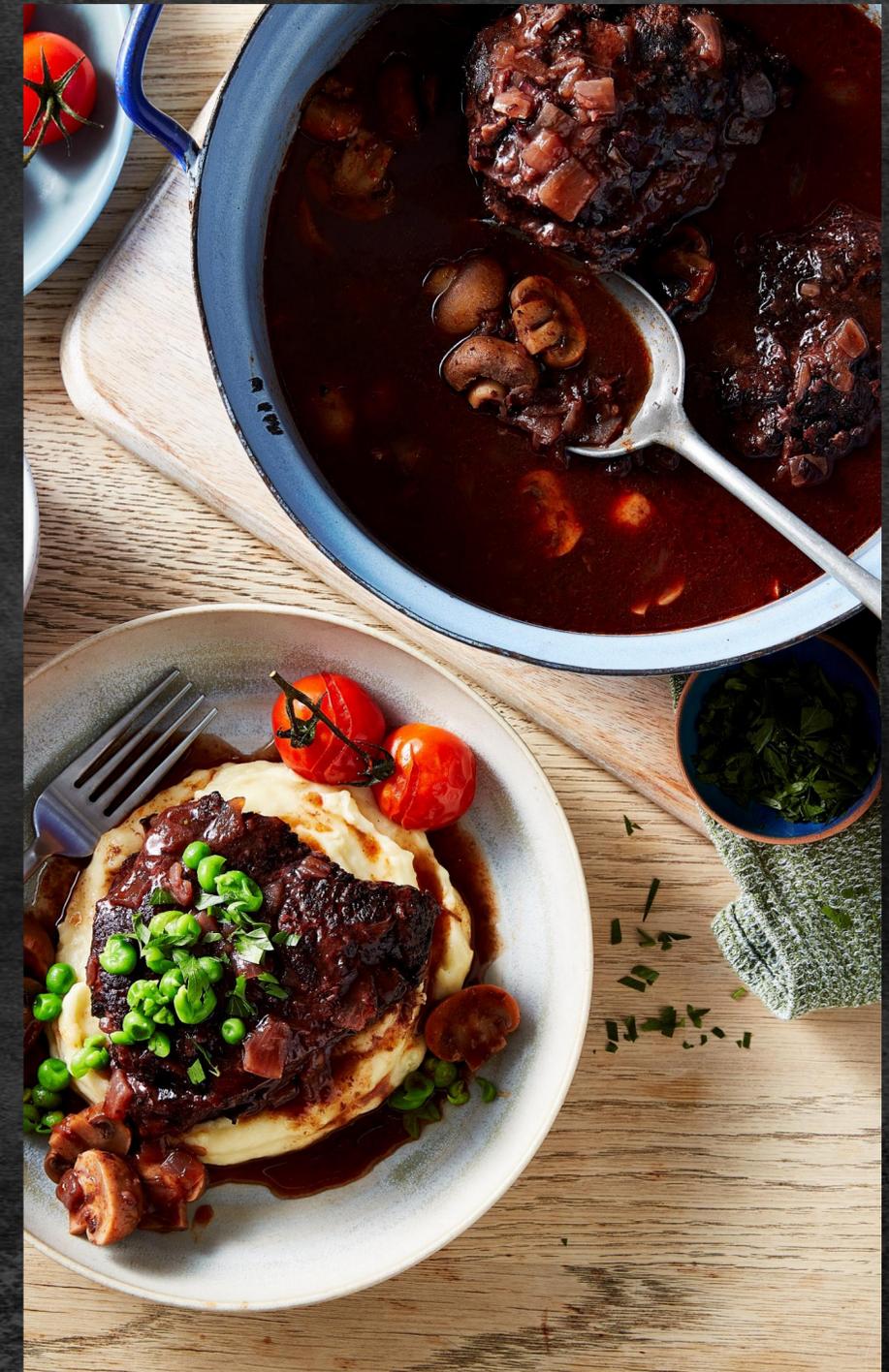
Click here for downloadable assets



Indian chuck casserole



Bolar blade pot roast



Beef cheeks bourguignon

Foodservice Beef Recipe Inspiration

Low and slow:
Shin
Brisket

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

Click images for recipes

Click here for downloadable assets

Braised shin of beef with orecchiette



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

Braised brisket shakshuka



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

Lamb Recipe Inspiration

Low and slow:
Shoulder
Leg
Shanks

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

Click images for recipes

Click here for downloadable assets



Butterflied lamb leg, cauliflower & zesty salad



Lamb, spinach and rice casserole



Lamb shank and mushroom ragu

Foodservice Lamb Recipe Inspiration

Low and slow:
Shoulder
Mince

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

Click images for recipes

Click here for downloadable assets

Braised lamb shoulder in masterstock



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

Baked lamb moussaka



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

Rare Medium: Foodservice Trends

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

Chefs are innovators, shaping what we eat long before it filters through to home cooks. Rare Medium offers a window into this dynamic world, giving you a direct line to these trends, offering practical inspiration for product development and innovation, as well as staff training.

Want to see what's cooking? Head over to Rare Medium to explore the latest in foodservice trends.

Steak? Yes Chef
With Neil Perry



[Watch video here](#)

Tongue Tonnato?
Yes Chef.



[Watch video here](#)

Rare Medium: The Goat Trail

Our annual Goat Trail returns!
– featuring Sarah Tiong

Join us as we head to Melbourne to seek out some of the best places to eat goat. Australia's second largest city does not disappoint with a range of tasty goat dishes served in a range of venues and cuisine types.

Want to see the hottest places serving goat? Check out Rare Medium.

Melbourne goat trail



2025 Nestlé Golden Chef's Hat Award

Entries for the 2025 Nestlé Golden Chef's Hat Award are now open!

Rare Medium is proud to sponsor the 2025 Nestlé Golden Chef's Hat Award as it celebrates 60 years in Australia. In this episode, we catch up with previous contestants to see where they are now and how Golden Chef's helped shape their careers.

[Watch video here](#)

[Click here to enter the 2025 Nestlé Golden Chef's Hat Award](#)



SHAPE YOUR FUTURE

DEVELOPING CULINARY CAREERS SINCE 1965

Supported by *Buondi* caffè



Australian Good Meat

Infographics, videos, and articles for you to share

Today's consumers are increasingly interested in the ethical treatment of livestock. Understanding the robust animal wellbeing practices in Australia is becoming increasingly important for you to build trust and confidently communicate the quality and values behind Australian red meat.

Want to understand more about the commitment of Australian farmers to animal wellbeing? Check out Australian Good Meat today.

Red meat animal welfare standards

5 domains of animal welfare

Hormone use and livestock

- Australian -
Good Meat
MORE THAN JUST GOOD FOR YOU

Australian red meat is:



Ethically raised



High quality



Safe

WWW.GOODMEAT.COM.AU

**The Australian
beef industry
is tracking
animal welfare
performance**



 **Australian Beef
Sustainability
Framework**

WWW.GOODMEAT.COM.AU

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.