



# WINTER 2025

Insights, Assets +  
Information



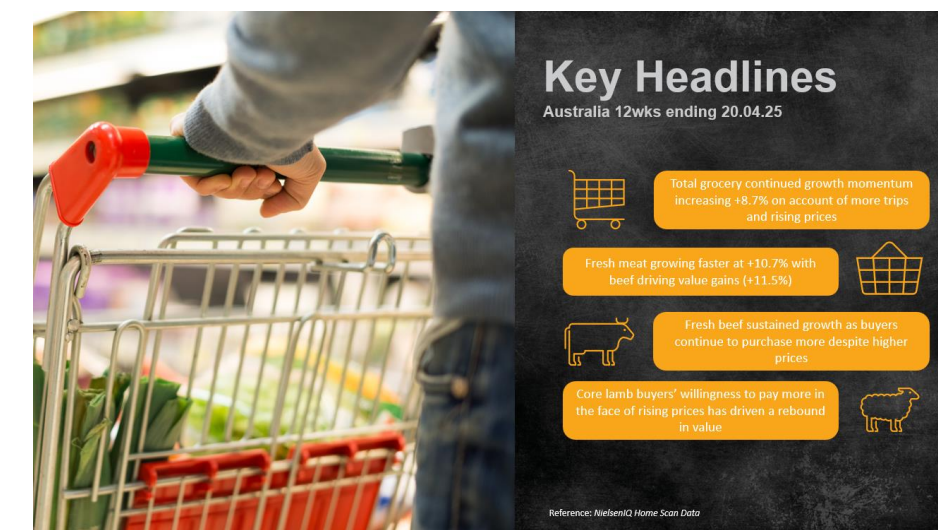


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Click image for your section of interest



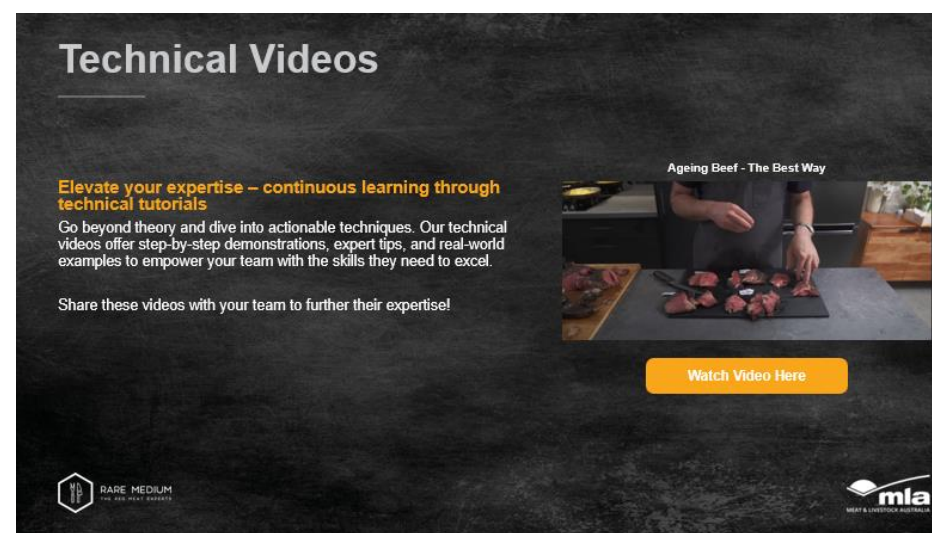
## Shopper Insights



## Market Updates



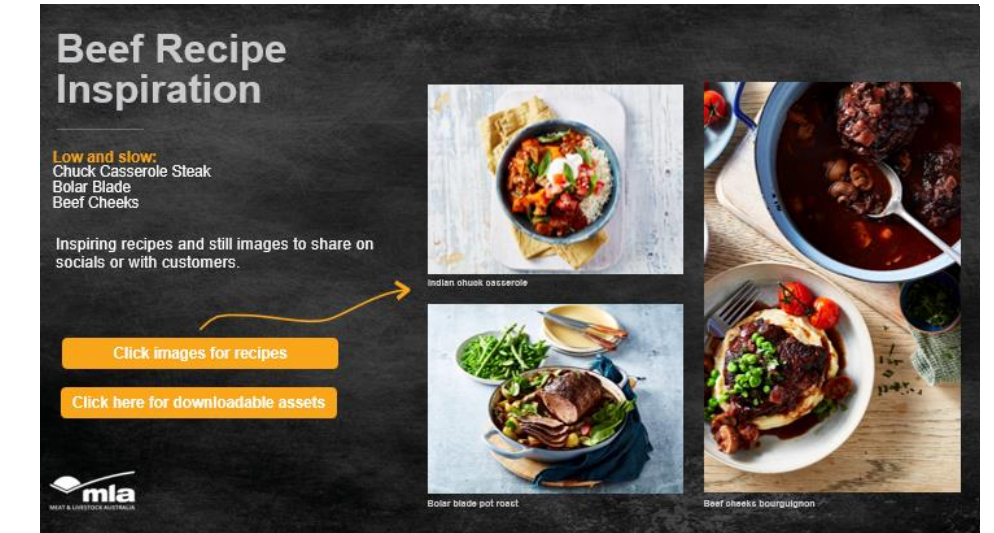
## Activity Calendar



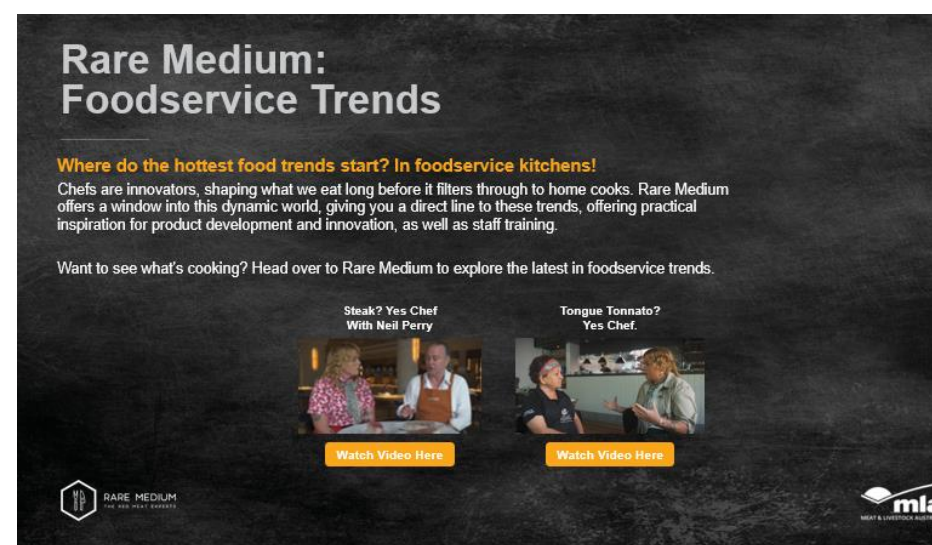
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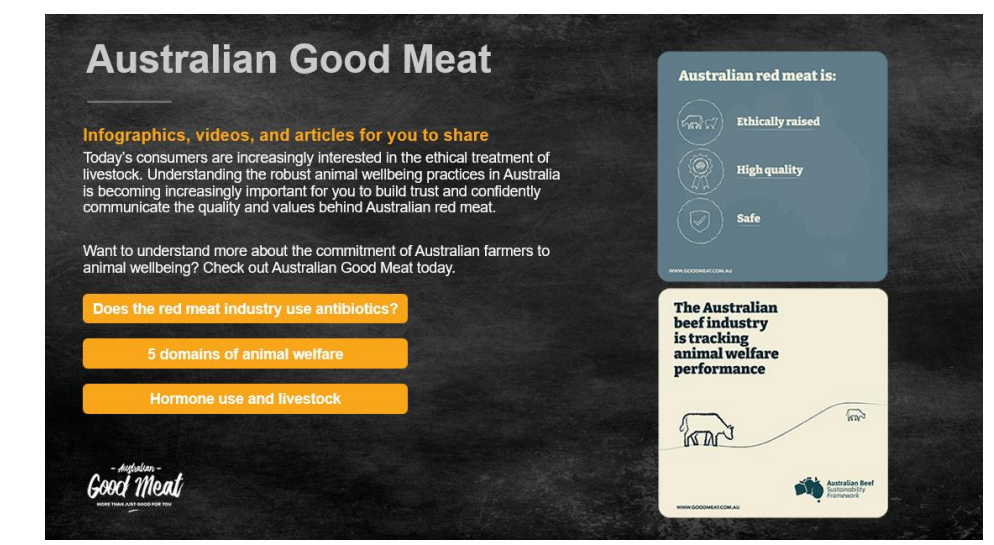
## Recipe Inspiration



## Rare Medium Trends



## 2025 Nestlé Golden Chef's Hat Award



## 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

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# Market share

Australia 52wks ending 23.03.25

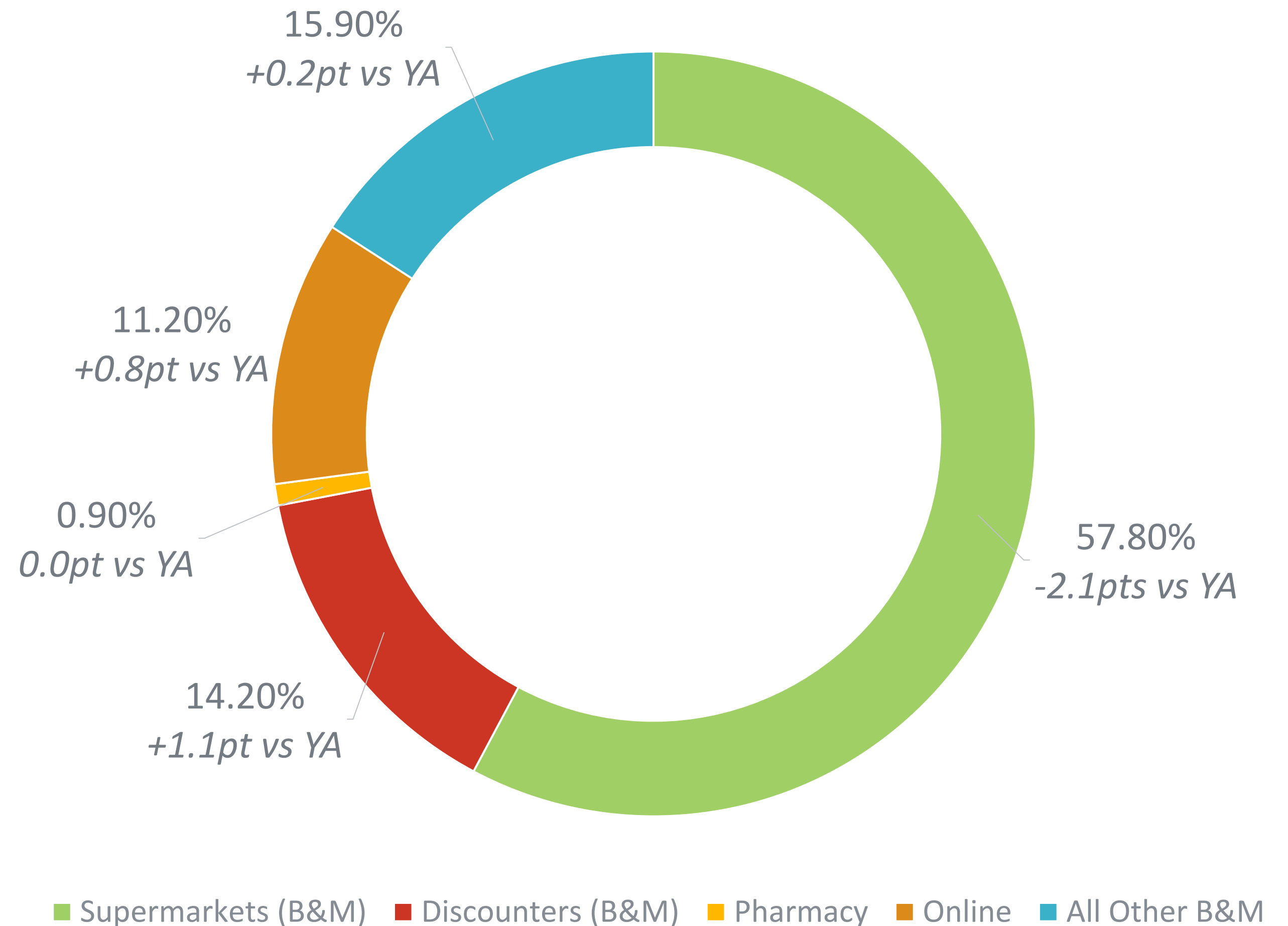
Whilst traditional supermarkets retain the lion's share of trade, their channel was the only one to experience shrinkage vs YA.

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



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# Value growth

Australia 52wks ending 23.03.25

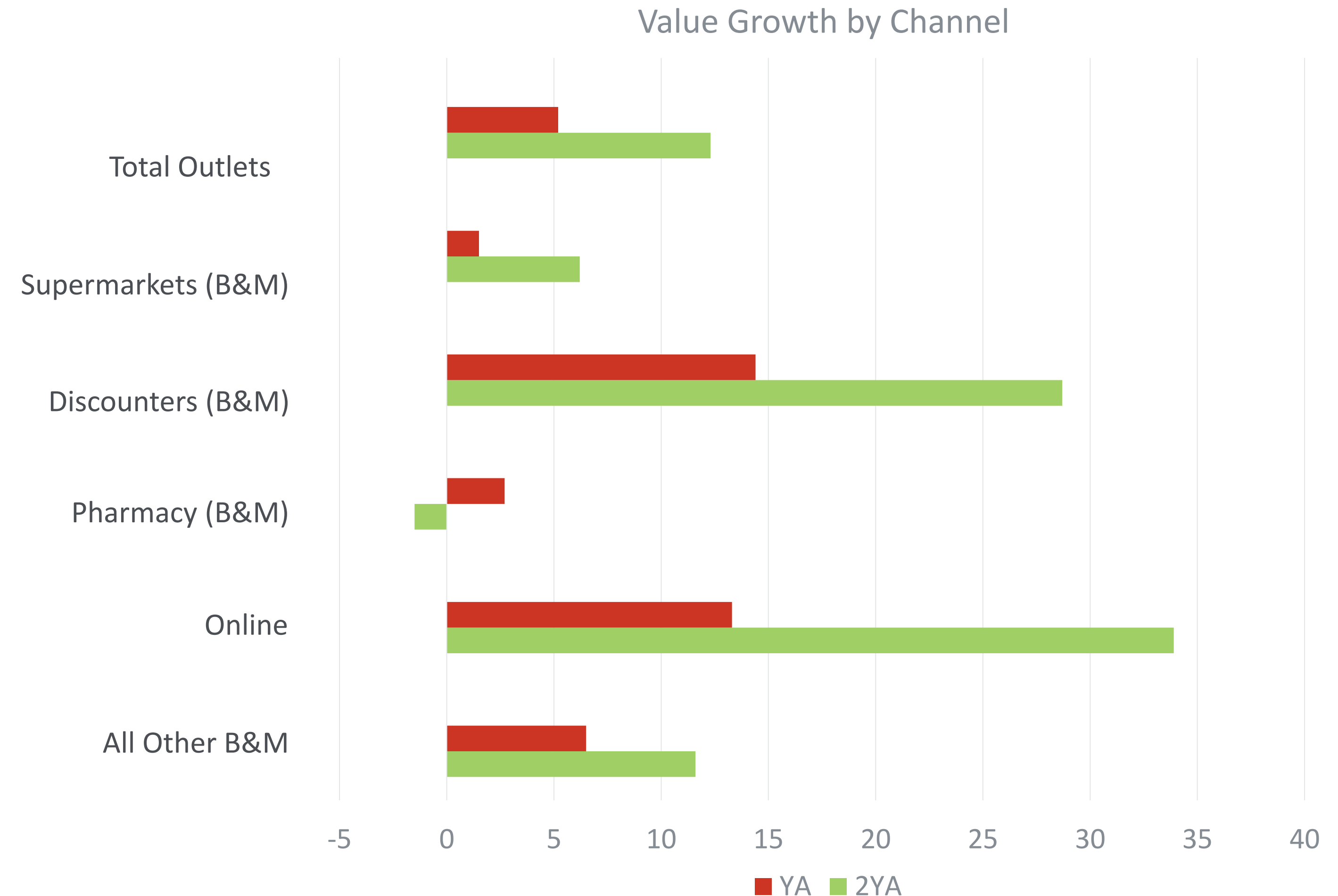
**Discounters and Online have seen significant growth vs YA, outstripping all other channels.**

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



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# Loyalty

Australia 52wks ending 23.03.25

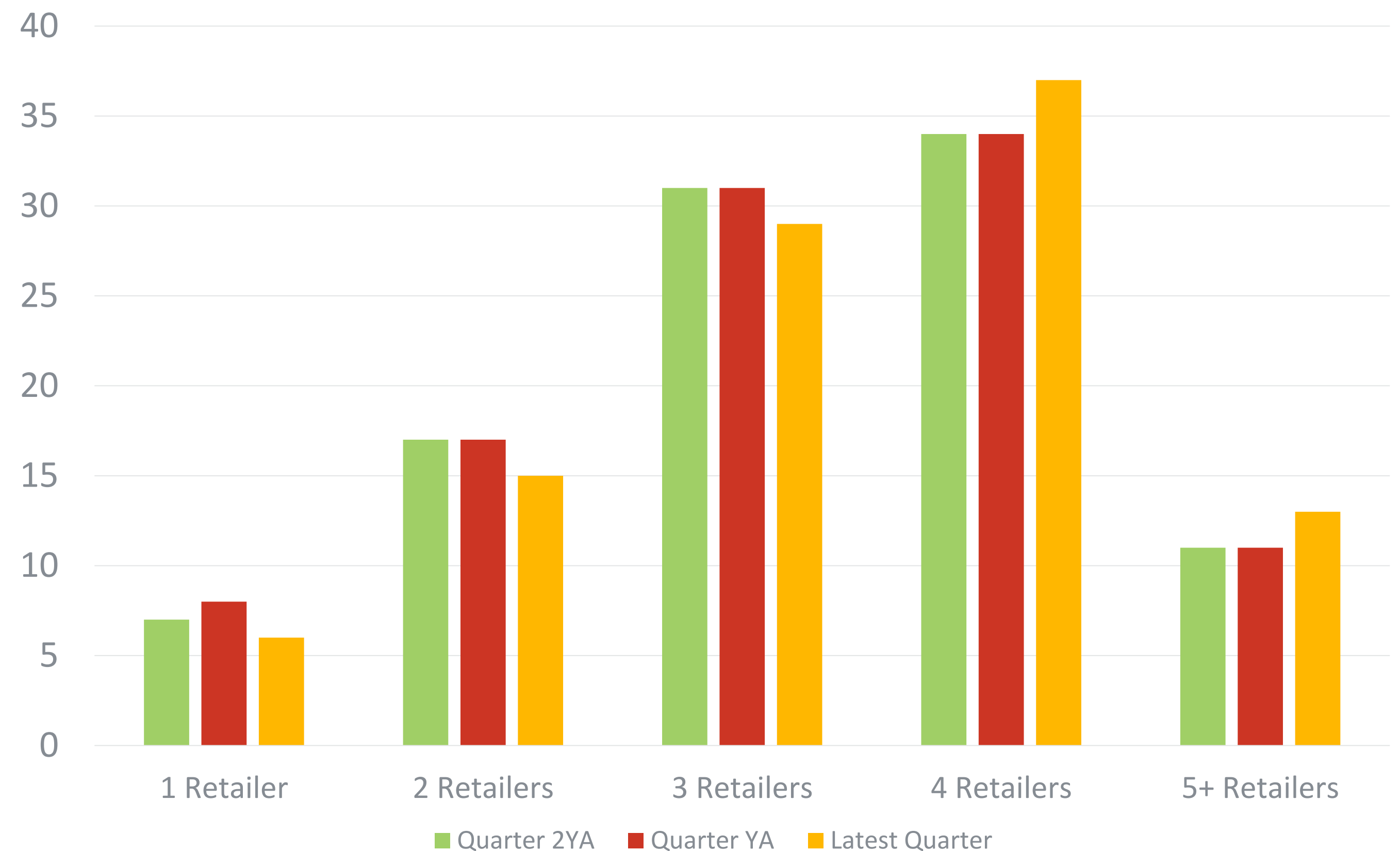
More shoppers are shopping around for their grocery needs.

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:



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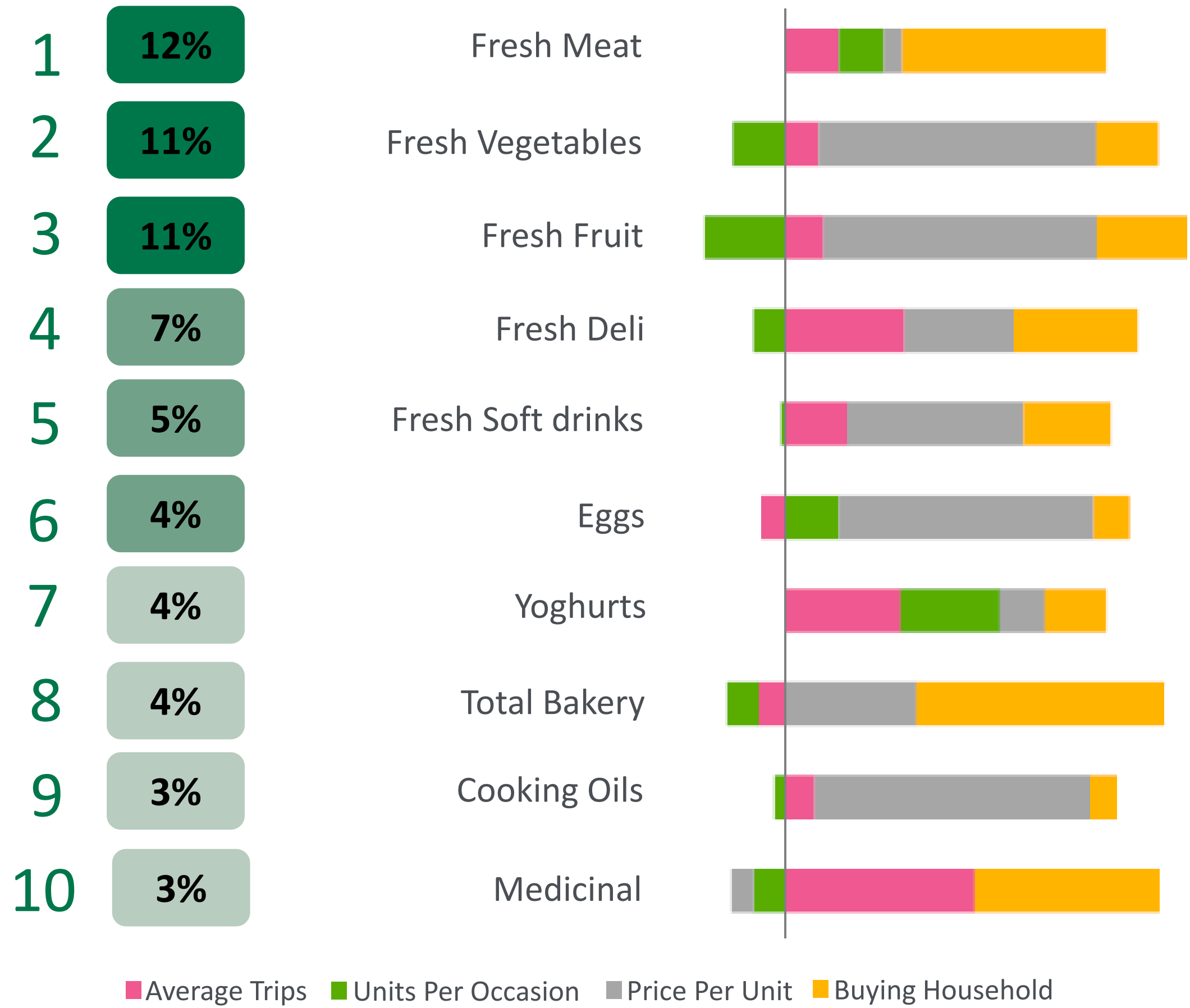


# Freshness

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)



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





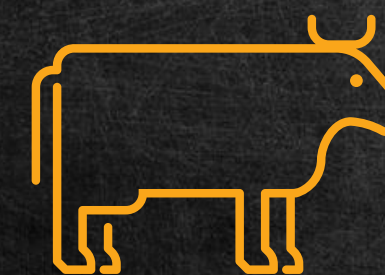
# Retail performance

Australia 12wks ending 20.04.25\*



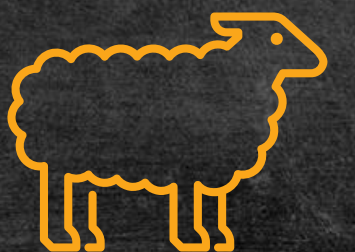
Total grocery continued growth momentum increasing +8.7% on account of more trips and rising prices

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*


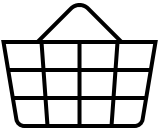
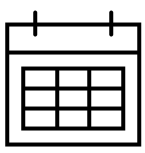


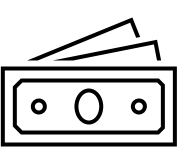
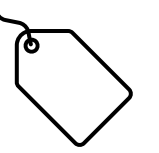


# Summary

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%

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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%



# 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	

Share the Lamb  
100% AUSTRALIAN

## 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

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## 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



RARE MEDIUM  
THE RED MEAT EXPERTS





# 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**



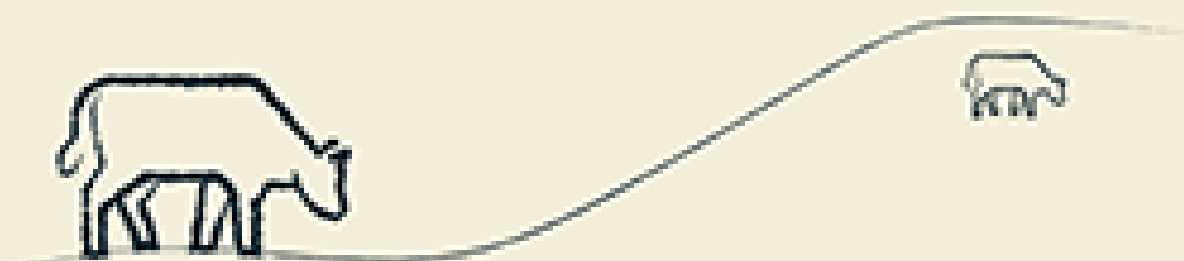
**High quality**



**Safe**

[WWW.GOODMEAT.COM.AU](http://WWW.GOODMEAT.COM.AU)

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



**Australian Beef Sustainability Framework**

[WWW.GOODMEAT.COM.AU](http://WWW.GOODMEAT.COM.AU)



**THANK YOU!**



# Meat & Livestock Australia

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