



# WINTER 2026

INSIGHTS, ASSETS + INFORMATION TO  
USE IN YOUR BUSINESS TO DRIVE  
DEMAND FOR BEEF AND LAMB

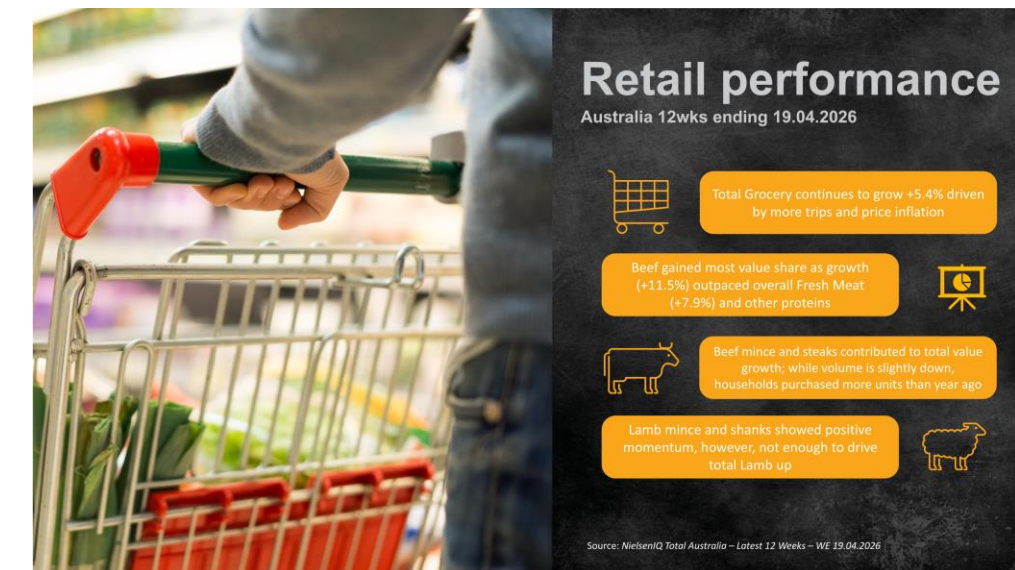


# Index of Seasonal Resources

CLICK IMAGE TO JUMP TO THE SECTION OF INTEREST



SUPPLY FORECASTS



RETAIL PERFORMANCE



BRAND CAMPAIGNS + ASSETS



RARE MEDIUM – RED MEAT READY



RED MEAT FOOD TRENDS

# Cattle Industry Projections

2026



**Herd:** 30.8m

**Slaughter:** 9.45m head

**Carcase Weights:** 307 kg/head

**Production:** 2.9m tonnes cwt

- Following the highest production, slaughter and export levels since the 1970s, the herd is expected to remain broadly stable.
- Despite slightly lower carcass weights in 2026 – driven by a higher proportion of grassfed cattle being turned off – beef production is expected to approach record levels and exceed 2.9 million tonnes.
- Increased production will support record export volumes of 2.3m tonnes cwt.
- The national herd is, however, expected to begin declining between 2027–28 due to elevated slaughter, driven by strong global demand, gradually reducing the pool of available cattle.

[CLICK TO VIEW 2026 CATTLE INDUSTRY PROJECTIONS & WEBINAR](#)



# Sheep Industry Projections

2026



- ➔ **Flock:** 67.1m
- ➔ **Lamb Slaughter:** 21.86m head
- ➔ **Lamb Production:** 537,000 tonnes cwt

- Challenging seasonal conditions continue to weigh on the flock.
- Lower turn-off is set to tighten sheepmeat availability, while productivity gains continue to support output.
- Despite the decline in sheepmeat production, lamb output is expected to remain high by historical standards, with 2026 production forecast to be the fourth-largest on record.
- Export conditions remain mixed, although tighter global supply continues to support demand for Australian sheep products

[CLICK TO VIEW 2026 SHEEP INDUSTRY PROJECTIONS & WEBINAR](#)





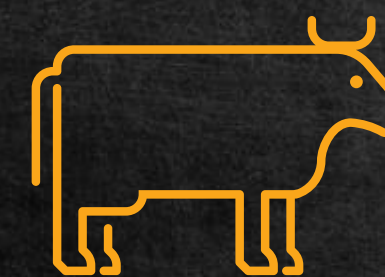
# Retail performance

Australia 12wks ending 19.04.2026



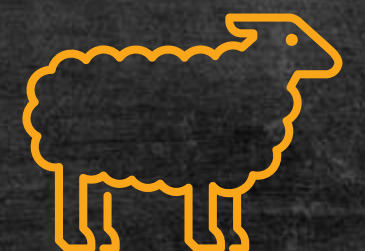
Total Grocery continues to grow +5.4% driven by more trips and price inflation

Beef gained most value share as growth (+11.5%) outpaced overall Fresh Meat (+7.9%) and other proteins



Beef mince and steaks contributed to total value growth; while volume is slightly down, households purchased more units than year ago

Lamb mince and shanks showed positive momentum, however, not enough to drive total Lamb up




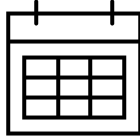
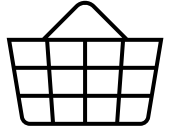

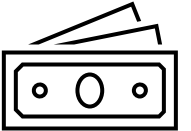
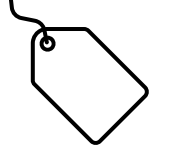
# Retail summary

Australia 12wks ending 19.04.2026

The expansion of the steak category is continuing to see growth for beef in value terms, while volume has decreased slightly – driven by households purchasing smaller cuts, rather than less beef items. E.g. corned silverside and large roast items.

Lambs increasing prices have seen overall volumes down – mince and shanks have seen positive growth in both value and volume, however, not enough to offset the declines across all other cuts.

Reach out to us for more information

	Household KPIs				Category KPIs		
							
	Penetration	Penetration vs YA	Frequency vs YA	Vol per Shop vs YA	Purchase Volume Vs YA	Purchase Value vs YA	\$/KG Vs YA
Fresh meat	93.4%	(0.5)	2.0%	(2.3%)	1.0%	7.9%	6.9%
Beef	80.8%	(0.9)	0.1%	(1.6%)	(0.8%)	11.5%	12.4%
Lamb	43.9%	(3.9)	(2.2%)	(5.1%)	(13.1%)	(1.4%)	13.5%

# How are people shopping?

Australia 52wks ending 22.03.2026

TOTAL FMCG:

 **+6.1%**  
Value Growth  
+11.8% vs 2YA

 **+2.8%**  
Volume Growth  
+8.7% vs 2YA

**Total FMCG grocery sales continue to grow despite price rises, but increased trip frequency and smaller basket sizes indicate tightening household budgets.**



Average Trips  
+4.4% vs YA  
+7.5% vs 2YA



Spend per trip  
-0.4% vs YA  
-0.2% vs 2YA



Buying Households  
+2.0% vs YA  
+4.2% vs 2YA



Vol Per Trip  
-3.5% vs YA  
-2.9% vs 2YA

Reference: NielsenIQ Homescan | 52 weeks to 22.03.2026 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.

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# FY27 domestic marketing activity

Make the most out of your programs by aligning activities with our calendar

FY27	2026						2027					
	Q1			Q2			Q3			Q3		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
<b>BRAND CAMPAIGNS</b> ● BEEF ● LAMB	The Greatest FIFA	You're Thinking Beef		The Greatest				You're Thinking Beef		The Greatest		
		Beef Ethnicity							Beef Ethnicity			
	Generation Lamb							Summer Lamb			Generation Lamb	

Share the Lamb  
100% AUSTRALIAN

## Generation Lamb

Win the next generation of Lamb lovers through comedy, culture and kitchen confidence.

## Summer Lamb

Create an unmissable cultural moment that positions Lamb as the food to celebrate the Aussie Summer.



## Aussie Beef. The Greatest.

Inspire Australians to choose Beef by reminding them it's the greatest

## You're thinking Beef

Increased consideration for Beef during midweek by showcasing its ease, versatility and taste

# NEW episodes to share: Generation Lamb

The latest episodes in our content series – The Roast + Grandfluent – have dropped to win the next generation of Lamb lovers through comedy, culture and kitchen confidence.



**'The Roast'** / A weekly comedy podcast series where nothing is sacred and everything is up for a good roasting. Including the lamb (which we actually do cook up on the show).



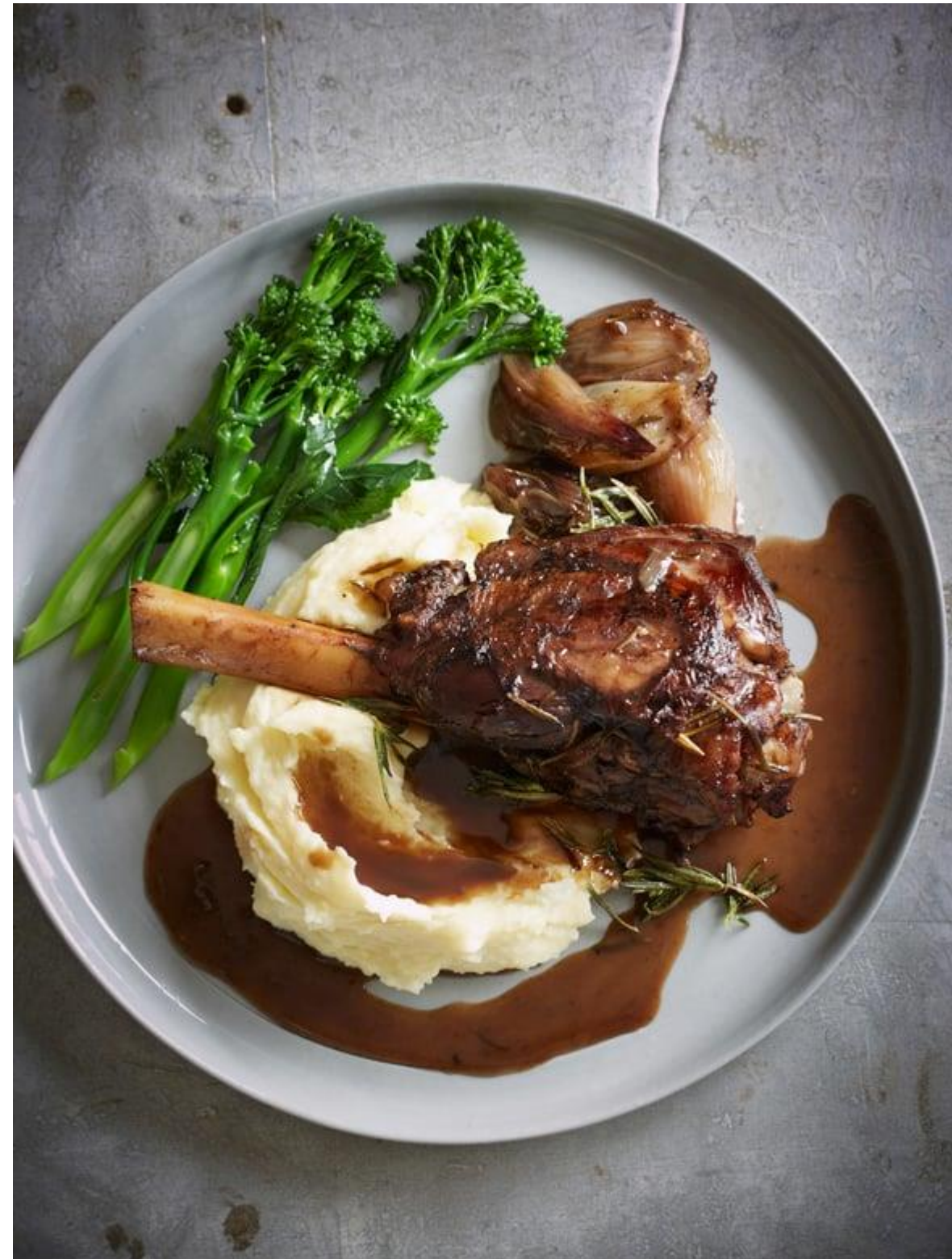
**'Grandfluent in Lamb'** / We visit a different grandparent each week to learn delicious family lamb secrets and recipes. Your nonno makes the best spezzatino? We're coming over.

Watch and share on your socials or with your customers

# Lamb recipe inspiration

## LAMB CUTS IN FOCUS: SHANKS | LEG | SHOULDER

Inspiring recipes and still images to share on socials or with customers. **CLICK ON** the images below to access the recipe and click on the active red button for high resolution still images.



Red Wine Balsamic & Rosemary  
Braised Lamb Shanks



Butterflied Lamb Leg with Lemon &  
Herb Cream



Chilli Soy Glazed Lamb

# Season 2 now showing: Raise the Steaks

3 FULL LENGTH EDUCATIONAL VIDEOS + 9 SOCIAL CUTDOWNS

Raise the Steaks Season 2 continues to deliver inspiration and education on everything beef.

This Season shows the audience how to shape their eating experience of steak from BBQ methods, to different cuts, to marinades. Led by resident beef expert Chef Sam Burke, each episode breaks down a key steak topic with side-by-side cooking comparisons and real taste tests.

Use these assets across your social channels, websites or digital communications, or share them directly with your customers to help build confidence with cooking beef.

[CLICK HERE TO ACCESS ASSETS](#)



*BBQ: Gas, Charcoal, Woodfire*



*CUTS: Tasty, Tender, Happy Medium*



*MARINADES: Italian, Mexican, Asian*



# Cooking with Danielle

**CUTS IN FOCUS:**  
MINCE, SHORT RIBS, FLANK STEAK

A recipe content series supports you to promote BEEF through inspiring, achievable mid-week meal ideas.

Fronted by chef, restaurateur and influencer Danielle Alvarez (*Culinary Director Sydney Opera House, ex Head Chef - Fred's*), the series features recipes to showcase how beef can be cooked simply, confidently and deliciously at home.

Within this pack you'll find three recipe videos, along with matching written recipes and imagery to support multi-channel use.

Use these assets across your social channels, websites or digital communications, or share them directly with your customers to help inspire everyday cooking with beef.

[CLICK HERE TO VIEW THE PLAYLIST](#)

## 2 FULL LENGTH RECIPE VIDEOS



# Beef recipe inspiration

## BEEF CUTS IN FOCUS: RUMP ROAST | CHUCK STEAK | BRISKET

Inspiring recipes and still images to share on socials or with customers. **CLICK ON** the images below to access the recipe and click on the active red button for high resolution still images.



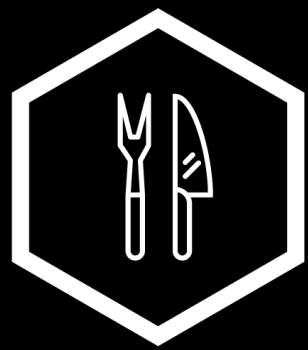
Beef Rump Roast with Chimichurri



Chuck Rendang Curry



Southern Spice Rubbed Brisket



RARE MEDIUM  
THE RED MEAT EXPERTS

# RED MEAT READY: CLUBS



Tap into our new professional masterclass series on how to maximise value and inspire contemporary menu development with beef and lamb specifically for clubs.

Led by respected industry professionals and culinary experts, the session delivers practical techniques, menu innovation and approachable ideas that can be confidently implemented in busy club kitchens.

The Red Meat Ready: Clubs toolkit includes:

- **Highlights reel of chef & butchery demonstrations**
- **Recipe Cards** *for easy application within your venue*
- **Point of Sale Kit** *for use directly on venue screens*

[CLICK HERE TO ACCESS TOOL KIT](#)

# RED MEAT READY recipe inspiration

## ONE CUT – MULTIPLE REVENUE STREAMS: LAMB SHOULDER

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

[CLICK HERE FOR RECIPES + IMAGES](#)



### ***Crispy Lamb Birria Tacos***

Chilli braise, Mexican street spices,  
green pico de gallo, charred corn, coriander, lime



### ***HSP Loaded Lamb Fries***

Garlic yoghurt, secret spices, spring onion,  
Jack cheese, feta

# RED MEAT READY recipe inspiration

## ONE CUT – MULTIPLE REVENUE STREAMS: ROSTBIFF

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

[CLICK HERE FOR RECIPES + IMAGES](#)



### ***Panino con Bistecca*** *(Steak Sandwich)*

*Seared rosbiff, beef bacon jam, chimichurri  
slaw, fermented chilli and koji aioli, tobacco  
onions, toasted Tuscan flatbread*



### ***Nam Tok Neua*** *(Thai beef salad)*

*Marinated rosbiff, crisp Asian  
greens, vermicelli noodles, Nan  
Yam dressing and toasted rice*

# Butchery in focus: Beef Rostbiff

One of the most commercially rewarding and versatile cuts of the beef carcass, the Rostbiff is the main centre section of the Rump, that has had the rump cap removed leaving you with an easier to portion primal with minimal waste that suits a variety of meal solutions. It offers exceptional flavour, multiple format options, and strong margin potential across both foodservice and retail channels.

Cook method	Foodservice Applications	Retail Applications
<b>LOW &amp; SLOW: Perfect for braising, roasting, and pulled beef applications</b>	<ul style="list-style-type: none"> <li>Braised beef dishes (bourguignon, ragu, curries)</li> <li>Carvery roasts with strong yield</li> </ul>	<ul style="list-style-type: none"> <li>Family roasts</li> <li>Ready-to-cook meal solutions</li> </ul>
<b>QUICK COOK: When properly prepared, delivers excellent results</b>	<ul style="list-style-type: none"> <li>Steak sandwich and burger fillings</li> <li>Schnitzels</li> <li>Stir fries</li> </ul>	<ul style="list-style-type: none"> <li>Pre-marinated steaks</li> <li>Premium BBQ steaks</li> <li>Stir-fry and diced beef packs</li> </ul>



**CLICK ON** the HAM order numbers for the cuts displayed in the video

**[Beef Rostbiff – HAM 2110](#)**



RARE MEDIUM  
THE RED MEAT EXPERTS

# TREND SPOTLIGHT

Rare Medium's 2026 Red Meat Trends showcases the innovation, creativity and evolving consumer tastes shaping the future of Australian beef and lamb across the country and around the world.

Developed in consultation with chefs, producers and industry experts, the report identifies six key movements – the Sizzling Six – that show how red meat is cooked, served and enjoyed in the year ahead.

Here we shine a spotlight on one of the trends – Remixed Roots.



[CLICK TO SEE THE FULL REPORT](#)



## REMIXED ROOTS

*Global flavours reimaged – born elsewhere, belonging everywhere*

### Key Drivers

- ✓ Increased travel and ingredient exposure via social media
- ✓ Creativity in fusion without cultural appropriation
- ✓ Chefs foreground identity and family history; diners crave authentic storytelling

# TRENDSPOTLIGHT

## REMIXED ROOTS

*“Modern Australian cuisine is quite multicultural – there’s bits and pieces from here and there and I think it makes it unique. For me when I write my menus, I always focus on traditional flavours; I love intense flavours from different parts of the world, but I try to approach it in a way that is understandable for the Australian diner.”*

KHANH NGUYEN | EXECUTIVE CHEF | KING CLARENCE

Executive chef Jean-Paul El Tom embodies the concept of remixed roots – telling the stories and experiences of Australian migrants through the food on his menus. Here, JP takes inspiration from the many stuffed pepper dishes across Europe and elevates it using rump cap mince – lightly fried and finished with paprika spice.



The Beef Wellington has had quite a time in the spotlight – from high-end menus, to Sunday specials. With cost-of-living pressures – the classic beef wellington gets a pub makeover with beef mince replacing eye fillet for an affordable special that ticks all the taste boxes.



Mexican meets Japanese in this decadent beef birria ramen where the traditions and techniques of both dishes harmoniously and deliciously combine. Beef forequarter is slowly braised in a large pot of perpetual-broth before the beef pieces are picked and the broth replenished. It’s a long, slow process – served fast and fresh.

# Fine Food Australia 2026 partnership with Rare Medium

Rare Medium, MLA's foodservice program, is proud to partner with Fine Food Australia 2026 to bring red meat inspiration, education and industry storytelling to the nation's premier foodservice event. Together, we'll connect with thousands of chefs and operators, delivering insights, ideas and practical knowledge that build confidence with Australian beef, lamb and goat to inspire their place on menus now and into the future.

*Discover what's next in red meat at Fine Food Australia 2026*



RARE MEDIUM  
THE RED MEAT EXPERTS

 Melbourne Convention & Exhibition Centre  
 31 August – 3 September 2026

[CLICK FOR MORE INFORMATION OR  
TO REGISTER FREE](#)



**THANK YOU!**

# Meat & Livestock Australia

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