



AUTUMN 2026

Insights, Assets + Information



Index of Resources

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NEW: Australian market snapshot



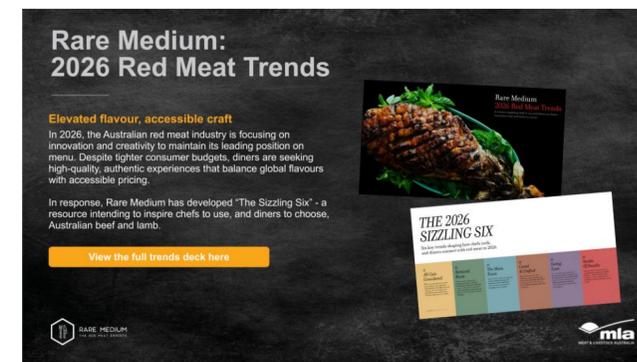
Retail performance and shopper insights



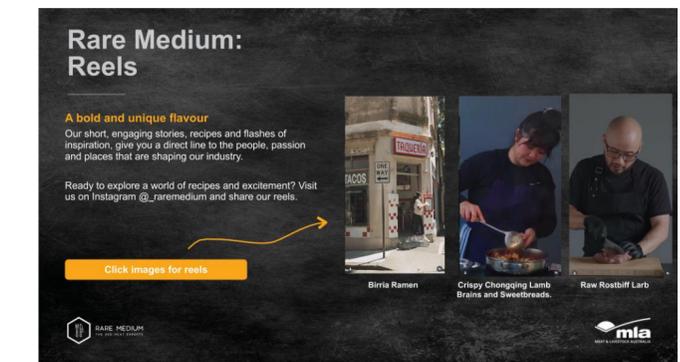
Campaign Activity Calendar + Assets you can use



Recipe Inspiration



NEW: 2026 Red Meat Trends



Rare Medium Reels & Inspiration

NEW: market snapshot

An overview of the changing market dynamic in Australia, uncovering the key drivers behind channel performance and how to meet consumer expectations.

Australia



MARKET SNAPSHOT | BEEF & SHEEPMEAT



MARKET

Largest single market with strong year-round demand for Australian beef and lamb



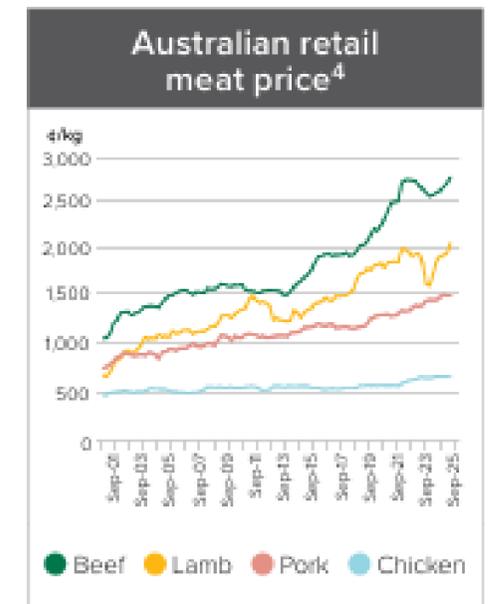
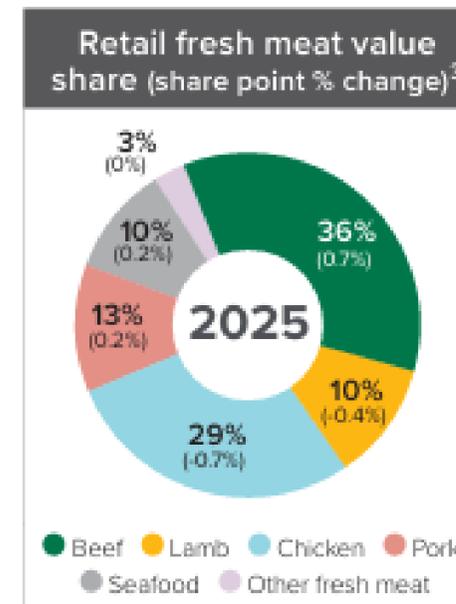
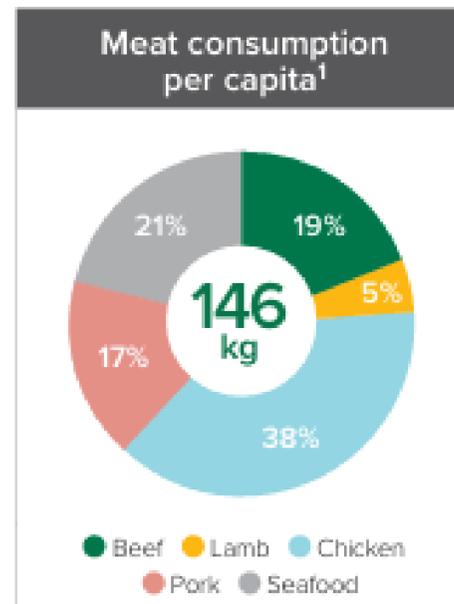
CONSUMERS

Diverse consumers seeking value and versatility as tastes and expectations evolve



GROWTH

Trusted, everyday quality with growing opportunities in value and convenience



[Read the full report here](#)

Cattle & Sheep projections



Release: 23rd March

Webinar: 30th March (Beef)
31st March (Sheep)

Register here: Cattle

Register here: Sheep



Industry projections 2024

Australian cattle – September update

MLA's Market intelligence – insights@mla.com.au

KEY POINTS

- In 2024, elevated turn-off from breeding cows is expected to result in the national herd easing.
- Slaughter is expected to rise, driven by a larger and more productive herd.
- US beef production is declining, creating an opportunity for Australian beef in the global market.

KEY 2024 NUMBERS

- ➔ **Herd:** 30.2 million head
- ➔ **Slaughter:** 8.18 million head
- ➔ **Carcass weights:** 310 kg/head
- ➔ **Production:** 2.53 million tonnes cwt



*Graphic illustrates year-on-year change

Summary

The national cattle herd has reached and passed a cyclical peak after operating at maturity for the past 12 months. Elevated turn-off will ensure a higher supply of finished beef, though turn-off of retained and utilised cows will stabilise the breeding herd.

Northern:

- The northern herd is expected to stabilise in 2024 and 2025 as average-to-good wet seasons will continue to support a large, productive breeding herd and increasing numbers of cattle exported into South-East Asia.

Southern:

- Southern Australia will drive the contraction of the herd over the forecast period, as strong overseas beef demand supports higher turn-off in a now-mature herd.

The Australian cattle herd is expected to maintain a mild destock over the forecast period, as the age profile of the herd continues to mature and strong overseas demand encourages turn-off of processor-ready cattle.

Slaughter is expected to rise above 10-year averages but remain well below the all-time peak previously set in 2014. We expect seasonal conditions to remain largely average in southern Australia and average-to-good in northern Australia, meaning that increases in turn-off will be driven by increasing availability of processor-ready cattle, as opposed to a climate-driven need to reduce stocking rates.

In particular, much of the breeding herd that was retained to power the rebuild is now mature and ready to be turned off. We expect that much of the rise in slaughter will be from this cohort, which will push the female slaughter rate (FSR) above average. This dynamic has been evident across the first two quarters of 2024 and will continue.



How are people shopping?

Australia 52wks ending 28.12.2025

TOTAL FMCG:

 **+6.2%**
Value Growth
+11.9% vs 2YA

 **+3.9%**
Volume Growth
+9.6% vs 2YA

Grocery sales continue to grow despite price rises, but increased trip frequency and smaller basket sizes indicate tightening household budgets



Average Trips
+4.7% vs YA
+7.2% vs 2YA



Spend per trip
-0.6% vs YA
+0.1% vs 2YA



Buying Households
+2.1% vs YA
+4.2% vs 2YA



Vol Per Trip
-2.8% vs YA
-1.9% vs 2YA

Reference: NielsenIQ Homescan | 52 weeks to 28/12/2025 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.

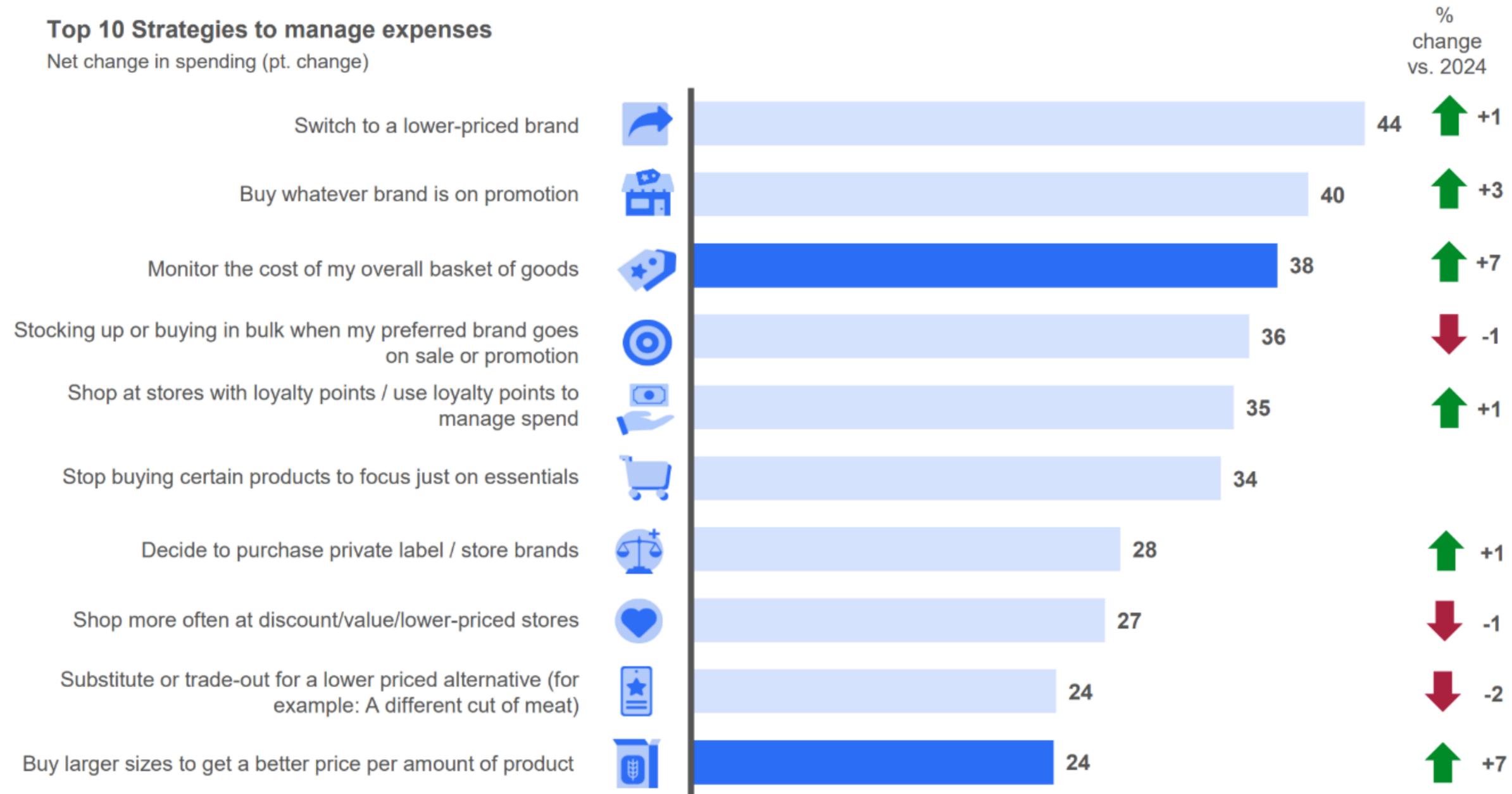
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Shopper behaviour

As cost of living pressures continue, shoppers are scrutinising price, promotions and monitoring the overall cost of their basket.

Top 10 Strategies to manage expenses

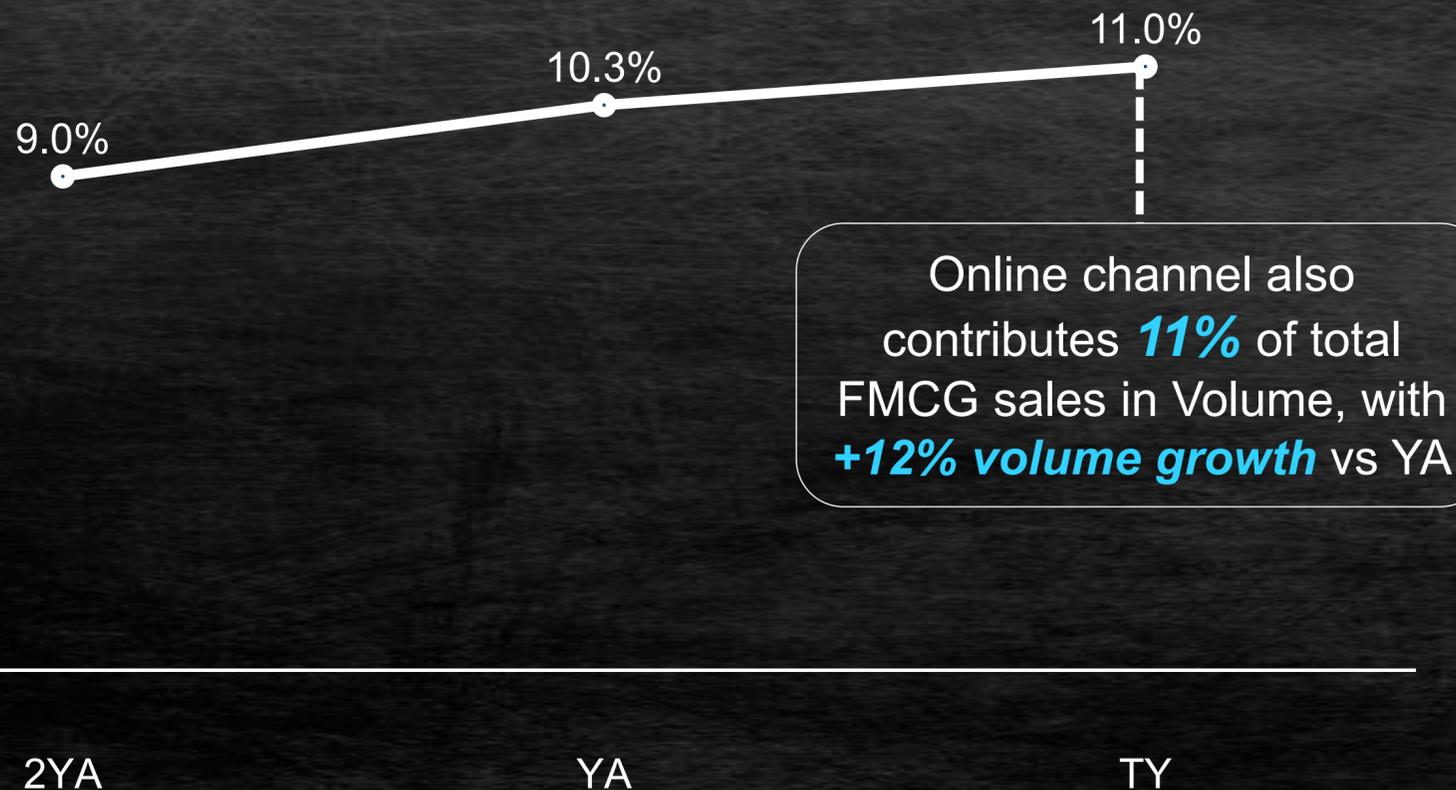
Net change in spending (pt. change)



Shopper behaviour

Omni-shopping has become more common, with online channels continuing to gain momentum through shopper expansion and increased basket values.

Value Share of Online Channel



In the latest 52 weeks:

60%

Aus Households are **cross-shopping** in both Online and Brick & Mortar, up +4.1pts vs YA

2x

Avg \$ spend per trip Online (\$108) vs Brick & Mortar (\$48)

65%

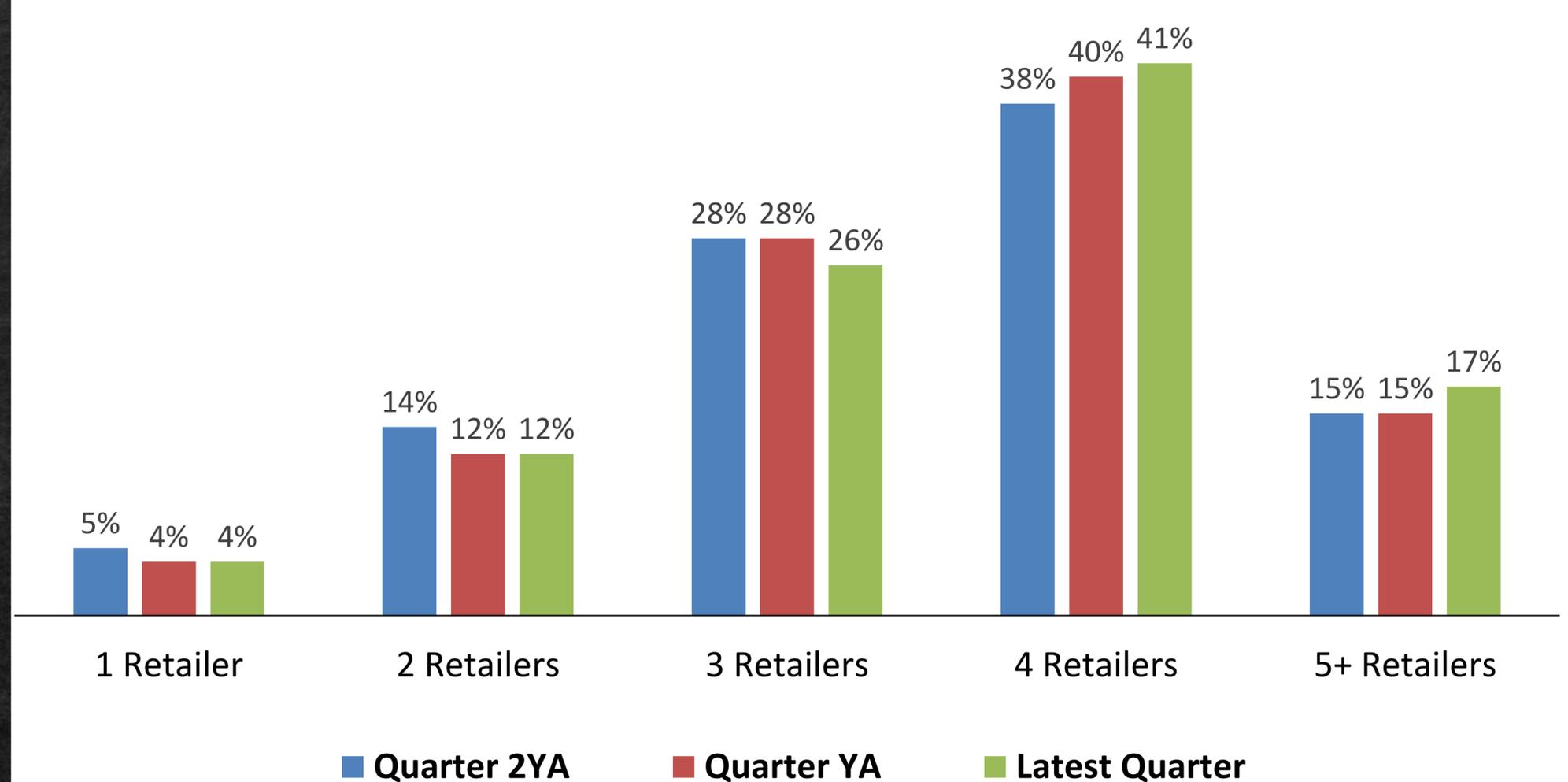
of Online growth is driven by **new shoppers** and **increased spend amongst existing shoppers**

Shopper behaviour



*of shoppers shop in 3+ retailers,
up +0.7pt vs YA*

Shopper loyalty declines as more consumers spread their spend across 4 or more retailers.





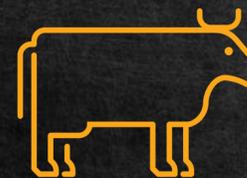
Retail performance

Australia 12wks ending 25.01.2026



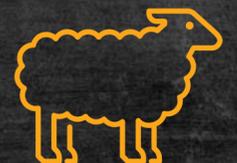
Total Grocery continues to grow +5.9% driven by more trips and higher prices

Beef gained most value share as growth (+13.2%) outpaced overall Fresh Meat (+9.3%) and proteins



Steaks and mince key drivers of beef value growth; mainstream steaks lead volume gains

Lamb benefitted from the festive season, delivering value growth (+5.6%) as shoppers bought more per trip despite higher prices



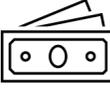
Retail summary

Australia 12wks ending 25.01.26

Beef has continued to see growth across most metrics. Value and \$/kg are supported by expansion in the steak category.

Lamb's growth in value can be mostly attributed to increasing \$/kg. However, some cuts have seen strong volume growth over this period – namely Shoulder and Chops

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	93.7%	(0.3)	2.1%	0.3%	4.2%	9.3%	5.0%
Beef	80.8%	(0.9)	0.3%	(0.7%)	0.6%	13.2%	12.5%
Lamb	45.0%	(2.1)	(4.9%)	2.1%	(5.4%)	5.6%	11.6%

FY26 Activity

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

FY26	2026					
	QUARTER 3			QUARTER 4		
	JAN	FEB	MAR	APR	MAY	JUN
BEEF		YOU'RE THINKING BEEF		THE GREATEST		
LAMB	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.

You're Thinking Beef

Build up the mid-week meal by increasing beef consideration through ease and versatility

Aussie Beef: The Greatest

Back on the air and in social feeds, our Beef The Greatest advertising campaign continues to showcase why beef is the number one choice when you want the best.

As the most persuasive beef campaign of the past decade, it is a great opportunity to align your promotional activities to amplify impact and accelerate purchase.

The next burst: Apr – Jun 2026

Here's a handy pack of materials you can use to support your promotional efforts. It includes the key visual + beef logos.

[Click for assets](#)

YOU'LL WANT SECONDS



Recruiting the next generation of lamb consumers

To widen Lamb's appeal to younger consumers by increasing their consideration for the protein, Australian Lamb has launched a new content series.

The 'always on' content positions lamb as delicious, affordable and easy across TikTok, Instagram and YouTube:

- **The Roast podcast:** with Lachy McIntyre and Edan McGovern. Each week they'll get a mate (or someone pretending to be) to roast life's little annoyances - all while whipping up some tasty with lamb!
- **Grandfluencers:** A warm, personality-led series that celebrates culture, connection and the timeless role lamb plays around the table featuring the real experts in the kitchen, our grandparents.



Watch and share on your socials or with your customers

Consumer Beef Recipe Inspiration

Cuts that count:

Rump
Bolar blade
Topside

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

[Click Images For Recipes](#)

[Click Here For Downloadable Assets](#)



Herb crusted topside roast



Grilled beef & pumpkin wraps



Slow cooked beef ragu

Consumer Lamb Recipe Inspiration

Cuts that count:

Leg
Shoulder
Shanks

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

[Click Images For Recipes](#)

[Click Here For Downloadable Assets](#)



Roast lamb roll with chilli and parmesan slaw



Mediterranean butterflied lamb



Warm lamb salad

Foodservice Beef Recipe Inspiration

Cuts that count:
Short ribs
Blade

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

[Click images for recipes](#)

[Click here for downloadable assets](#)

Braised yellow curry beef short rib



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

Stir fried Sichuan pepper beef noodles



Perfect for: Casual dining,
cafes, pubs, clubs, and
hotels

Foodservice Lamb Recipe Inspiration

Cuts that count:

Leg
Ribs

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

[Click images for recipes](#)

[Click here for downloadable assets](#)

Smoked lamb shoulder



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

Braised master stock lamb ribs



Perfect for: Pubs,
clubs, and fine dining

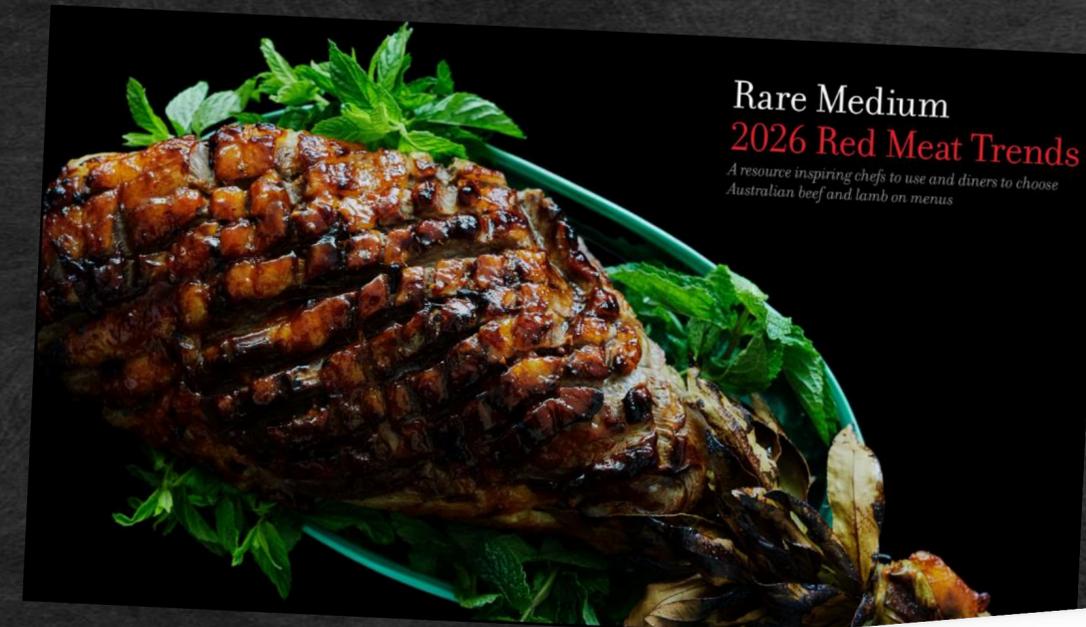
Rare Medium: 2026 Red Meat Trends

Elevated flavour, accessible craft

In 2026, the Australian red meat industry is focusing on innovation and creativity to maintain its leading position on menu. Despite tighter consumer budgets, diners are seeking high-quality, authentic experiences that balance global flavours with accessible pricing.

In response, Rare Medium has developed “The Sizzling Six” - a resource intending to inspire chefs to use, and diners to choose, Australian beef and lamb.

[View the full trends deck here](#)



Rare Medium: Reels

A bold and unique flavour

Our short, engaging stories, recipes and flashes of inspiration, give you a direct line to the people, passion and places that are shaping Australian foodservice.

Ready to explore a world of recipes and excitement? Visit us on Instagram [@_raremedium](#) and share our reels.

Click images for reels



Birria Ramen



Crispy Chongqing Lamb Brains and Sweetbreads.



Raw Rostbiff Larb

Rare Medium: Foodservice Inspiration

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

Get a taste of what is being served on menus around the country to deliver conversation starters with your customers or share on socials.

Red Curry Cheeseburger Sliders

At KIIN in Adelaide you can't go past the red curry cheeseburger sliders. Featuring red curry beef patties (60% grass fed chuck + 40% grain fed brisket mix) on steamed buns with provolone cheese, house-made Thai-flavoured pickles, crispy fried onions, Frenchie's mustard and Japanese mayo - it's a melting pot of Mod Oz flavours.



[Watch video here](#)

Lamb get a 'Lankan twist

The bold flavours of Sri Lanka meet Aussie Lamb at Marshi's Kitchen in the Adelaide Hills. Here, 8-hour overnight Sri Lankan spiced lamb shoulder, kasundi, pickled onions, cumin spiced yogurt and coriander are wrapped in a flaky roti wrap.

[Watch video here](#)



RARE MEDIUM
THE RED MEAT EXPERTS


MEAT & LIVESTOCK AUSTRALIA

THANK YOU!

Meat & Livestock Australia

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