

Exceeding

~~Meeting~~ consumers expectations



1. Eating Quality is an expectation

2. Getting sophisticated with MSA

3. MSA Plus

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Eating quality is an expectation



Consistent quality is important everywhere

HIGHEST CORRELATION WITH VOLUME OF PURCHASE

	2018		2017		2016, 2018		2017		2018				
	Japan	Korea	China	Hong Kong	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	USA	Mexico
1	Is my/my family's favourite meat	Is the most superior meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is easy and convenient to prepare	Is easy and convenient to prepare	Is easy and convenient to purchase	Is an essential part of a healthy diet for growing children	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat
2	Is easy and convenient to purchase	Is my/my family's favourite meat	Is easy and convenient to prepare	The industry is environmentally sustainable	Is easy and convenient to prepare	Consistent quality standards	Is my/my family's favourite meat	Fresh	Fresh	Is my/my family's favourite meat	Tastes delicious	Is easy and convenient to prepare	Can be used in many different meals
3	Is easy and convenient to prepare	Is easy and convenient to prepare	Tastes delicious	The meat is usually tender	Consistent quality standards	Is easy and convenient to prepare	Consistent quality standards	Is easy and convenient to purchase	Is my/my family's favourite meat	Can be used in many different meals	Fresh	Consistent quality standards	Is easy and convenient to prepare
4	Consistent quality standards	Consistent quality standards	Cheaper	Consistent quality standards	Is an essential part of a healthy diet for growing children	Is the most superior meat	The meat is usually tender	Tastes delicious	Can be used in many different meals	Is the most superior meat	Is easy and convenient to purchase	Is an essential part of a healthy diet for growing children	Is an essential part of a healthy diet for growing children
5	The meat is usually tender	The animal is well cared for	Consistent quality standards	Guaranteed safe to eat	Tastes delicious	The industry is environmentally sustainable	Fresh	The meat is usually tender	Is easy and convenient to prepare	Tastes delicious	Is easy and convenient to prepare	Is the most superior meat	The industry is environmentally sustainable

Consumers tell us what matters

An infographic on a parchment-like background listing 15 factors consumers care about, arranged in three rows. Each factor is accompanied by a star rating (1-3 stars) and a horizontal line above and below the text. The factors are: Tropical BREED Content (1 star), Carcass WEIGHT (3 stars), SEX (1 star), HORMONAL GROWTH PROMOTANTS (0 stars), HANGING METHOD (0 stars), CUT Ageing (1 star), MILK-FED VEAL (1 star), pH (3 stars), INDIVIDUAL CUT (0 stars), Cooking METHOD (0 stars), Via SALEYARD (0 stars), MARBLING (0 stars), RIB-FAT MEASUREMENT (1 star), and OSSIFICATION (MATURITY) (1 star). At the bottom, there is an illustration of a herd of cattle in a field with mountains in the background, and a person in a white lab coat and hard hat holding a clipboard.

Tropical
BREED
Content

★ ★ ★
Carcass
WEIGHT

★
SEX

HORMONAL
GROWTH
PROMOTANTS

=====
HANGING
METHOD
=====

★
CUT
Ageing

MILK-FED
VEAL

★ ★ ★
pH

● ● ●
INDIVIDUAL
CUT

Cooking
METHOD

Via
SALEYARD

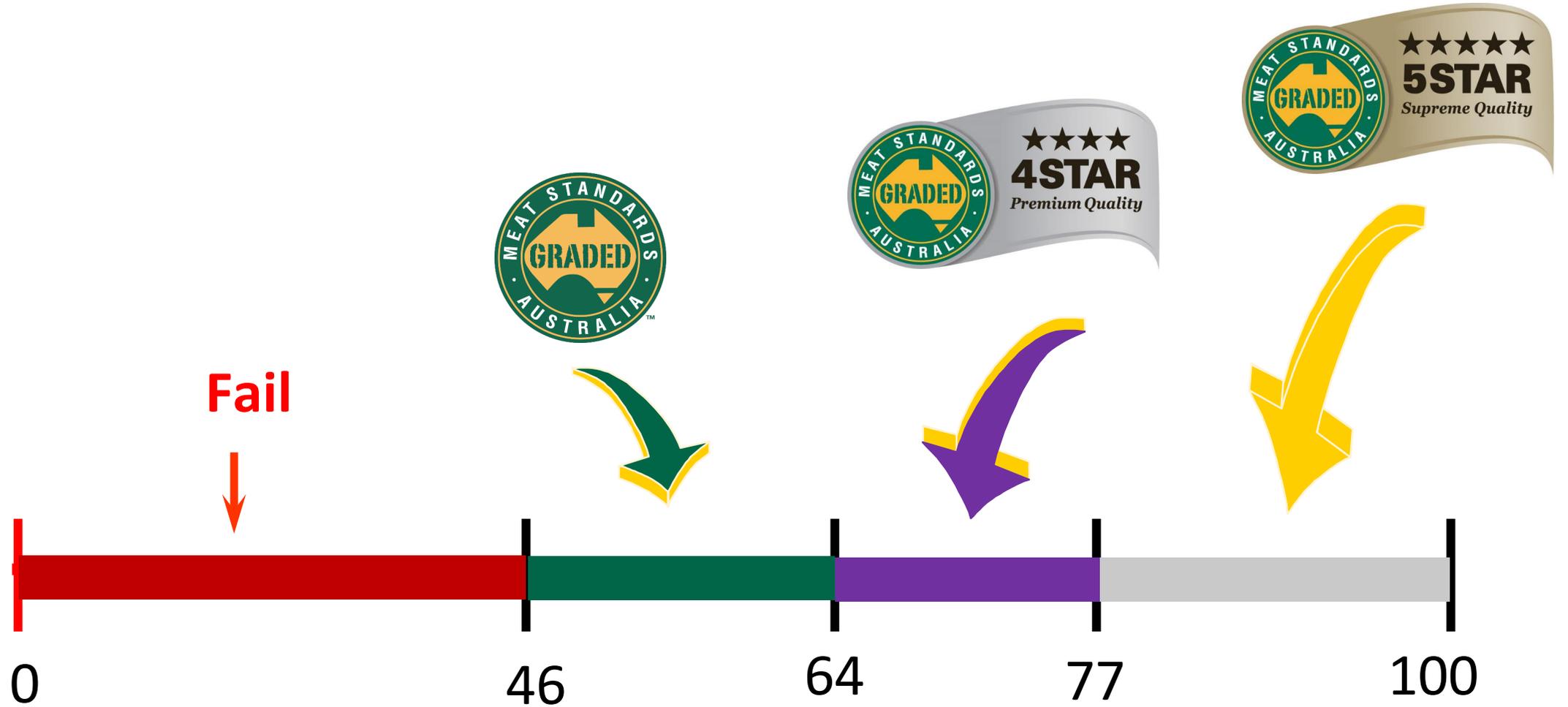
=====
MARBLING
=====

RIB-FAT
MEASUREMENT

●
OSSIFICATION
(MATURITY)



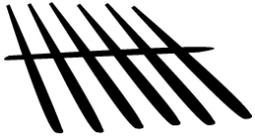
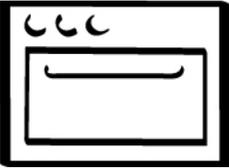
Consumers identify Good-Better-Best



Global consumers will pay more for higher quality



Making beef simple for consumers

Occasion	Meal style						
							
Everyday	3*	\$	\$	\$	\$	\$	\$
Special	4*	\$ x 1.5	\$ x 1.5				
Very special	5*	\$ x 2	\$ x 2				

**Getting sophisticated with MSA to
exceed expectations**



MSA recognised globally for integrity



- > Eating Quality Assured for tenderness, juiciness and flavor
 - > Beef Grading Program developed to predict the eating quality of beef
- <http://processverified.usda.gov/>



- Eating Quality Assured for tenderness, juiciness, flavor
 - Pathways developed to reduce the variation in lamb eating quality
- <http://processverified.usda.gov/>



little joe

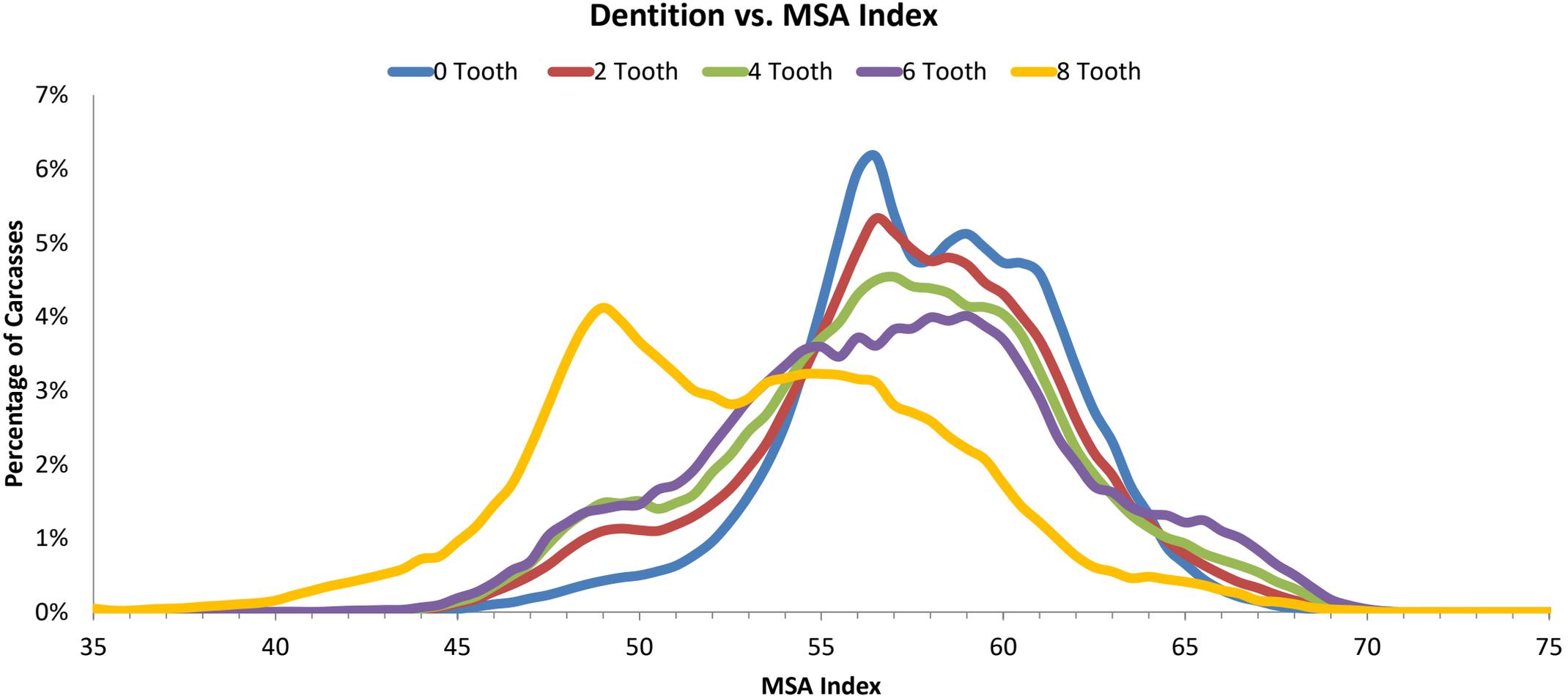


GIPPSLAND NATURAL



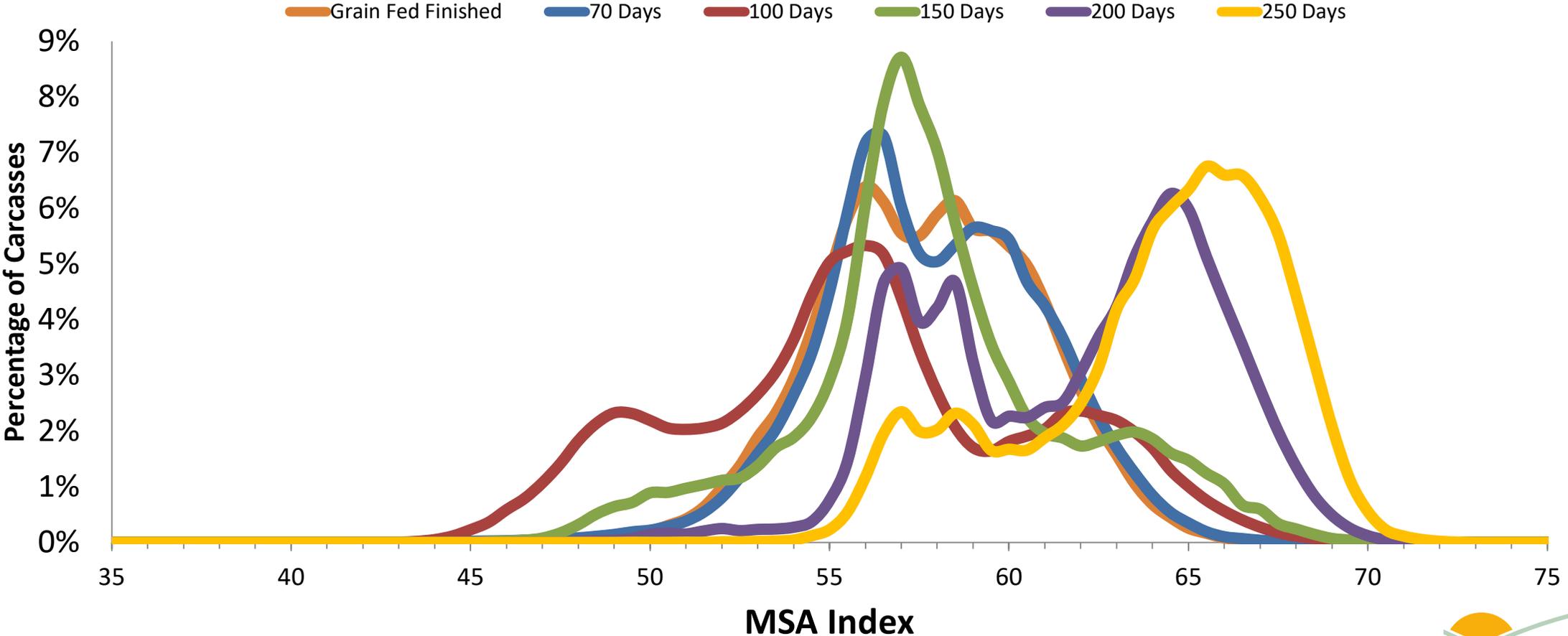
MSA underpins 195 Australian brands

Existing dentition-based language doesn't describe consumer quality

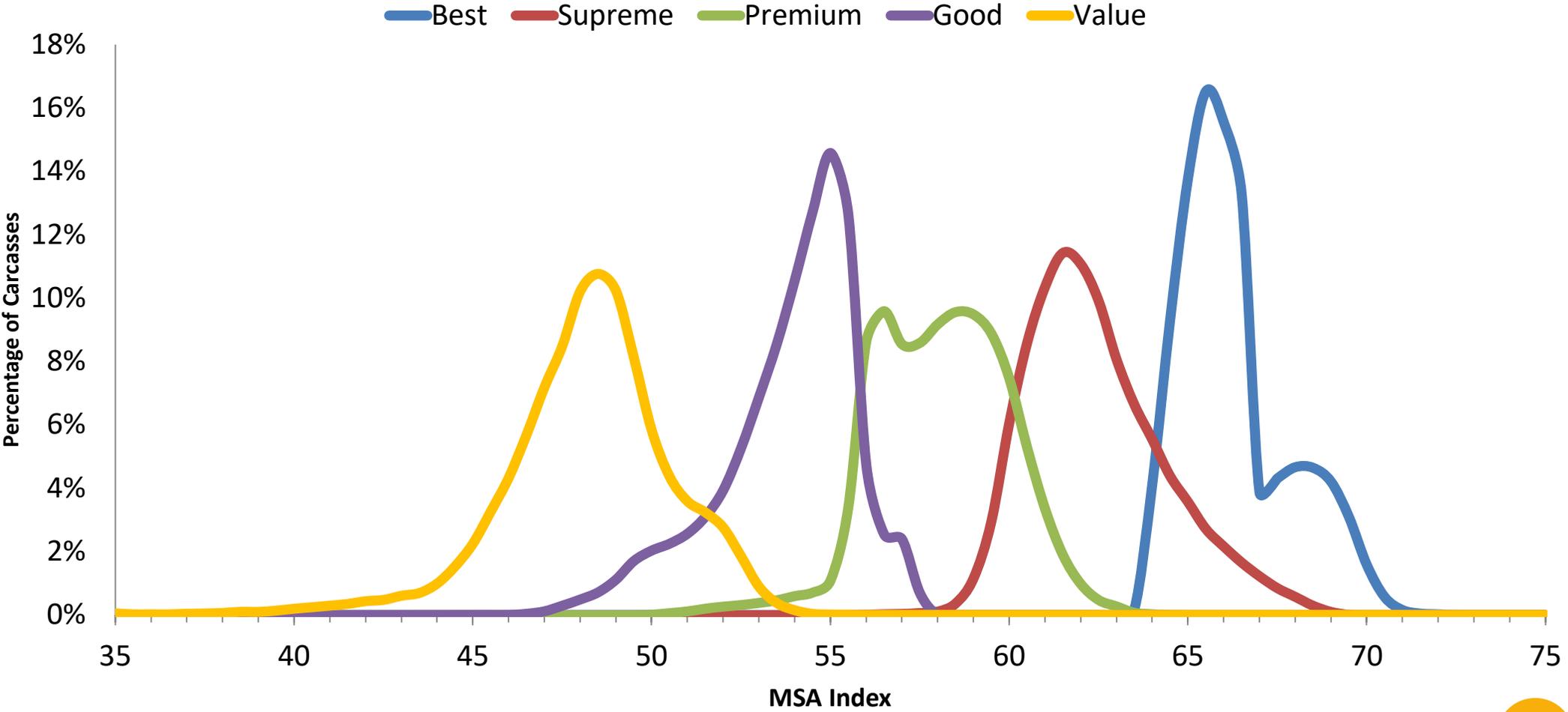


Single attributes don't provide a guarantee of consumer quality

MSA Index Distribution by Days on Feed

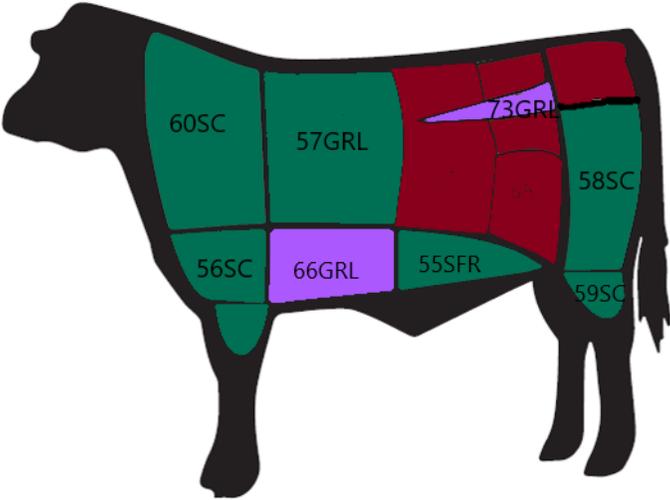


Focusing on consumer outcomes can be meaningful

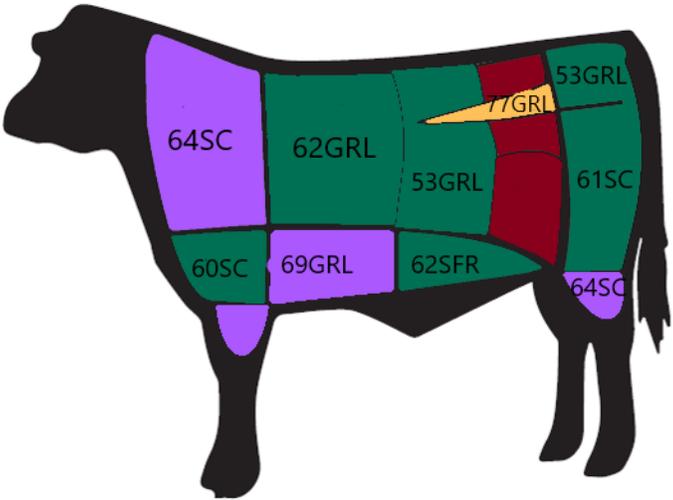


Extracting the most value from an animal

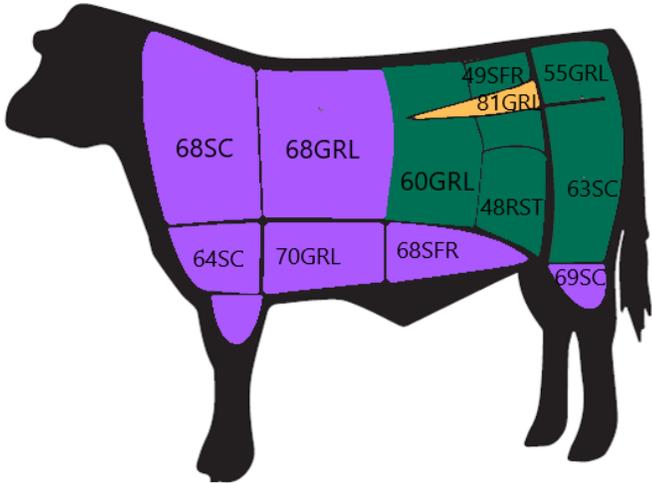
- Segregation by consumer outcome
- Carcase utilisation



Good
MSA Index 55



Better
MSA Index 60



Best
MSA Index 63

New developments focused on consumer outcomes

BONE IN BEEF
PRODUCT OF AUSTRALIA

EQG **SHORTLOIN**

IW/VAC

ANY MEAT WORKS Co
LONG FLAT ROAD
ANYTOWN NSW
32307
KEEP REFRIGERATED



(01) 9 931671012345 3 (3101) 000262 (13) 140110 (21) 41457354

PACKED ON 22 - SEP - 2017
BEST BEFORE 30 - NOV - 2017

GRL MSA 3 @ 5 days MSA 4 @ 14 days
RST MSA 3 @ 5 days MSA 4 @ 14 days
TSL MSA 4 @ 5 days

26.2kg 57.8lb NET WEIGHT

BATCH: 448 CARTON ID: 41457354

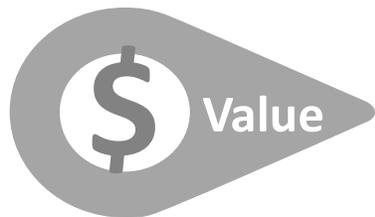
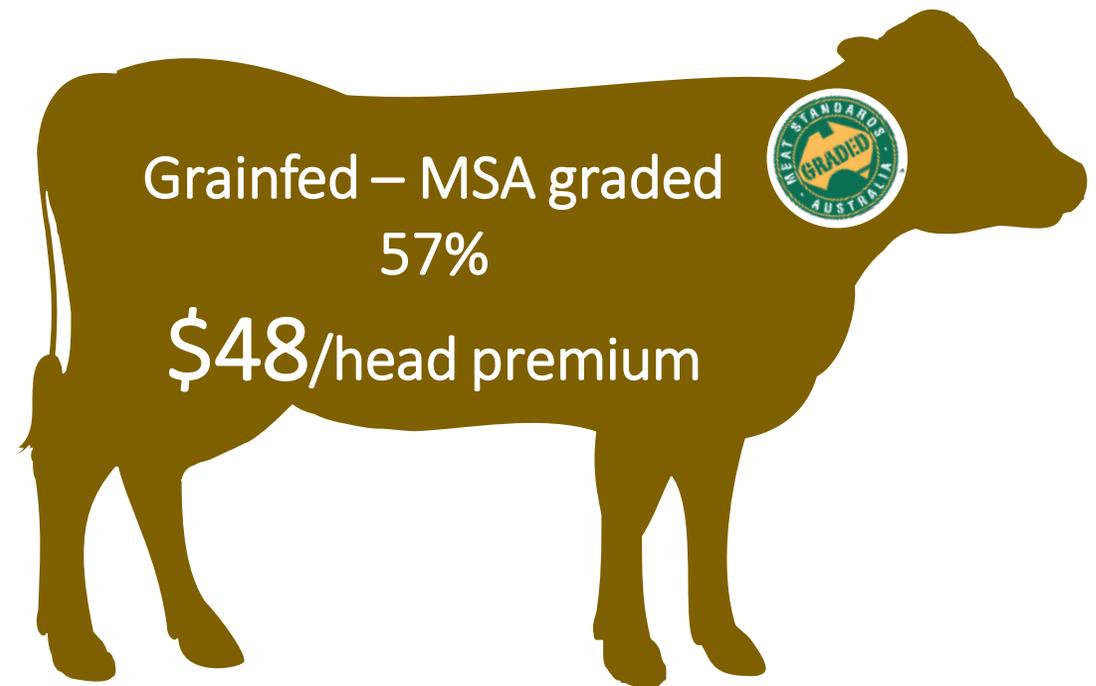
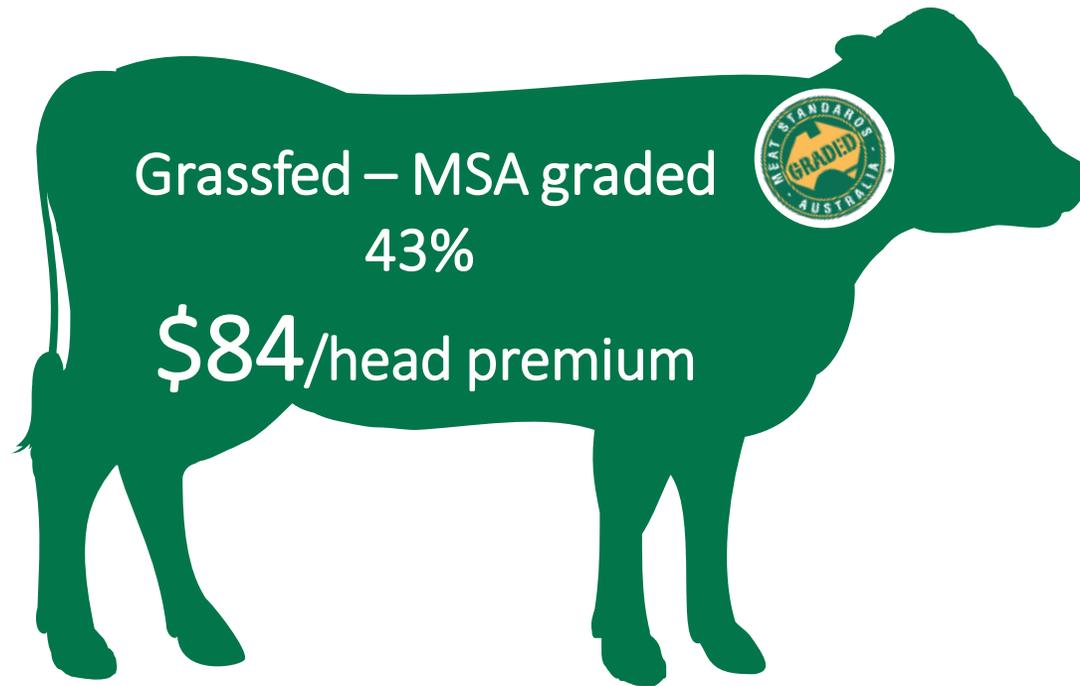


EST. NO.9999

- Consistency
- Reliability
- Precision

Return to farm gate

- Price differential for MSA young, non-feedlot cattle = Au\$0.30/kg
- Price differential for MSA grainfed cattle = Au\$0.15/kg



\$198m delivered back to the farm gate

MSA Plus



Eating
Quality

Food safety

Convenience

Sustainability

Value for
money

Experience
(the story)

Health & nutrition

Animal wellbeing

B Bontà

[bon-tà]
sostantivo femminile

La presenza di doti o qualità che incarna il morale o sul piano della funzionalità e del sapore eccezionalmente gradevole.

Per Noi di Coop la bontà è raggiunta ed è il frutto della partnership con

approvvigionamento dal punto di

vista, la bontà di ogni



BILANCIA

SACCHETTI

CONTI

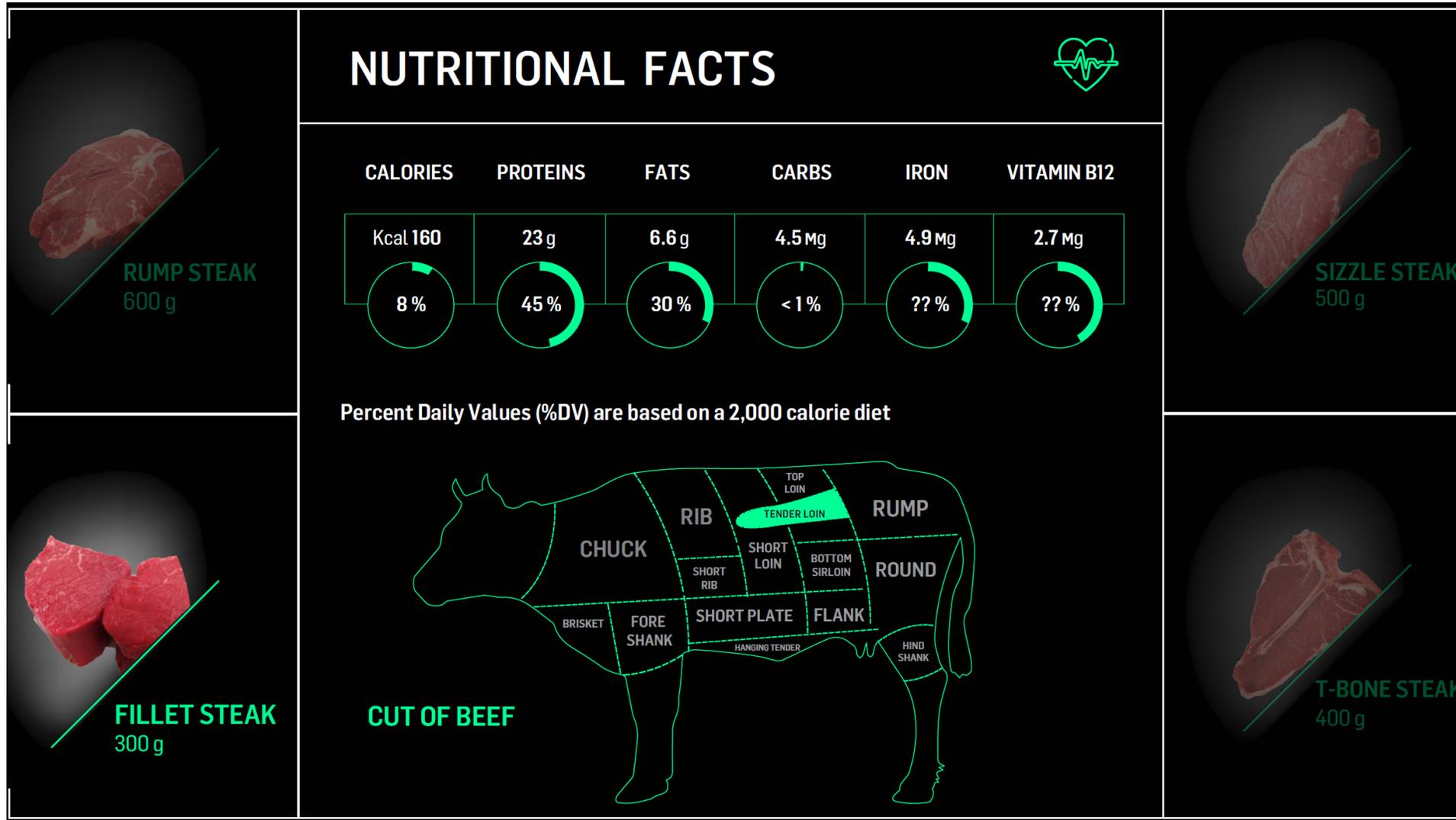


Future retail

- Consumer's will purchase differently

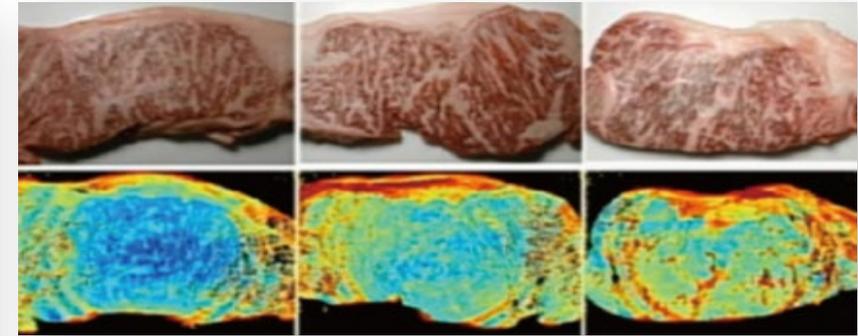


Future retail





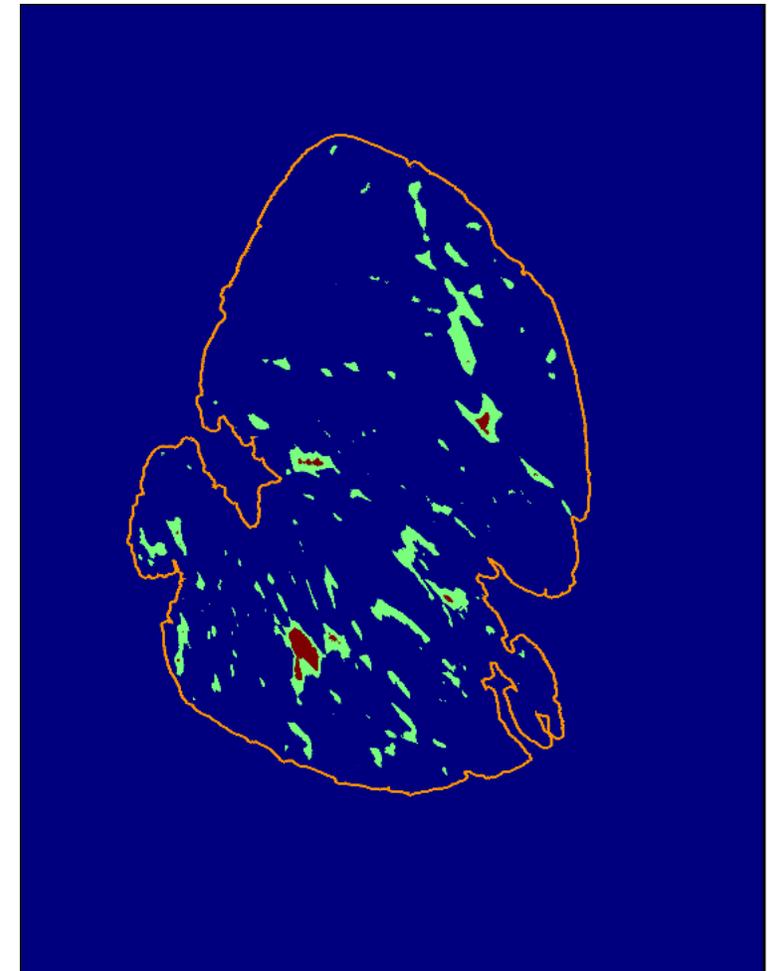
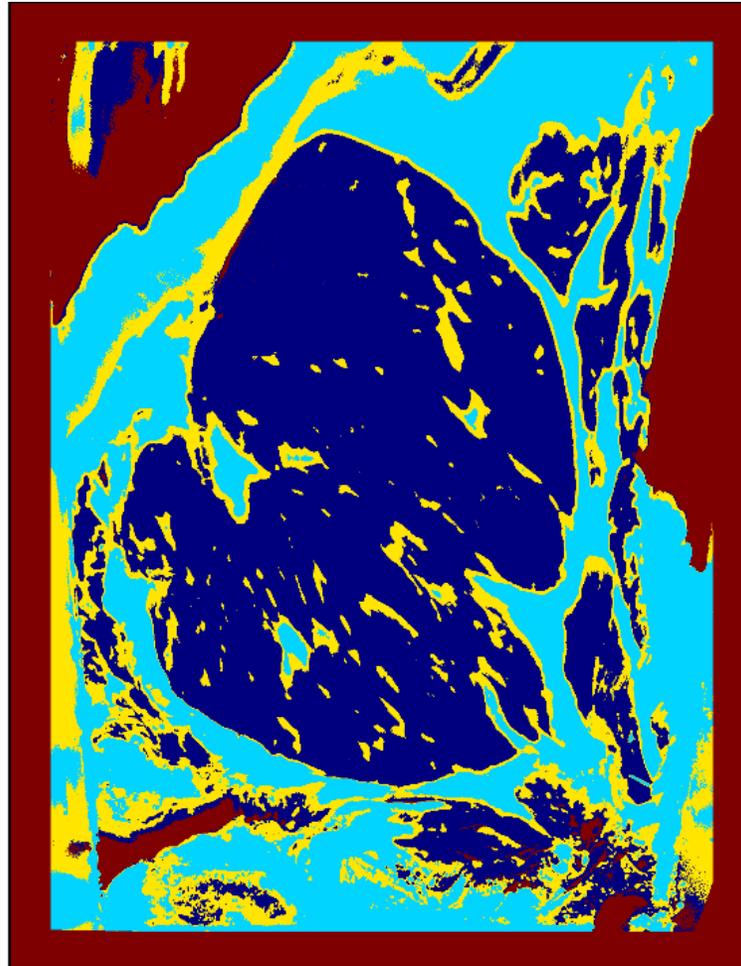
Efficiency through technologies



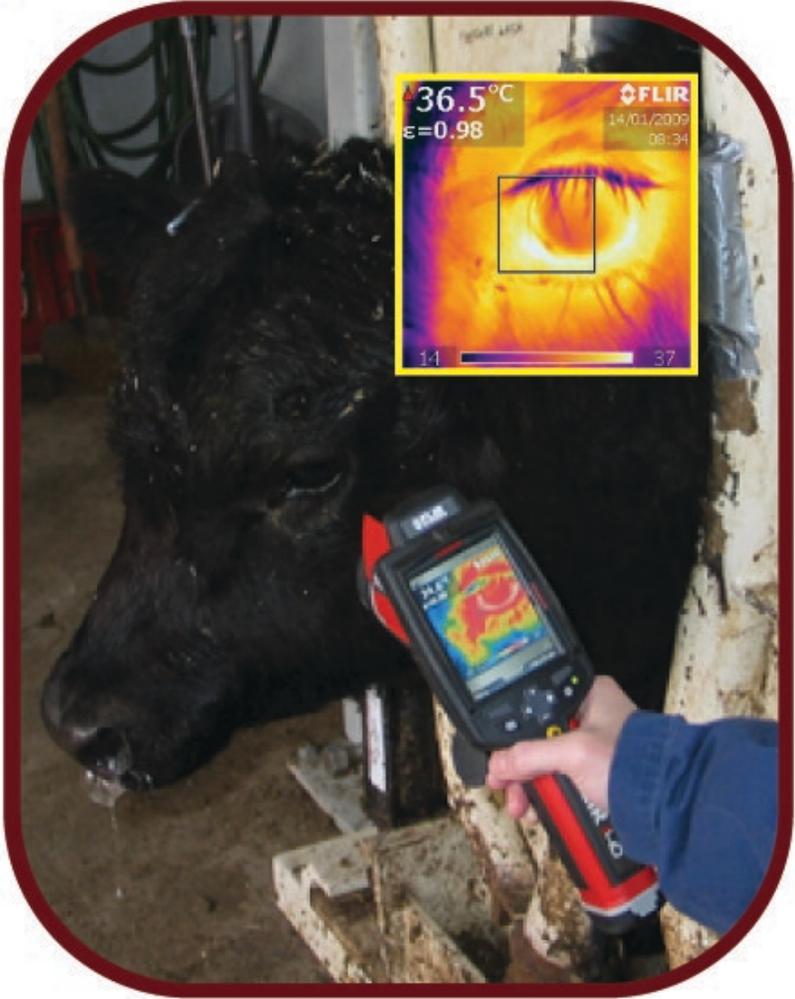
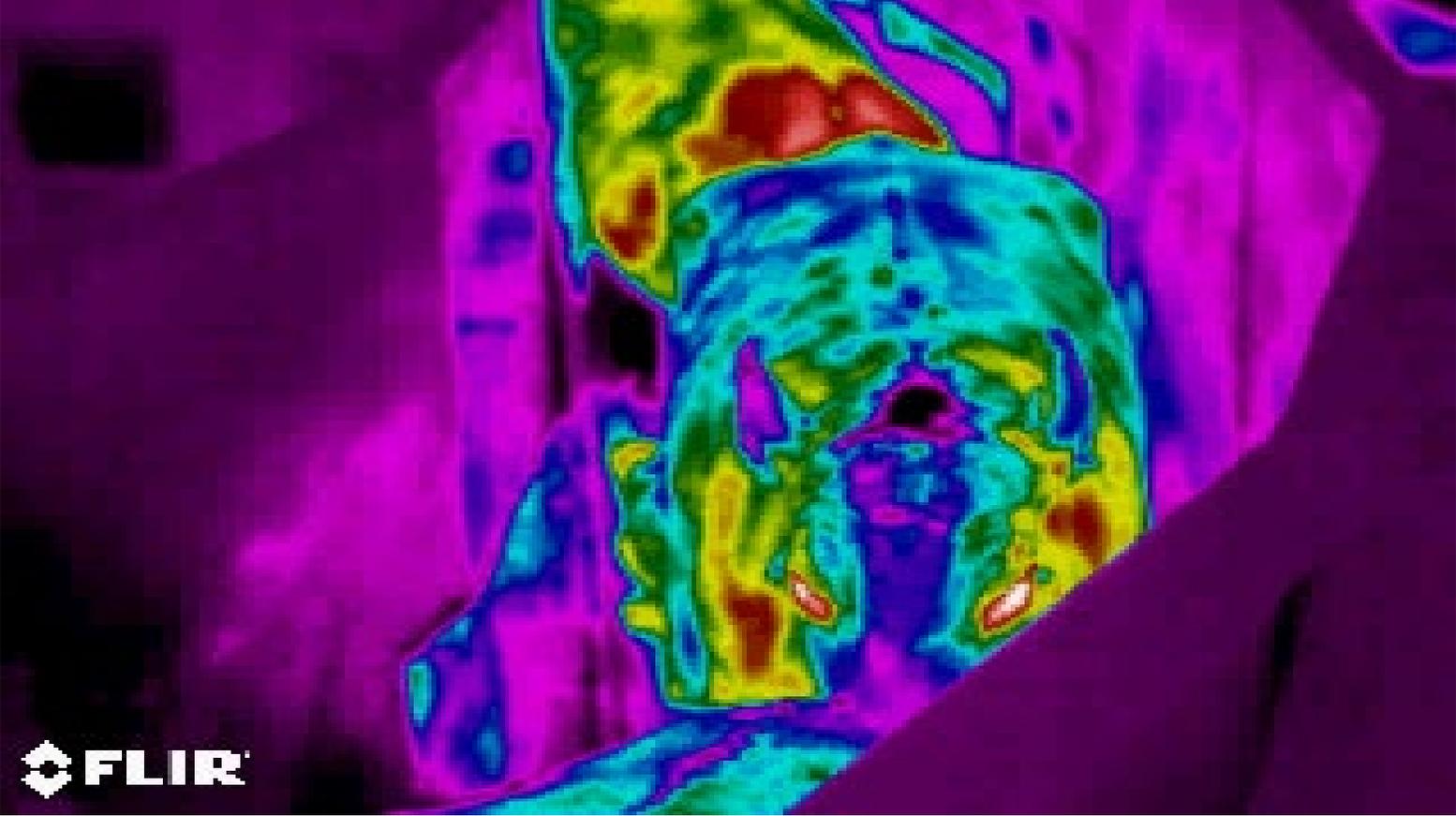
Frontmatec MKII Hyperspectral camera



Beef Frontmatec MKII Hyperspectral Camera



On-farm technologies to reduce risk of failure



New pathways that meet consumer expectations



New pathways that meet consumer expectations

Reconditioning
older females

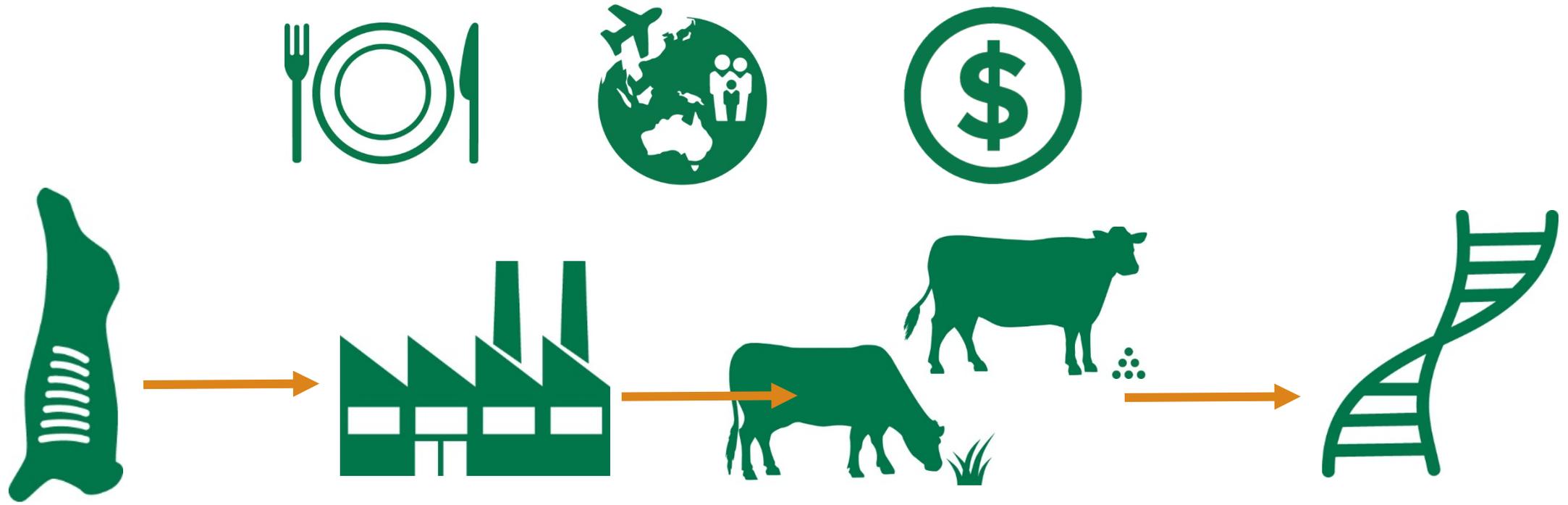
Dairy beef
and veal



Wagyu

Entire
males

Value chain approach to exceed consumer expectations



Understand brand customer requirements	Carcase feedback and benchmarking tools to optimise performance	Identifying best pathways and bang for buck production changes	Carcase feedback linked to genetics
Rewards through meeting sophisticated brand owner requirements	Objective LMY and quality measurement technology will give ability to assess 'value'	Objective measures of live animals to predict market spec compliance	Cheaper genomic tests DNA testing animals routine