



# **Industry / Market Overview**

## ***Porkstar Background***

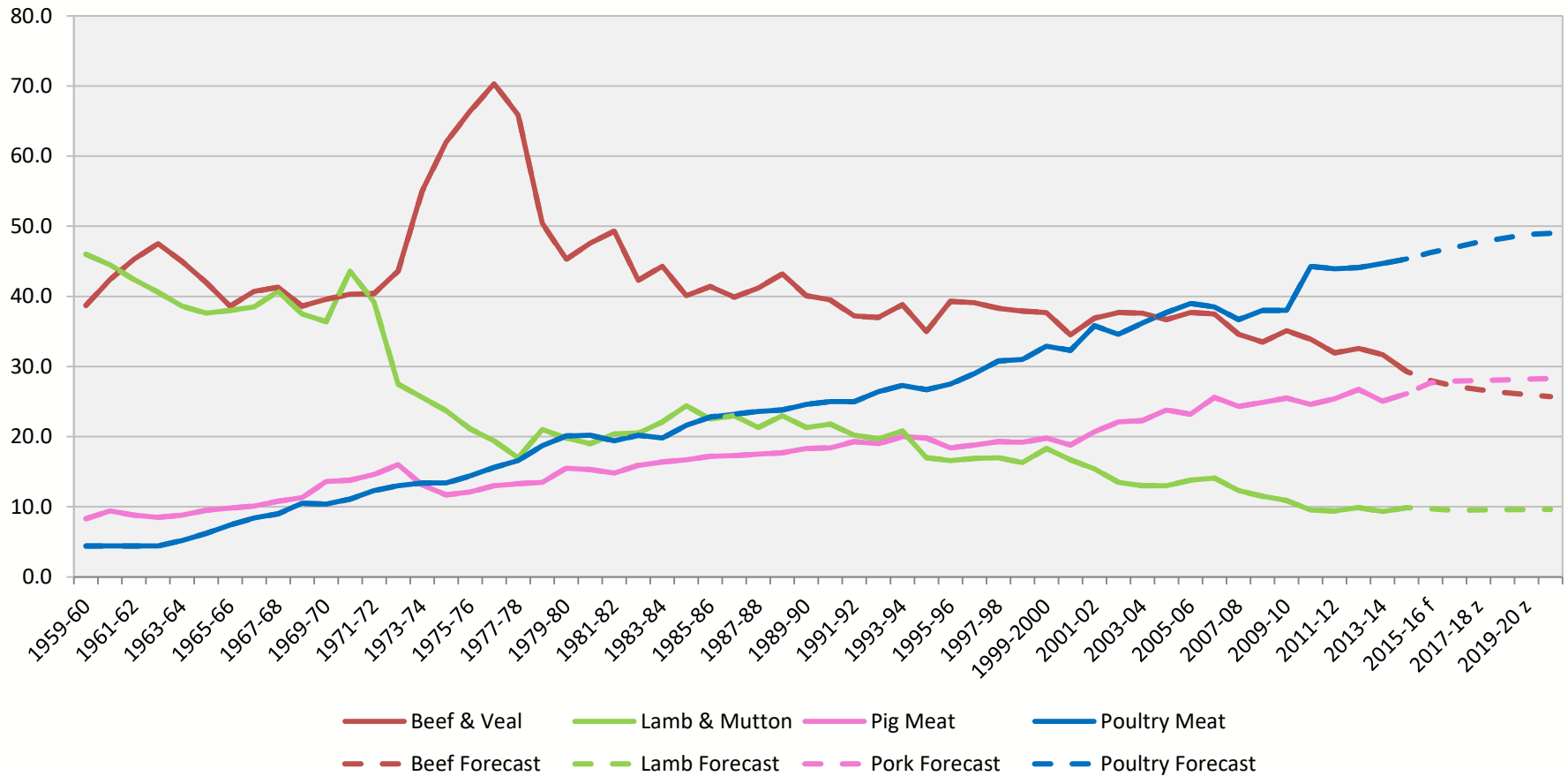
November 2017

Prepared for Kylie Roberts



# Overall consumption trend and forecast

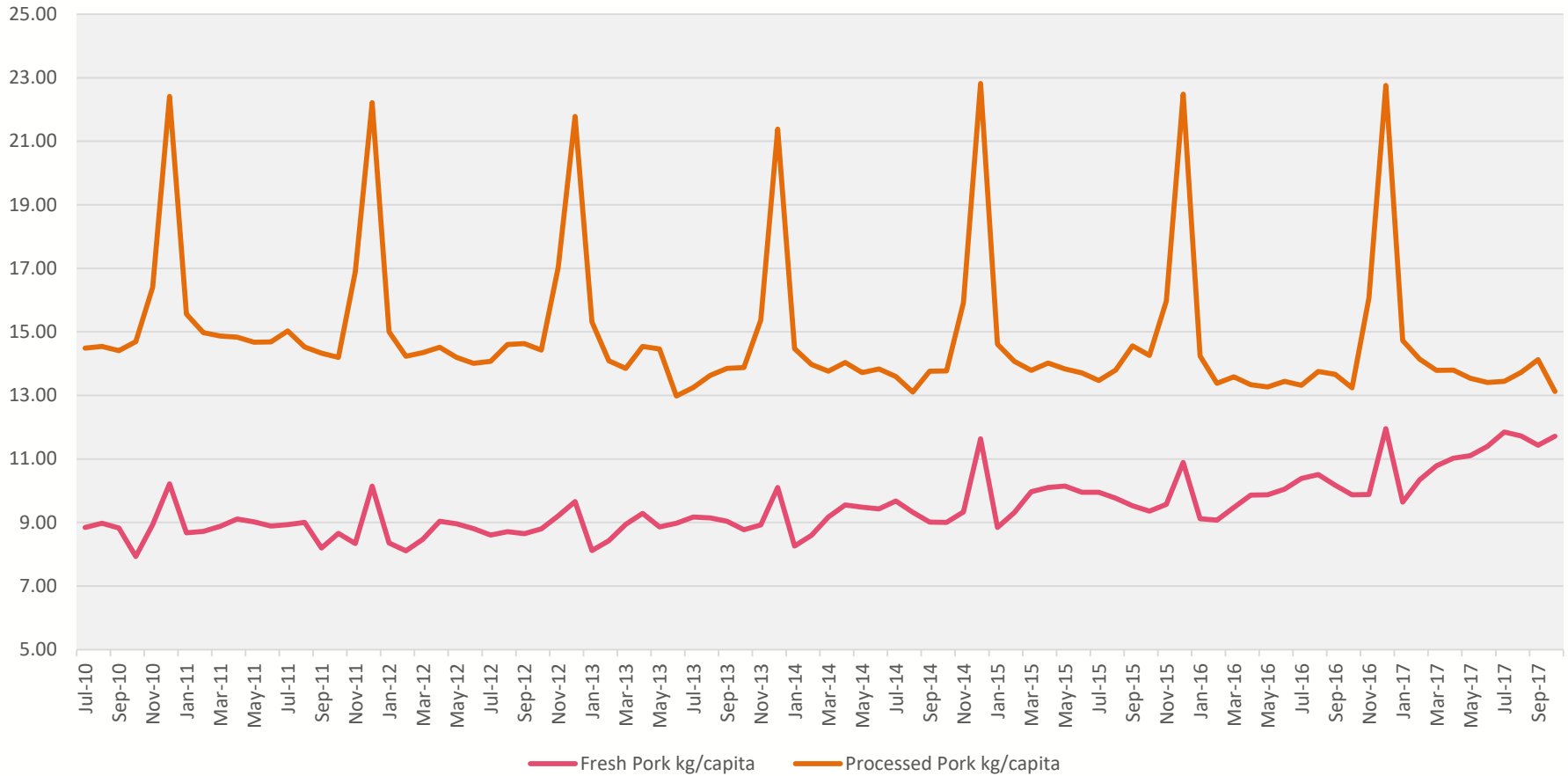
Australian Apparent Consumption per Capita (kg)



Source: Australian Bureau of Agricultural and Resource Economics (Update: March 2016 release)

# Retail consumption trend

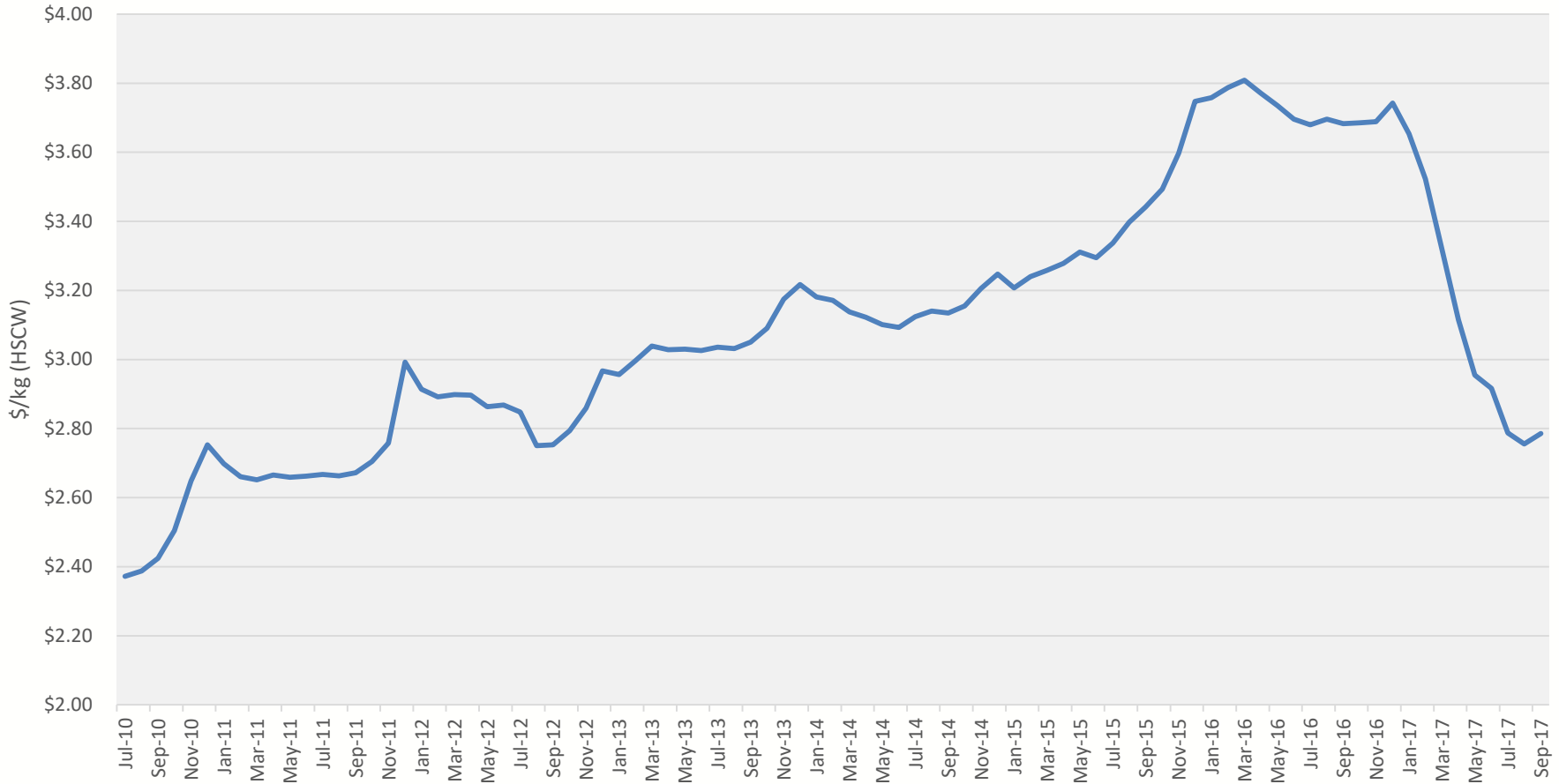
Per capita consumption estimate (based off Retail Sales)



Source: Nielsen Homescan and APL

# Current pig price crisis

Australian pig price (farm gate)



Source: APL Pig Price report (Sept 2017, Thrive Research)



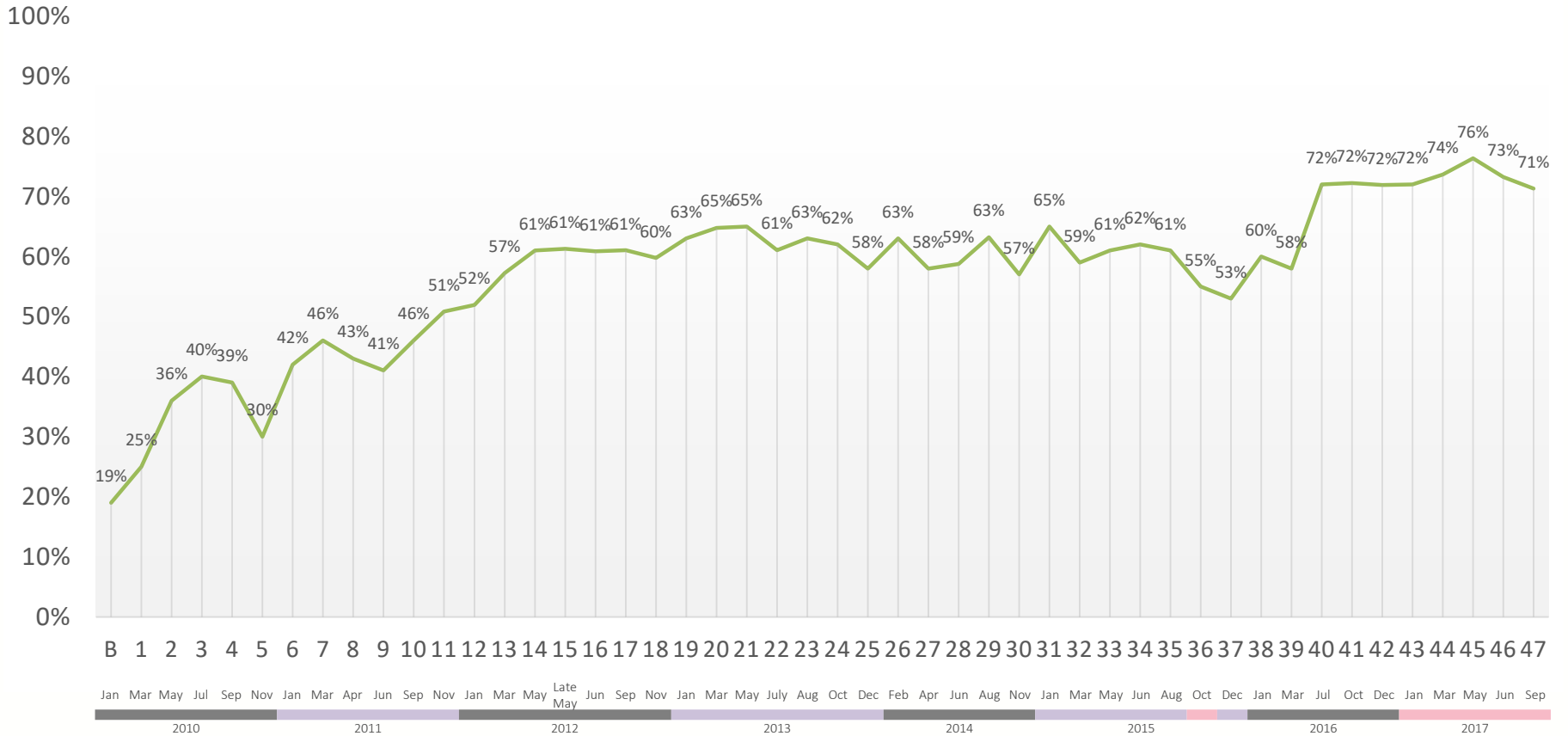
# Consumer awareness



# Overall campaign recall



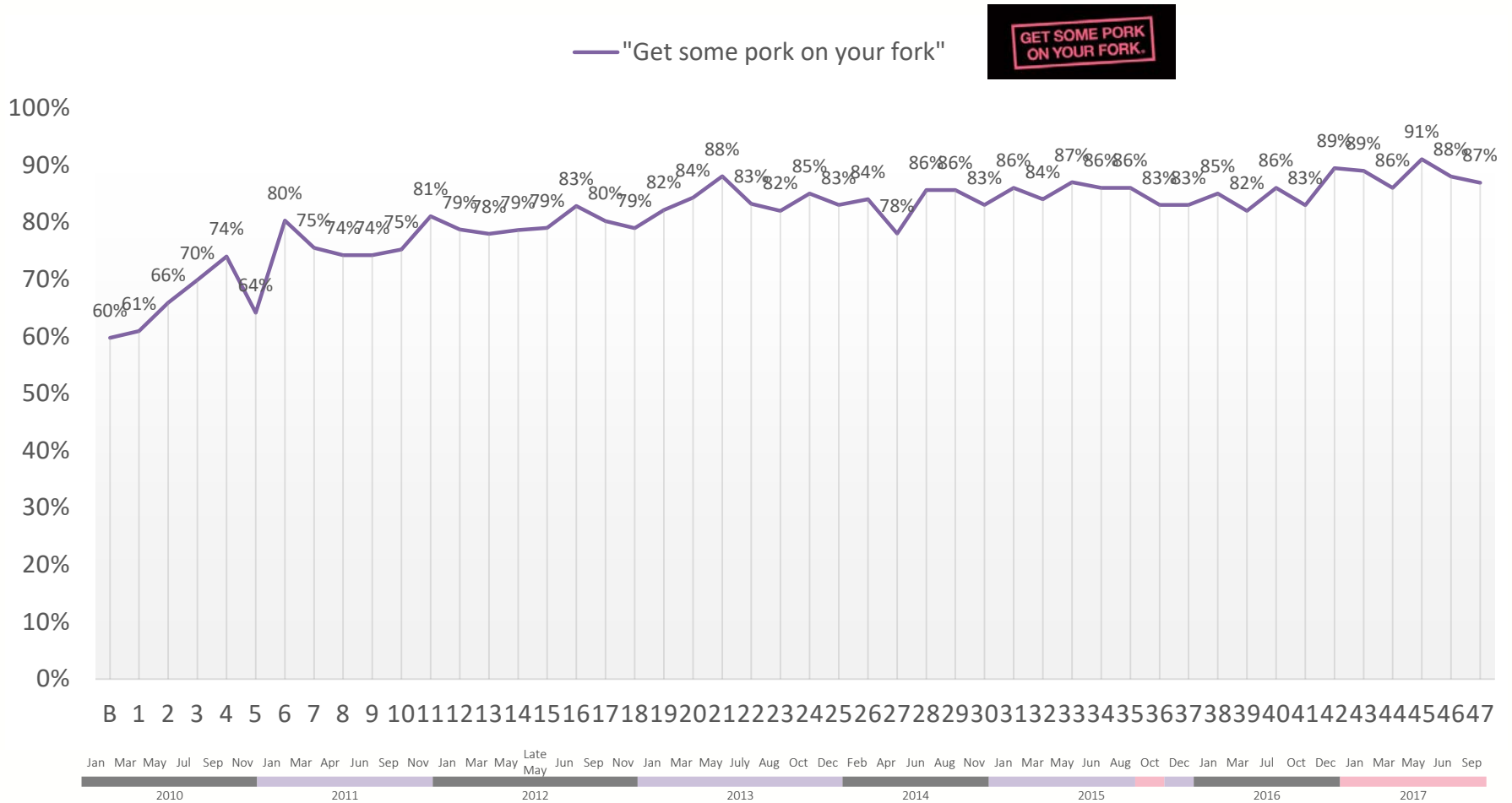
— Any TVC or Radio



Source: APL Advertising Tracking (Sept 2017, Thrive Research)



# Prompted tagline recall



Source: APL Advertising Tracking (Sept 2017, Thrive Research)



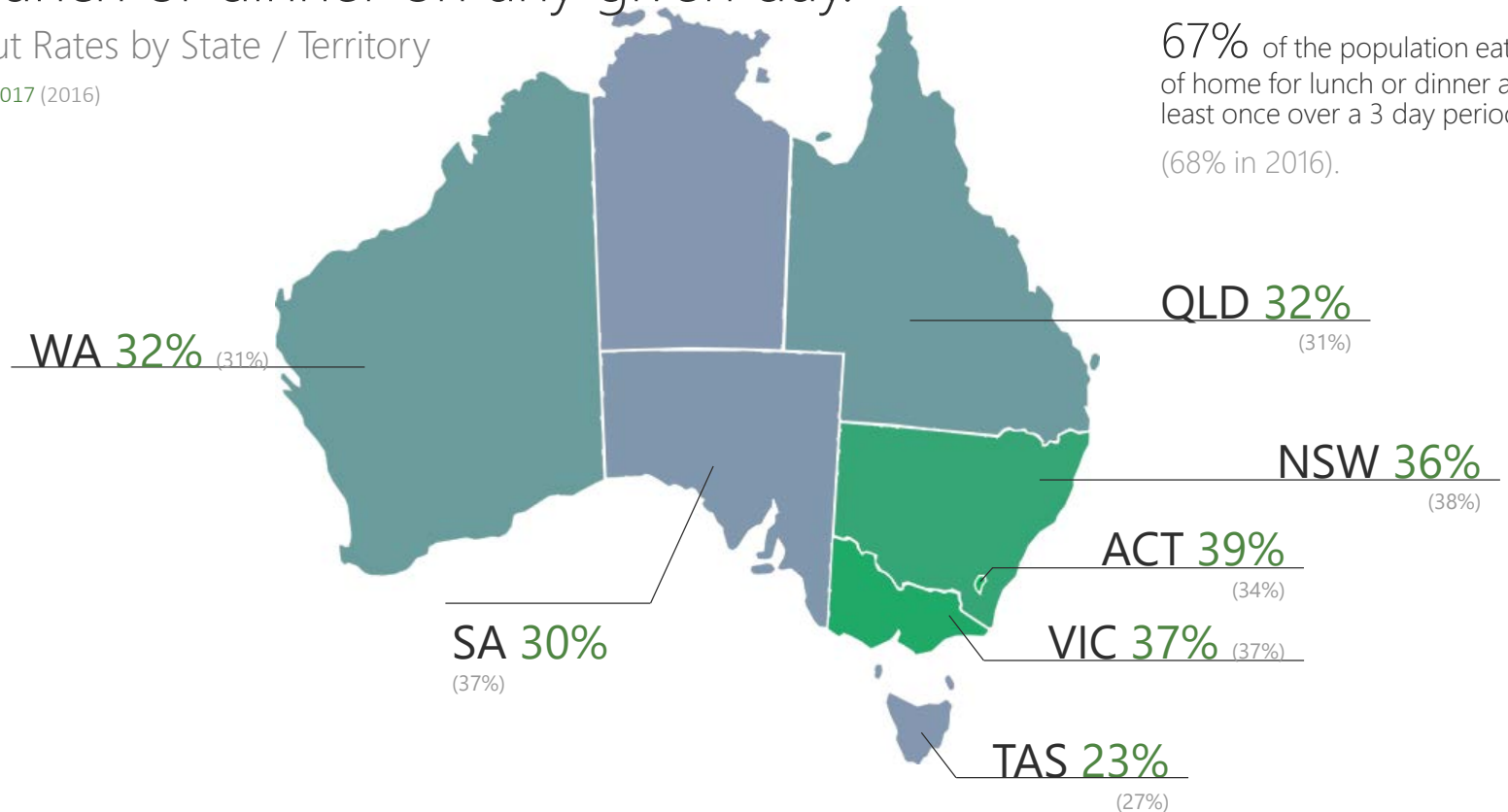
# Foodservice



# 34% of the population eat out of home\* for lunch or dinner on any given day.

Eat-out Rates by State / Territory

Jun-Aug 2017 (2016)



67% of the population eat out of home for lunch or dinner at least once over a 3 day period.

(68% in 2016).

Base: Total population: 2016 (n=9,389); Jun-Aug 2017 (n=2,425); NSW (n=586), VIC (n=518), QLD (n=455), SA (n=273), WA (n=254), ACT (n=97), TAS (n=122), NT (n=120).

Source: Out of Home Market Sizing (Aug 2017, Thrive Research)

# Total spend on Out of Home Meals

Despite the overall **volume** of out-of-home meals in Jun-Aug 2017 being **down on 2016**, total out-of-home meal **expenditure has increased**. Encouragingly, spend on meals incorporating **pork** has also increased.



7.8m out of home lunches and dinners are eaten by adult Australians (18+) every day, amounting to **\$139.1m**

Up from **\$128.7m** in 2016; but from **8.1m** out of home meals

Adults  
**\$51bn**  
per year

**\$47b** in 2016

With approximately 9% of lunches and dinners containing pork, we spend **\$16.7m** daily on pork-based meals.

**\$14.9m** in 2016

## LUNCH

4.4 million lunches eaten out of home, amounting to

▲ **\$70.8m** (64.4m 2016)



2.1m (11%) of lunches are take away / home delivery, with an average spend of \$15 per person, amounting to

▲ **\$30.6m**

**\$26.1m** in 2016



2.3m (12%) of lunches are from a restaurant / café / food outlet, with an average spend of \$17 per person, amounting to

▲ **\$40.2m**

**\$38.3m** in 2016

## DINNER

3.4 million dinners eaten out of home, amounting to

▲ **\$68.3m** (64.3m 2016)



1.8m (10%) of dinners are take away / home delivery, with an average spend of \$16 per person, amounting to

▲ **\$28.3m**

**\$27.4m** in 2016



1.5m (8%) of dinners are from a restaurant / café / food outlet, with an average spend of \$27 per person, amounting to

▲ **\$40.0m**

**\$36.9m** in 2016

Source: Out of Home Market Sizing (Aug 2017, Thrive Research)