



# Malaysia



## MARKET SNAPSHOT | BEEF & SHEEPMEAT



### EXPORTS

Australia's second largest\* red meat export market in South-East Asia  
\*By volume, after Indonesia



### CONSUMERS

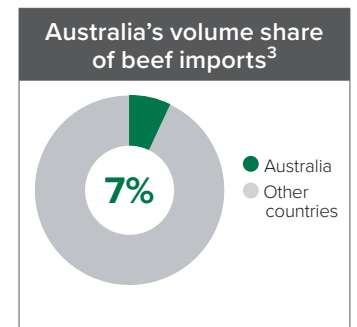
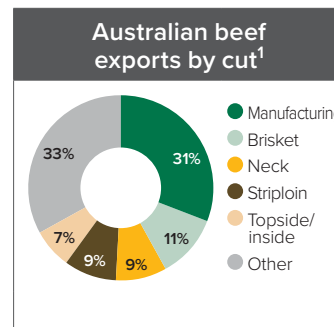
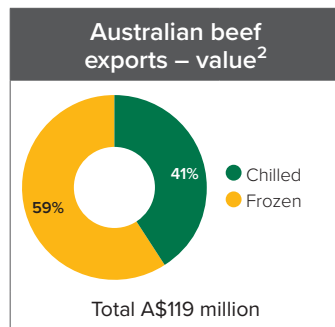
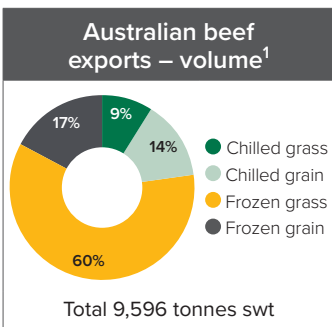
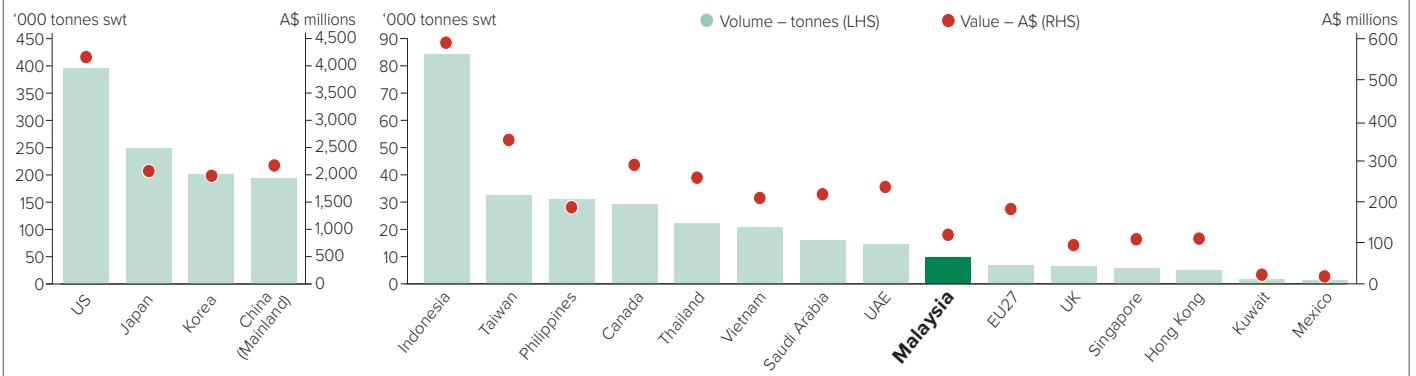
Highest regional per capita beef consumption, underpinned by cultural preference and high incomes



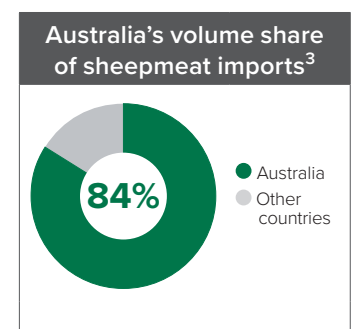
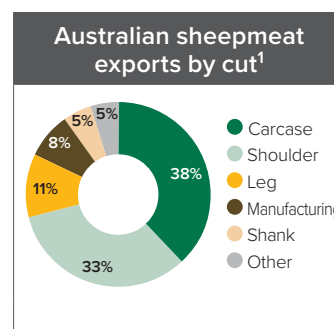
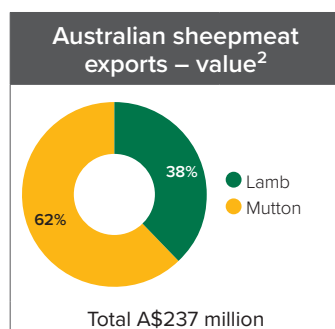
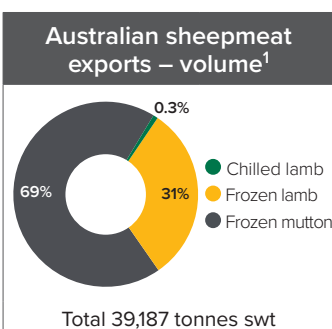
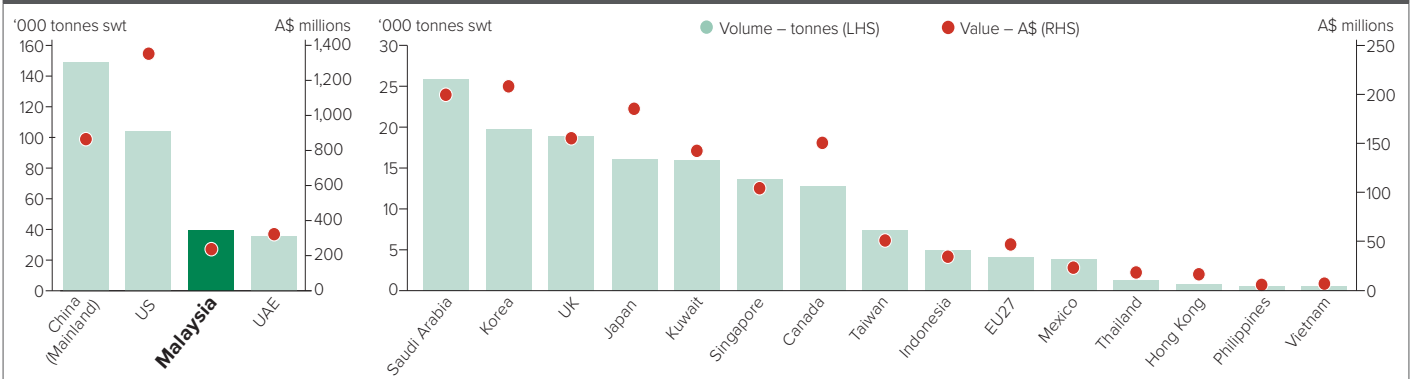
### GROWTH

Demand for quality protein by affluent locals and during Muslim festive celebrations

### Australian beef exports to Malaysia in a global context<sup>1 and 2</sup>



### Australian sheepmeat exports to Malaysia in a global context<sup>1 and 2</sup>



Data source for charts: <sup>1</sup>DAFF (CY2024), <sup>2</sup>Trade Data Monitor (TDM) (MAT November 2024), <sup>3</sup>Trade Data Monitor (TDM) (MAT October 2024)



## CONSUMERS

- Malaysia has the second highest consumer purchasing power in the South-East Asia region after Singapore. Malaysia's average per capita annual disposable income is approximately US\$11,800 compared to US\$4,200 average for the rest of ASEAN (excluding Singapore) (Source: Fitch Solutions).
- Similar to other ASEAN countries, Malaysian diets are dominated by chicken and fish. However, Malaysians have the highest per capita beef consumption among ASEAN countries at 8.8kg per person in 2024 (Source: Fitch Solutions).
- According to a recent survey, Malaysians are the most concerned about rising living costs in South-East Asia (Source: GlobalData Global Consumer Survey Q2 2024). Despite these budgetary pressures, health remains a priority that consumers are unwilling to compromise on. This presents an opportunity for beef to capitalise on its positive nutritional perception among Malaysians.
- Beef and lamb are considered premium proteins as they are perceived as the most superior meat, with consistently high quality, tenderness and delicious taste. These perceptions drive the willingness of Malaysians to pay more for these meats (Source: MLA Global Consumer Tracker Malaysia 2023).
- Australian beef is considered the family's favourite imported beef, with consumers appreciating its consistent quality and good variety of cuts (Source: MLA Global Consumer Tracker 2023).
- Australian beef enjoys the highest awareness in Malaysia, reflecting its large shelf space in modern retail. Some 71% of Malaysian consumers claim to have eaten Australian beef, a

similarly high consumption rate as local beef (Source: MLA Global Consumer Tracker Malaysia 2023).

- For religious reasons, Halal is an important element in beef purchasing in Malaysia. Beef consumption typically spikes during the festive seasons both at home and in foodservice venues, particularly around the months of Ramadan and Hari Raya Aidilfitri, as well as at Christmas.
- Health and wellbeing trends remain important for Malaysians, driven by the pandemic and high obesity rates, with half the population being overweight. Despite cost-of-living concerns, Malaysians prioritise health in their food choices. This has led to increased awareness and consumption of beef types associated with naturalness and better health, such as grassfed and organic beef. (Sources: MLA Global Consumer Tracker Malaysia 2023; GlobalData Consumer Survey Q2 2024).

### Malaysia – Top five attributes when:

Selecting between proteins	Justifying a premium price
Fresh	Is the most superior meat
Cheaper	Tastes delicious
High nutritional value	My/my family's favourite meat
The industry is environmentally sustainable	The meat is usually tender
The animal is well cared for	The animal is well cared for

Source: MLA Global Consumer Tracker Malaysia 2023

## FOODSERVICE



- Malaysia has an established and expanding foodservice sector, driven by changing consumer lifestyles, growing local and international tourism and increasing consumer spending.
- Australian beef is typically used in higher-end hotels and restaurants. Global recognition of Malaysia's fine dining sector is reflected in its second Michelin Guide edition in 2024.

### Malaysia international tourist arrivals and restaurants and hotels spending

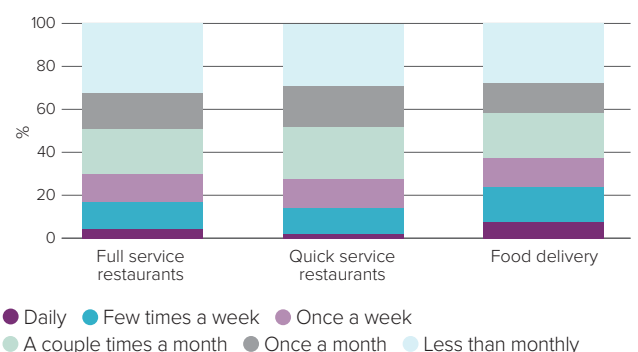


Source: Fitch Solutions

- Centred on Greater Kuala Lumpur in the Klang Valley, a vibrant foodservice sector offers a wide variety of choices from affordable local to luxury international cuisines. Klang Valley is home to approximately 200 shopping malls, which are popular destinations for food, drinks and social interactions in Malaysia. The region is seeing a growing number of contemporary, culture-themed restaurants including Asian, European, American and Middle Eastern styles.

- Local Malaysian is the favourite cuisine, followed by Chinese. Japanese, Korean and Western cuisines are gaining popularity, mostly driven by young, educated and affluent consumers. Many affluent consumers who frequent the high-end foodservice sector are keen on Wagyu beef.
- Dine-in options are expected to continue expanding, fueled by the evolving demand for social dining spaces and tourism growth. Visitors are increasingly looking for authentic Malaysian cuisine, as well as its unique fusions with Chinese, Japanese and other international cuisines.
- Food delivery will continue to be a significant source of revenue for the Malaysian foodservice sector. Many dine-in services have expanded into delivery services by collaborating with apps like FoodPanda, GrabFood, and Beep. Following rapid adoption during the pandemic, consumers still appreciate the convenience of meal delivery, even as dine-in options have normalised.

### Frequency of Malaysians ordering food from foodservice types

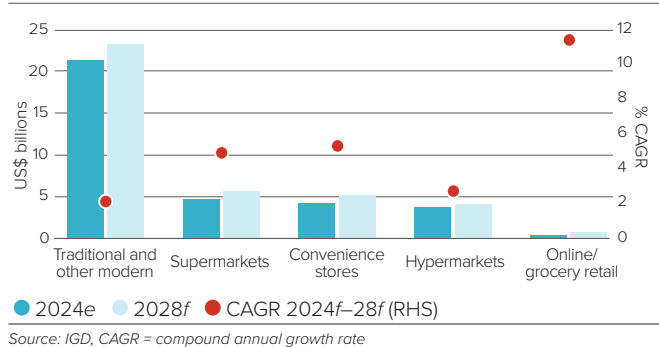


Source: Global Data Global Consumer Survey Q2 2024



- Malaysia's grocery retail sector is fragmented, with modern retailers accounting for approximately 38% of the market. Despite a relatively high disposable income and urbanisation rate compared to other South-East Asian countries, traditional channels such as wet markets are still dominant.

### Malaysia grocery retail sales and outlook by channel



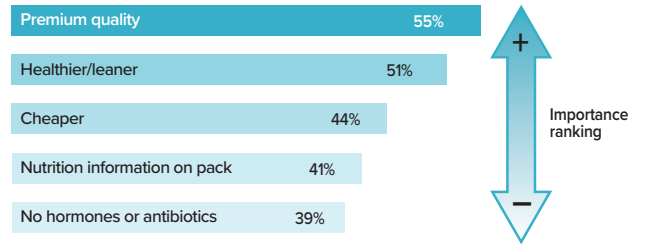
Source: IGD, CAGR = compound annual growth rate

- Most Malaysian consumers frequent traditional markets to buy local beef and Indian buffalo meat, and modern retail outlets such as supermarkets or hypermarkets for imported beef, including Australian. However, there is a growing trend of modern retailers offering self-service fresh meat counters to appeal to wet market customers.
- The retail landscape is evolving as larger stores lose their attractiveness to customers. Shoppers are now favouring smaller-format stores, leading retailers to adjust their strategies

by opening smaller stores in residential areas that cater to the specific needs of local communities. As an example, international retailers are planning to expand by opening more smaller supermarkets of approximately 1,000 square meters in size (Source: IGD).

- Premium retailers are also gaining popularity due to their superior food quality offerings, including higher proportions of imports and selections of naturally healthier products. This trend offers a growing avenue for premium beef such as that supplied by Australia.

### Factors Malaysian shoppers consider when purchasing fresh red meat



Source: MLA Global Consumer Tracker Malaysia 2023

- Halal slaughter practices are an important factor in influencing Muslim consumer decisions, and are tied up in consumers' perceptions of freshness, hygiene and safety. Beyond Halal, freshness is a very important factor influencing Malaysian consumers' beef purchasing decisions as it is thought to affect the taste of the dish.

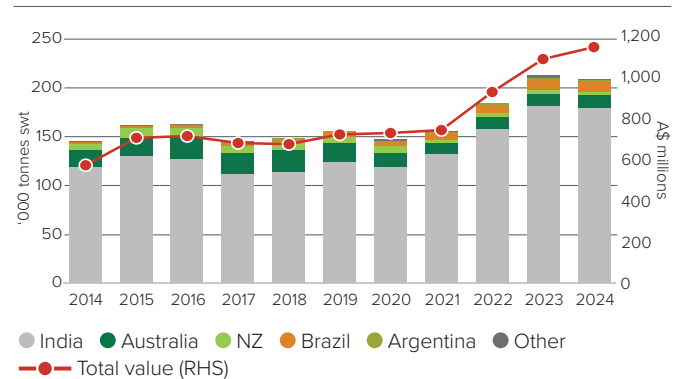
## COMPETITIVE LANDSCAPE



- Malaysia's domestic beef production system produces only about 11% of the country's total consumption requirements, with imports filling the large gap (Source: GIRA). Overall, beef imports remained strong with more than 200,000 tonnes swt for a second consecutive 12 month period in 2023-24. This large import volume was valued at more than A\$1 billion, underscoring Malaysia's strong demand.
- India is by far the largest supplier, accounting for 86% of total import volume. In the 12 months ending in August 2024, imports of Indian buffalo meat (IBM) were relatively stable year-on-year, reaching 178,692 tonnes swt.
- In the 12 months ending in August 2024, Australia accounted for 7% of total imports at 14,222 tonnes swt, which marked a small increase on the previous year. Demand for Australian product can be attributed to the high supply from Australia coupled with rising demand in the dynamic foodservice sector and expansion of modern retail, where Australian beef enjoys a strong presence.
- Brazil is the third largest supplier, accounting for 5% of total imports. In the last 12 months ending in August 2024, volume declined by 6% year-on-year. Brazil's beef unit price is positioned in between IBM and premium beef such as Australian and US beef.
- Demand for Australian grainfed beef has been strong in recent years, reaching around 2,519 tonnes swt in 2023-24. This trend is fueled by the growing Japanese retail and foodservice outlets that demand highly marbled beef. Australia is the largest supplier of grainfed beef to the market, competing with Japanese and US beef.

- Import demand for high value chilled beef continues to grow, with Australia the dominant supplier in 2023-24, followed by Japan.
- Imports from Japan have been on the rise with a growing presence in the market fuelled by expanding Japanese investments. More than half of Japanese beef is imported chilled to supply the retail demand.
- Malaysia maintains strict Halal requirements for food products. Meat intended to be imported to Malaysia must be Halal. This means that meat plants must follow Halal protocols and be inspected and approved by the Malaysian Department of Islamic Development (JAKIM) and the Department of Veterinary Services (DVS) (Source: Malaysia Department of Veterinary Services).

### Malaysia beef imports by supplier\*



Source: Trade Data Monitor (TDM), \*MAT year ending August



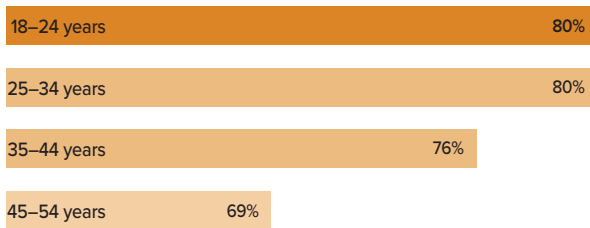
# Sheepmeat



## CONSUMERS

- Although Malaysia has modest per capita sheepmeat consumption levels, it still accounts for a relatively high proportion of dietary protein at 25%. About one-third of consumers say they have bought lamb or mutton in the last month, well above Asia's average of 21% (Source: MLA Global Consumer Tracker Malaysia 2023).
- Malaysia's cuisine is influenced by many different cultures including Malay, Chinese, Arabic, Indian, Indian Muslim, Javanese and European. Sheepmeat is not only popular among the Muslim and Indian communities, but is also enjoyed by many other groups. Sheepmeat is not restricted by most religions and hence can be enjoyed by many consumers.
- Sheepmeat has increasingly become a favourite meat for daily consumption among many families, in addition to being a favourite meat for special treats and occasions. Demand for sheepmeat typically spikes during the Muslim festive seasons, particularly during the months of Diwali, Ramadan and Hari Raya Aidilfitri.

### Percentage of Malaysian lamb buyers by age



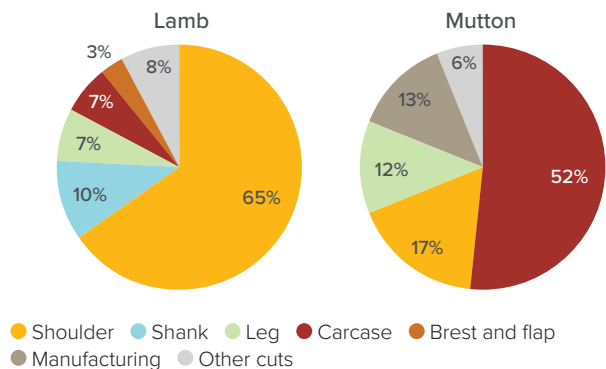
Source: MLA Global Consumer Tracker Malaysia 2023, Q: Have ever bought lamb to cook at home

- Malaysian consumers tend to eat sheepmeat more often than those in neighbouring countries. Younger consumers,

especially, are leading this trend, with around 80% of Malaysians aged 18 to 34 having eaten lamb recently, laying the foundation for future consumption growth. This is driven by their interest in novel and exotic dishes and cuisines (Source: MLA Global Consumer Tracker 2023).

- Younger consumers experimenting with cooking lamb at home have led to increased familiarity with sheepmeat. As a result, awareness of lamb has grown, and the two main barriers of taste and smell have significantly declined in recent years (Source: MLA Global Consumer Malaysia Tracker 2023).
- Malaysia is Australia's fourth largest sheepmeat export market and the second largest mutton market after China, with lamb accounting for a third of total sheepmeat exports. In 2023–24, 64% of exported mutton were carcasses, trunk meat and trimmings commonly used in the manufacturing industry. However, 65% of exported lamb were shoulder cuts, suitable for foodservice meals and adventurous consumers cooking lamb at home.

### Australian sheepmeat exports to Malaysia – top cuts



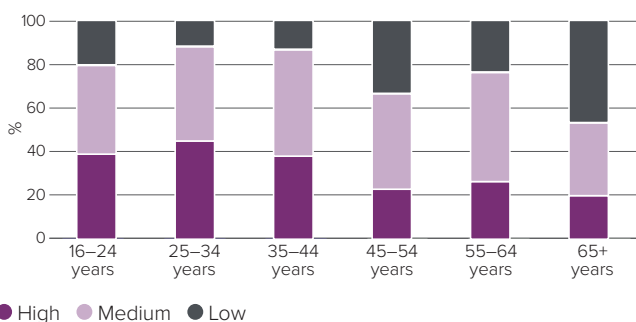
Source: DAFF, Australian Financial Year 2023–24

## FOODSERVICE



- Foodservice plays a significant role in growing sheepmeat consumption in Malaysia as a key driver of home cooking trials. About 28% of lamb consumers don't purchase it for eating at home, instead enjoying it when dining out (Source: MLA Global Consumer Tracker Malaysia 2023).
- Australian lamb exported to Malaysia finds its primary use in high-end hotels and restaurants, especially in Kuala Lumpur. This vibrant and ever-evolving foodservice segment offers a wide array of choices, spanning affordable local dishes and Japanese *Shabu-Shabu*, Chinese hot pot, to luxurious international cuisines.

### Malaysians' spending on food in foodservice by age



Source: Global Data Global Consumer Survey Malaysia Q2 2024, Self-defined spend

- As tourism rebounds, many foodservice providers have premiumised their offerings to attract both tourists and locals. At the same time, food delivery services like GrabFood and FoodPanda remain popular due to continued demand for convenience.
- Sheepmeat is widely served in many restaurants and there is a growing interest from Chinese restaurants to serve sheepmeat for stir fry, braised, stewed, clay pot and hot pot because of its versatility. Grilled and BBQ lamb chops are also growing in popularity on the menus of Asian buffet dining restaurants and pub restaurants.



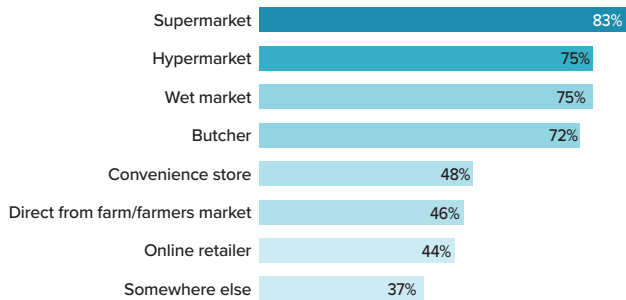
Soya-braised lamb in clay pot





- Malaysian consumers buy sheepmeat from multiple retail outlets, both modern and traditional. Supermarkets and hypermarkets remain the most common places to purchase imported sheepmeat products.

### Place of purchase for frequent lamb shoppers



Source: MLA Global Consumer Tracker Malaysia 2023  
Base: Malaysians who purchase lamb from these channels at least monthly

- Although still a small proportion of overall retail sales, e-commerce adoption continues to grow beyond the initial bump seen during the pandemic. Retailers are heavily investing in developing this channel by enhancing customer services, such as substantive return policies, to assuage consumer reticence to purchase perishable goods online.

- Roast, grill, stew, pan-fry, curry and BBQ are the most popular ways of cooking lamb at home. Malaysian consumers tend to use more pre-prepared ingredients such as marinades when cooking sheepmeat dishes to help make cooking sheepmeat easier.
- Capturing the growing need for convenient home-cooking, there has been an increase in the number of pre-prepared 'ready to cook' meals including marinated lamb sold through online channels such as Shopee, Lazada, Grabmart and Happy Fresh, alongside traditional retailers.
- The increase in home cooking due to increased cost-of-living pressures has exposed more Malaysian consumers to lamb. The concurrent increase in tips and recipes on social media has led to an uptick in interest in new cooking styles.



Gule Kambing, a popular menu item for Eid al Adha

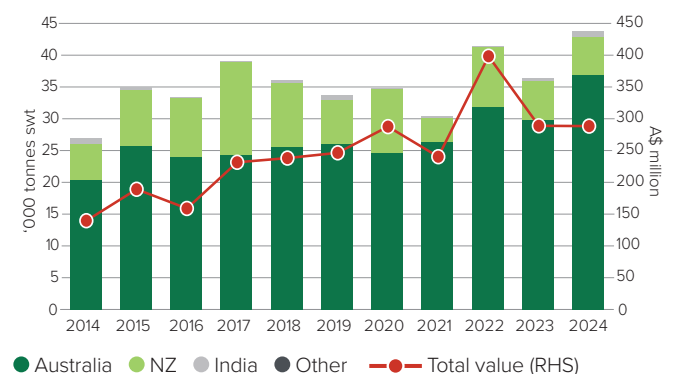
# COMPETITIVE LANDSCAPE



- Malaysia produces only about 10% of the total sheepmeat consumed, needing to import more than 90% to meet domestic demand. Imports are expected to grow by 1.3% annually between 2024 and 2028 (Source: GIRA).
- In the 12 months ending in August 2024, imports continued strongly, reaching a record high import volume of 43,807 tonnes swt valued at A\$288 million. Australia is the leading supplier, with a market share of around 84%, followed by New Zealand at 13% and very small volumes from India, Saudi Arabia and China. Frozen bone-in sheepmeat cuts account for 80% of Malaysia's imported product.
- With the rebounding economy and tourism, import demand for lamb and mutton has grown. Australia has consistently increased exports to Malaysia to reach more than 35,000 tonnes swt in the 12 months ending in August 2024. During this period, Australia exported 11,737 tonnes swt of lamb, the second highest volume after 2022, and a record 23,600 tonnes swt of mutton, making it the second largest mutton market after China.
- Aside from Australia and New Zealand, few other exporters play in the market. India is the only other consistent supplier to Malaysia, typically exporting around 200 tonnes per year.

- Most of Malaysia's sheepmeat imports consist of frozen products, with chilled lamb accounting for a relatively small volume. During 2023–24, the most commonly imported cuts from Australia included lamb shoulder, making up 65% of the total imported Australian lamb, while 52% of the imported Australian mutton consisted of carcasses.

### Malaysia sheepmeat imports by supplier\*



Source: Trade Data Monitor (TDM), \*MAT year ending August

# Beef



## Market access overview – beef

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Malaysia-Australia Free Trade Agreement ( <b>MAFTA</b> )  Trans-Pacific Partnership ( <b>CP-TPP</b> )	<b>Under AANZFTA and MAFTA:</b> 0% for all product lines	<b>India:</b> 0%  <b>New Zealand:</b> Same conditions as Australia  <b>Brazil:</b> 0%	Zero	Maintains import regulations in accordance with Halal and health requirements

Best access  Major challenges

Source: Trade agreements, DFAT, WTO

# Sheepmeat



## Market access overview – sheepmeat

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Malaysia-Australia Free Trade Agreement ( <b>MAFTA</b> )  Trans-Pacific Partnership ( <b>CP-TPP</b> )	<b>Under AANZFTA:</b> 0% for all product lines	<b>New Zealand:</b> Same conditions as Australia	Zero	Maintains import regulations in accordance with Halal and health requirements

Best access  Major challenges

Source: Trade agreements, DFAT



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