



MARKET SNAPSHOT | BEEF & SHEEPMEAT

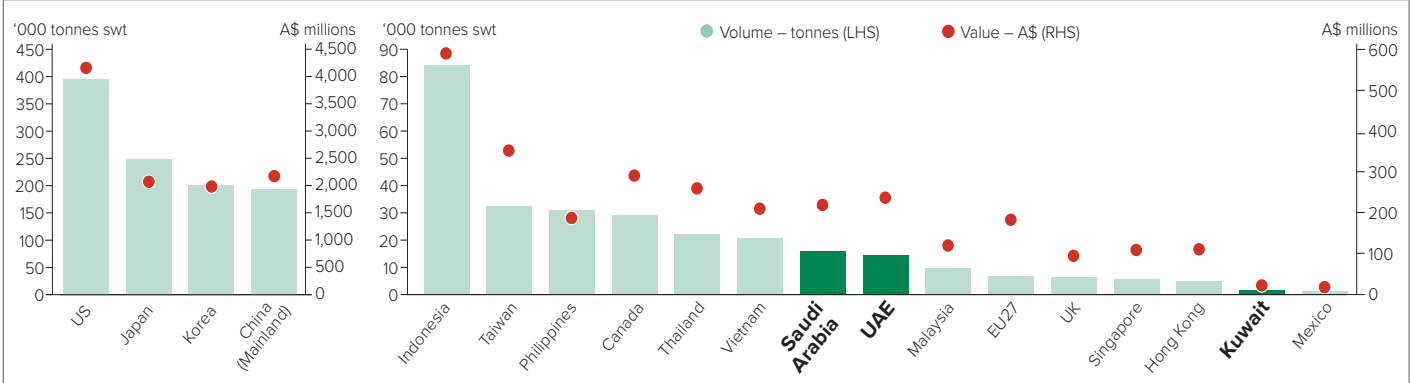
EXPORTS
Large and established region for sheepmeat, growth building for premium beef

CONSUMERS
Affluent locals, expats and tourists, high proportion of young consumers

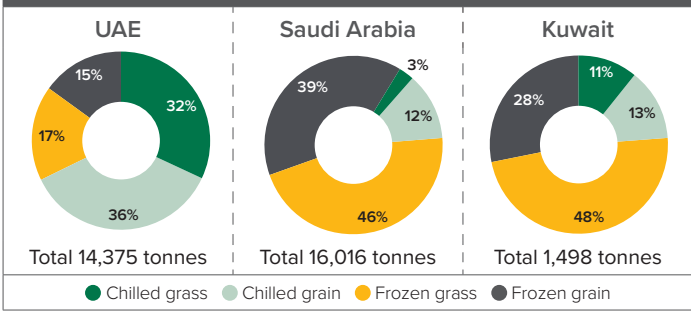
GROWTH
Increasing awareness and appreciation of high quality red meat

Unless otherwise stated in this snapshot, MENA includes 12 countries: the six Gulf Cooperation countries of Bahrain, Oman, Kuwait, Qatar, Saudi Arabia and the United Arab Emirates (the UAE) plus Egypt, Jordan, Palestine/Israel, Iran, Iraq and Mauritius. These 12 countries have been identified as presenting the greatest opportunities for Australian red meat and livestock exports now and into the medium-term future.

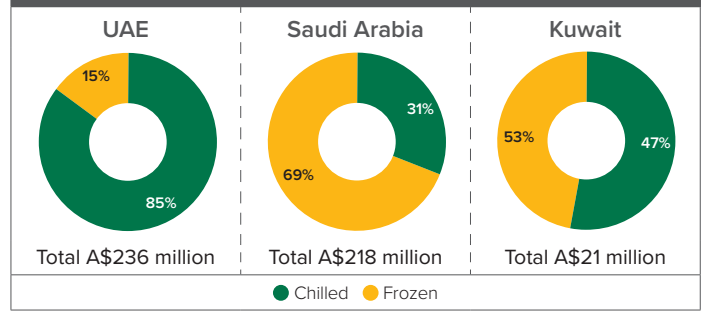
Australian beef exports to MENA in a global context^{1 and 2}



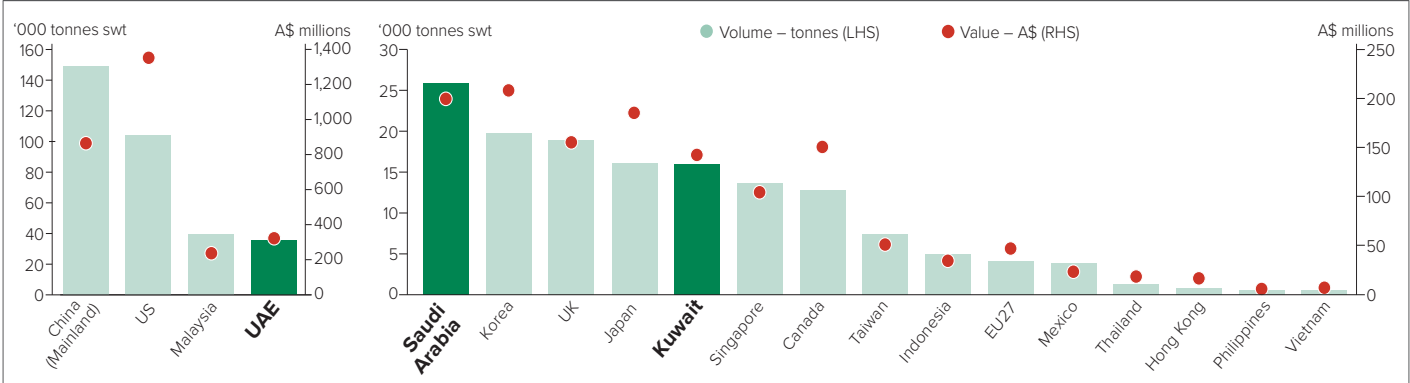
Australian beef exports – volume (swt)¹



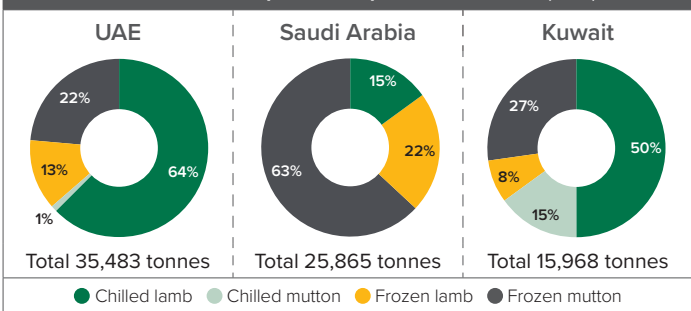
Australian beef exports – value²



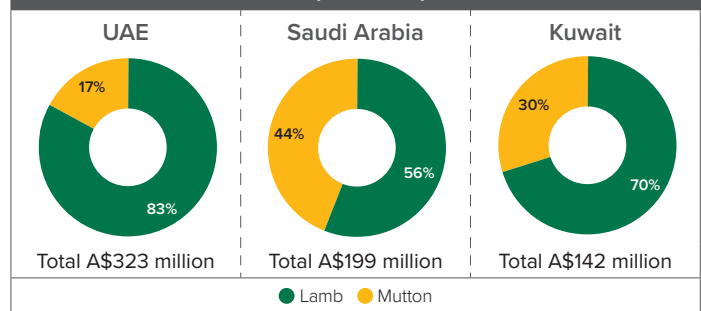
Australian sheepmeat exports to MENA in a global context^{1 and 2}



Australian sheepmeat exports – volume (swt)¹



Australian sheepmeat exports – value²



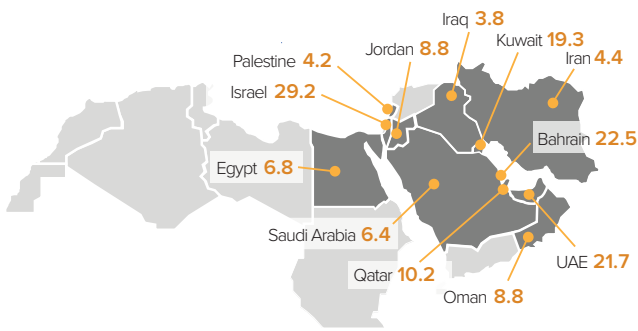
Data source for charts: ¹DAFF (CY2024), ²Trade Data Monitor (TDM) (MAT November 2024)

CONSUMERS



- Across MENA, beef is a popular meat enjoyed for its good taste. Consumers have access to a wide range of products, from lower grade, lean, local ex-dairy industry product and Indian buffalo meat, to locally slaughtered beef from live imports, as well as a range of boxed imports from all over the world.
- Total consumption of beef across the MENA region of 20 countries is forecast to grow at a compound annual growth rate (CAGR) of 2.1% from 2023 to 2028 (Source: GIRA). This growth is being driven by several factors such as increasing disposable incomes, a growing and young population, already-high urbanisation, shifting dietary habits, sizable wealthy expatriate populations and expanding leisure and tourism sectors.

MENA countries – per capita beef consumption*



Source: GIRA, 2024f, *Kg cwe per person per year

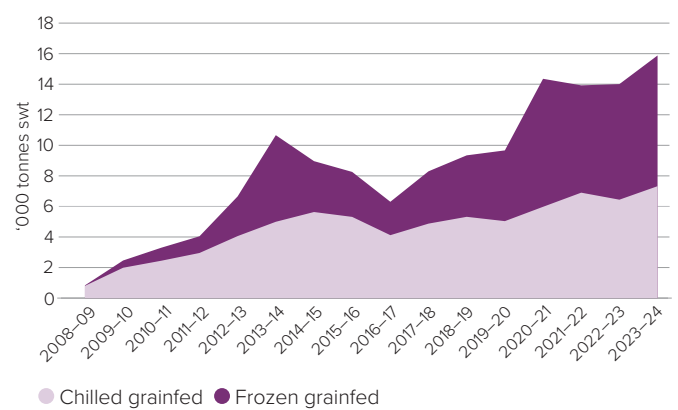
- Consumers have traditionally preferred leaner meat which is considered best suited to slow wet cooking and the strong aromatic style of many local dishes. Mince is used in kofta, kibbeh, pastry fillings and burgers. Grilled and fried beef dishes such as kebabs, shawarma and steak generally require beef with a somewhat higher fat content. Indeed, there is a growing preference for highly marbled product for grilling, as the product can be cooked well-done, which is the local preference, but will still offer a better eating quality experience than less marbled meat.
- After local beef, Australian beef generally has the highest awareness and regard compared to other suppliers. While domestic product tends to rate strongest on important attributes such as freshness and Halal-certification, Australian beef is seen as offering strengths in other areas. These include a superior, tender and consistently high quality product in a range of cuts to meet cooking needs, produced sustainably and from well-cared for animals (Source: MLA Global Tracker 2024).
- Across the Gulf, there is an annual slow-down in foodservice and retail sales during the peak summer months of July to August, when affluent locals and expats tend to leave. By contrast, the cooler months from November to February are peak season for BBQ and grilling outdoors.
- Military action in the region since October 2023 has been negatively impacting on regional consumer sentiment and tourism, and disruptive to trade.

FOODSERVICE



- Dining out is a vital part of social and business life in the region, where other leisure options have been limited. The foodservice sector, in particular, has played a key role in expanding home meal repertoires.
- MLA estimates that around 70% of Australian beef exports to the region are utilised in the foodservice sector, though this varies somewhat by country. Around 40% of Australian beef export volumes to MENA is frozen manufacturing product, mostly used in fast food and casual dining restaurants. American and Italian cuisines dominate this segment with beef items such as steak, burgers, pasta, pizza, wraps and sandwiches. Local, other Middle Eastern, Lebanese and Turkish cuisines are also very popular and have their own unique beef dishes.
- Higher value cuts are generally used in full-service restaurants. A 'premiumisation' trend in the category is illustrated by growing demand for Australian grainfed beef, particularly cube roll, rib and loin cuts. The average unit price of Australian beef exports to MENA increased at a CAGR of 7.8% in the five years from 2018–19 to 2023–24, compared to 4.4% for our global export average, and was 60% higher than the global average in 2023–24 (Source: Trade Data Monitor (TDM)).
- Affluent residents and tourists enjoy an increasing variety of cuisines when dining out, many of which utilise high quality beef. Full-service restaurants offer cuisines such as Chinese, Indian, Japanese, Thai and Mexican which feature items such as steak, other meat mains, curries and kebabs. The entry of the Michelin Guide to Dubai and Abu Dhabi since 2022 reflects the significant and growing number of premium quality dining establishments and chefs in the region.

Australian grainfed beef exports to MENA



Source: DAFF, MENA-12 countries

- Countries in the region are developing their tourism industries, which is presenting new opportunities in foodservice. Tourist visitors to the region are currently forecast to increase 28% from 124 million in 2024 to 159 million in 2028, though this may differ depending on the security situation in the region (Source: Fitch Solutions).
- Countries such as the UAE and Saudi Arabia have seen growth in take away and home meal delivery from a small base, accelerated by the pandemic and sustained by younger, affluent urban consumers, in particular. There has been a growing trend of pop-up and food truck style food festivals, led by the UAE.



- Retail sector development varies across the region but is evolving and generally more advanced in the wealthier, more urbanised Gulf markets. While affluent locals and Arab expats in the region tend to shop for beef at a mix of channels including wet markets, butchers and supermarkets, most Australian beef that is available in the retail sector is purchased at modern outlets as branded and packaged product.

Top three things beef shoppers look for on-pack

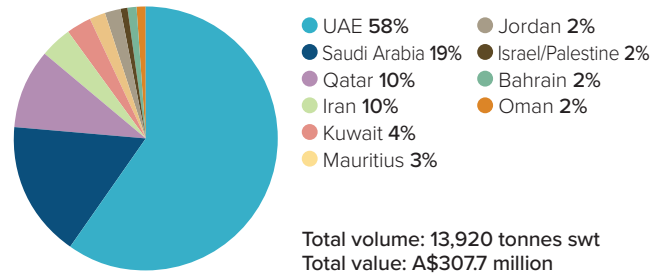
	UAE	Saudi Arabia	Qatar
1	Country of origin	100% natural	100% natural
2	Meat colour	Meat colour	Country of origin
3	Halal certification	Freshness	Meat colour

Source: MLA Global Consumer Tracker UAE 2024, Saudi Arabia and Qatar 2022, Affluent consumers are those living in households earning AED322,000+ (UAE), SAR241,000+ (KSA), QAR180,000+ (Qatar) / year

- Major retailers selling Australian beef are Majid Al Futtaim/ Carrefour and Lulu (across the region), Spinneys (UAE, Oman, Saudi Arabia), Choithrams (UAE, Qatar), Monoprix (Kuwait, Qatar), Panda, Al Othaim and Danube (Saudi Arabia), however it is available at a wide range of supermarkets and up-scale butchers.
- With comparatively few market access restrictions, consumers are typically presented with product from a large number of countries on retail shelves.

- The majority of beef used in home-cooking is commodity type product but affluent consumers are increasingly seeking out premium imported primal cuts purchased at modern retail, particularly for Western-style dishes like steak, which are gaining a place in family meal repertoires.

Australian chilled beef export markets in MENA (2023–24)



Source: DAFF, Trade Data Monitor (TDM), Percentage by exported volume, Grassfed and grainfed combined, MENA-12 countries only

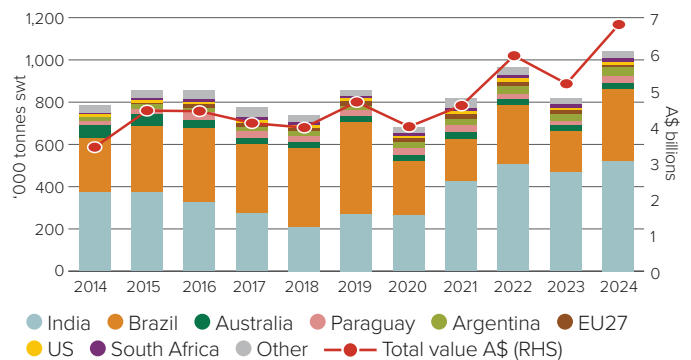
- The pandemic accelerated uptake by affluent consumers in large cities of meal kits and online grocery shopping. Even in Q2 2023, consumers in the UAE and Saudi Arabia are much more likely than global counterparts to intend to either continue or increase their use of meal kits and online grocery in the coming months (Source: GlobalData Q2 2023).
- Whilst still low by global standards, women's workforce participation in the region has seen significant increases in most countries in recent years, increasing the need for food products and services that make life easier and save time.

COMPETITIVE LANDSCAPE



- Beef import demand across the MENA region varies depending on domestic production and consumption habits. In some Gulf countries like the UAE, Kuwait, Oman, Qatar and Bahrain, almost all beef consumed is imported. In Saudi Arabia, Jordan, Egypt, Israel and Iran, generally over half of beef consumed is imported, with the rest coming from both live imports and local production, primarily from the domestic dairy industry. Overall, the largest boxed beef importers by volume are Egypt, the UAE, Saudi Arabia, Israel and Iraq (Source: GIRA).
- The bulk of the region's beef imports come from India and Brazil, comprising mostly frozen boneless and lean cuts of beef and buffalo meat. MENA imported around 17% more volume of beef in 2023–24 year-on-year, reflecting strong demand and favourable global prices. Australia is also a key supplier of frozen veal carcasse to Saudi Arabia.
- Competition for Australian grainfed beef comes mostly from the US and, to some extent, Canada, Japan and South Africa. Japan exports small but increasing volumes of Wagyu to the Gulf.

MENA-12 beef imports by supplier*



Source: Trade Data Monitor (TDM), *Exporter reported totals, *MAT year ending September

- Most key MENA markets are forecast to increase beef imports over the next several years, with particularly notable import demand growth expected in Algeria, Tunisia and Syria (Source: GIRA).

LIVESTOCK EXPORTS



- MENA is a major global market for live cattle. The broader region is forecast to import some 1.6 million head in 2024 but decrease somewhat to 1.49 million head in 2028f (Source: GIRA).
- In 2023–24, Australia exported 56,824 head, up 35% year-on-year, valued at A\$79.3 million to the region. Israel was Australia's largest regional destination taking feeder cattle, with smaller numbers of slaughter and some breeder cattle imported by Jordan, the UAE and Kuwait (Source: DAFF, ABS).

- Australian live cattle exports to the MENA region have been on a long-term downward trend due to several factors.
- Key competitors in the MENA live cattle market are Colombia, Brazil, Uruguay and European countries such as Spain, Portugal, Romania and France, particularly in the significant importing countries such as Türkiye, Israel, Egypt and Iraq (Source: GIRA, MLA).



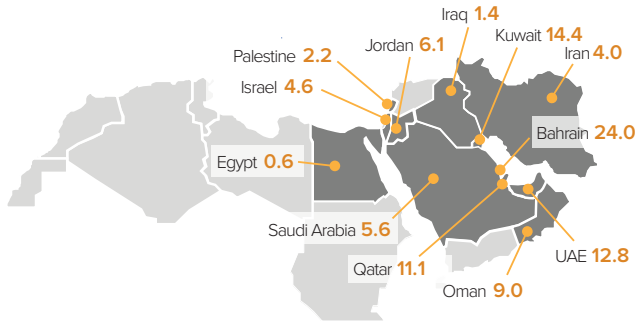
Sheepmeat

CONSUMERS



- Sheepmeat is a culturally important item in MENA. As a meat, lamb is considered a superior protein that is tender, juicy and tasty, making it a family favourite. As a premium product, per capita consumption is low compared to chicken and fish but is notably higher in MENA compared to most countries in Europe, North America and Asia (Source: MLA, GIRA).
- Total sheepmeat consumption in Australia's main MENA markets is forecast to increase at a CAGR of +1.5% from 2024 to 2028 from around 1.1 million to 1.2 million tonnes cwe (Source: GIRA).

MENA countries – per capita sheepmeat* consumption



Source: GIRA, 2024f, *Includes sheepmeat and goatmeat, Kg cwe/head/year

- The region has significant demand for both lamb and mutton. Mutton is favoured over lamb in some sectors due to taste preference and cooking styles, such as in Oman, Saudi Arabia and Kuwait. Frozen mutton is also used by the catering sector in countries with significant numbers of migrant workers, where it competes with frozen bobby veal.

- While the majority of the sheepmeat market is commodity product in carcass form, premium lamb consumption and imports have been growing, particularly in Gulf countries, driven by tourism growth, a young population and higher disposable incomes.
- Australia has been a key sheepmeat supplier to MENA markets for more than 50 years, with high awareness and a strong, positive reputation. Australian sheepmeat is particularly appreciated for its consistently high quality, good taste and naturalness (Source: MLA Global Consumer Tracker).



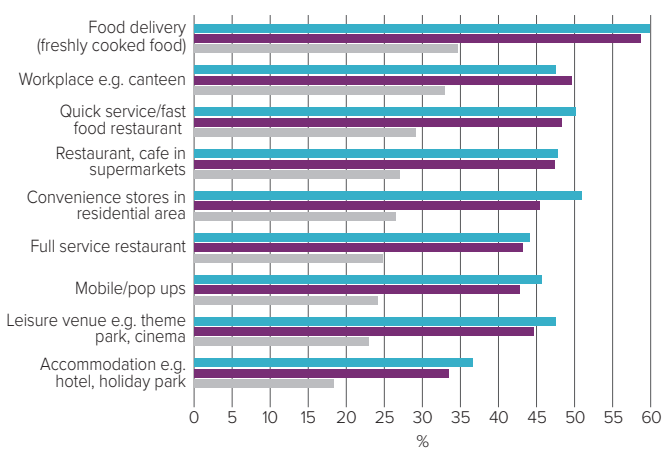
Grilled lamb kefta is a popular regional dish

FOODSERVICE



- Over half of Australian sheepmeat exports to the MENA region are utilised in the foodservice sector. With disposable incomes among the world's highest, affluent consumers frequently enjoy premium dining experiences, many of which include lamb.

High dining out frequency across channels



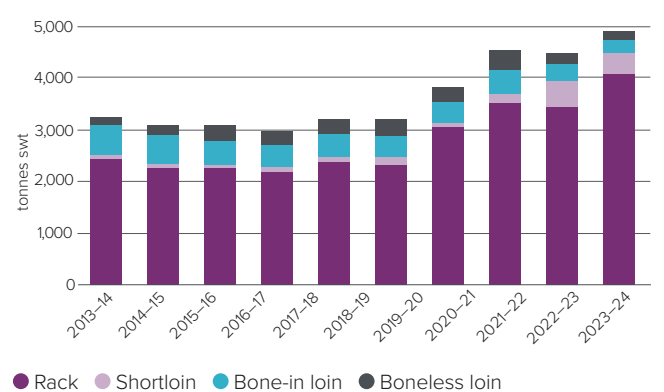
● The UAE ● Saudi Arabia ● Global average*

Source: GlobalData Global Consumer Survey Q2 2024, *Average of 41 countries, Order food and drinks at least weekly from these channels

- Lamb features on menus at mostly full-service restaurants as well as some casual ones, particularly in local and other Middle Eastern, Indian and Chinese cuisine establishments where it is

found in various meat mains, kebabs, curries and wraps (Source: GlobalData Menu Intelligence 2022). While lamb is among the proteins of choice when dining at top tier restaurants, there are opportunities to further develop premium lamb offerings, particularly in Western-style restaurants.

Australian premium lamb cuts exports to MENA*



● Rack ● Shortloin ● Bone-in loin ● Boneless loin

Source: DAFF, *MENA-12 countries, Chilled and frozen combined

- In markets with fast-growing tourism sectors such as the UAE, Saudi Arabia and Qatar, demand for Australian high value chilled lamb loin cuts in the high-end foodservice sector has been growing.





- As the modern retail sector develops across the region, new opportunities for Australian premium, packaged and branded lamb products are emerging.
- In most MENA countries, the majority of Australian packaged lamb is purchased from hypermarkets and supermarkets, while a significant proportion of unpackaged product, typically in the form of chilled carcasse, is sold through butchers.

Strongest associations with Australian premium lamb

The UAE	Saudi Arabia	Qatar
Consistent quality standards	Consistent quality standards	Is my family's favourite lamb
Guaranteed safe to eat	Guaranteed safe to eat	The meat is usually tender
More nutritious	Low in fat	Consistently high quality

Source: MLA Global Consumer Tracker UAE 2024; Qatar and KSA 2023, Based on percentage agreement scores, Affluent consumers living in households earning AED322,001+ (UAE), SAR241,000+ (KSA), QAR180,000+ (Qatar) / year

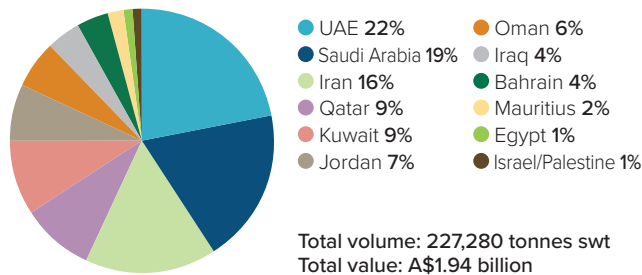
- Key retailers in the region where consumers purchase Australian sheepmeat include Majid Al-Futtaim/Carrefour and Lulu (across the region), Spinneys (UAE, Oman, Saudi Arabia), Choithrams (UAE, Qatar), Monoprix (Kuwait, Qatar), Al Meera (Qatar), Sultan Centre (Kuwait), Panda, Al Othaim and Danube (Saudi Arabia). The UAE also has a number of large retail cooperatives that tend to sell more traditional products such as carcasse.
- Regional home-cooking of sheepmeat dishes tends to involve slow-cook methods (roasting or stewing), followed by grilling or broiling and are often heavily spiced. Traditionally, lean sheepmeat has been favoured as best-suited for use in traditional dishes. However, the eating qualities of Australian sheepmeat are increasingly appreciated, particularly for grilling and pan-frying, where a higher fat content is desired.

COMPETITIVE LANDSCAPE



- Domestic sheep and goatmeat production, from both domestic and live imported animals, in the broader MENA region met around 94% of consumption in 2024. For the foreseeable future however, there will remain a gap that imports will need to fill, as production growth is limited due to various environmental constraints. Hence, both boxed and live imports will need to rise to fully meet demand (Source: GIRA).

MENA boxed sheepmeat import markets by volume share



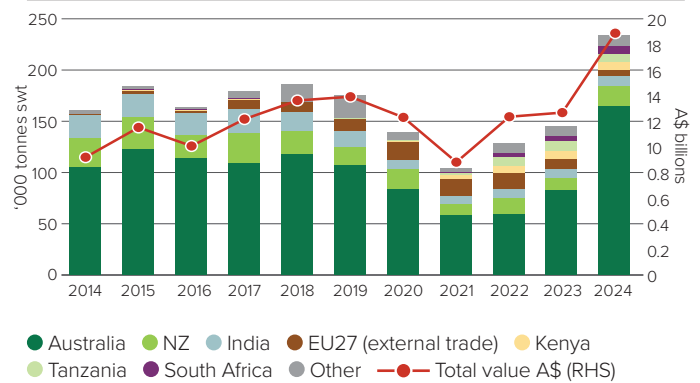
Source: Trade Data Monitor (TDM), 2023–24, Data based on available supplier export data, All suppliers combined, Lamb and mutton combined, Excluding offal, MENA-12 markets only

- Australia is the region's largest and most consistent sheepmeat supplier with around two-thirds volume share in 2023–24. New Zealand, India and the EU are also significant suppliers. Small and ad hoc but growing volumes are coming from African countries such as South Africa, Pakistan,

Tanzania, Kenya and Ethiopia. An average year typically sees product imported into the region from as many as 22 countries, highlighting the strength of demand and price sensitivity in some segments.

- New Zealand exports significant volumes of frozen bone-in lamb to Saudi Arabia and Jordan. India supplies mostly chilled mutton carcasse to the UAE and smaller volumes to Qatar and Kuwait. In recent years, some European countries such as Romania, Georgia and Spain have become more significant suppliers, particularly of mutton (chilled and frozen bone-in).

MENA sheepmeat imports by supplier*



Source: Trade Data Monitor (TDM), *Exporter reported totals, MAT year ending August

LIVESTOCK EXPORTS



- MENA countries, particularly Saudi Arabia, have high demand for live sheep imports due to limited potential to significantly expand domestic flocks and a preference for local, freshly-slaughtered Halal meat for use in religious observances and daily diets.
- The broader region was forecasted to import around 8.3 million head of live sheep and goats (169,700 tonnes carcasse weight equivalent) in 2024 and is forecast to be around just under 9 million head by 2028 (Source: GIRA).
- In 2023–24, the region remained Australia's top export destination for live sheep, exporting 503,012 head (a 19%

year-on-year decline), valued at A\$41 million, with Kuwait taking 33% by volume, with notable volumes also exported to Jordan, Saudi Arabia, the UAE and Israel (Sources: DAFF, Trade Data Monitor (TDM)).

- Regulatory changes in Australia mean that live sheep shipments are prohibited from departing Australia between June and September. As a consequence, Australia has been facing increased competition from African countries such as Somalia, Sudan, Ethiopia and South Africa, as well as European countries such as Romania, Spain and Georgia.



Market access overview – beef

The United Arab Emirates:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>Negotiations on the Australia-United Arab Emirates Comprehensive Economic Partnership Agreement (CEPA) concluded on 17 Sep 2024</p> <p>The CEPA treaty is now being prepared for signature and entry into force (EIF) will occur in accordance with Australia's domestic treaty making process</p>	<p>0% for chilled meat and carcasses</p> <p>Pre-CEPA EIF: 5% for frozen meat and carcasses, chilled and frozen bovine offal</p> <p>Post-CEPA EIF: 0% on all beef products</p>	<p>India, Brazil and South Africa:</p> <p>Same as Australia</p> <p>NZ**:</p> <p>Zero tariffs with NZ-GCC FTA entry into force</p>	Zero	Pre-CEPA EIF: Barriers relating to shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections

Other Gulf Cooperation Council* (GCC) countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
<p>Australia has been negotiating a GCC-Australia Free Trade Agreement (FTA) since 2007</p>	<p>0% for chilled meat and carcasses</p> <p>5% on frozen meat and carcasses, chilled and frozen bovine offal (5.5% on frozen boneless beef to Saudi Arabia)</p>	<p>India, Brazil and South Africa:</p> <p>Same as Australia</p> <p>NZ**:</p> <p>Zero tariffs with NZ-GCC FTA entry into force</p>	Zero	Numerous barriers by country including shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections

Non-GCC MENA countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement	<p>Australia to:</p> <p>Morocco: 30–200% tariff on beef products</p> <p>Türkiye: 40–225% tariff on beef products</p> <p>Iran: Tariff rates vary significantly depending on demand</p> <p>Israel: 50% tariff on chilled bovine offal</p> <p>Tunisia: 36% on all meat and offals</p> <p>Egypt: 5% on bovine offal</p> <p>Jordan: 10% tariff on boneless meat; 2.5–5% on bovine offal</p>	<p>India, Brazil, South Africa and NZ**:</p> <p>Same as Australia</p> <p>EU-27, US: Preferential access (lower tariff rates) to some North African countries</p>	Zero	Numerous barriers by country including shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections

Best access Major challenges

Source: Trade agreements, DFAT, MLA, *GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates, **NZ-GCC FTA was finalised on 1 November 2024 but yet to enter into force, alongside the New Zealand-UAE Comprehensive Economic Partnership Agreement (CEPA) signed in September 2024



Sheepmeat



Market access overview – sheepmeat

The United Arab Emirates:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Negotiations on the Australia-United Arab Emirates Comprehensive Economic Partnership Agreement (CEPA) concluded on 17 Sep 2024 The CEPA treaty is now being prepared for signature and entry into force (EIF) will occur in accordance with Australia's domestic treaty making process	0% for chilled meat and carcasses Pre-CEPA EIF: 5% for frozen meat and carcasses, chilled and frozen ovine offal Post-CEPA EIF: 0% on all sheepmeat products	EU-27 and India: Same as Australia NZ**: Zero tariffs with NZ-GCC FTA entry into force	Zero	Pre-CEPA EIF: barriers relating to shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections

Gulf Cooperation Council (GCC*) countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement but Australia has been negotiating a GCC-Australia Free Trade Agreement (FTA) since 2007	0% for chilled meat and carcasses, 5% for frozen, 2.5% for chilled ovine offal, 5% for frozen	EU-27 and India: Same as Australia NZ**: Zero tariffs with NZ-GCC FTA entry into force	Zero	Numerous barriers by country including shelf life, product labelling, coding, document legalisation, quality inspections and phytosanitary standards

Non-GCC MENA countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement	Australia to: Morocco: 30–200% duty on sheepmeat products Türkiye: 100–225% duty on sheepmeat products Iran: Tariff rates vary significantly depending on demand Israel: 60% tariff on chilled ovine offal Tunisia: 36% on all meat and offals Egypt: 0% on sheepmeat, 5% on ovine offal Israel: 0% on sheepmeat Jordan: 12.5% tariff on boneless meat, 5% on ovine offal	NZ and India: Same access as Australia EU-27: Preferential access (lower tariff rates) to some North African countries	Zero	Numerous barriers by country including shelf life, product labelling, item sizing and packing, coding, document legalisation, quality inspections and phytosanitary standards

Best access Major challenges

Source: Trade agreements, DFAT, MLA, *GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates, **NZ-GCC FTA was finalised on 1 November 2024 but yet to enter into force, alongside the New Zealand-UAE Comprehensive Economic Partnership Agreement (CEPA) signed in September 2024

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