# MARKET SNAPSHOT | BEEF & SHEEPMEAT

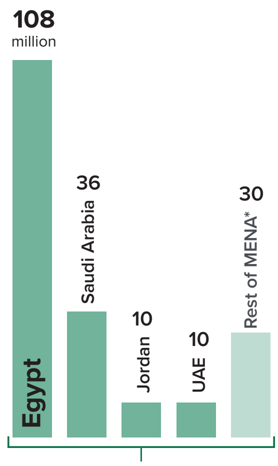
# MENA

## (Middle East & North Africa)

MENA* is a large, diverse region with numerous and varied consumer markets for red meat products. Forecast increases in affluent households in the context of the region's young and urbanised populations will support attractive growth opportunities for Australian red meat in the short and longer-term future.

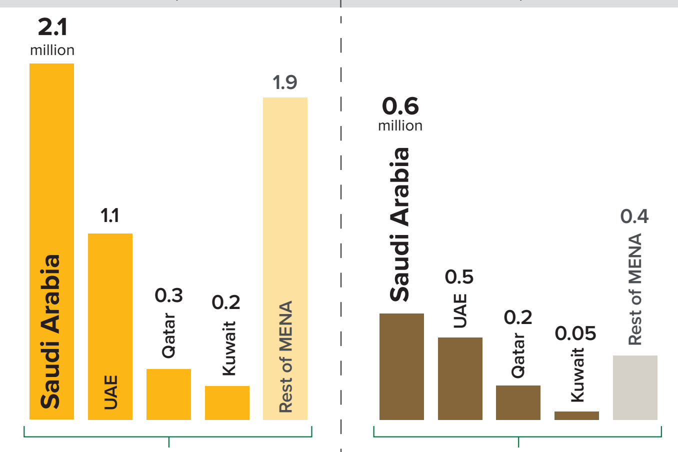
** Unless otherwise stated in this snapshot, MENA includes 10 countries: the six Gulf Cooperation Countries of Bahrain, Oman, Kuwait, Qatar, Saudi Arabia and the United Arab Emirates (the UAE) plus Egypt, Jordan, Palestine/Israel and Mauritius. These 10 countries have been identified as presenting the greatest opportunities for Australian red meat and livestock exports now and into the medium-term future.*

### Population[1]




**204 million by 2026f**
(+4% from 2023f)

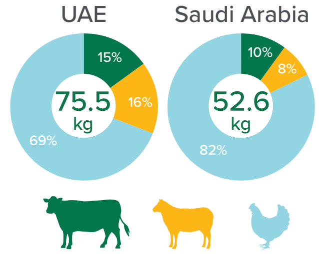
### Household number by disposable income[2]




**6.6 million by 2026f**
(+16% from 2023f)

**2.2 million by 2026f**
(+25% from 2023f)

### Meat consumption per capita[3]



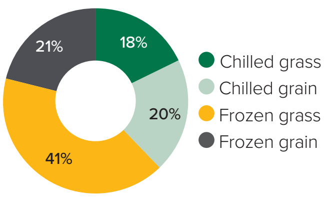

### Annual grocery spend[4]

UAE: A$**3,804** per person/year

KSA: A$**2,333** per person/year

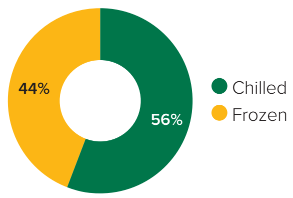
**MENA demand for Australian beef has grown over the past decade, particularly for grainfed product. Saudi Arabia and the United Arab Emirates are our largest beef markets in the region.**

### Australian beef exports – volume[5]



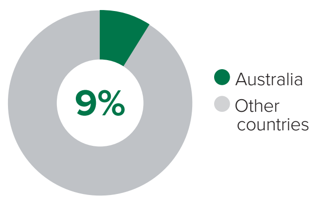

Total 28,786 tonnes swt

### Australian beef exports – value[6]



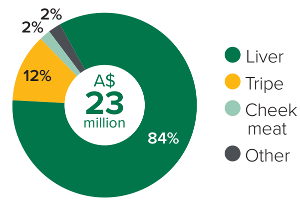

Total A$475 million

### Australia's value share of beef imports[7]




Total imports A$5.35 billion

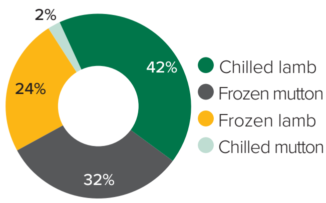
### Australian beef offal cuts exports[5,6]




Total 9,228 tonnes swt

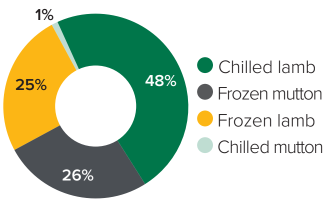
**MENA has been a major market for Australian sheepmeat for over 25 years, accounting for 13% of Australia's total global sheepmeat export volume and value in 2021–22.**

### Australian sheepmeat exports – volume[5]



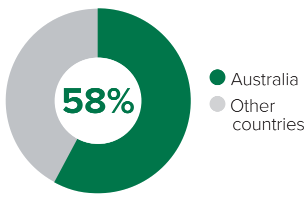

Total 56,958 tonnes swt

### Australian sheepmeat exports – value[6]



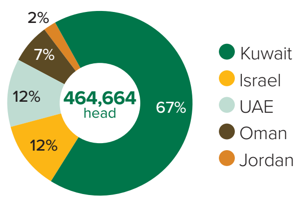

Total A$603 million

### Australia's value share of sheepmeat imports[7]




Total imports A$1.05 billion

### Australian live sheep exports[8]




Total A$80 million

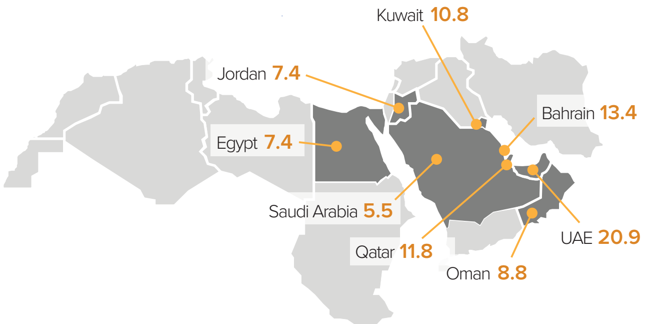
*Data source for charts: [1]Fitch Solutions 2023f, (*Rest of MENA-10), [2]Fitch Solutions 2023f, MENA includes MENA-10 minus Oman and Palestine (West Bank and Gaza) (Disposable income = earnings after taxes and social security charges), [3]Gira/IRA 2022f, sheepmeat includes goat meat (kg per person per year in cwt excluding fish/seafood), [4]IGD 2023f (defined as the total annual grocery retail market turnover in a given year, divided by the population for the same year. Grocery retail market data excludes VAT/sales tax), [5]DAFF (2021–22), [6]IHS Markit (2021–22), [7]IHS Markit (2021–22) (Figures based on AUD value of supplier exports to MENA-10), [8]DAFF/IHS Markit (2021–22)*

# Beef

## 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 markets is forecast to grow at a compound annual growth rate (CAGR) of 3.3% from 2021–2026 *(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. 2022f. *kg cwe/head/year*

- Consumers have traditionally preferred leaner meat which is considered best suited to the slow wet cooking and 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.

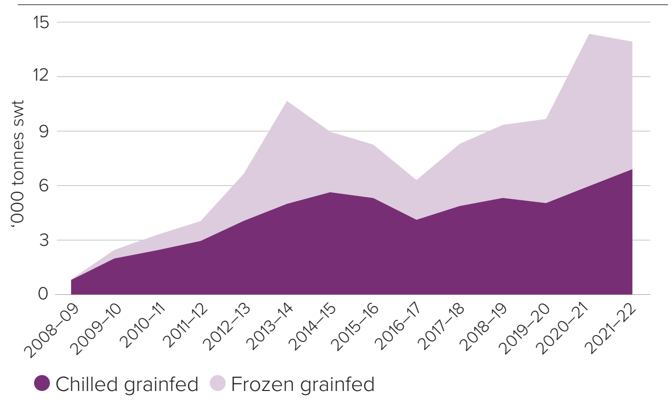
*Grilled beef kebabs, a popular regional beef dish*

- 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 such as 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. These are what make it a family favourite *(Source: MLA Global Tracker, 2022).*

## FOODSERVICE

- Dining out is a vital part of social and business life in the region, where other leisure options can be 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 a quarter 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 *(Source: GlobalData Menu Intelligence 2022)*.
- 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 unit price of Australian beef exports to MENA increased at a CAGR of 9.7% from 2017–2021, compared to 5.1% for our global export average *(Source: IHS Markit)*.
- 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 in mid-2022 reflects the significant and growing number of high quality dining establishments in the city.

**Australian grainfed beef exports to MENA***




*Source: DAFF, *MENA-10*

- Countries in the region are developing their tourism industry. Increased hosting of international events, such as the FIFA World Cup in Doha in 2022, is presenting new opportunities in foodservice. Tourist visitors to the region are currently forecast to almost double from an estimated 67 million in 2022 to 125 million by 2026 *(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, and women in particular. The global average weekly use of meal delivery services is around 40% but around 62% in both UAE and Saudi Arabia *(Source: GlobalData Q2 2022)*.

# RETAIL

- 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 3 things beef shoppers look for on-pack

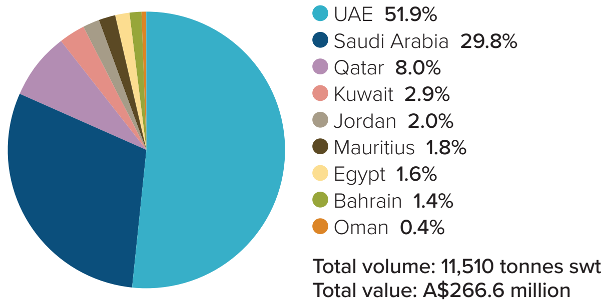
| | UAE | Saudi Arabia | Qatar |
|---|---|---|---|
| 1 | 100% natural | 100% natural | 100% natural |
| 2 | Freshness | Meat colour | Animal country of origin |
| 3 | Animal country of origin | Freshness | Meat colour |

*Source: MLA Global Consumer Tracker 2022. Based on percentage agreement scores. Affluent consumers are those living in h'holds earning AED322,000+ (UAE), SAR241,000+ (KSA), QAR180,000+ (Qatar)*

- Major retailers selling Australian beef are Majid Al Futtaim/ Carrefour and Lulu (across the region), Spinneys and Choithrams (the UAE), Panda, Al Othaim and Danube (Saudi Arabia), however it is available at a wide range of supermarkets and up-scale butchers.
- Country of origin labelling is generally not mandatory but most red meat products at modern retail are actually labelled. 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* (2021–22)



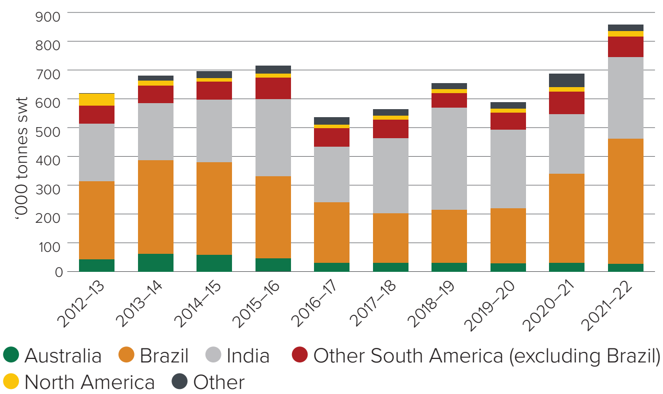

*Source: DAFF, IHS Markit. Percentage by exported value. Grassfed and grainfed combined. *MENA-10 countries*

- The pandemic accelerated uptake by affluent consumers in large cities of meal kits and online grocery shopping. Even in Q2 2022, 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 2022)*.
- 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 and Iran *(Source: GIRA, IHS Markit)*.
- The bulk of the region's beef imports come from Brazil and India, comprising mostly frozen boneless and lean cuts of beef and buffalo meat. The past 12–18 months has seen notable increases in supply from smaller suppliers such as Sudan, Ethiopia and Tanzania. Australia is also a key supplier of frozen veal carcase to Saudi Arabia.
- Competition for Australian grainfed beef comes mostly from the US and, to some extent, Canada and Japan. Japan exports small but increasing volumes of wagyu to the Gulf – mostly to the UAE but also Qatar and Bahrain.

### Beef/veal exports to MENA* by supplier




*Source: IHS Markit. Excludes offal. *MENA-10 countries. Figures include a small volume of intra-regional trade*

- All key MENA markets are forecast to increase beef imports over the next several years, with particularly notable import demand growth expected in Egypt, Jordan and Kuwait.

# LIVESTOCK EXPORTS

- MENA is a major global market for live cattle. The region is forecast to import some 1.36 million head in 2022 and increase at a CAGR of +6.3% to around 1.74 million head by 2026*f* *(Source: GIRA)*.
- In 2021–22, Australia exported 27,315 head valued at A$45 million to the region. Israel was Australia's largest regional destination taking feeder cattle, followed by Kuwait and the UAE which imported slaughter cattle *(Source: DAFF, ABS)*.
- Australian live cattle exports to the MENA region have been on a long-term decline due to several factors.
- Key competitors in the MENA live cattle market are Brazil, Uruguay and European countries such as Portugal and Russia, particularly in the significant importing countries such as Lebanon, Turkey and Israel *(Source: GIRA, MLA)*.

# Market access overview – beef

Gulf Cooperation Council (GCC*) countries:

| Trade agreements | Import tariffs | Competitors | Volume restrictions | Technical access |
|---|---|---|---|---|
| No agreement, however Australia is negotiating a GCC-Australia Free Trade Agreement (FTA) | **2022 and 2023:**<br>0% for chilled meat and carcases<br>5% for frozen meat and carcases, chilled and frozen bovine offal | **India, Brazil and NZ**:**<br>Same as Australia | Zero | Numerous barriers by country including shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections |

Non-GCC countries:

| Trade agreements | Import tariffs | Competitors | Volume restrictions | Technical access |
|---|---|---|---|---|
| No agreement | Australia to:<br>**Morocco:** 30–200% duty on beef<br>**Turkey:** 40–225% duty on beef<br>**Iran:** tariff rates vary depending on demand<br>**Israel:** 50% tariff on chilled offal<br>**Jordan:** 10% tariff on boneless meat, 2–5% on offal | **India, Brazil and NZ:**<br>Same access as Australia<br>**EU-27:**<br>Preferential access to some North African countries | Some quota restrictions in Palestine | Numerous barriers by country including shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections |

Best access — Major challenges

*Source: DFAT, MLA. *GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. ** NZ-GCC FTA negotiations concluded but yet to be ratified*

# Australian beef exports to MENA* – summary table

**Volume – in tonnes swt**

| | | 2021–22 | % out of total | 2020–21 | % out of total | five-year average (2016–17 to 2020–21) | % out of total | change 2021–22 vs five-year average: % | change 2021–22 vs five-year average: in tonnes swt |
|---|---|---|---|---|---|---|---|---|---|
| Total | | **28,786** | | **32,164** | | **29,802** | | **-3%** | **-1,016** |
| Storage | Chilled | 11,477 | 40% | 11,598 | 36% | 12,108 | 41% | -5% | -631 |
| | Frozen | 17,309 | 60% | 20,567 | 64% | 17,691 | 59% | -2% | -382 |
| Meat type | Grassfed | 14,861 | 52% | 17,810 | 55% | 20,261 | 68% | -27% | -5,401 |
| | Grainfed | 13,925 | 48% | 14,354 | 45% | 9,608 | 32% | 45% | 4,318 |
| Storage/meat type | Chilled grassfed | 4,576 | 16% | 5,622 | 17% | 7,047 | 24% | -35% | -2,471 |
| | Chilled grainfed | 6,901 | 24% | 5,975 | 19% | 5,089 | 17% | 36% | 1,812 |
| | Frozen grassfed | 10,285 | 36% | 12,188 | 38% | 13,216 | 44% | -22% | -2,931 |
| | Frozen grainfed | 7,024 | 24% | 8,379 | 26% | 4,557 | 15% | 54% | 2,467 |

*Source: DAFF. *MENA-10 = Bahrain, Egypt, Jordan, Kuwait, Mauritius, Oman, Palestine/Israel, Qatar, Saudi Arabia and the United Arab Emirates*

**Value – in A$ 000**

| | | 2021–22 | % out of total | 2020–21 | % out of total | five-year average (2016–17 to 2020–21) | % out of total | % | in A$ 000 |
|---|---|---|---|---|---|---|---|---|---|
| Total | | **475,195** | | **377,178** | | **313,822** | | **51%** | **161,373** |
| Storage | Chilled | 266,617 | 56% | 193,810 | 51% | 172,007 | 55% | 55% | 94,610 |
| | Frozen | 208,578 | 44% | 183,368 | 49% | 141,816 | 45% | 47% | 66,763 |

*Source: ABS/IHS Markit*

**Australian beef exports to Saudi Arabia – by major cut (in tonnes swt)**

| | 2021–22 | % out of total | 2020–21 | % out of total | five-year average (2016–17 to 2020–21) | % out of total | % | in tonnes swt |
|---|---|---|---|---|---|---|---|---|
| Brisket | 1,991 | 17% | 1,648 | 13% | 985 | 9% | 102% | 1,006 |
| Carcase | 1,808 | 15% | 2,501 | 20% | 1,771 | 17% | 2% | 37 |
| Manufacturing | 1,670 | 14% | 1,957 | 16% | 1,934 | 18% | -14% | -265 |
| Blade | 802 | 7% | 337 | 3% | 333 | 3% | 141% | 469 |
| Other | 5,422 | 46% | 5,822 | 47% | 5,436 | 52% | 0% | -15 |
| **Total** | **11,692** | | **12,265** | | 10,459 | | **12%** | **1,233** |

*Source: DAFF*

**Australian beef exports to the UAE – by major cut (in tonnes swt)**

| | 2021–22 | % out of total | 2020–21 | % out of total | five-year average (2016–17 to 2020–21) | % out of total | % | in tonnes swt |
|---|---|---|---|---|---|---|---|---|
| Manufacturing | 2,167 | 24% | 3,435 | 33% | 2,380 | 27% | -9% | -213 |
| Topside/inside | 1,383 | 15% | 1,444 | 14% | 1,433 | 16% | -3% | -50 |
| Tenderloin | 907 | 10% | 688 | 7% | 625 | 7% | 45% | 282 |
| Striploin | 697 | 8% | 619 | 6% | 585 | 7% | 19% | 111 |
| Other | 3,967 | 43% | 4,124 | 40% | 3,844 | 43% | 3% | 123 |
| **Total** | **9,120** | | **10,310** | | **8,867** | | **3%** | **254** |

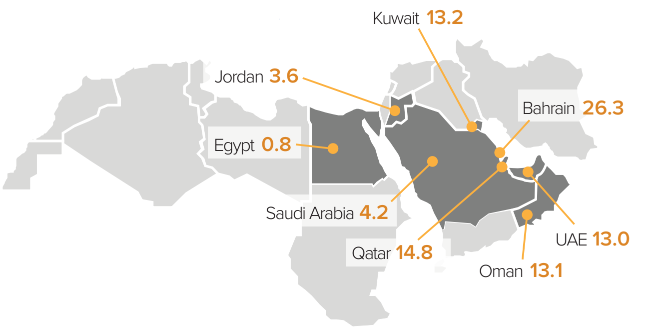
*Source: DAFF*

# 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 *(Sources: MLA, GIRA)*.
- MENA sheepmeat consumption has seen recovery post-pandemic, supported by high oil prices, the return of expats and resumption of tourism-related activity. Consumption in Australia's main MENA markets is forecast to average a CAGR of +2.2% from 2021 to 2026 from around 600,000 to 635,000 tonnes cwe *(Source: GIRA)*.

**MENA countries – per capita sheepmeat consumption***




*Source: GIRA. 2022f, includes sheepmeat and goat meat. *kg cwe/head/year*

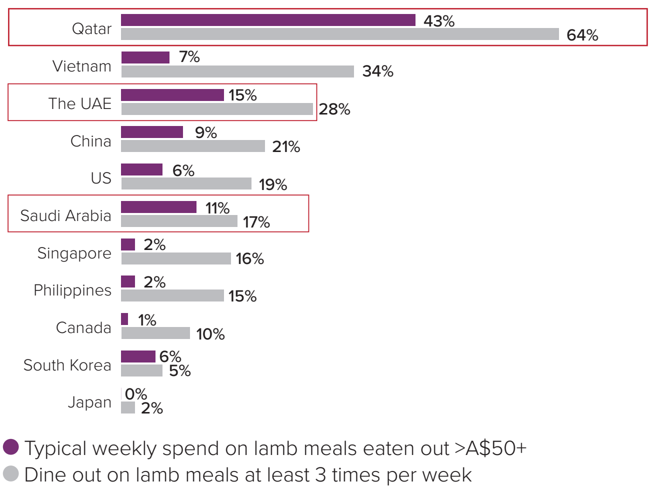
- The region has significant demand for both lamb and mutton. Mutton is favoured over lamb in some sectors due to taste preference and cooking styles, such as in Oman, Saudi Arabia and Kuwait. Frozen mutton is also used by the catering sector in countries with significant numbers of migrant workers, where it competes with frozen bobby veal.
- While the majority of the sheepmeat market is commodity product in carcase form, premium lamb consumption and imports have been growing, particularly in Gulf countries, driven by a young population and higher disposable incomes.
- Australia has been a key sheepmeat supplier to MENA markets for over 50 years, building high awareness and a strong, positive reputation. Australian sheepmeat is particularly appreciated for its consistently high quality, good taste and naturalness *(Source: MLA 2020, 2022)*.

*Grilled lamb kofta 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.

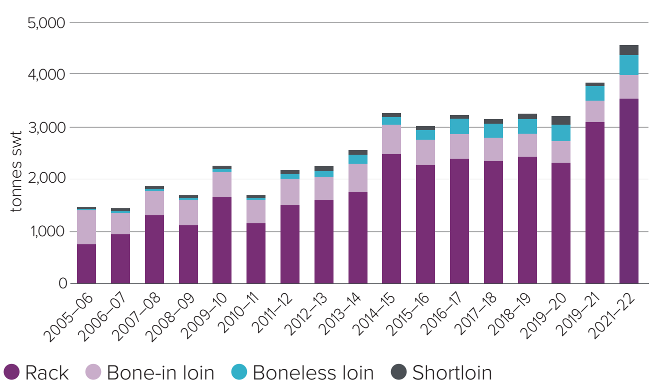
**Frequency and spend on out-of-home lamb meals in MENA**




*Source: MLA Global Consumer Tracker 2022. Percentage of consumers in each market who agree with the higher spend and frequency of lamb meals eaten out as their typical weekly behaviour*

- 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***




*Source: DAFF. *Australian exports to MENA-10 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.

# RETAIL

- 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 carcase, is sold through butchers.

**Strongest associations with Australian premium lamb**

| UAE | Saudi Arabia | Qatar |
|---|---|---|
| Offers cuts to suit my meals | The animals are well-cared for | Is my family's favourite lamb |
| Consistent high quality | Trusted Halal | The meat is usually tender |
| Most superior lamb | Industry is environ-mentally sustainable | Consistently high quality |

*Source: MLA Global Tracker 2022. Based on percentage agreement scores.Affluent consumers living in h'holds earning AED322,000+ (UAE), SAR241,000+ (KSA), QAR180,000+ (Qatar)*

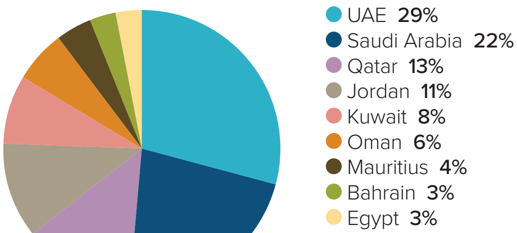
- Key retailers in the region where consumers purchase Australian sheepmeat include Majid Al-Futtaim/Carrefour and Lulu (across the region), Spinneys and Choithrams (UAE), Al Meera (Qatar), Sultan Centre (Kuwait), Panda, Al Othaim and Danube (Saudi Arabia).
- Regional home-cooking of sheepmeat dishes 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.

*Sheepmeat is often boiled with aromatic spices, then roasted and served on rice – regional variations are known as kabsa, biryani or mandi*

# COMPETITIVE LANDSCAPE

- Whilst domestic sheepmeat production is notable in the MENA-10 markets and will meet around three-quarters of consumption needs in 2022, production growth is limited due to various environmental constraints. Hence, to meet consumption growth, boxed imports will need to rise from around 165,000 to 199,000 tonnes cwe from 2022 to 2026f to fully meet demand *(Source: GIRA)*.
- In 2021–22, the MENA-10 region's combined volume of boxed sheepmeat imports registered through customs was around 106,000 tonnes swt, up 6% on the year prior and valued at just over A$1 billion which is up 24%, due largely to high global sheepmeat prices and other input costs.

**MENA* boxed sheepmeat importers by volume share**

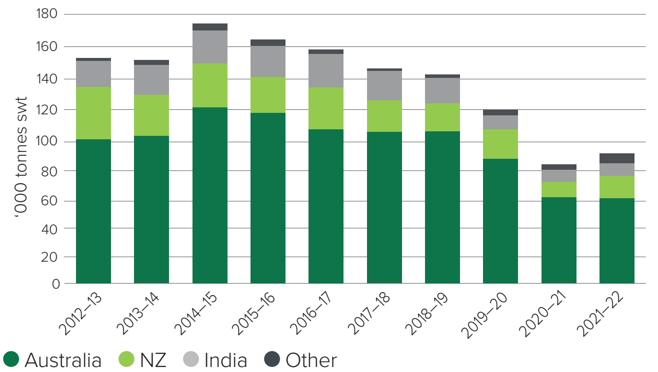



Total imports: 105,755 tonnes swt
Total value: A$1.1 billion

*Source: IHS Markit 2021–22. *MENA-10 countries. Data based on available supplier export data. Lamb and mutton combined but excluding offal*

- Australia is the region's leading boxed supplier, representing around 65% of imports in 2021–22, with New Zealand, India and Europe the main competitors.
- New Zealand exports significant volumes of frozen bone-in lamb to Saudi Arabia and Jordan. India supplies mostly chilled mutton carcase 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 frozen mutton carcase and bone-in cuts. While still relatively small, volumes have been increasing from countries like Tanzania, South Africa and Ethiopia.

**Sheepmeat exports to MENA* by supplier**




*Source: IHS Markit. *MENA-10 countries. Includes lamb and mutton. Does not include exports from African countries except for South Africa. Includes a small volume of intra-regional trade*

# LIVESTOCK EXPORTS

- MENA countries, particularly Saudi Arabia, have high demand for live sheep imports due to limited growth potential for local production and a preference for local, freshly-slaughtered Halal meat for use in religious observances and daily diets.
- The broader region is forecast to import around 5 million head of live sheep and goats (136,000 tonnes carcase weight equivalent) in 2022 and forecast to be around 6.3 million head by 2026 *(Source: GIRA)*.
- In 2021–22, the region remained Australia's top export destination for live sheep, exporting 464,644 head (-23% year-on-year), valued at just under A$80 million (-6% year-on-year), with Kuwait taking around two-thirds, followed by the UAE, Israel, Oman and Jordan *(Source: DAFF, IHS Markit)*.
- Regulatory changes in Australia mean that live sheep shipments are prohibited from departing Australia between June and September. As a consequence, Australia is 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 – sheepmeat

Gulf Cooperation Council (GCC*) countries:

| Trade agreements | Import tariffs | Competitors | Volume restrictions | Technical access |
|---|---|---|---|---|
| No agreement. Australia is negotiating an FTA with GCC. | **2022 and 2023:** 0% for chilled meat and carcases, 5% for frozen, 2.5% for chilled ovine offal, 5% for frozen | **NZ**, EU and India:** Same access as Australia | Zero | Numerous barriers by country including shelf life, product labelling, coding, document legalisation, quality inspections and phytosanitary standards |

Non-GCC countries:

| Trade agreements | Import tariffs | Competitors | Volume restrictions | Technical access |
|---|---|---|---|---|
| No agreement | Australia to:<br>**Morocco:** 200%<br>**Turkey:** 100–225%<br>**Iran:** variable depending on demand<br>**Jordan:** 12.5% tariff on boneless meat, 5% on offals | **NZ** and India:** Same access as Australia<br>**EU-27:**<br>Preferential access with some North African countries. | Some quota restrictions in Palestine | 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: DFAT, MLA. *GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE, ** NZ-GCC FTA negotiations concluded but yet to be ratified*

# Australian sheepmeat exports to MENA* – summary table

**Volume – in tonnes swt**

| | | 2021–22 | % out of total | 2020–21 | % out of total | five-year average (2016–17 to 2020–21) | % out of total | change 2021–22 vs five-year average % | change 2021–22 vs five-year average in tonnes swt |
|---|---|---|---|---|---|---|---|---|---|
| | Total | **56,958** | | **59,209** | | **93,231** | | | **-36,273** |
| Storage | Chilled | 25,276 | 44% | 38,490 | 65% | 52,823 | 57% | -39% | -27,547 |
| | Frozen | 31,682 | 56% | 20,719 | 35% | 40,429 | 43% | -52% | -8,747 |
| Meat type | Lamb | 37,313 | 66% | 45,103 | 76% | 58,436 | 63% | -22% | -21,123 |
| | Mutton | 19,645 | 34% | 14,106 | 24% | 34,766 | 37% | -36% | -15,122 |
| Storage/meat type | Chilled lamb | 23,810 | 41.8% | 36,188 | 61% | 47,800 | 51% | -43% | -23,990 |
| | Chilled mutton | 1,466 | 3% | 2,301 | 4% | 5,037 | 5% | -50% | -3,572 |
| | Frozen lamb | 13,503 | 24% | 8,915 | 15% | 10,657 | 11% | -71% | 2,846 |
| | Frozen mutton | 18,179 | 32% | 11,804 | 20% | 29,743 | 32% | 27% | -11,564 |

*Source: DAFF. MENA-10 = Bahrain, Egypt, Jordan, Kuwait, Mauritius, Oman, Palestine/Israel, Qatar, Saudi Arabia and the United Arab Emirates*

**Value – in A$ 000**

| | | 2021–22 | % out of total | 2020–21 | % out of total | five-year average | % out of total | % | in A$ 000 |
|---|---|---|---|---|---|---|---|---|---|
| | Total | **603,261** | | **519,737** | | **709,004** | | **-15%** | **-105,744** |
| Meat type | Lamb | 439,327 | 73% | 430,325 | 83% | 496,192 | 70% | -11% | -56,865 |
| | Mutton | 163,933 | 27% | 89,412 | 17% | 212,812 | 30% | -23% | -48,879 |

*Source: ABS/IHS Markit*

**Australian lamb exports to the UAE – by major cut (in tonnes swt)**

| | 2021–22 | % out of total | 2020–21 | % out of total | five-year average | % out of total | % | in tonnes swt |
|---|---|---|---|---|---|---|---|---|
| Carcase | 7,409 | 50% | 8,499 | 51% | 11,926 | 62% | -38% | -4,517 |
| Leg | 3,352 | 23% | 3,755 | 22% | 3,515 | 18% | -5% | -163 |
| Other | 4,047 | 27% | 4,524 | 27% | 3,927 | 20% | 3% | 120 |
| **Total** | **14,809** | | **16,778** | | **19,368** | | **-24%** | **-4,559** |

**Australian lamb exports to Qatar – by major cut (in tonnes swt)**

| | 2021–22 | % out of total | 2020–21 | % out of total | five-year average | % out of total | % | in tonnes swt |
|---|---|---|---|---|---|---|---|---|
| Carcase | 4,264 | 81% | 13,563 | 95% | 16,711 | 97% | -74% | -12,447 |
| Shank | 484 | 9% | 243 | 2% | 76 | 0% | 538% | 408 |
| Other | 493 | 9% | 522 | 4% | 516 | 3% | -4% | -23 |
| **Total** | **5,241** | | **14,328** | | **17,303** | | **-70%** | **-12,062** |

**Australian lamb exports to Jordan – by major cut (in tonnes swt)**

| | 2021–22 | % out of total | 2020–21 | % out of total | five-year average | % out of total | % | in tonnes swt |
|---|---|---|---|---|---|---|---|---|
| Shoulder | 3,184 | 61% | 1,093 | 35% | 1,907 | 23% | 67% | 1,278 |
| Carcase | 702 | 14% | 1,077 | 34% | 5,295 | 64% | -87% | -4,593 |
| Other | 1,302 | 25% | 987 | 31% | 1,097 | 13% | 19% | 204 |
| **Total** | **5,188** | | **3,157** | | **8,300** | | **-37%** | **-3,112** |

*Source: DAFF*