MEAT & LIVESTOCK AUSTRALIA

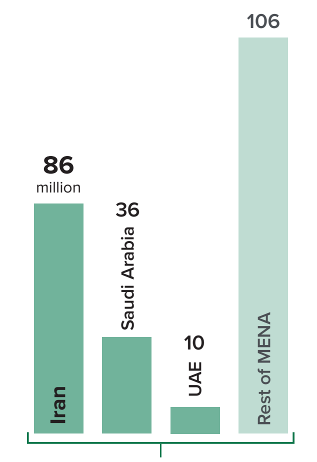
MARKET SNAPSHOT | BEEF & SHEEPMEAT

MENA
(Middle East & North Africa)

MENA* is a large, complex region with numerous and varied consumer markets. While some countries are highly dependent on imports to meet red meat consumption demand, even those that are significant producers in their own right also have strong import demand. The forecast increases in affluent households and young, urbanised populations provide attractive opportunities for Australian red meat.

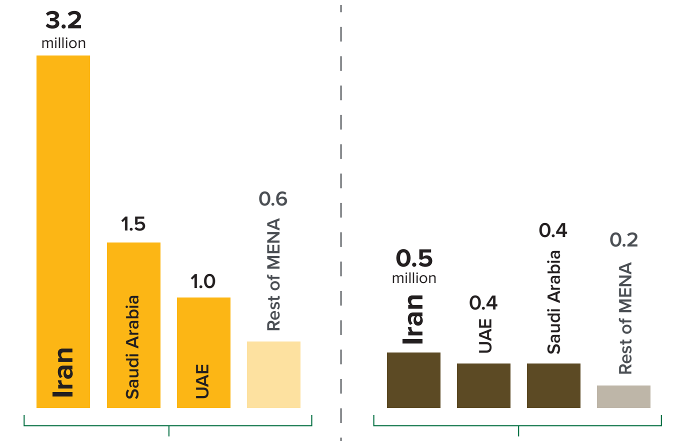
** Unless otherwise stated in this snapshot, MENA includes 10 countries: the six Gulf Cooperation Countries of Bahrain, Oman, Kuwait, Qatar, Saudi Arabia (KSA) and the United Arab Emirates (the UAE) plus Egypt, Iran, Jordan, and Lebanon. These 10 countries have been identified as presenting the greatest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

Population[1]



280 million by 2025f
(+4% from 2022f)

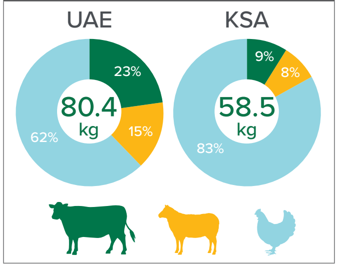
Household number by disposable income[2]



6.4 million in 2022f
7.1 million by 2025f (+12% from 2022f)

1.5 million in 2022f
1.8 million by 2025f (+17% from 2022f)

Meat consumption per capita[3]



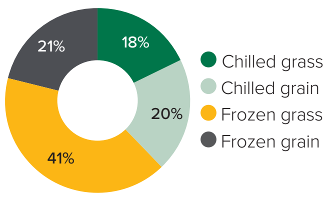
Annual grocery spend[4]

UAE: A$**4,818** per person/year

KSA: A$**2,695** per person/year

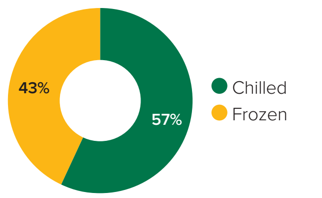
MENA demand for Australian beef has grown over the past decade, particularly for grainfed product. Saudi Arabia and the United Arab Emirates are the largest markets in the region.

Australian beef exports – volume[5]



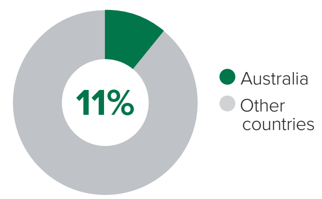
Total 29,741 tonnes swt

Australian beef exports – value[6]



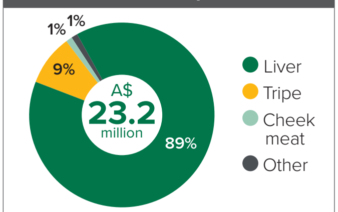
Total A$333.6 million

Australia's value share of beef imports[7]



Total A$3.05 billion

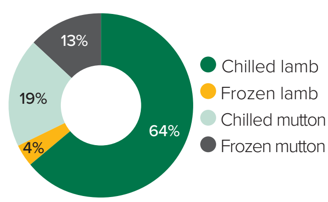
Australian beef offal cuts exports[5,6]



Total 10,928 tonnes swt

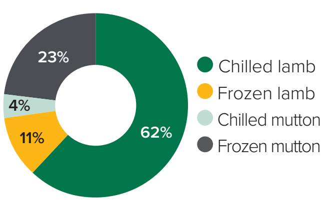
MENA has been an important market for Australian sheepmeat for over 25 years, accounting for 14% of Australia's total global sheepmeat export volume and value in 2020–21.

Australian sheepmeat exports – volume[5]



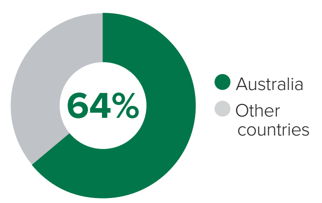
Total 56,457 tonnes swt

Australian sheepmeat exports – value[6]



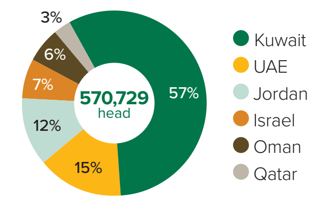
Total A$733 million

Australia's value share of sheepmeat imports[7]



Total A$781 million

Australian live sheep exports[5,8]



Total A$84.5 million

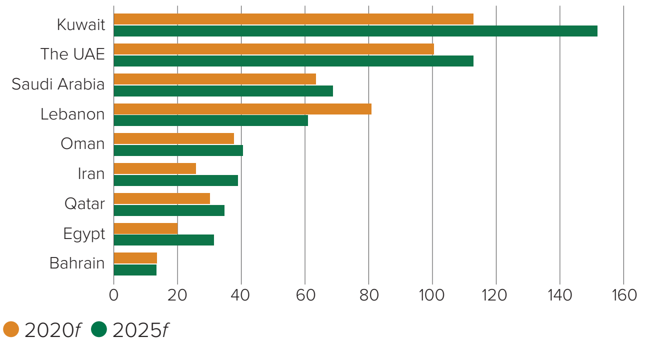
Data source for charts: [1]Fitch Solutions 2022f, (Rest of MENA = Egypt, Bahrain, Iran, Jordan, Kuwait, Qatar, KSA, UAE), [2]Fitch Solutions 2021, MENA includes MENA-10 minus Oman and Lebanon (Disposable income = earnings after taxes and social security charges), [3]Gira 2021f, (kg per person per year in cwt excluding fish/seafood), [4]IGD 2022f (It is 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]DAWE (2020–21), [6]ABS/IHS Markit (2020–21), [7]IHS Markit (2020–21) (Figures based on AUD value of supplier exports to MENA-10), [8]ABS/IHS Markit (2019–20) (Includes Israel).

Beef

CONSUMERS

- While MENA dietary protein is dominated by poultry and fish, beef is a popular meat enjoyed for its good taste. Consumers have access to a wide range of beef products, from lower grade lean local ex-dairy industry product and Indian buffalo meat to locally slaughtered beef from live imports plus a range of boxed imports from all over the world.
- Consumers in the region have traditionally preferred leaner meat, considered best suited to the slow wet cooking and strong aromatic style of many popular traditional dishes. Mince is used in kofta, meatballs, pastry fillings and burgers. Grilled and fried beef dishes such as kebabs and steak generally require somewhat fattier beef.
- The forecast of increased beef consumption and spending across almost all MENA markets in coming years will be driven largely by increasing disposable incomes, ongoing urbanisation, changing diets, sizable wealthy expatriate populations and an expanding tourism sector.
- After local beef, Australian beef typically has the highest consumer awareness 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 advantages in other areas such as consistent high quality, good taste, cuts variety to suit different cooking styles and good animal welfare *(Source: MLA Global Tracker, 2020)*.

Beef sales per capita (US$/person/year)



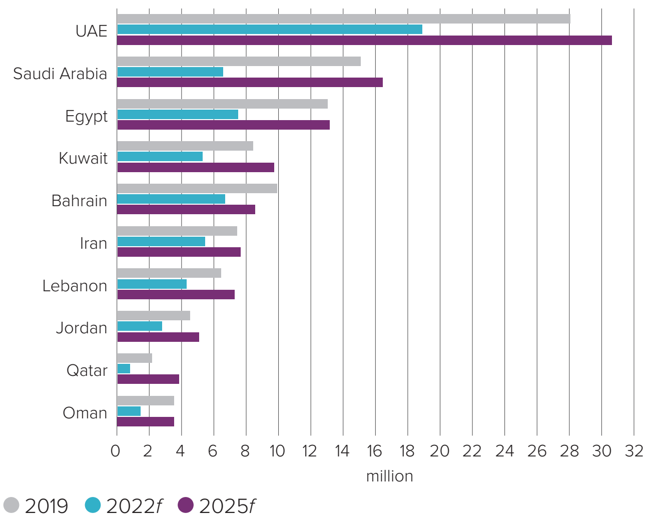
Source: Fitch Solutions. Based on annual household spending on beef for domestic consumption, all channels (data last reviewed August 2021, no data for Jordan)

Grilled beef kebabs, a popular regional beef dish

FOODSERVICE

- Dining out is a vital part of social and business life in the region, where other leisure options can be more limited. Around 70% of Australian beef exports to the region are utilised in the foodservice sector.
- A large proportion of Australian beef exports to MENA is frozen manufacturing product such as trimmings and ground beef, much of which is used in fast food and casual dining restaurants. American and Italian cuisines dominate this sector, with beef items such as burgers, pasta, pizza, wraps, salads and sandwiches. Middle Eastern (local), Lebanese and Turkish beef dishes are also very popular across both casual and fine dining *(Source: GlobalData Menu Intelligence 2021)*.
- Higher value cuts are used in full-service restaurants, often in frozen format. A 'premiumisation' trend in beef imports in the region is evident in the growing demand for Australian grainfed product and loin cuts. Affluent locals and tourists enjoy an increasing variety of cuisines when dining out, many of which utilise high quality beef. Full-service restaurants offer a wide mix of cuisines such as Chinese, Indian, Japanese, Thai and Mexican and feature beef items such as steak, other meat mains, curries and kebabs.
- The growing number of international events hosted in the region such as the World Expo in Dubai (2021–22) and the FIFA World Cup in Doha (2022) are helping to expand the tourism sector in many countries, presenting new opportunities in hospitality foodservice. High COVID-19 vaccination rates in key countries are supporting the sector's recovery.

MENA annual tourist visitor arrivals – 106 million by 2025*f*



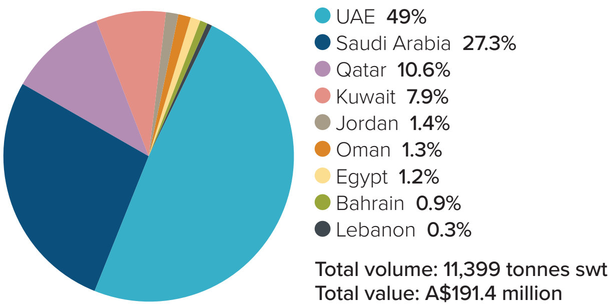
Source: Fitch Solutions. Data last reviewed Jan-Sep 2021.

- Growth in home meal delivery services has been accelerated by the pandemic, driven by younger and affluent urban populations. A majority of UAE (59%) and Saudi (58%) consumers say they are still involved in ordering takeaway or meal delivery from a restaurant at least as much as, if not more than, three months prior *(Source: GlobalData Q3 2021)*.

RETAIL

- The level of development of the retail sector varies across the region but is increasing and is generally higher 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, supermarkets and hypermarkets, most Australian beef is purchased at modern retail.
- Retail modernisation is typically accompanied by growth in the chilled market for red meat. Along with a preference for chilled product in retail, MENA markets present growing opportunities for premium Australian packaged and branded products.

Australian chilled beef export markets in MENA* (2020–21)



*Source: DAWE. Percentage by exported volume. *MENA = MENA-10 countries.*

- Key retailers selling Australian beef are Carrefour and Lulu (across the region), Spinneys and Choithrams (the UAE), Panda and Danube (Saudi Arabia).
- Country of origin labelling is generally not mandatory in the region but most beef products at modern retail are labelled. With comparatively few market access restrictions, consumers are usually presented with product from a large number of countries on retail shelves.
- The majority of beef used in home-cooking in the region is still commodity product but affluent consumers are increasingly seeking out premium imported primal cuts for special occasions.
- As the novelty of cooking from scratch at home in lockdown has worn off before foodservice fully reopens, there has been greater demand for convenience offerings at retail. In 2021, many consumers in the UAE (71%) and Saudi Arabia (72%) say they are still using meal kits at least as much as, if not more than, three months prior *(Source: GlobalData Q3 2021)*.

Top five strongest associations with Australian premium beef

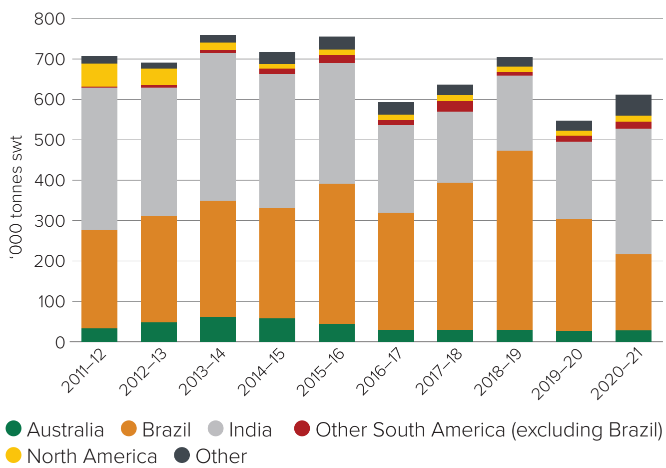
	UAE	Saudi Arabia
1	Easy to purchase	Usually tender
2	Consistently high quality	Trusted Halal
3	Animal well-cared-for	Animals well-cared-for
4	Most superior beef	Consistently high quality
5	Trusted Halal	Industry is sustainable

Source: MLA Global Tracker UAE, Saudi Arabia 2020.

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.
- Australia is a key secondary supplier of beef by volume and a major supplier in the premium segment. Australia is also an important supplier of frozen bobby veal carcase to Saudi Arabia, where it competes with mutton. Other secondary suppliers include the US, New Zealand, the EU, Paraguay and South Africa. The past year has seen notable increases in product supply from South Africa and Russia, as well as smaller suppliers such as Sudan, Ethiopia and Tanzania.

Beef/veal exports to MENA* by supplier



*Source: IHS Markit. Excludes offal. *MENA = MENA-10 countries.*

LIVESTOCK EXPORTS

- The wider MENA region is forecast to import around a total of 1.25 million head of live cattle from all suppliers combined in 2021 and increase at a CAGR of +7.3% to 1.71 million head in 2025*f* *(Source: GIRA)*.
- In 2020–21, Australia exported 30,676 head valued at A$45.5 million to the region. Israel is Australia's largest regional destination for live (feeder) cattle *(Source: DAWE, ABS)*.
- Key competitors in this live cattle market are Brazil, Uruguay and European countries such as Portugal, Spain and Russia, particularly in the significant importing countries such as Lebanon, Turkey, Israel, Iraq, Egypt, Libya and Algeria. *(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)	**2021 and 2022:** 0% for chilled meat and carcases 5% for frozen meat and carcases, chilled and frozen bovine offal	**India and Brazil:** Same as Australia **NZ:** FTA negotiation was concluded but yet to be ratified.	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: **Morocco:** 200% duty on beef **Turkey:** 225% duty on beef **Iran:** tariff rates vary depending on demand/supply situation **Israel:** 50% tariff on chilled offal **Jordan:** 10% tariff on boneless meat	**India, Brazil and NZ:** Same access as Australia **EU-27:** 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.*

Australian beef exports to MENA* – summary table

Volume – in tonnes swt

		2020–21	% of total	2019–20	% of total	five-year average (2015–16 to 2019–20)	% of total	change 2020–21 vs five-year average %	change 2020–21 vs five-year average in tonnes swt
	Total	**29,741**		**27,616**		**31,047**		**-4**	**-1,306**
Storage	Chilled	11,399	38	12,155	44	12,817	41	-11	-1,418
	Frozen	18,342	62	15,461	56	18,229	59	1	113
Meat type	Grassfed	17,493	59	18,683	68	23,042	74	-24	-5,549
	Grainfed	12,248	41	8,933	32	8,004	26	53	4,244
Storage/meat type	Chilled grassfed	5,427	18	7,042	25	7,715	25	-30	-2,288
	Chilled grainfed	5,972	20	5,113	19	5,103	16	17	870
	Frozen grassfed	12,066	41	11,641	42	15,327	49	-21	-3,261
	Frozen grainfed	6,276	21	3,820	14	2,902	9	116	3,374

*Source: DAWE. *MENA includes Bahrain, Egypt, Iran, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia and United Arab Emirates*

Value – in A$ 000

		2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in A$ 000
	Total	**334,474**		**308,082**		**296,380**		**13**	**38,094**
Storage	Chilled	192,042	57	186,355	60	173,666	59	11	18,376
	Frozen	142,432	43	121,727	40	122,715	41	16	19,717

Source: ABS/IHS Markit

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

	2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in tonnes swt
Carcase	2,501	20	2,705	24	1,401	12	78	1,100
Manufacturing	1,957	16	1,770	16	2,801	23	-30	-844
Brisket	1,648	13	970	9	750	6	120	898
Mince/ground	790	6	664	6	1,238	10	-36	-447
Other	5,369	44	5,059	45	5,902	49	-9	-533
Total	**12,265**		**11,168**		**12,092**		**1**	**173**

Source: DAWE

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

	2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in tonnes swt
Manufacturing	3,435	33	1,905	23	2,299	26	49	1,136
Topside/inside	1,444	14	1,319	16	1,487	17	-3	-44
Carcase	738	7	846	10	704	8	5	34
Tenderloin	688	7	597	7	637	7	8	51
Other	4,005	39	3,611	44	3,661	42	9	344
Total	**10,310**		**8,277**		**8,787**		**17**	**1,522**

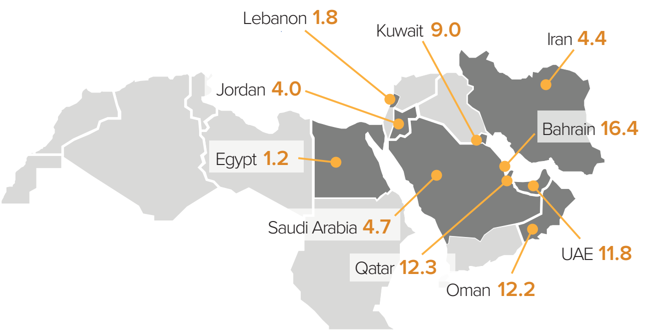
Source: DAWE

Sheepmeat

CONSUMERS

- Sheepmeat is a culturally important meat in MENA, associated with religious occasions and family celebrations. Lamb is considered a superior protein that is tender, juicy and tasty, making it a family favourite. As a niche protein, however, per capita consumption is typically low compared to chicken and fish *(Source: MLA Global Consumer Tracker, 2020)*.
- Consumption has fallen somewhat since 2020 across most countries due to numerous pandemic impacts, including a drop in oil prices in 2020 that hit Gulf economies hard, international travel bans and higher global sheepmeat prices, which have all flowed on to reduce foodservice demand. In addition, the decline in international flights has increased air freight costs by A$3–$4/kg which has been a major factor in reducing consumption.
- However, consumption is forecast to increase again for the MENA-10 countries at an average CAGR of +2.4% from 2020 to 2025f *(Source: GIRA)*, supported by factors such as higher oil prices, international tourism resumption and high regional vaccination rates.

MENA countries – per capita sheepmeat consumption*



Source: GIRA. 2021f, includes sheepmeat and goat meat. MENA = MENA-10 countries.
**kg cwe/head/year.*

- There is significant demand for both mutton and lamb. Despite its lower price point, mutton is favoured in some sectors due to taste preference and cooking styles, such as in Oman, Saudi Arabia and Kuwait. Frozen mutton also goes into 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 import demand are forecast to continue increasing, particularly in Gulf countries, driven by increasing disposable incomes, ongoing urbanisation and westernisation, young populations and large groups of wealthy expats.

Grilled lamb kofta is a popular regional dish

- Australia has been a key sheepmeat supplier to MENA markets for over 50 years, building a strong, positive reputation. Australian sheepmeat is particularly appreciated for its consistently high quality, good taste and naturalness *(Source: MLA MENA consumer understanding study, 2020)*.

FOODSERVICE

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

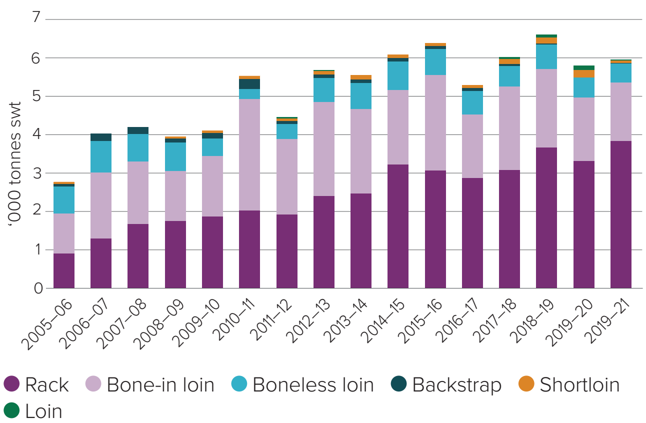
Affluent* locals enjoy frequent fine dining

% agree	Dubai	Doha	Riyadh	Kuwait City
"I enjoy indulging in more expensive food when I dine out"	81%	64%	73%	71%
*"I dine out at least weekly at top-tier** restaurants"*	31%	42%	38%	49%

Source: MLA MENA Attractive Cities Study, 2018
** Affluent: living in households earning annual incomes over: Dubai (A$114,000), Riyadh (A$78,000), Doha (A$138,000), Kuwait City (A$138,000).*
***A$110/head equivalent.*

- Unlike beef, a high proportion of which is consumed through quick service restaurants, lamb features on menus at both full-service and casual quick service restaurants, particularly in local and other Middle Eastern, Indian and Chinese cuisine establishments *(Source: GlobalData Menu Intelligence 2021)*. While lamb is among the proteins of choice when dining at top tier restaurants, there are opportunities to further develop premium lamb offerings in these establishments.

Australian premium sheepmeat cuts exports to MENA*



*Source: DAWE. *Australian exports to MENA-10 countries. Lamb and mutton, chilled and frozen combined.*

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

RETAIL

- The modern retail sector is seeing significant development across the region, presenting growing opportunities for Australian premium, packaged and branded lamb products.

Strongest associations with Australian premium lamb

UAE	Saudi Arabia	Kuwait
Consistently high quality	Guaranteed safe	Guaranteed safe
Guaranteed safe	Sustainable	Well-cared-for animals
Usually tender	Low in fat	Offers suitable cuts
Sustainable	More nutritious	Consistent quality

Source: MLA Global Tracker UAE and Saudi Arabia 2020, Kuwait 2019

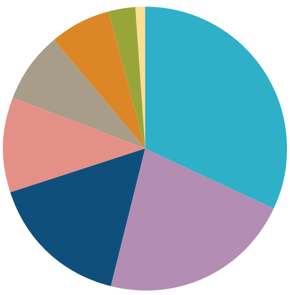
- In most MENA countries, the majority of Australian packaged lamb is purchased from hypermarkets and supermarkets, while a significant proportion of unpackaged product, typically in the form of chilled carcase, is sold through butchers. The pandemic has driven some growth in e-commerce meat sales but from a low base, as cultural barriers and cold chain challenges continue to constrain shopper uptake.
- Key retailers where consumers purchase Australian sheepmeat include Carrefour and Lulu (across the region), Spinneys and Choithrams (UAE), Al Meera (Qatar), Sultan Center (Kuwait), Panda, Al Othaim and Danube (Saudi Arabia).
- Regional home-cooking of sheepmeat dishes often involves slow-cook methods (roasting or stewing), followed by grilling or broiling. 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.

Traditional sheepmeat dish known as kabsa, biryani or mandi depending on the region.

COMPETITIVE LANDSCAPE

- In 2020–21, the MENA-10 region's combined volume of boxed sheepmeat imports registered through customs was just under 95,000 tonnes swt, a 31% decline on the year prior. Pandemic-related factors and higher sheep prices in Australia were among the main factors for the decline. However, the outlook for import demand from 2021 to 2025*f* is for growth at a CAGR of 8.7% *(Source: GIRA)*, driven by population, income and tourism sector recovery and growth.

MENA* boxed sheepmeat importers by volume share



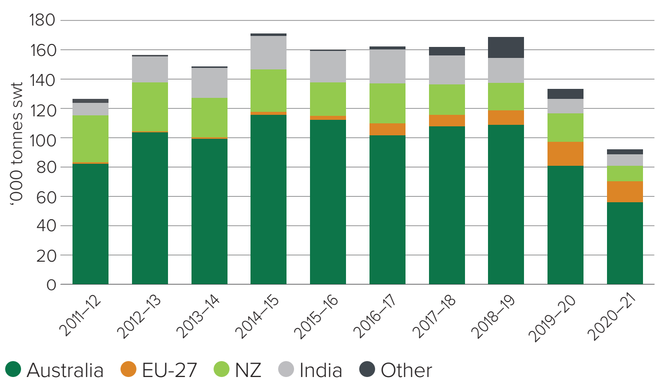
- UAE 32%
- Qatar 22%
- Saudi Arabia 16%
- Kuwait 11%
- Jordan 8%
- Oman 7%
- Bahrain 3%
- Egypt, Lebanon and Iran 1%

Total imports: 94,843 tonnes swt
Total value: A$803.5 million

Source: IHS Markit 2020–21. MENA-10 countries. Data based on available supplier export data. Lamb and mutton combined but excluding offal.

- Australia is the region's leading supplier, representing around 60% of imports in 2020–21, with New Zealand, Europe and India the main competitors.
- New Zealand exports significant volumes of frozen bone-in lamb to Saudi Arabia and Jordan and smaller volumes of chilled lamb to Oman. India supplies mostly chilled mutton carcase to the UAE and smaller volumes to Qatar. In recent years, some European countries such as Romania, Georgia and Spain have become more significant suppliers to the region, particularly of frozen mutton carcase and bone-in cuts. Air freight chilled carcase volumes, while still relatively small, have been increasing from Horn of Africa and Sub-Saharan countries such as Sudan, Ethiopia and Tanzania.

Sheepmeat exports to MENA* by supplier



*Source: IHS Markit. *MENA = MENA-10 countries. Does not include exports from African countries. From 2019–20 EU, does not includes UK.*

LIVESTOCK EXPORTS

- MENA countries, particularly Saudi Arabia, have strong demand for live sheep imports due to limited local production, a preference for local, freshly slaughtered Halal meat and because of its use in religious observances. The region is forecast to import around 6.7 million head of live sheep and goats (158,000 tonnes cwe) in 2021, similar to the forecast 193,000 tonnes volume of boxed imports. With post-pandemic economic recovery, live import demand is expected to pick up in the coming years *(Source: GIRA)*.
- In 2020–21, the region remained Australia's top destination for live sheep, exporting 570,529 head valued at over A$84.5 million, with Kuwait, the UAE, Jordan, Israel and Oman key destinations *(Source: DAWE, ABS)*.
- 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 South Africa, Somalia and Sudan, 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.	**2021 and 2022:** 0% for chilled meat and carcases, 5% for frozen 2.5% for chilled ovine offal, 5% for frozen	**NZ** 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: **Morocco and Turkey:** 30% **Iran:** variable depending on demand/supply situation **Jordan:** boneless chilled/ frozen 12.5%	**NZ** and India:** Same access as Australia **EU-27:** 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

		2020–21	% of total	2019–20	% of total	five-year average (2015–16 to 2019–20)	% of total	change 2020–21 vs five-year average %	change 2020–21 vs five-year average in tonnes swt
Total		**56,457**		**83,363**		**104,877**		**-46**	**-48,419**
Storage	Chilled	38,462	68	51,982	62	61,358	59	-37	-22,896
	Frozen	17,995	32	31,381	38	43,519	41	-59	-25,523
Meat type	Lamb	43,217	77	56,634	68	64,819	62	-33	-21,603
	Mutton	13,241	23	26,729	32	40,057	38	-67	-26,817
Storage/meat type	Chilled lamb	36,161	64	48,261	58	55,558	53	-35	-19,397
	Chilled mutton	2,301	4	3,721	4	5,800	6	-60	-3,499
	Frozen lamb	7,056	12	8,373	10	9,261	9	-24	-2,206
	Frozen mutton	10,940	19	23,008	28	34,258	33	-68	-23,318

*Source: DAWE. * MENA includes Bahrain, Egypt, Iran, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia and United Arab Emirates*

Value – in A$ 000

		2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in A$ 000
Total		**498,324**		**732,221**		**740,512**		**-33**	**-242,188**
Meat type	Lamb	415,771	83	532,647	73	515,353	70	-19	-99,582
	Mutton	82,553	17	199,574	27	225,159	30	-63	-142,606

Source: ABS/IHS Markit

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

	2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in tonnes swt
Carcase	8,499	51	11,911	64	12,852	64	-34	-4,352
Leg	3,755	22	3,230	17	3,436	17	9	319
Other	4,524	27	3,483	19	3,856	19	17	668
Total	**16,778**		**18,624**		**20,144**		**-17**	**-3,366**

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

	2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in tonnes swt
Carcase	13,563	95	18,950	98	16,965	97	-20	-3,402
Leg	245	2	175	1	217	1	13	28
Other	520	4	264	1	362	2	44	158
Total	**14,328**		**19,389**		**17,544**		**-18**	**-3,216**

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

	2020–21	% of total	2019–20	% of total	five-year average	% of total	%	in tonnes swt
Carcase	1,093	35	2,434	28	2,027	19	-46	-934
Shoulder	1,077	34	4,674	54	7,156	64	-85	-6,079
Other	987	31	1,489	17	1,482	14	-33	-495
Total	**3,157**		**8,597**		**10,665**		**-70**	**-7,508**

Source: DAWE