MEAT & LIVESTOCK AUSTRALIA

MARKET SNAPSHOT | BEEF & SHEEPMEAT

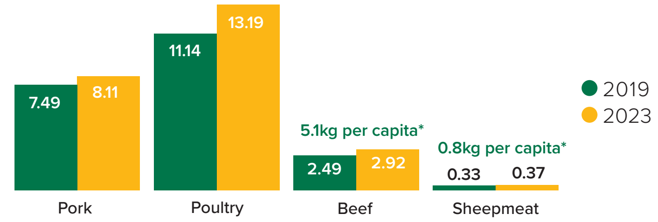
South-East Asia*

Improving household incomes and changing consumer tastes in the region are driving a rapid rise in red meat consumption. The variance in market maturity and consumption habits requires a highly targeted approach to identify and develop opportunities for Australian red meat.

** In this report, South East Asia (SEA) includes the following countries – Indonesia, Singapore, Malaysia, Thailand, the Philippines, and Vietnam, as well as Brunei, Cambodia, Laos and Myanmar.*

Meat consumption South-East Asia

43kg per capita* total meat protein**



in million tonnes cwt *2019e per person per year in cwt ** Excluding fish/seafood

Source: Fitch Solutions, 2019 estimate and 2023 forecast

Population*

661.0 in 2019

686.8 in 2023

in million

Source: Fitch Solutions, 2019 estimate and 2023 forecast

Households earning** >US$35k/year

5.0 in 2019

8.5 in 2023

in million households

Source: Fitch Solutions, 2019 estimate and 2023 forecast

Households earning** >US$50k/year

2.8 in 2019

4.5 in 2023

in million households

Source: Fitch Solutions, 2019 estimate and 2023 forecast

Households earning** >US$75k/year

1.4 in 2019

2.3 in 2023

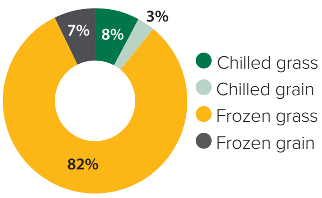
in million households

Source: Fitch Solutions, 2019 estimate and 2023 forecast

*includes Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam.
**Disposable income: earnings after taxes and social security charges – includes Cambodia, Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam.

Within the region, Indonesia and the Philippines are high volume markets for Australian beef, followed by fast-growing Vietnam. Singapore and Thailand take smaller volumes of high value products.

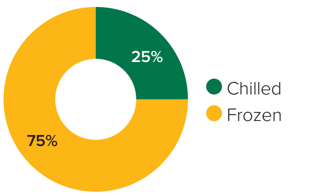
Australian beef exports – volume



Total 138,180 tonnes swt

Source: DAWR, 2018–19

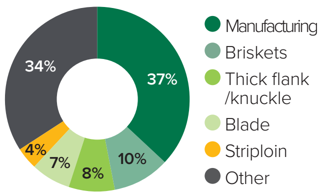
Australian beef exports – value



Total A$850.3 million

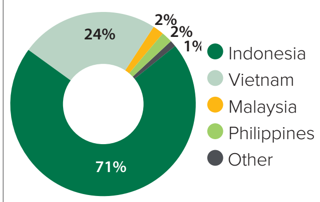
Source: ABS/IHS Markit, MAT (12 months ending May 2019)

Proportion of key cuts (beef)



Source: DAWR, 2018–19

Australian live cattle exports to SEA

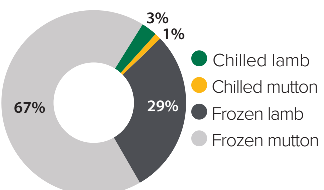


Total 909,450 head

Source: DAWR, 2018-19

Malaysia and Singapore are key markets for Australia, ranking the 3rd and 4th largest amongst global mutton exports, respectively. Exports to other SEA countries are growing, although demand has been volatile.

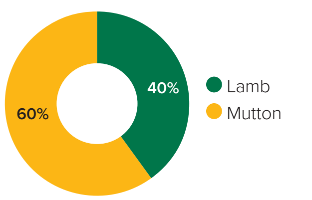
Australian sheepmeat exports – volume



Total 43,515 tonnes swt

Source: DAWR, 2018–19

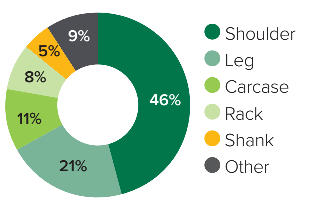
Australian sheepmeat exports – value



Total A$330.4 million

Source: ABS/IHS Markit, MAT (12 months ending May 2019)

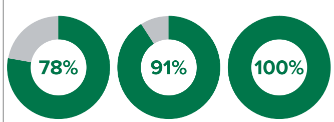
Proportion of key cuts (lamb)



Source: DAWR, 2018–19.

Australia's share of sheepmeat imports

Malaysia Singapore Indonesia



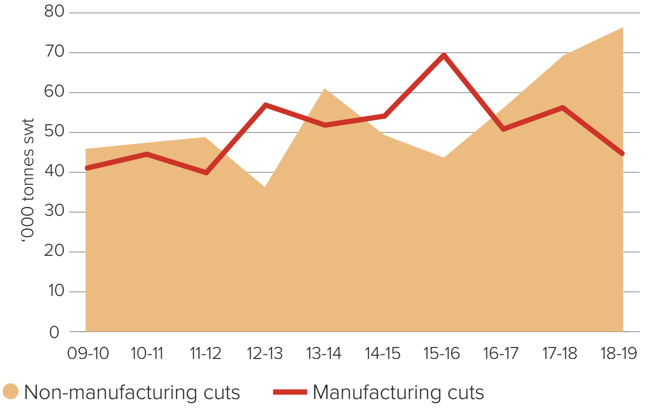
Source: IHS Markit, based on 12 months of volume, Malaysia (May 2018 – April 2019), Singapore (July 2018 – June 2019), Malaysia (June 2018 – May 2019)

Beef

CONSUMERS

- Beef comprises a small proportion in the daily diets of SEA consumers compared to fish, chicken and pork. However, it's forecast to be the second fastest growing meat category in the region after chicken, with consumption volume estimated to increase 16% from 2018 to 2022 *(Source: GIRA)*. This strong growth is driven by rising incomes, an expanding affluent consumer class and continued urbanisation.
- SEA consumers associate beef with superiority and good taste, which typically drive consumers to pay a premium for it. Consumers also have positive perceptions of imported meat products with 'premium quality' and 'better taste' being commonly perceived benefits.
- Beef is mostly utilised in local traditional cuisines; however, there's a growing trend to try new, international beef dishes at home. Japanese beef *gyudon*, *shabu-shabu*, Korean *bulgogi* and western-style steak are among popular international beef recipes being adopted by many urban SEA consumers. Beef is also often used as a special family treat.

Australian beef exports to SEA – non-manufacturing vs. manufacturing cuts

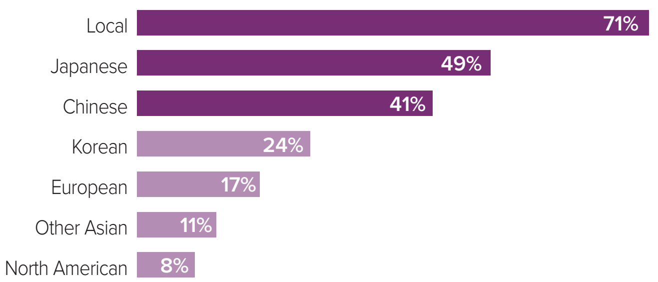


Source: DAWR

FOODSERVICE

- SEA has a vibrant foodservice sector with a wide range of food and price options. Although the market remains fragmented and dominated by local mid-range restaurants, the modern higher-end segment – a major foodservice channel of Australian beef in the region – has been expanding.
- New restaurant concepts and menus have been introduced by local and international foodservice operators to capture the rising number of young affluent foodies in urban cities. Continued modernisation and premiumisation in the foodservice sector is creating growth opportunities for Australian beef.
- Key motivations for SEA consumers to dine out on beef are the taste of beef and variety in beef dishes, especially those that are difficult to cook at home. Young urban consumers, in particular, show strong interest in trying out new food trends and cuisines from different cultures *(Source: MLA ASEAN Attractive Cities Study)*. Enjoyment, variety and experience are key themes that Australian beef can leverage in developing value propositions targeting the young aspirational consumer segment.
- Demand for beef products of good quality and variety – in terms of cuts, grassfed, grainfed, marble score, breed – is expected to increase, supported by a number of factors including the growing popularity of Japanese, Korean, and western cuisines, increased consumer sophistication, competition and diversification led by operators within the higher end foodservice segment.

Which cuisines do SEA consumers prefer when dining out?



Source: MLA ASEAN Attractive Cities Study

RETAIL

- The SEA retail sector shares similar trends to foodservice. Apart from Singapore, SEA has a relatively fragmented retail market with traditional channels making up approximately 85% of market share *(Source: IGD)*. However, modern retail is developing rapidly as major retailers seek to expand their store network and formats to keep up with evolving consumer needs.
- Australian (boxed) beef has high penetration in modern retail, especially in high-end supermarkets. Within this channel, Australian beef mainly competes with the US, New Zealand and Argentina, and with Japan on Wagyu.
- In SEA, Australian beef is one of the most commonly consumed products after domestic (except in Singapore, where Australian beef is predominantly consumed), a result of its strong market presence and perceived advantages including high quality, good taste and higher hygiene standards *(Source: MLA ASEAN Attractive Cities Study)*.

Top 5 attributes SEA consumers look for on-pack when making beef purchases

Singapore	Malaysia	Indonesia	Thailand	Vietnam*
Safety	Halal	Halal	Safety	Origin
Freshness	Safety	Freshness	Natural	Quality
Natural	Freshness	Safety	Freshness	Use-by-date
Value	Natural	Natural	Value	Freshness
Origin	Value	Value	Origin	Price

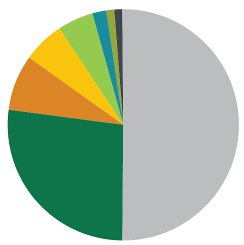
Source: MLA Global Tracker (Singapore, Malaysia, Indonesia, Thailand); MLA ASEAN Attractive Cities Study (Vietnam), 2018
** Based on top attributes consumers look for on-pack when purchasing meat*

- The region is seeing an increase in the number of gourmet grocer outlets across major cities, which target emerging affluent local and expatriate consumers. This trend creates further opportunity to grow premium beef products.

OTHER SUPPLIERS

- Beef imports to SEA grew significantly in 2018 – 13% year-on-year – underpinned by strong demand growth in Indonesia, Vietnam, Philippines and Thailand.
- India is a dominant supplier of buffalo meat to SEA markets except Singapore and Thailand. It's mostly utilised in low-end traditional retail and foodservice channels including wet markets and small restaurants, and by small to medium-sized food manufacturers. It's also sold in modern retail, in Malaysia and Indonesia in particular, in frozen or thawed form at relatively competitive prices.
- Imports from Brazil increased 28% year-on-year in 2018, underpinned by strong demand from the Philippines and Malaysia.
- Singapore and Thailand saw a surge of Argentinian beef imports in 2018. Albeit off a small base, shipments to Singapore increased 4 times compared to 2017, and shipments to Thailand grew 29% year-on-year.
- Australia accounts for about a quarter of the SEA's imported beef market. It's also the largest supplier of chilled beef to the region with a market share of over 80%, followed by New Zealand (8%), US (5%), and Japan (2%).

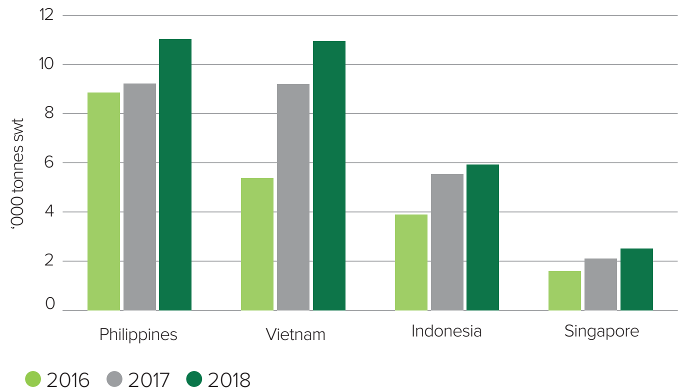
SEA* beef imports by major supplier – 2018



Source: IHS Markit, Agromonitor, calendar year
** SEA-6 includes Singapore, Malaysia, Indonesia, Philippines, Thailand and Vietnam*

- Strong growth of US beef imports pose a potential threat to Australia's share in the SEA market as the US is also positioned as a high quality brand, targeting high-end retail, foodservice channels and affluent consumer segments.
- Australia has a strong trade and economic relationship with the SEA region. Free trade and economic partnership agreements, including the newly signed Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) with Indonesia, will continue to underpin Australia's competitive position across the SEA markets.

US beef imports by key SEA markets

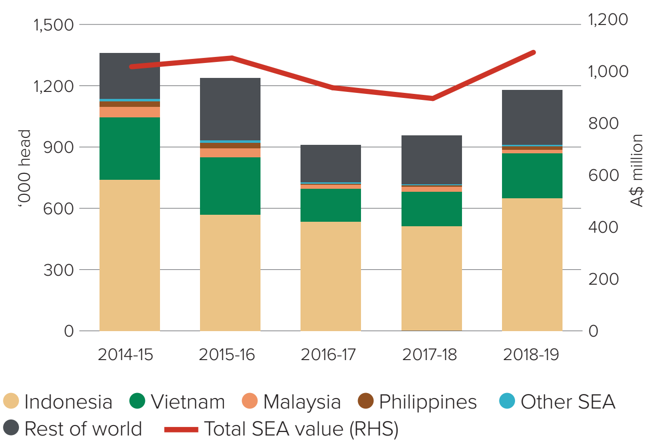


Source: IHS Markit, Agromonitor

LIVESTOCK EXPORTS

- SEA is the largest market for Australian live cattle exports with a combined volume share of 77%, of which Indonesia makes up almost two thirds by volume, and Vietnam accounts for about 23%.
- Australian cattle have played an important role in meeting SEA's rising demand for beef and SEA consumers' strong preference for freshly slaughtered meat. It's estimated to have supplied approximately 20% of the total beef consumed in Indonesia and Vietnam.
- Australian cattle exports to SEA increased in 2018–19 at a moderate rate of 3% year-on-year. Strong growth occurred in Indonesia and the Philippines at 6% and 43% year-on-year respectively, while demand from Vietnam remained stable.
- As part of the Indonesian government's efforts to increase self-sufficiency, it imposed a '5:1' policy on live cattle trade since October 2016, requiring importers to import one breeder for every five feeder cattle. The government is looking to diversify its live cattle supply, considering US and Mexico as potential suppliers.

Australian live cattle exports



Source: DAWR, ABS/IHS Markit
**2018-19 value MAT (12 months ending May 2019)*

Market access overview – Indonesia

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN*- Australia-NZ Free Trade Agreement **(AANZFTA)** Indonesia-Australia Comprehensive Economic Partnership Agreement **(IA-CEPA)** Signed in March 2019	**Boxed beef – 5%** for chilled and frozen boneless** and frozen bone-in***; 0% for all other lines **Live cattle – 5%** (0% for purebred breeding cattle)***	**India** (buffalo meat): India-ASEAN FTA. 5% tariff	Volumes managed by the Indonesian government's import permit system	Highly regulated market, with complex import conditions and regulations. The government controls type of meat and offal products that can be imported into the country

Best access — Major challenges

Source: Trade agreements, DFAT, MLA

* Association of Southeast Asian Nations. Members include Indonesia, Malaysia, Singapore, the Philippines, Thailand, Vietnam, Brunei, Myanmar, Laos and Cambodia.

** Under AANZFTA: tariffs for chilled & frozen boneless beef exports will be removed on 1 January 2020.

*** *IA-CEPA on enter into force: tariffs for frozen bone-in beef exports will be reduced to 2.5% and removed by 2023; 0% tariff for male cattle exports within quota (575,000 head) and 2.5% out of quota, and 0% for female cattle exports with no quota.*

Australian beef exports to Indonesia – summary table

Volume – in tonnes swt

		2018–19	% out of total	2017–18	% out of total	5-year average (2013–14 to 2017–18)	% out of total	change 2018–19 vs 5-year average %	change 2018–19 vs 5-year average in tonnes swt
	Total	**54,417**		**58,213**		**50,096**		**9**	**4,321**
Storage	Chilled	4,502	8	4,188	7	3,741	7	20	761
	Frozen	49,915	92	54,025	93	46,355	93	8	3,560
Meat type	Grassfed	53,324	98	56,852	98	49,288	98	8	4,036
	Grainfed	1,093	2	1,361	2	808	2	35	285
Storage/meat type	Chilled grassfed	4,042	7	3,391	6	3,276	7	23	767
	Chilled grainfed	460	1	798	1	466	1	-1	-6
	Frozen grassfed	49,282	91	53,461	92	46,013	92	7	3,269
	Frozen grainfed	633	1	564	1	342	1	85	291

Source: DAWR

Value – in A$ 000

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in A$ 000
	Total	**332,142**		**324,995**		**287,361**		**16**	**44,781**
Storage	Chilled	49,140	15	48,842	15	41,722	15	18	7,418
	Frozen	283,002	85	276,153	85	245,639	85	15	37,363

Source: ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Volume – by major cut (in tonnes swt)

	2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
Manufacturing	13,674	25	18,865	32	24,128	47	-43	-10,454
Brisket	7,678	14	5,575	10	3,120	6	146	4,559
Thick flank/knuckle	7,536	14	8,630	15	4,718	9	60	2,818
Other	25,529	47	25,143	43	19,754	38	29	5,776
Total	**54,417**		**58,213**		**51,720**		**5**	**2,698**

Source: DAWR

Australian beef offal exports to Indonesia (in tonnes swt)

	2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
Manufacturing	11,286	33	9,945	36	5,214	31	116	6,073
Heart	5,461	16	3,974	14	3,112	18	75	2,349
Liver	4,640	14	2,654	10	2,003	12	132	2,638
Other	12,813	37	11,239	40	6,585	39	95	6,228
Total	**34,201**		**27,812**		**16,913**		**102**	**17,288**

Source: ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Value – in A$ 000

	2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in A$ 000
Total	**102,453**		**77,090**		**40,350**		**154**	**62,103**

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian live cattle exports to Indonesia

	2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	change
Volume – in head	603,769		510,937		595,008		1	8,761
Value – in A$ 000	675,129		573,551		571,131		18	103,998

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Market access overview –SEA*

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia-New Zealand Free Trade Agreement **(AANZFTA)**	**Singapore, Malaysia, the Philippines and Vietnam** Zero	**India** (buffalo meat) India-ASEAN FTA 0% tariff into **Malaysia**; 6% to the **Philippines** 12% to **Vietnam**; (15% for frozen carcases), eliminated by 2022	**Singapore, Malaysia, the Philippines and Vietnam** Zero	**Singapore, the Philippines, Vietnam and Thailand** No major hurdles
Malaysia-Australia FTA **(MAFTA)** Thailand-Australia FTA **(TAFTA)** Singapore-Australia FTA **(SAFTA)**	**Thailand** 2.67% within quota, 50% out of quota in 2019 Zero in 2020	**Brazil** No FTA	**Thailand** Safeguard quantity of 1,536.43 metric tonnes in 2019.	**Malaysia** Maintains import regulations in accordance with Halal

Best access — Major challenges

Source: Trade agreements, DFAT, MLA

** excluding Indonesia*

Australian beef exports to SEA* – summary table

Volume – in tonnes swt

		2018–19	% out of total	2017–18	% out of total	5-year average (2013–14 to 2017–18)	% out of total	change 2018–19 vs 5-year average %	change 2018–19 vs 5-year average in tonnes swt
	Total	**83,763**		**68,176**		**61,598**		**36**	**22,164**
Storage	Chilled	11,246	13	9,653	14	8,837	14	27	2,409
	Frozen	72,517	87	58,523	86	52,761	86	37	19,755
Meat type	Grassfed	70,731	84	56,058	82	51,624	84	37	19,107
	Grainfed	13,032	16	12,118	18	9,974	16	31	3,058
Storage/meat type	Chilled grassfed	7,353	9	6,711	10	6,347	10	16	1,007
	Chilled grainfed	3,893	5	2,943	4	2,490	4	56	1,402
	Frozen grassfed	63,378	76	49,347	72	45,278	74	40	18,100
	Frozen grainfed	9,139	11	9,176	13	7,484	12	22	1,655

*Source: DAWR. *SEA includes Brunei Darussalam, Cambodia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam*

Value – in A$ 000

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in A$ 000
	Total	**518,141**		475,974		**474,001**		**9**	**44,140**
Storage	Chilled	166,800	32	145,060	30	123,981	26	35	42,819
	Frozen	351,340	68	330,914	70	350,020	74	0	1,320

Source: ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian beef exports to Singapore – volume (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
	Total	**6,344**		**5,660**		**7,901**		**-20**	**-1,557**
Storage	Chilled	4,265	67	3,859	68	3,601	46	18	664
	Frozen	2,079	33	1,801	32	4,301	54	-52	-2,222
Value – in A$ 000	Total	**$91,459**		**$80,862**		**$81,196**		**13**	**$10,263**

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian beef exports to Malaysia – volume (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
	Total	**10,096**		**11,274**		**11,905**		**15**	**-1,810**
Storage	Chilled	2,198	22	2,082	18	2,035	17	8	163
	Frozen	7,898	78	9,192	82	9,870	83	-20	-1,972
Value – in A$ 000	Total	**$83,554**		**$79,761**		**$76,168**		**10**	**$7,386**

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian beef exports to Phillipines – volume (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
	Total	**31,786**		**36,612**		**30,801**		**3**	**985**
Storage	Chilled	793	2	838	2	815	3	-3	-22
	Frozen	30,993	98	35,775	98	29,985	97	3	1,007
Value – in A$ 000	Total	**$172,391**		**$177,791**		**$140,400**		**23**	**$31,991**

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian beef exports to Vietnam – volume (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
	Total	**11,503**		**7,337**		**4,551**		**153**	**6,952**
Storage	Chilled	1,220	11	914	12	708	16	72	512
	Frozen	10,283	89	6,422	88	3,843	84	168	6,440
Value – in A$ 000	Total	**$88,908**		**$58,900**		**$35,350**		**152**	**$53,558**

Source: DAWR, ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Sheepmeat

CONSUMERS

- Per capita sheepmeat consumption is low compared to other meat proteins and varies between SEA markets. While it's a less popular meat in the Thai and Vietnamese diet, sheepmeat is widely featured in Malaysian and Indonesian cuisine.
- Sheepmeat consumption typically spikes during the Islamic festive seasons in Malaysia, Indonesia, Singapore and Brunei, particularly around the months of Ramadan and Idul Fitri.
- Despite being a less frequently consumed meat, lamb is associated with superiority, an attribute driving consumers to pay a premium when making meat purchases *(Source: MLA Global Tracker)*.
- A lack of familiarity and cooking knowledge remain major barriers to growing sheepmeat consumption. However, many young aspirational and affluent SEA consumers show a strong interest in learning how to cook exciting dishes with sheepmeat, as well as trying it at restaurants when they dine out.

What would convince consumers to buy lamb?

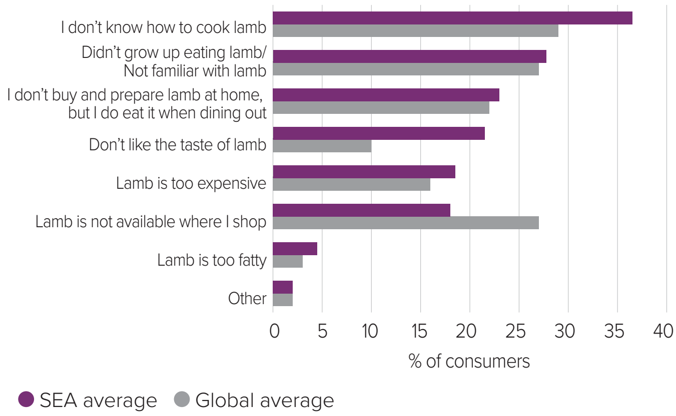
Indonesia	Malaysia	Thailand
Trying it at a restaurant	Recipe ideas	Trying a free sample
Trying a free sample	Trying it at a restaurant	Trying it at a restaurant
Tips on preparation	Tips on preparation	Recipe ideas

Source: MLA Global Consumer Tracker Indonesia, Malaysia and Thailand, 2018

FOODSERVICE

- Foodservice continues to be a strategic channel for sheepmeat in SEA as the majority of consumers lack confidence in cooking lamb at home, finding it more beneficial to enjoy the meat in foodservice venues *(Source: MLA ASEAN Attractive Cities Study)*.
- Sheepmeat is served in a wide variety of restaurants, ranging from low to high end and from local to international. However, Australian sheepmeat is mostly utilised in high-end restaurants, while local products cater to the lower end of the segment.
- Increasing disposable incomes and evolving needs and aspirations of a rising generation of consumers in SEA, the so-called Millennials and Gen Z, as well as continued development of the SEA foodservice sector, are expected to continue to drive growth in demand for high quality sheepmeat products.

% of consumers surveyed who have never purchased lamb



Source: MLA Global Consumer Tracker

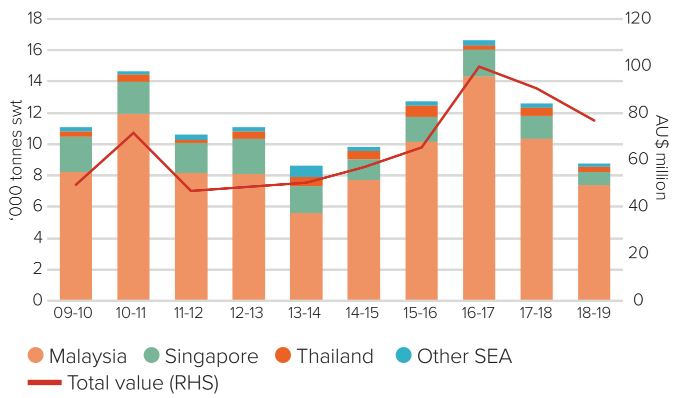
RETAIL

- Australian lamb has strong penetration across modern retail chains in the region, with New Zealand a key competitor.
- Increasing consumer awareness and confidence in sheepmeat cooking will be one of the key drivers to grow sales.
- Providing convenient cuts with recipe recommendations, as well as information about nutritional benefits of sheepmeat in retail stores, remain a priority for players.

OTHER SUPPLIERS

- Australia has long been the leading supplier of sheepmeat in SEA. It maintains a market share of about 70%, followed by New Zealand, whose shipments have declined recently due to supply constraints and strong demand from China.

NZ sheepmeat exports to major SEA markets



Source: IHS Markit.

Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia-New Zealand Free Trade Agreement **(AANZFTA)** Indonesia-Australia Comprehensive Economic Partnership Agreement **(IA-CEPA)*** Conclusion of negotiations	**0%** Except Indonesia, Cambodia, Laos and Myanmar**	**NZ** same access conditions as Australia	Zero	Indonesia, Malaysia and Brunei maintain import regulations in accordance with Halal requirements

Best access — Major challenges

Source: Trade agreements, DFAT, MLA. * Indonesia: IA-CEPA, on entry into force, tariff cut to 2.5% (from 5%) and eliminated after five years. ** Indonesia: 5% for chilled bone-in and all frozen products; Cambodia: 15% (except a 35% tariff on frozen boneless products); Myanmar: 5%; Laos: 10%. Tariff will be 0% in Myanmar and Cambodia in 2020, and in Laos in 2021.

Australian sheepmeat exports to SEA* – summary table

Volume – in tonnes swt

		2018–19	% out of total	2017–18	% out of total	5-year average (2013–14 to 2017–18)	% out of total	change 2018–19 vs 5-year average %	change 2018–19 vs 5-year average in tonnes swt
	Total	**43,515**		**41,078**		**40,411**		**8**	**3,104**
Storage	Chilled	1,772	4	1,705	4	1,555	4	14	218
	Frozen	41,742	96	39,373	96	38,856	96	7	2,886
Meat type	Lamb	14,155	33	13,817	34	14,295	35	-1	-140
	Mutton	29,360	67	27,261	66	26,116	65	12	3,244
Storage/ meat type	Chilled lamb	1,392	3	1,332	3	1,205	3	16	187
	Chilled mutton	380	1	373	1	350	1	9	30
	Frozen lamb	12,762	29	12,485	30	13,090	32	-3	-328
	Frozen mutton	28,980	67	26,888	65	25,766	64	12	3,214

*Source: DAWR. *Includes ASEAN-10: Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam.*

Value – in A$ 000

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in A$ 000
	Total	**330,375**		**277,317**		**227,415**		**45**	**102,960**
Meat type	Lamb	131,773	40	107,686	39	95,961	42	37	35,811
	Mutton	198,602	60	169,631	61	131,454	58	51	67,149

Source: ABS/IHS Markit, 2018-19 = MAT (12 months ending May 2019)

Australian sheepmeat exports to Singapore – by major cut (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
Lamb	Leg	749	33	775	34	727	34	3	22
	Carcase	523	23	452	20	358	17	46	165
	Shoulder	284	12	259	12	269	13	5	15
	Other	740	32	762	34	789	37	-6	-49
	Total	**2,297**		**2,249**		**2,144**		**7**	**153**
Mutton	Carcase	4,964	54	3,638	42	4,565	51	9	399
	Leg	2,751	30	3,209	37	2,857	32	-4	-105
	Manufacturing	802	9	1,382	16	1,151	13	-30	-349
	Other	669	7	431	5	423	5	58	246
	Total	**9,186**		**8,661**		**8,996**		**2**	**190**

Source: DAWR

Australian sheepmeat exports to Malaysia – by major cut (in tonnes swt)

		2018–19	% out of total	2017–18	% out of total	5-year average	% out of total	%	in tonnes swt
Lamb	Shoulder	5,434	68	5,044	66	5,973	71	-9	-540
	Carcase	890	11	834	11	897	11	-1	-6
	Leg	765	10	810	11	572	7	34	193
	Other	922	12	972	13	955	11	-4	-34
	Total	**8,011**		**7,660**		**8,397**		**-5**	**-387**
Mutton	Carcase	10,123	57	9,358	55	8,156	55	24	1,967
	Shoulder	3,152	18	3,042	18	2,491	17	27	661
	Leg	2,318	13	2,311	14	1,322	9	75	996
	Other	2,241	13	2,217	13	2,830	19	-21	-590
	Total	**17,834**		**16,927**		**14,800**		**21**	**3,034**

Source: DAWR

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