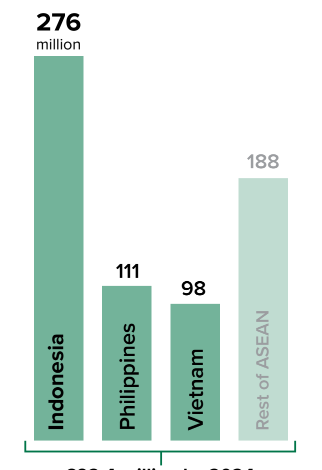
MARKET SNAPSHOT | BEEF & SHEEPMEAT

South-East Asia*

This dynamic and fast-growing region is diverse in population size, economic status and cultural/ethnic background. Improving household incomes and changing consumer tastes in the region are driving a rapid rise in red meat consumption, particularly in urban cities of developing markets. The variance in market maturity and consumption habits requires a highly targeted approach to identify and develop opportunities for Australian red meat.

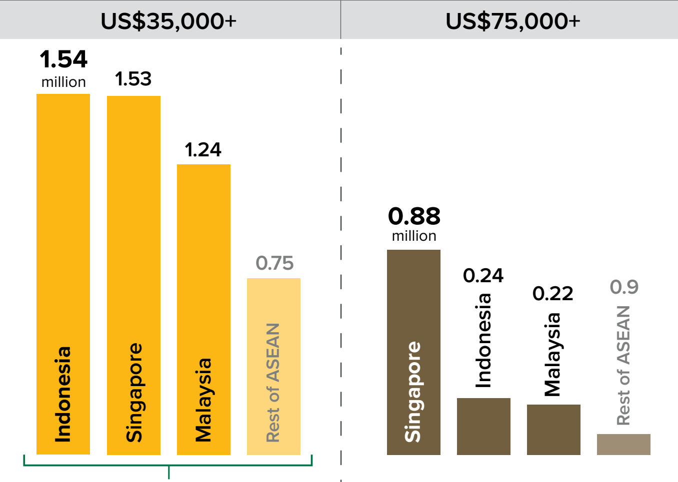
** In this report, South-East Asia (SEA) includes the following countries – Indonesia, Singapore, Malaysia, Thailand, the Philippines and Vietnam, as well as Brunei, Cambodia, Laos and Myanmar.*

Population[1]



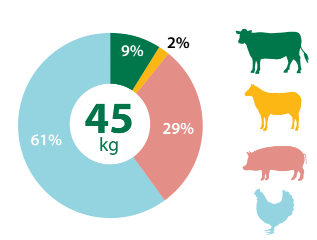
692.4 million by 2024
(+3% from 2021)

Household number by disposable income[2]



5.1 million in 2021
8.3 million by 2024 (+64%)

Meat consumption per capita[3]

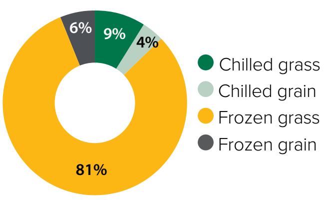


Grocery spend[4]

A$ 992 per person

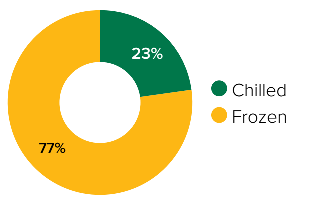
Within the region, Indonesia and the Philippines are high volume markets for Australian beef, followed by fast-growing Vietnam. Singapore and Thailand take smaller volumes of high value products.

Australian beef exports – volume[5]



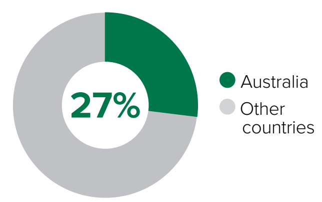
Total 123,624 tonnes swt

Australian beef exports – value[6]

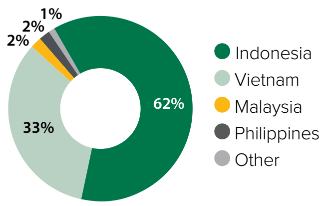


Total A$1.04 billion

Australia's share of beef imports[7]



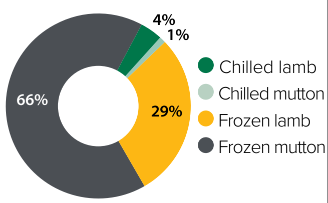
Australian live cattle exports to SEA[5]



Total 992,253 head

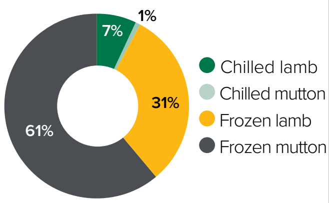
Malaysia and Singapore are key markets for Australian sheepmeat, ranking the third and fifth largest among global mutton exports, respectively. Exports to other SEA countries are growing, although demand has been volatile.

Australian sheepmeat exports – volume[5]



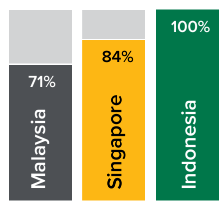
Total 39,266 tonnes swt

Australian sheepmeat exports – value[6]

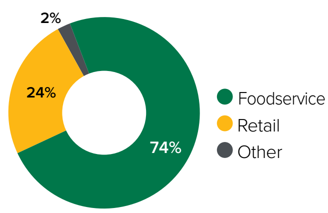


Total A$336 million

Australia's share of sheepmeat imports[8]



Key distribution channels of Australian sheepmeat[9]



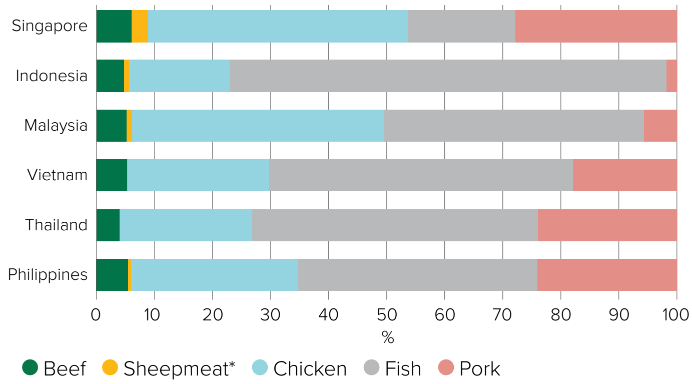
Data source for charts: [1]Fitch Solutions 2021, [2]Fitch Solutions 2021 (disposable income = earnings after taxes and social security charges) (Rest of ASEAN total of Vietnam, Philippines and Thailand), [3]Fitch Solutions, GIRA (per person per year in cwt excluding fish/seafood) 2020 and 2021, [4]IGD 2021 (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 2019–20, [6]ABS/IHS Markit (FY 2019–20), [7]IHS Markit, Vietnam Customs, MLA estimate FYTD (July 2019 – May 2020) Chart represents Singapore, Indonesia, Malaysia, Thailand, Philippines and Vietnam., [8] IHS Markit FYTD (July 2019 – May 2020), [9] MLA estimate

Beef

CONSUMERS

- Beef comprises a small proportion in the daily diets of SEA consumers compared to fish, chicken and pork. However, it is forecast to be the second-fastest growing meat category in the region after chicken, with consumption volume estimated to increase 8% year-on-year from 2019 to 2024 *(Source: GIRA)*. This strong growth is partly driven by rising incomes, a growing number of affluent consumers and expanding modern retail and foodservice sectors.
- 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 beef products, with 'premium quality' and 'better taste' being commonly perceived benefits.
- Beef is mostly utilised in local traditional cuisines such as stir-fries, stews and soups, however, there's a growing trend to try new, international beef dishes at home. Japanese beef *gyudon, shabu-shabu*, Korean *bulgogi* and western-style steaks are among popular international beef recipes being adopted by many urban SEA consumers. Beef is also often used as a special family treat.

Per capita meat consumption proportion

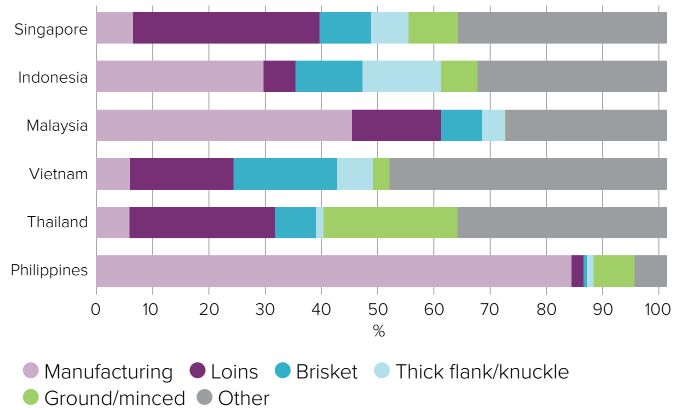


*Source: GIRA 2020f (*sheepmeat includes goatmeat)*

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 – is undergoing rapid expansion.
- Key motivations for SEA consumers to dine out on beef are the joyful eating experiences including the taste of beef and variety in beef dishes, especially those that are difficult to cook at home.
- Young, affluent foodies in urban cities are a major driving force of foodservice growth in SEA. Local and international foodservice operators continue to introduce new restaurants, concepts and menus to capture evolving preferences of this consumer group. Continuous development in SEA's foodservice sector is expected to grow demand for Australian beef.
- This consumer segment also shows strong interest in trying out new food trends and cuisines from different cultures (*Source: MLA ASEAN Attractive Cities Study*). Local cuisines are key offerings, however, the region is seeing a rapid growth and rising popularity of Japanese, Korean and western cuisines. Enjoyment, variety and novelty are key themes that Australian beef can leverage to attract SEA consumers.
- As SEA foodservice offers many different food choices, it demands a wide range of beef products, spanning from grassfed, grainfed, marbled to different breeds (e.g. Angus, Wagyu). It also demands various beef cuts.
- Like other markets around the globe, SEA tourism and foodservice sectors have been heavily affected by the COVID-19 outbreak. With uncertainty around COVID-19 still high, domestic consumption is expected to be the key for SEA to overcome ongoing challenges until international travel resumes. A local customer-centric approach within foodservice is essential to growing Australian beef in SEA as COVID-19 continues to unfold globally.

Proportion by key beef cut exports



Source: DAWE FY 3-year average 2017-18 to 2019-20

RETAIL

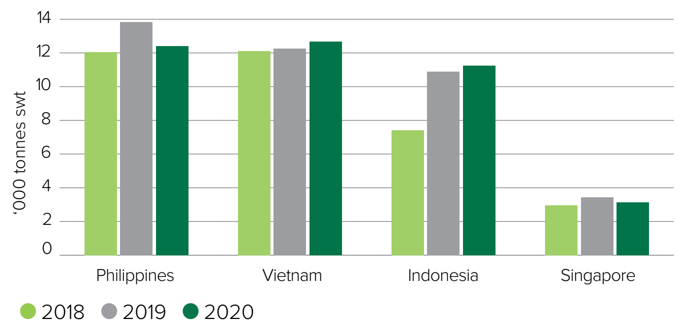
- The SEA retail sector shares similar trends to foodservice. Apart from Singapore, SEA has a relatively fragmented retail market, with traditional channels making up approximately 70% of market share *(Source: IGD)*. However, modern retail is developing rapidly as major retailers seek to expand their store networks 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 modern retail, Australian beef is one of the most commonly consumed products after domestic (except in Singapore, where there is no local supply) 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)*.
- 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.
- COVID-19 has impacted consumers' shopping habits, with many moving online to purchase their groceries during the outbreak. Online grocery shopping is expected to reduce once things settle down, but is likely to continue to evolve going forwards, albeit at a slow pace.

COMPETITIVE LANDSCAPE

- Growing beef consumption, combined with a local supply deficit, has resulted in a steady increase in beef imports to SEA in recent years.
- Australia accounts for about a quarter of SEA's imported beef market and is the largest supplier of chilled beef to the region, with a market share of over 80%, followed by New Zealand (7%), US (3%), and Brazil (2%).
- Overall, India is the largest supplier of bovine meat (buffalo meat) to the region, followed by Australia, Brazil, US and New Zealand.
- Indian buffalo meat is dominant across SEA markets except Singapore and Thailand. It is 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 is also sold in modern retail, in Malaysia and Indonesia in particular, in frozen or thawed form at relatively competitive prices.
- Brazilian beef's presence has increased steadily in SEA, at 13% a year on average in recent years. Strong growth has been underpinned by increased demand from the Philippines, Singapore and Malaysia. Brazil has regained access for frozen beef to Indonesia since August 2019. Importation of Brazilian beef is undertaken by state-owned enterprises with an allocation for 2019 totalling 50,000 tonnes shipped weight (swt). However, only 3,525 tonnes swt was realised by the end of 2019. The allocation for Brazilian beef for 2020 is 20,000 tonnes swt, which is expected to arrive in Indonesia during the second half of the year.
- SEA is also seeing a robust increase in the presence of US beef. US beef imports have grown at 25% a year on average over the past three years. Strong growth is occurring across all US export markets in SEA.
- SEA is the largest export market for Japanese beef, albeit at a small volume, accounting for 45% of total shipments in 2019 (1,934 tones swt). Japanese beef exports to SEA have grown at a significant rate of 38% a year on average over the past three years (2016–2019).
- Despite the COVID-19 outbreak, SEA saw an uplift in beef imports in Singapore, Malaysia*, Thailand and Vietnam in the year-to-May period. Indonesia and the Philippines'* beef imports declined by 46% and 28% respectively over the same period. The decline was caused by a combination of factors including COVID-19 induced disruptions to supply such as Indian buffalo meat imports and weakening purchasing power due to economic uncertainty. Indonesia's allocation for Indian buffalo meat for 2020 is around 170,000 tonnes swt, but due to COVID-19 disruptions, only 672 tonnes were realised as at May 2020. The market is expected to see more Indian buffalo meat coming in during the rest of the year.
- New Zealand imports to SEA have continuously declined due to subdued supply recently. However, New Zealand imports from January to May 2020 grew 21% compared to the same period last year, largely supported by increased demand from Indonesia.
- Australia has a strong trade and economic relationship with the SEA region. The commencement of the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) in July 2020, as well as the removal of tariffs and safeguard for Australian beef to Thailand under the ASEAN-Australian-New Zealand Free Trade Agreement in January 2020, will create further growth opportunities for Australian beef exports to the region (see details in the 'Market access overview' tables).

**Malaysia and Philippines: year to April*

US beef imports by key SEA markets

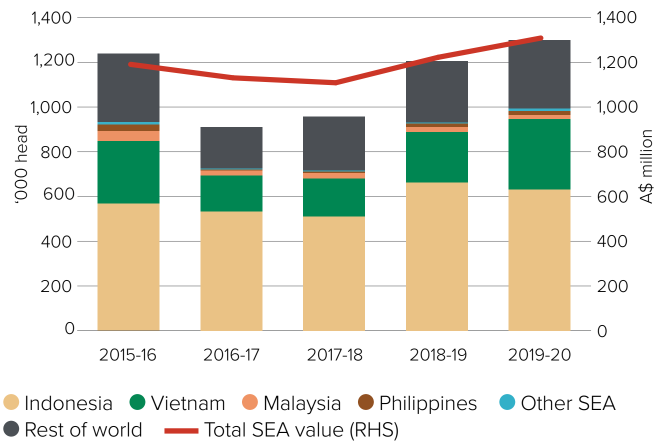


Source: IHS Markit, (FY July–June)

LIVESTOCK EXPORTS

- SEA is the largest market for Australian live cattle exports with a combined volume share of 76%, of which Indonesia makes up almost two thirds by volume, and Vietnam accounts for about 32%. Australian cattle exports to SEA grew 7% from 931,197 head in 2018–19 to 992,320 head in 2019–20.
- 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 is estimated to represent approximately 20% of the total beef consumed in Indonesia and Vietnam.
- Cattle exports to Vietnam are up 39% for the year-to-June 2020, at 166,500 head. The reduced supply of regional live cattle trade due to COVID-19 and shortage of pork supply due to African Swine Fever outbreak has benefited Australian live cattle exports to Vietnam.
- Australian feeder cattle exports to Indonesia totalled 254,000 head in the first half of 2020, down 16% on 2019 levels. Mixed market signals amid the COVID-19 outbreak and fluctuating prices have resulted in importers being more cautious about buying in large numbers.

Australian live cattle exports



Source: DAWE, ABS/IHS Markit (FY 2019–20)

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)**	**Boxed beef – 2.5%** for frozen with bone-in, removed by 2023; 0% for all other product lines **Live cattle – 0%** **0%** for male cattle within quota (281,215 head, reset on 1 January 2021), **2.5% out of quota**; 0% for all other product lines	**India** (buffalo meat): India-ASEAN FTA. 5% tariff **Brazil** No 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.

Australian beef exports to Indonesia – summary table

Volume – in tonnes swt

		2019–20	% of total	2018–19	% of total	five-year average (2014–15 to 2018–19)	% of total	change 2019–20 vs five-year average %	change 2019–20 vs five-year average in tonnes swt
	Total	**57,629**		**54,417**		**52,352**		**10**	**5,276**
Storage	Chilled	3,986	7	4,502	8	3,743	7	6	243
	Frozen	53,643	93	49,915	92	48,609	93	10	5,034
Meat type	Grassfed	56,693	98	53,324	98	51,357	98	10	5,337
	Grainfed	936	2	1,093	2	996	2	-6	-60
Storage/meat type	Chilled grassfed	3,457	6	4,042	7	3,209	6	8	248
	Chilled grainfed	529	1	460	1	534	1	-1	-5
	Frozen grassfed	53,236	92	49,282	91	48,148	92	11	5,089
	Frozen grainfed	407	1	633	1	462	1	-12	-55

Source: DAWE

Value – in A$ 000

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in A$ 000
	Total	**416,057**		**322,373**		**300,296**		**39**	**115,761**
Storage	Chilled	49,448	12	48,459	15	42,757	14	16	6,691
	Frozen	366,609	88	273,915	85	257,539	86	42	109,070

Source: ABS/IHS Markit

Volume – by major cut (in tonnes swt)

	2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
Manufacturing	17,364	30	13,674	25	22,898	44	-24	-5,533
Thick flank/knuckle	7,187	12	7,536	14	5,018	10	43	2,169
Brisket	6,741	12	7,678	14	4,312	8	56	2,430
Other	26,336	46	25,529	47	20,125	38	31	6,211
Total	**57,629**		**54,417**		**52,352**		**10**	**5,276**

Source: DAWE

Australian beef offal exports to Indonesia (in tonnes swt)

	2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
Manufacturing	13,320	36	11,286	33	6,893	32	93	6,427
Heart	6,169	16	5,461	16	3,572	17	73	2,598
Lungs	4,903	13	3,508	10	1,964	9	150	2,940
Other	13,121	35	13,945	41	8,838	42	48	4,283
Total	**37,513**		**34,201**		**21,266**		**76**	**16,248**

Source: DAWE

Value of Australian beef offal– in A$ 000

	2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in A$ 000
Total	**120,779**		**102,365**		**56,119**		**115**	**64,660**

Source: ABS/IHS Markit

Australian live cattle exports to Indonesia

	2019–20	% of total	2018–19	% of total	five-year average	% of total	%	change
Volume – in head	632,188		663,363		602,943		5	29,245
Value – in A$ 000	650,427		687,856		614,005		6	36,422

Source: DAWE, ABS

Market access overview – SEA*

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia-New Zealand Free Trade Agreement **(AANZFTA)** Malaysia-Australia FTA **(MAFTA)** Thailand-Australia FTA **(TAFTA)** Singapore-Australia FTA **(SAFTA)**	**Singapore, Malaysia, the Philippines, Vietnam and Thailand:** 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 **Brazil:** No FTA	**Singapore, Malaysia, the Philippines, Vietnam and Thailand**: Zero	**Singapore, the Philippines, Vietnam and Thailand:** No major hurdles **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

		2019–20	% of total	2018–19	% of total	five-year average (2014–15 to 2018–19)	% of total	change 2019–20 vs five-year average %	change 2019–20 vs five-year average in tonnes swt
	Total	**65,995**		**67,384**		**62,530**		**6**	**3,465**
Storage	Chilled	11,874	18	10,811	16	9,391	15	26	2,482
	Frozen	54,121	82	56,573	84	53,139	85	2	983
Meat type	Grassfed	54,673	83	54,826	81	51,114	82	7	3,559
	Grainfed	11,322	17	12,558	19	11,416	18	-1	-94
Storage/meat type	Chilled grassfed	7,750	12	7,187	11	6,516	10	19	1,234
	Chilled grainfed	4,123	6	3,624	5	2,875	5	43	1,248
	Frozen grassfed	46,923	71	47,639	71	44,598	71	5	2,325
	Frozen grainfed	7,199	11	8,934	13	8,541	14	-16	-1,342

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

Value – in A$ 000

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in A$ 000
	Total	**620,023**		509,619		**432,191**		**43**	**187,831**
Storage	Chilled	189,057	30	168,094	33	139,926	32	35	49,131
	Frozen	430,966	70	341,525	67	292,266	68	47	138,700

Source: ABS/IHS Markit

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

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
	Total	**6,156**		**6,336**		**6,366**		**-3**	**-210**
Storage	Chilled	2,205	36	4,317	68	3,547	56	-38	-1,342
	Frozen	3,951	64	2,019	32	2,819	44	40	1,132
Value – in A$ 000	**Total**	**118,754**		**91,011**		**82,381**		**44**	**36,373**

Source: DAWE, ABS/IHS Markit

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

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
	Total	**4,246**		**9,986**		**10,062**		**-58**	**-5,816**
Storage	Chilled	1,129	27	2,294	23	1,936	19	-42	-807
	Frozen	3,117	73	7,692	77	8,126	81	-62	-5,009
Value – in A$ 000	**Total**	**89,006**		**81,950**		**78,370**		**14**	**10,635**

Source: DAWE, ABS/IHS Markit

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

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
	Total	**11,149**		**25,844**		**28,401**		**-61**	**-17,252**
Storage	Chilled	462	4	886	3	761	3	-39	-298
	Frozen	10,687	96	24,958	97	27,641	97	-61	-16,954
Value – in A$ 000	**Total**	**194,493**		**164,487**		**151,036**		**29**	**43,456**

Source: DAWE, ABS/IHS Markit

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

		2019–20	% of total	2018–19	% of total	five-year average	% of total	%	in tonnes swt
	Total	**5,327**		**13,925**		**6,683**		**-20**	**-1,356**
Storage	Chilled	625	12	1,478	11	849	13	-26	-224
	Frozen	4,703	88	12,447	89	5,834	87	-19	-1,132
Value – in A$ 000	**Total**	**122,592**		**89,969**		**49,907**		**146**	**72,685**

Source: DAWE, ABS/IHS Markit

Sheepmeat

CONSUMERS

- Sheepmeat is a niche protein in the SEA diet. Per capita sheepmeat consumption is relatively low compared to other meat proteins and varies between SEA markets. While it is a less popular meat in the Thai and Vietnamese diet, sheepmeat is widely featured in Malaysian and Indonesian cuisine.
- Sheepmeat is often used as a special treat for oneself or for family and guests. It is also used more in special family and religious celebrations in Muslim-majority markets in SEA such as Malaysia, Indonesia and Brunei. Therefore, demand for sheepmeat typically spikes during the Islamic festive seasons, particularly around the months of *Ramadan* and *Idul Fitri*.
- Consumers' lack of familiarity and cooking knowledge remain major barriers to growing sheepmeat consumption in SEA. However, many young aspirational and affluent SEA consumers show a strong interest in learning how to cook exciting dishes with sheepmeat at home or trying it at restaurants when they dine out.
- Although SEA consumers are not familiar with lamb, they see it as a superior meat and are willing to pay a little more for it. Lamb tends to be more popular among Malaysian consumers. Malaysia has more consumers who perceive lamb to be healthy, nutritious and versatile compared to other markets.

What would convince consumers to buy lamb?

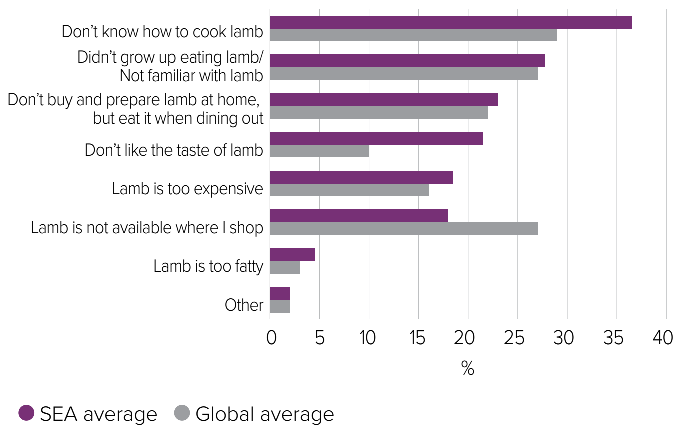
Indonesia	Malaysia	Thailand
Trying it at a restaurant	Recipe ideas	Trying a free sample
Trying a free sample	Trying it at a restaurant	Trying it at a restaurant
Tips on preparation	Tips on preparation	Recipe ideas

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 more to the lower end.
- 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 the continued development of the SEA foodservice sector, are expected to continue to drive demand for high quality sheepmeat products.

Reasons SEA consumers don't buy lamb



Source: MLA Global Consumer Tracker (Singapore, Malaysia, Indonesia, Thailand)

RETAIL

- Australian sheepmeat has strong penetration across modern retail chains in the region, with New Zealand a key competitor.
- Growing consumer awareness and confidence in sheepmeat cooking is key to boosting sales.
- Providing SEA consumers with a combination of offerings including exciting, easy-to-make options and recipe recommendations – especially for special occasions or special treats – preparation tips and information about the nutritional benefits of sheepmeat in retail stores, remain a priority for industry players.

Top five attributes SEA consumers look for on pack when making lamb purchases

Singapore	Malaysia	Indonesia	Thailand
Natural	Halal	Halal	Safety
Safety	Safety	Freshness	Natural
Freshness	Natural	Natural	Environmental
Value	Freshness	Safety	Freshness
Nutritional	Value	Value	Origin

Source: MLA Global Consumer Tracker (Singapore, Malaysia, Indonesia, Thailand)

COMPETITIVE LANDSCAPE

- 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.

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)**	**0%** except the following markets: **Indonesia: 2.5%** for frozen (excluding frozen lamb), removed by 2023 **Cambodia: 10%,** removed by 2021 (except a **35%** tariff on frozen boneless)	**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

Australian sheepmeat exports to SEA* – summary table

Volume – in tonnes swt

		2019–20	% out of total	2018–19	% out of total	five-year average (2014–15 to 2018–19)	% out of total	change 2019–20 vs five-year average %	change in tonnes swt
	Total	**39,266**		**43,515**		**41,430**		**-5**	**-2,164**
Storage	Chilled	1,709	4	1,772	4	1,635	4	5	74
	Frozen	37,557	96	41,742	96	39,795	96	-6	-2,238
Meat type	Lamb	12,833	33	14,155	33	14,599	35	-12	-1,766
	Mutton	26,433	67	29,360	67	26,831	65	-1	-398
Storage/ meat type	Chilled lamb	1,367	3	1,392	3	1,264	3	8	104
	Chilled mutton	342	1	380	1	371	1	-8	-30
	Frozen lamb	11,465	29	12,762	29	13,335	32	-14	-1,870
	Frozen mutton	26,091	66	28,980	67	26,459	64	-1	-368

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

Value – in A$ 000

		2019–20	% out of total	2018–19	% out of total	five-year average	% out of total	%	in A$ 000
	Total	**336,334**		**332,555**		**267,319**		**26**	**69,015**
Meat type	Lamb	129,213	38	132,049	40	113,276	42	14	15,937
	Mutton	207,121	62	200,506	60	154,043	58	34	53,078

Source: ABS/IHS Markit

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

		2019–20	% out of total	2018–19	% out of total	five-year average	% out of total	%	in tonnes swt
Lamb	Leg	1,253	38	749	33	755	34	66	498
	Carcase	495	15	523	23	404	18	22	90
	Shoulder	481	15	284	12	275	12	75	206
	Other	1,028	32	740	32	797	36	29	232
	Total	**3,257**		**2,297**		**2,231**		**46**	**1,026**
Mutton	Carcase	4,126	49	4,964	54	4,782	52	-14	-657
	Leg	2,736	33	2,751	30	2,790	31	-2	-54
	Manufacturing	828	10	802	9	1,074	12	-23	-246
	Other	647	8	669	7	501	5	29	146
	Total	**8,336**		**9,186**		**9,147**		**-9**	**-812**

Source: DAWE

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

		2019–20	% out of total	2018–19	% out of total	five-year average	% out of total	%	in tonnes swt
Lamb	Shoulder	4,430	66	5,434	68	6,065	70	-27	-1,636
	Leg	636	10	765	10	633	7	0	3
	Shank	509	8	375	5	428	5	19	82
	Other	1,101	16	1,437	18	1,514	18	-27	-413
	Total	**6,675**		**8,011**		**8,640**		**-23**	**-1,964**
Mutton	Carcase	8,371	50	10,123	57	8,750	56	-4	-379
	Shoulder	3,478	21	3,152	18	2,672	17	30	806
	Leg	2,092	12	2,318	13	1,579	10	32	513
	Other	2,952	17	2,241	13	2,644	17	12	309
	Total	**16,893**		**17,834**		**15,645**		**8**	**1,248**

Source: DAWE