

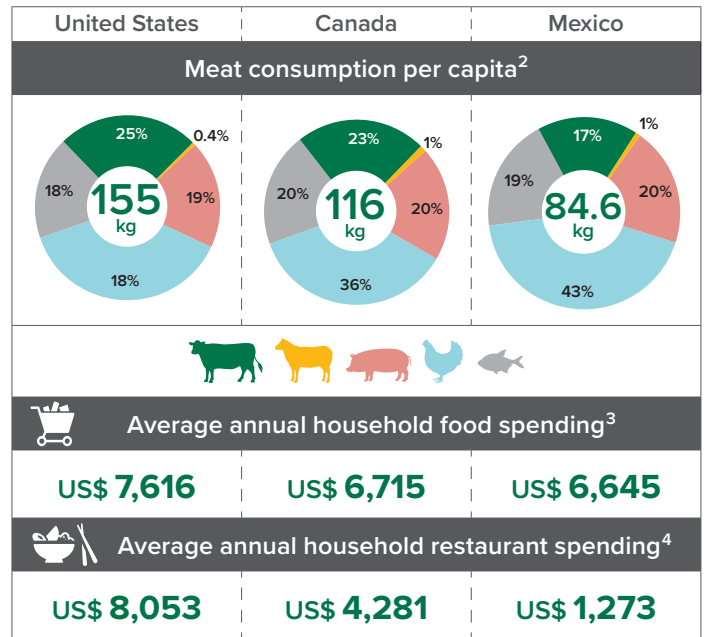
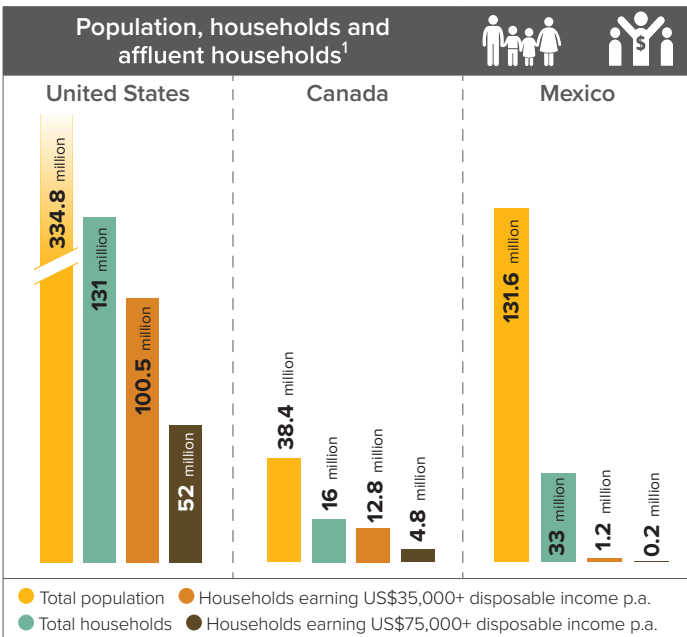


# MARKET SNAPSHOT | BEEF & SHEEPMEAT

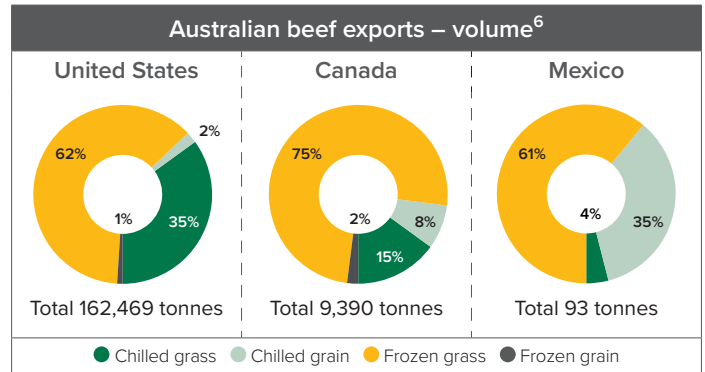
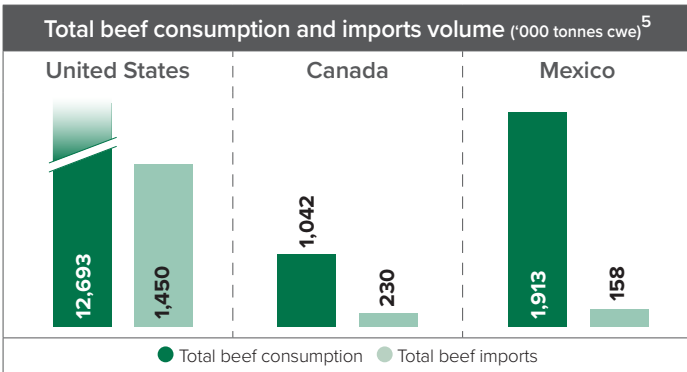
## North America (United States, Canada and Mexico)

for the various strengths of Australian red meat in the region. There are growing opportunities for Australian red meat to differentiate beyond beyond safety and quality on credentials such as those relating to health and sustainability.

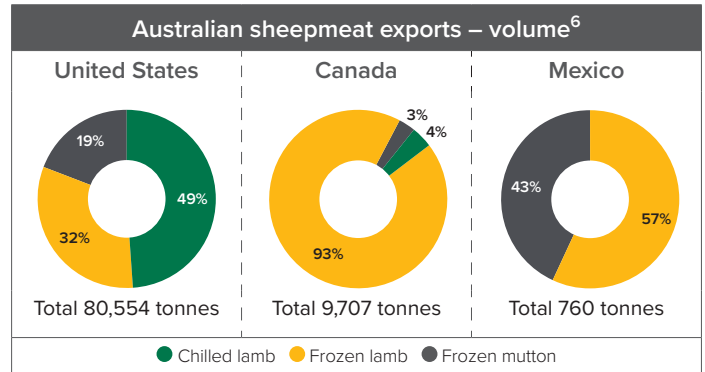
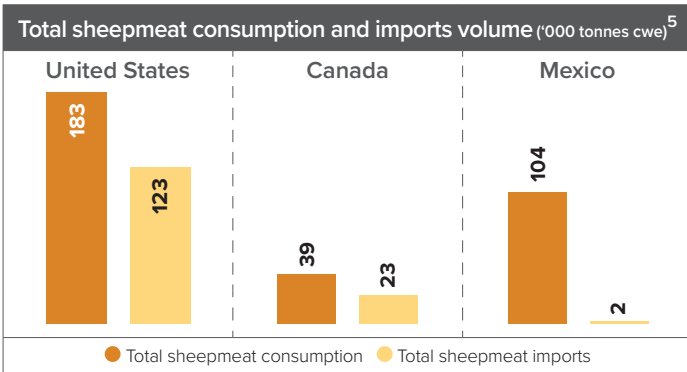
The United States (US) is Australia's single largest red meat export market in the North America region, reflecting its large affluent population that loves red meat. As one of Australia's main export markets since the 1960s, there is strong awareness and appreciation



## North America Beef



## North America Sheepmeat



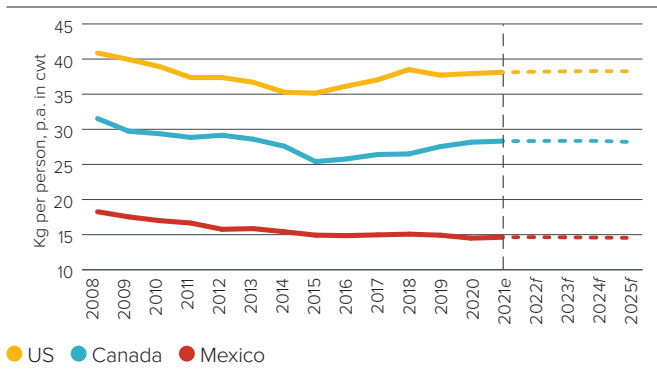
Data source for charts: <sup>1</sup>Fitch Solutions 2022f, data last reviewed July 2021, (disposable income = earnings after taxes and social security charges), <sup>2</sup>GIRA GMC20, 2021f (per person per year in cwt, <sup>3</sup>Fitch Solutions 2022f, (Food spending is based on average household spending on food purchased via all channels but consumed in the home), <sup>4</sup>Fitch Solutions 2022f (Restaurant spending is based on household spending on restaurants, catering and accommodation services), <sup>5</sup>GIRA GMC20, 2021f, <sup>6</sup>DAWE, IHS Markit (2020–21)



## CONSUMERS

- The US is one of the largest global consumers of animal protein, with levels of meat consumption nearing maturity. Going forward, the growth opportunity within the beef category will be to increase value through premium products like chilled grassfed beef, rather than growing the volume of conventional beef.
- Beef consumption has increased since 2015, in line with higher US beef production and a return to a more favourable price point for US consumers. Consumption has also grown among health-conscious consumers who eat beef that is 'better for me' such as grassfed beef, organic beef and beef with no added hormones or antibiotics.
- Although 'buy local' was further cemented as a trend during COVID-19, based on Meat & Livestock Australia's (MLA) 2020 consumer tracker report, the majority of US consumers would consider buying imported beef and are aware of grassfed beef.
- 28% of US shoppers are focused on choosing nutritious and healthy meat/poultry (Source: Power of Meat 2021). This trend has been evident throughout the COVID-19 pandemic, with sales of grassfed beef growing much faster than conventional beef, up by 45% in value compared to a year ago (Source: IRI 52 weeks to Dec 2020).
- Purchasers of grassfed beef have great interest in knowing their beef is high in quality and 'naturally raised', with concerns for animal welfare and environmental sustainability also being major factors (Source: The Power of Meat 2021).
- Australia is well positioned to meet the demands for quality and animal welfare with superior food safety, traceability protocols and a unique quality grading system (Source: MLA Global Tracker 2020).

### North American beef consumption



Source: Fitch Solutions

### US consumer priorities

Top factors linked to protein volume	Top factors linked to premiumness for proteins
Is my/my family's favourite meat	Is the most superior meat
Is easy and convenient to prepare	Is my/my family's favourite meat
Is easy and convenient to purchase	Tastes delicious

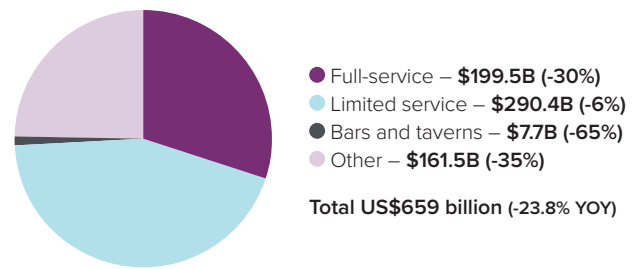
Source: MLA Global Consumer Tracker US, 2020

## FOODSERVICE



- Pre-COVID-19 saw stable foodservice growth in the US, especially for full-service restaurants. Retail foodservice has seen strong expansion. However, the COVID-19 outbreak has had a significant impact on the sector, with around 10% of locations (110,000) permanently closing. This has particularly affected high-end independent restaurants.
- The COVID-19 outbreak impacted foodservice, with restrictive dine-in regulations and rising consumer health concerns becoming a significant challenge for the sector. Foodservice sales saw a substantial decline of around 24% year-on-year, which has not been offset by the increase in delivery. It will take some time for foodservice to recover to pre-pandemic levels, with current estimates taking until year 2023 (Source: GlobalData).
- Manufacturing beef used for burgers and other processed beef products makes up a large proportion of Australian beef sold into the foodservice sector in the US, while chilled grassfed beef is largely destined for retail.

### Foodservice sales value and year-on-year change – 2020



Source: National Restaurant Association State of the Industry 2021, Dataassist/Menus Matters, 2020. Note: pre-COVID situation



**110,000**  
restaurants  
closed

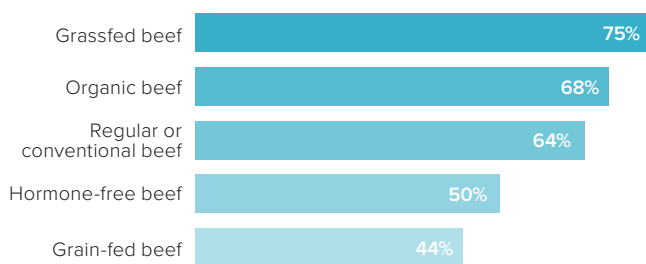
**10%**  
locations  
permanently closed  
YOY 2020

Source: National Restaurant Association State of the Industry 2021



- Although sales of grassfed beef through the US retail channel accounts for a relatively small proportion (2% of total beef sales), it has seen some of the strongest growth in the meat category. This has been especially true over the last year, with growth of grassfed beef outstripping growth of conventional beef (Source: IRI Q4 2020). While ground grassfed beef is now quite common, demand for higher value chilled grassfed beef continues to increase. Some of the most popular cuts include tenderloin, striploin and ribeye.
- No requirement for 'country of origin' labelling at point of purchase is a challenge for Australian product to be differentiated in the sector. Retailers prefer flexibility within their private label product offer, and 'local' callouts in their meat case. In contrast, research indicates US consumers consider Australia as aspirational and able to deliver ethical production claims on their grassfed beef purchases.

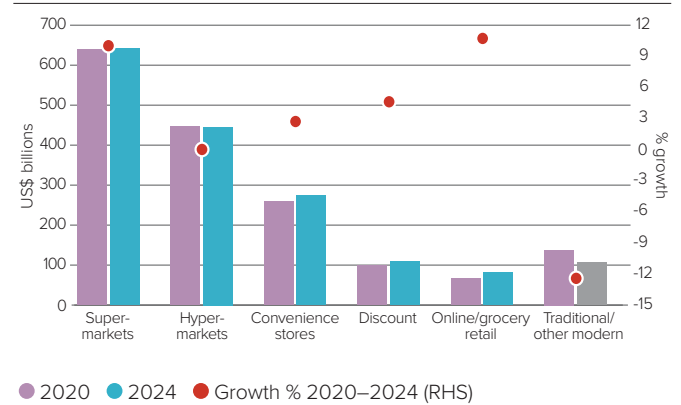
### Awareness of different types of beef – top five in US



Source: MLA Global Consumer Tracker US, 2020

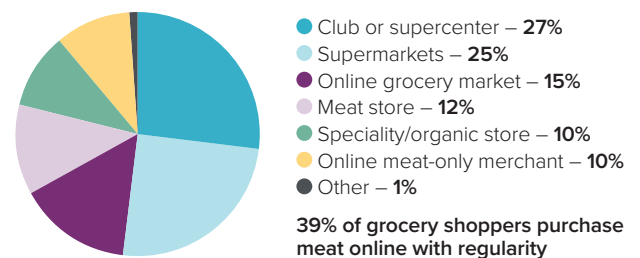
- Supermarkets are the main purchase channel for Australian grassfed beef, followed by independent and regional butchers, online retailers and warehouse club stores, reflecting the retail environment in the US.

### Grocery retail sales by channel



Source: IGD, Growth % = Compound annual growth rate (CAGR) 2020-2024, IGD forecast

### Online meat purchases – channel choices 2021



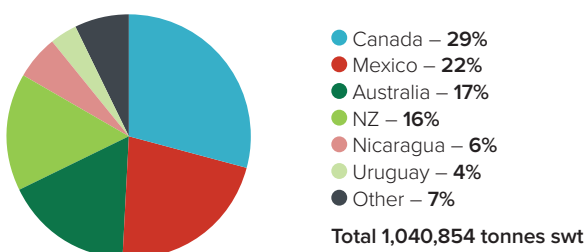
Source: Power of Meat, 2021. Base: Shoppers who have bought meat online with some regularity, beyond just once or twice.

# COMPETITIVE LANDSCAPE



- As most of the Australian beef entering the market is grassfed beef, the key competitors are New Zealand, and increasingly the growing mobilisation of local US grassfed beef production. Other smaller suppliers include Uruguay and Nicaragua, which have access to smaller quotas.
- Grassfed beef is perceived as healthy and natural and matches rising US consumer demands. While Australian grassfed beef is perceived to provide higher quality steak than other imported products (Source: MLA Global Tracker 2020), the trend of localism may continue to grow in the wake of COVID-19, which could act as a challenge to Australian beef.

### US beef imports by market share – year ending May 2021



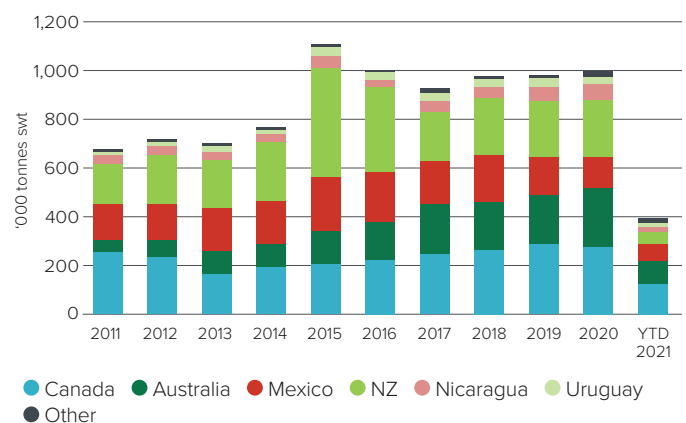
Source: IHS Markit

- US imports of Australian grassfed beef are growing faster than imports of beef from its largest competitor, New Zealand. In addition, 99% of New Zealand imports to the US are manufacturing beef, whereas 46% of Australian grassfed imports are chilled cuts. In recent years, US imports from South

American countries have grown in volume, although they are still coming from a smaller base.

- Australia maintains its preferred access status to the US, only behind United States-Mexico-Canada Agreement (USMCA) partners (Canada and Mexico – with no quota restrictions). New Zealand has an annual quota of 213,402 tonnes swt, with an out-of-quota tariff of 26.4% (within quota 4.4¢/kg).
- Canada and Mexico are the major suppliers of imported chilled grainfed beef to the US. The larger volume of frozen imported beef is chiefly supplied by New Zealand and Australia, which is almost entirely frozen boneless grassfed manufacturing product.

### US beef imports by major supplier



Source: IHS Markit, 2021 YTD Jan-May



# US – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia-United States Free Trade Agreement (AUSFTA)	Zero within quota <b>2021:</b> 3.52% above quota <b>2022:</b> 0% above quota	<b>Canada and Mexico:</b> USMCA, no quota; <b>New Zealand:</b> 213,402 tonnes quota, with an in-quota tariff of US\$4.4¢/kg <b>Nicaragua, Honduras and Costa Rica:</b> CAFTA-DR with US, shares the same 65,000 tonnes with other countries, in quota 4–4.4¢/kg, 26.4% out of quota tariff <b>Uruguay and Argentina:</b> no FTA, quota of 20,000 tonnes each, tariff 4–4.4¢/kg in quota and 26.4% out of quota	<b>Australian beef quota:</b> <b>2021:</b> 438,214 tonnes swt <b>2022:</b> 448,214 tonnes swt	E. coli and salmonella sampling programs, label approvals and port mark compliance

Best access Major challenges

Source: Trade agreements DFAT, MLA

## Australian beef exports to North America – summary table



Volume – in tonnes swt		2020–21		2019–20		five-year average (2015–16 to 2019–20)		change 2020–21 vs five-year average	
			% of total		% of total		% of total	%	in tonnes swt
<b>Total</b>		<b>171,952</b>		<b>259,092</b>		<b>273,565</b>		<b>-37</b>	<b>-101,613</b>
Storage	Chilled	61,825	36	69,919	27	67,935	25	-9	-6,110
	Frozen	110,127	64	189,173	73	205,630	75	-46	-95,503
Meat type	Grassfed	166,483	97	253,285	98	265,010	97	-37	-98,527
	Grainfed	5,468	3	5,807	2	8,555	3	-36	-3,087
Storage/meat type	Chilled grassfed	58,057	34	65,657	25	61,503	22	-6	-3,446
	Chilled grainfed	3,768	2	4,262	2	6,432	2	-41	-2,664
	Frozen grassfed	108,427	63	187,628	72	203,507	74	-47	-95,081
	Frozen grainfed	1,700	1	1,545	1	2,122	1	-20	-422

Source: DAWE, figures are rounded

Value – in A\$ 000									
			%		%		%	%	in A\$ 000
<b>Total</b>		<b>1,705,940</b>		<b>2,449,289</b>		<b>2,123,848</b>		<b>-20</b>	<b>-417,908</b>
Storage	Chilled	871,487	51	927,357	38	744,306	35	17	127,181
	Frozen	834,453	49	1,521,932	62	1,379,542	65	-40	-545,089

Source: ABS/IHS Markit

## Australian beef exports to US – by major cut

Volume – in tonnes swt	2020–21		2019–20		five-year average (2015–16 to 2019–20)		change 2020–21 vs five-year average	
		%		%		%	%	in tonnes swt
Manufacturing	84,967	52	143,496	59	156,432	62	-46	-71,465
Fullset	30,169	19	39,606	16	21,268	8	42	8,901
Thin flank	14,528	9	16,854	7	17,544	7	-17	-3,016
Topside/inside	6,783	4	10,953	4	17,013	7	-60	-10,231
Rump	4,735	3	5,366	2	4,637	2	2	97
Other	21,288	13	27,184	11	35,608	14	-40	-14,320
<b>Total</b>	<b>162,469</b>		<b>243,459</b>		<b>252,503</b>		<b>-36</b>	<b>-90,034</b>

Source: DAWE

## Australian beef exports to Canada – by major cut

Volume – in tonnes swt	2020–21		2019–20		five-year average (2015–16 to 2019–20)		change 2020–21 vs five-year average	
		%		%		%	%	in tonnes swt
Manufacturing	6,153	66	10,820	72	14,392	70	-57	-8,239
Striploin	797	8	1,101	7	1,006	5	-21	-209
Cube roll/ribeye roll	794	8	1,377	9	1,305	6	-39	-511
Other	1,646	18	1,826	12	3,891	19	-58	-2,245
<b>Total</b>	<b>9,390</b>		<b>15,124</b>		<b>20,594</b>		<b>-54</b>	<b>-11,204</b>

Source: DAWE

## Australian beef exports to Mexico – by major cut

Volume – in tonnes swt	2020–21		2019–20		five-year average (2015–16 to 2019–20)		change 2020–21 vs five-year average	
		%		%		%	%	in tonnes swt
Thin flank	57	61	424	83	440	94	-87	-383
Other	36	39	84	17	28	6	28	8
<b>Total</b>	<b>93</b>		<b>508</b>		<b>468</b>		<b>-80</b>	<b>-375</b>

Source: DAWE

## CONSUMERS



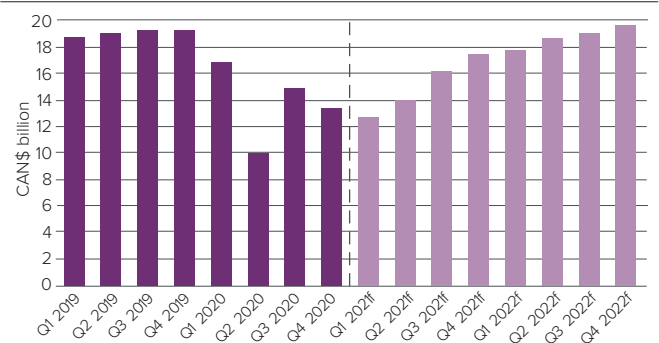
- Canadians' expenditure on food and non-alcoholic drinks accounts for around 10% of their total expenditure, amounting to CAN\$124 million in 2020 (Source: Fitch Connection).
- Domestic beef consumption is forecast to be around 1 million tonnes cwt in 2021 (Source: USDA).
- Most Canadian consumers already buy imported beef. The growing majority of grassfed beef buyers are aware of the 'country of origin' (around 70%), and most would consider buying imported beef (around 80%) (Source: MLA Global Tracker).
- Compared to global consumers, Canadian beef buyers are more concerned about 'naturalness', price and no added hormones.
- When purchasing beef, 'naturalness' is something buyers look for, with grassfed seen as an authentic differentiator. However, the appeal of grassfed beef has plateaued. At the same time, newer descriptors have become more prevalent like "organic", "hormone-free", "non-GMO" and "antibiotic-free". It appears consumers are not fully aware of the differences between these types of beef.

## FOODSERVICE & RETAIL



- Restaurants account for approximately half of the 172,660 foodservice venues in Canada, with approximately 85,500 units.
- Limited-service restaurants (including fast casual and quick service) account for around 60% of all restaurants while full-service (including casual dining, fine dining and midscale dining) accounts for another 40% (Source: Datassential's Firefly database (May 2021)).
- Beef is the most valuable meat category for commercial foodservice operators (such as restaurants, cafés, hotels and leisure venues) (Source: GlobalData).
- The COVID-19 outbreak will likely have a lasting effect on foodservice. It is forecast that it will return to 2019 pre-pandemic levels at the end of 2022 (Source: Restaurants Canada May 2021).
- The majority of imported Australian grassfed beef is manufacturing grade and is used in quick service restaurants.
- At the retail level, Australian beef is mainly purchased from supermarkets, with consumers focusing more on healthy and cost-effective products after COVID-19.

Quarterly total foodservice sales



Source: Restaurants Canada, May 2021

## COMPETITIVE LANDSCAPE



- The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) is a free trade agreement (FTA) between Australia and 11 other countries, including Canada and Mexico, signed in 2018.
- Under the trade agreement, Australia has favourable market access into Canada and a good trading environment, with no tariff from 2023. The majority of Australian beef exports to Canada are grassfed and follow a similar trend to the US.
- The main competitors are US beef and product from New Zealand. Australia is a modest supplier of beef to Canada.



## Canada – Market access overview



Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	2021: 8.8% 2022: 4.4% 2023: 0%	<b>US and Mexico:</b> USMCA, no quota; <b>New Zealand:</b> 29,600 tonnes quota, in quota 0% tariff, out 13.2%	Quota of 35,000 tonnes, out of quota pays tariff	E. coli and salmonella sampling programs, label approvals and port mark compliance

Best access  Major challenges

Source: Trade agreements DFAT, MLA

## CONSUMERS



- Mexicans are expected to consume approximately 1.94 million tonnes cwe of beef in 2021. Demand is also projected to rise, as the Mexican peso strengthens and the middle class grows (Source: United States Department of Agriculture – USDA).
- Beef is the second largest animal protein in Mexico, in terms of value, following poultry (Source: Fitch Solutions 2020). Young, wealthy consumers are driving beef consumption growth in Mexico.
- The number of households with a higher incomes (over US\$75,000/year) is expected to grow 32.2% from 2021 to 2025. In addition, after declining 11.6% in 2020, from 2021, hotel and restaurant expenditure is set to increase (16.3% growth in 2021), creating new opportunities for high-value products such as Australian beef and lamb (Source: Fitch Solutions).

## FOODSERVICE & RETAIL



- Mexicans' spend in the foodservice sector is expected to grow by around 6–7% each year (Source: CAGR) from 2022 to 2025 (COVID-19 adjusted), with the growing working-age population and urbanisation lifting demand for more convenience among foodservice customers.
- Full-service and quick service restaurants dominate the channel. Full-service restaurants are set to be the main beneficiary of Mexico's positive economic scenario, with rising disposable incomes allowing families to trade up from quick service restaurants and to become more receptive to higher value imported beef (Source: GlobalData).
- Pre-COVID-19, the foodservice sector was growing, with younger consumers willing to eat out more and try new things. Top steakhouses are dominated by USDA-graded prime steaks, as grainfed product is more preferred than grassfed. However, there is high potential for Australian grassfed beef to enter the market, underpinned by growing needs for health and well-being.
- Uniquely in this market, the most common cut used in foodservice is arrachera, or hanger steak, normally marinated in spices. Total grocery retail sales in Mexico were worth A\$301 billion in 2020 and are forecast to see CAGR growth of 3% from 2020–2022 (Source: IGD).
- In the retail sector, hypermarkets are the most prevalent outlet type in the country, with more than 80% of value share in retail. Retailers will increasingly target the upper middle-class segment in the coming years, through premium formats that offer popular imported produce (Source: Fitch Solutions and IGD).

## COMPETITIVE LANDSCAPE



- Mexico is a member of the CPTPP (The Comprehensive and Progressive Agreement for Trans-Pacific Partnership).
- There is still restricted market access and a mixed trading environment.
- Main competitors are the US, Japan and Canada. Australia is a very small part of the beef market and competing at the top end. The future is bright for premium beef (mostly grainfed) but current circumstances have put a dent in economic growth, likely impacting the realisation or timings of market potential being reached.

## Mexico – Market access overview



Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	2021: 12–15% 2022: 10–13% A temporary tariff waiver has operated for 2021.	US and Canada: USMCA, no quota  New Zealand: no quota and tariff 14%	No quota	Labelling, restriction on ports of entry, health certificates extra information required compared with other markets

Best access Major challenges

Source: Trade agreements DFAT, MLA



# United States – Sheepmeat

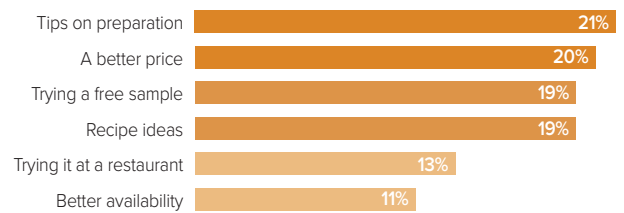


## CONSUMERS

- Lamb remains a niche and unfamiliar protein to around 40% of US consumers, challenged by concerns around taste, familiarity and limited knowledge on how to prepare it. However, US consumers are progressively increasing their willingness to try lamb, particularly the millennial generation (Source: *MLA Global Tracker 2019*).
- Lamb is traditionally regarded as a seasonal food for specific holidays with large retail sales spikes during Easter and Christmas.
- For first-time lamb eaters, it is generally eaten out-of-home, and consumers who eat lamb when dining out are more likely to try cooking lamb at home, if it is available (Source: *Voice of consumer, 2018*).
- With limited knowledge of lamb, Americans are much more likely to consider 'naturalness', safety and freshness ahead of 'country of origin' when purchasing lamb (Source: *Voice of consumer, 2018*).
- However, the importance of variety in the wake of COVID-19 has seen 42% of consumers buying different types of protein, which provides a good opportunity for lamb to be on dining tables. (Source: *Power of Meat 2021*).

- Consumers who purchase chilled lamb are generally premium shoppers, spend more in store and prefer healthier, home cooked items. According to IRI, loin and leg are the most consumed cuts, accounting for 45% of volume share (another 21% from shoulders) (Source: *IRI Scan*).
- Lamb consumption patterns vary by region in the US, with California, the mid-south and north-east areas seeing faster growth compared to the national rate (Source: *IRI*).
- The top four opportunities to encourage trialling of lamb would be "Tips on preparation", "A better price", "Trying a free sample" and "Recipe ideas" (Source: *GlobalTracker 2020*).

### Opportunities to encourage lamb trialling



Source: *MLA Global Consumer Tracker US, 2019*

## RETAIL



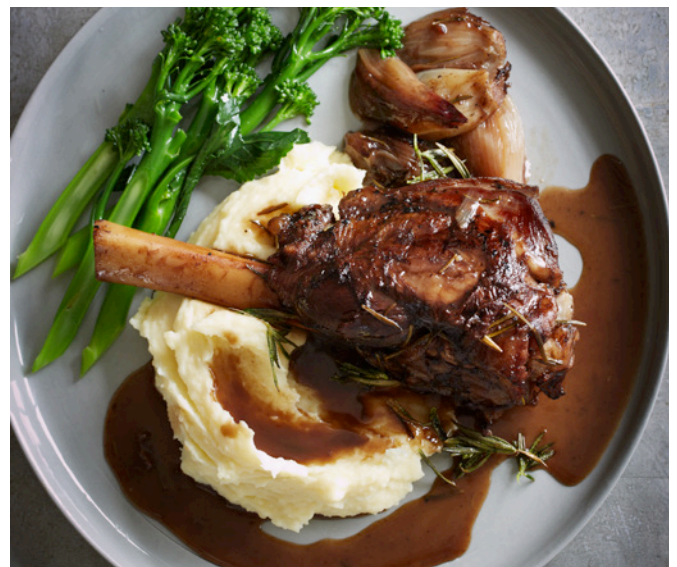
- While supermarkets are still the main purchase channel for Australian lamb, sales are also highly skewed to online retailers and club store warehouses.
- Stores such as Costco attract a younger, more affluent consumer, who seeks more ethnically diverse cuisine and more exciting 'non-traditional' flavours, with lamb recognised as a viable option.
- Prior to the pandemic, around 20% of US shoppers regularly purchased meat through e-commerce. At the peak of the pandemic, over half of meat purchases were online, and has now settled at around 34% of shoppers regularly doing so (Source: *Power of Meat and Midan Marketing, 2021*). It is a growth area and Australian lamb is well placed in this space.

- Retail lamb sales have grown in double digits across the board into Q1 2021 (Source: *IRI/Midan*). Opportunities for continued lamb sales looks promising, with some of the increase stemming from consumer boredom during the quarantine, 'cook from home' time, and generating consumer interest in lamb (Source: *Midan*).
- In general, lamb buyers in the USA are willing to pay more for better quality meat and are more adventurous in their meat purchasing habits (Source: *Voice of consumers 2018*).

### Factors associated with lamb purchase by volume and premium

Growing equity/volume	Growing premium
1 – Fresh	1 – Fresh
2 – Consistent quality standards	2 – Consistent quality standards
3 – Is my/my family's favourite lamb	3 – The meat is usually tender
4 – The meat is usually tender	4 – Guaranteed safe to eat
5 – Offers a variety of cuts that suit the meals I make	5 – Is my/my family's favourite lamb

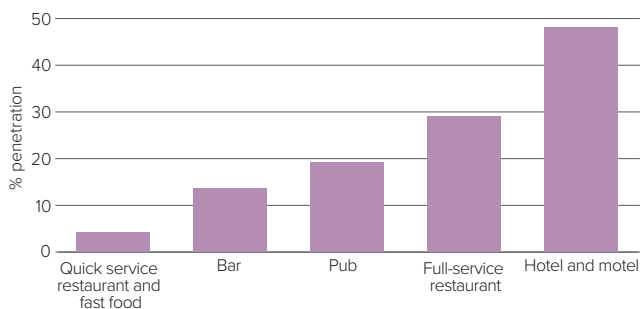
Source: *MLA Global Consumer Tracker US, 2020*





- Prior to COVID-19, lamb had steady growth across foodservice operations, with 20% penetration of menus. However, the disruptions caused by the pandemic generally saw lamb removed from menus in an effort to consolidate ingredients and stock, and focus on higher performing, lower cost delivery items. It is expected that lamb will experience a steady recovery back to 2019 menu penetration by the end of 2022 (Source: GlobalData Foodservice Intelligence Centre).
- Pre-COVID-19, lamb performed best in independent fine dining operations (Source: MenuMatters 2019). The penetration of lamb on US restaurant menus has grown steadily in the last decade before COVID-19. In 2021, overall penetration of lamb on menus in US foodservice is 20% of the penetration pre-COVID (Source: Datassential 2020).

## Lamb menu penetration by channel

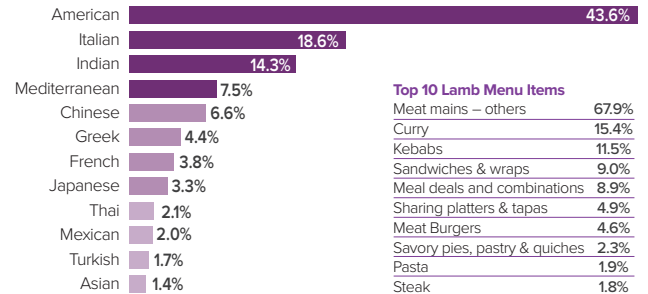


Source: GlobalData, 2021

- As the foodservice industry recovers from the impacts of COVID-19, there is an opportunity for Australian lamb to bring diversity and unique flavour to a menu, as well as deliver premium perceptions among diners for operators (Source: MenuMatters, 2019/2021).

- The foodservice sector, driven by changing demographics with a more culturally diverse population and a shift toward more convenient and affordable meals, presents opportunities to diversify beyond the lamb rack and bring alternative cuts and more casual applications that utilise lamb in menus.

## US lamb menu penetration by cuisine type



**Top 10 Lamb Menu Items**

Meat mains – others	67.9%
Curry	15.4%
Kebabs	11.5%
Sandwiches & wraps	9.0%
Meal deals and combinations	8.9%
Sharing platters & tapas	4.9%
Meat Burgers	4.6%
Savory pies, pastry & quiches	2.3%
Pasta	1.9%
Steak	1.8%

Source: GlobalData Menu Intelligence, 2021

## Lamb popularity increases

Lamb menu placement has largely been driven by international cuisines and upscaling traditional American fare. The growing popularity of casual ethnic cuisines (particularly Middle Eastern, Mediterranean and North African) are likely to be a key tool in driving lamb usage over the next few years. Lamb has also gained ground through more familiar and approachable applications such as burgers and flatbreads, although this 'swapping' technique is currently under-leveraged in foodservice

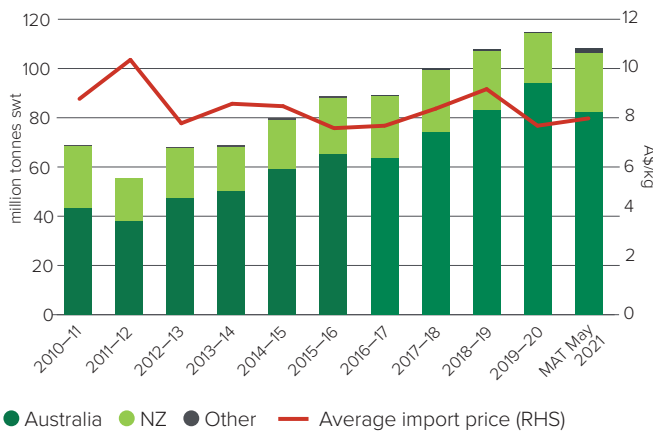


# COMPETITIVE LANDSCAPE



- Imports make a significant contribution to the lamb and mutton supply in the US. In 2020, imports accounted for approximately 70% of total sheepmeat consumed in the US (Source: GIRA).

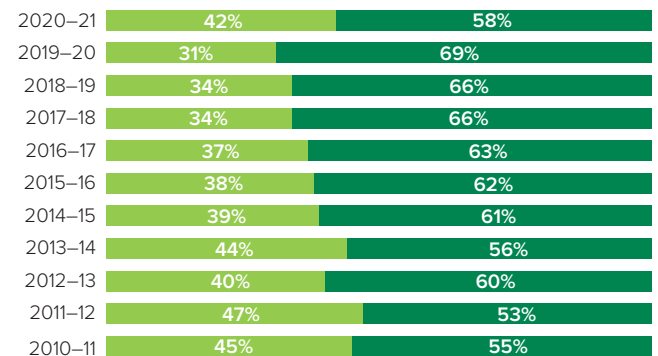
## Sheepmeat imports into US by major supplier



Source: IHS Markit

- Australia is the major supplier of lamb in the US (80% of imported lamb in 2021), and the fastest growing major importer (127% growth compared to 2011). The second largest supplier is New Zealand, accounting for 18% of total imports, and growing by 19% since 2012 (Source: IHS Markit).

## Percentage of imported chilled and frozen sheepmeat volume to the US (from all origins)



Source: IHS Markit





## Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia-United States Free Trade Agreement (AUSFTA)	Zero	<b>NZ, Uruguay and Chile:</b> has a tariff of US 0.7¢/kg for lamb and US 2.8¢/kg for mutton	Zero	Point of entry inspection, label approvals and port mark compliance

Best access Major challenges

Source: Trade agreements, DFAT, MLA

## Australian sheepmeat exports to US – summary table



### Volume – in tonnes swt

		2020–21		2019–20		five-year average (2015–16 to 2019–20)		change 2020–21 vs five-year average	
			% of total		% of total		% of total	%	in tonnes swt
<b>Total</b>		<b>80,554</b>		<b>76,020</b>		<b>71,779</b>		<b>12</b>	<b>8,776</b>
Storage	Chilled	39,763	49	30,273	40	28,572	40	39	11,190
	Frozen	40,792	51	45,747	60	43,206	60	-6	-2,415
Meat type	Lamb	65,740	82	55,833	73	56,059	78	17	9,681
	Mutton	14,815	18	20,187	27	15,720	22	-6	-905
Storage/meat type	Chilled lamb	39,752	49	30,273	40	28,570	40	39	11,181
	Chilled mutton	11	0	0	0	4	0	204	8
	Frozen lamb	25,988	32	25,560	34	27,489	38	-5	-1,501
	Frozen mutton	14,803	18	20,187	27	15,718	22	-6	-914

Source: DAWE, figures are rounded

### Value – in A\$ 000

			%		%		%	%	in A\$ 000
<b>Total</b>		<b>913,436</b>		<b>885,834</b>		<b>799,856</b>		<b>14</b>	<b>113,580</b>
Meat type	Lamb	802,513	88	736,289	83	683,618	85	17	118,896
	Mutton	110,922	12	149,544	17	116,238	15	-5	-5,316

Source: ABS/IHS Markit

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

		%		%		%	%	in tonnes swt
Carcase	19,667	30	15,827	28	17,583	31	12	2,084
Leg	18,742	29	14,191	25	15,086	27	24	3,655
Shoulder	7,029	11	5,916	11	5,747	10	22	1,283
Shortloin	6,968	11	5,911	11	4,888	9	43	2,080
Rack	6,581	10	6,674	12	5,348	10	23	1,232
Other	6,754	10	7,314	13	7,406	13	-9	-652
<b>Total</b>	<b>65,740</b>		<b>55,833</b>		<b>56,059</b>		<b>17</b>	<b>9,681</b>

Source: DAWE

## Australian sheepmeat exports to Canada

### Volume – in tonnes swt

			%		%		%	%	in tonnes swt
<b>Total</b>		<b>9,707</b>		<b>8,902</b>		<b>8,823</b>		<b>10</b>	<b>885</b>
Storage/meat type	Chilled lamb	4,752	49	3,813	43	3,816	43	25	936
	Chilled mutton	0	0	0	0	1	0	-100	-1
	Frozen lamb	4,450	46	3,755	42	3,963	45	12	487
	Frozen mutton	506	5	1,334	15	1,044	12	-52	-538

Source: DAWE

## Australian sheepmeat exports to Mexico

### Volume – in tonnes swt

			%		%		%	%	in tonnes swt
<b>Total</b>		<b>760</b>		<b>1,543</b>		<b>3,044</b>		<b>-75</b>	<b>-2,284</b>
Storage/meat type	Chilled lamb	0	0	0	0	1	0	-100	-1
	Chilled mutton	0	0	0	0	0	0	0	0
	Frozen lamb	435	57	619	40	872	29	-50	-437
	Frozen mutton	325	43	924	60	2,172	71	-85	-1,846

Source: DAWE