North America

(United States, Canada and Mexico)

MARKET SNAPSHOT | BEEF & SHEEPMEAT

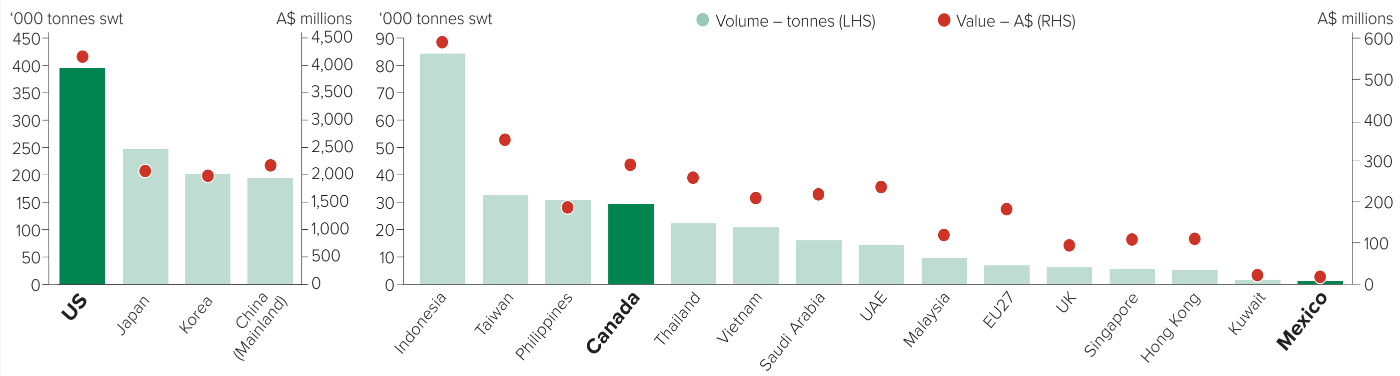
MEAT & LIVESTOCK AUSTRALIA

EXPORTS
Large and critical market for all Australian red meat products

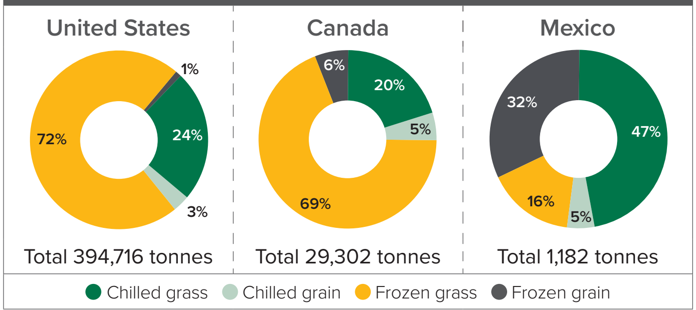
CONSUMERS
Largest pool of affluent and diverse consumers with high red meat consumption

GROWTH
Red meat that delivers affordability, quality, taste, 'better for me' and sustainability

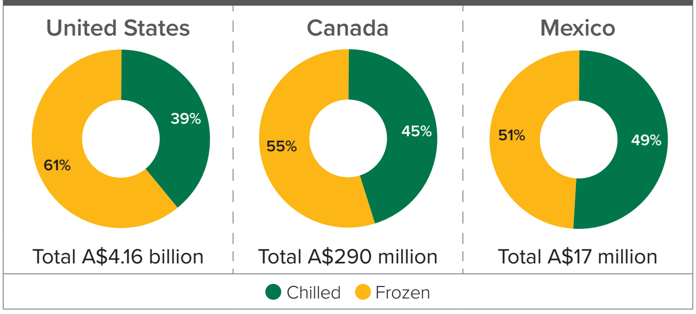
Australian beef exports to North America in a global context [1 and 2]



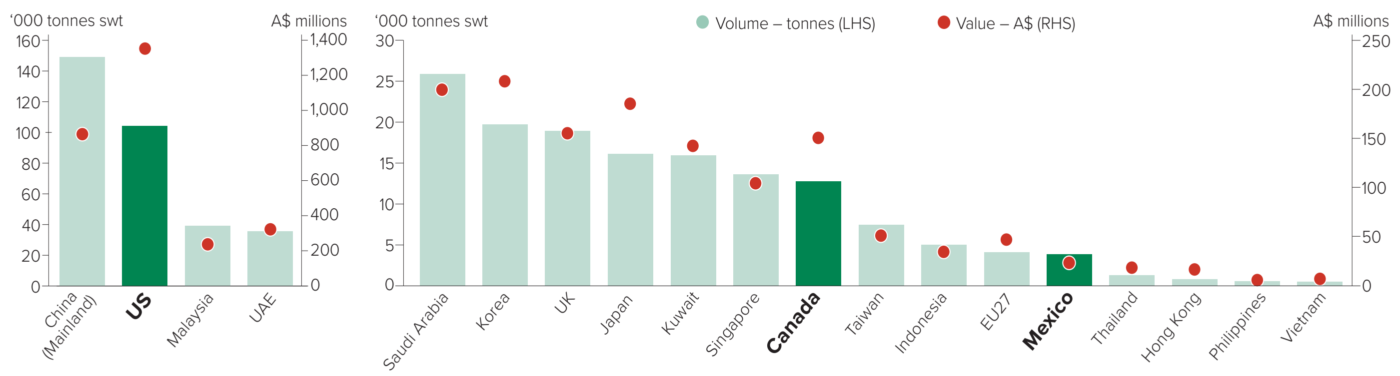
Australian beef exports – volume (swt)[1]



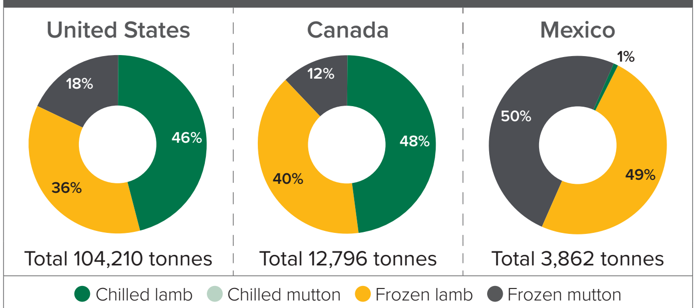
Australian beef exports – value[2]



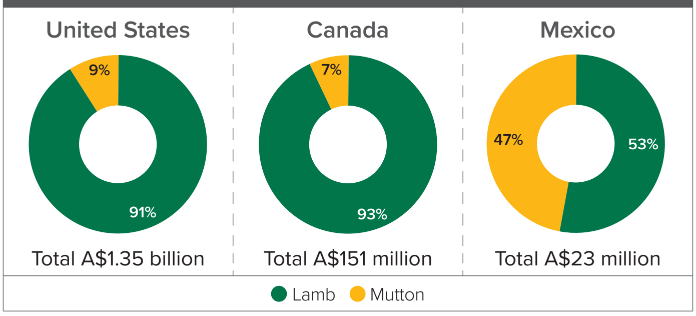
Australian sheepmeat exports to North America in a global context [1 and 2]



Australian sheepmeat exports – volume (swt)[1]



Australian sheepmeat exports – value[2]



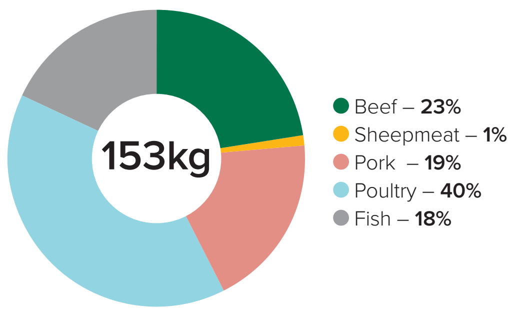
Data source for charts: [1]DAFF (CY2024), [2]Trade Data Monitor (TDM) (MAT November 2024)

United States – Beef

CONSUMERS

- The US is one of the largest global consumers of animal protein, with stable levels of meat consumption. With a high number of affluent households and meat loving consumers, there are a broad range of opportunities within the market from nutritious, everyday meals to premium experiences and special occasions.

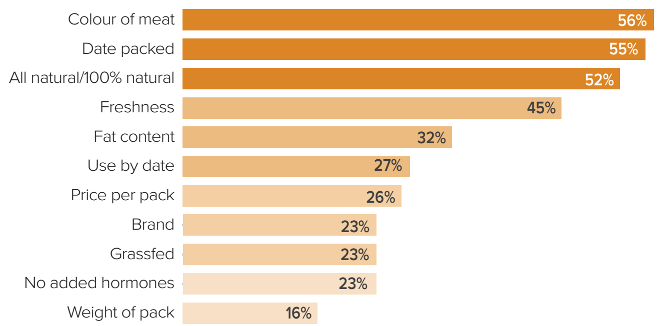
Meat consumption per capita



Source: GIRA, kg carcase weight equivalent (cwe) per year, 2024f

- Although 'buy local' further cemented as a trend during COVID-19, the majority of US consumers would still consider buying imported beef and are aware of grassfed beef (88%) *(Source: Voice of Shopper 2022).*
- 66% of US shoppers are focused on choosing 'better for me/my family', nutritious and healthy meat/poultry. Amidst cost of living pressures, this remains the primary driver of purchase however sustainability related factors continue to increase year-on-year with just over one third of US consumers considering 'better for the farmer, planet or animal' when purchasing meat or poultry.
- There is high interest (64%) in Australian grassfed beef, with US shoppers rating the Aussie offering as highly versatile, being a good source of energy, good flavour/taste, known country of origin and being high in quality. Sustainability has promising associations among US shoppers but there are opportunities to further share our sustainability story and efforts to raise awareness among consumers *(Source: Voice of Shopper 2022).*
- Grassfed beef is perceived by US consumers as healthy, natural and better for the animal, aligning well with current and emerging US consumer needs. While Australian grassfed beef is perceived to provide higher quality beef than most other imported products, continued communication of our strong value proposition remains critical *(Source: MLA Global Consumer Tracker 2023).*

Top 10 things consumers look for on pack when buying beef

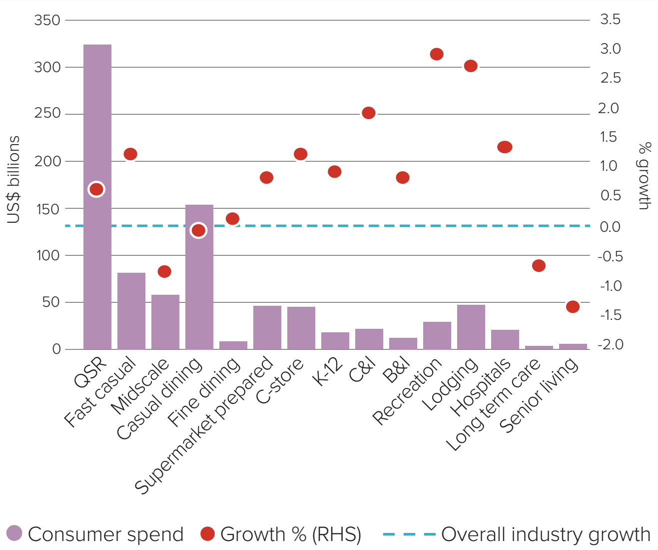


Source: MLA Global Consumer Tracker 2024

FOODSERVICE

- The US foodservice industry is forecast to reach US$921.7 billion in 2025. Despite easing inflation, most of the growth is attributed to price increases however this is less of a factor compared to previous years. Rising food costs, rising labour costs and inflation, coupled with labour and supply chain challenges are the key concerns of restaurant operators *(Source: Datassential).*

Consumer spend and growth by foodservice segment



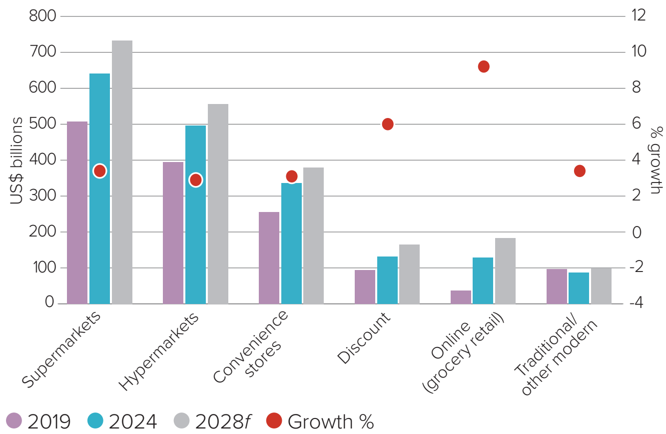
Source: Datassential 2025 Foodservice Forecast, Prepared food and non-alcoholic beverages

- The US has the largest pool of affluent consumers globally and household restaurant and hotel spending is expected to grow at a compound annual growth rate (CAGR) of 4% between 2025 to 2028 *(Source: Fitch Solutions).*
- The US has a diverse foodservice sector with the biggest steakhouse sector *(Source: GlobalData)* and the third largest fine dining sector in the world (by value). The US is ranked third after France and Japan with 13 three-star Michelin restaurants *(Source: Michelin Guide).* It is estimated that around 45% of Australian beef exported to the US goes into the foodservice sector *(Source: MLA Estimates 2024).*
- Burgers remain a popular menu item in the US foodservice scene with US consumers eating on average, three burgers a month. Although most burgers are consumed through quick service restaurants and fast food chains, one third of consumer are interested in premium burger offerings using Wagyu, brisket or short rib. Casual chains and fine dining restaurants are tapping into this opportunity and gaining their fair market share with their premium burger options *(Source: Datassential).*
- 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. The past year has also seen increasing diversity and volume of chilled grainfed cuts, meaning broader opportunities for Australian exporters are available.

RETAIL

- While grassfed beef only accounts for around 2% of total beef sales through the US retail channel, sales have grown by more than 20% compared to the five year average. This has been driven by increased availability and range of grassfed beef product at retail. Additionally, the easing of prices has meant less of a price gap between conventional beef and grassfed beef. This has resulted in more uptake of grassfed beef as consumers view grassfed as 'better for me' with more benefits than conventional beef *(Source: Circana, 52 weeks to June 2024).* Ground grassfed beef is now more commonly seen in store, and demand for higher value chilled grassfed beef continues to increase. Some of the most popular cuts include tenderloin, striploin and ribeye.
- The lack of requirement for 'country of origin' labelling at point of purchase is a challenge for growing awareness of and preference for Australian beef. There are competing interests between suppliers, retailers and consumers. Retailers prefer supply flexibility within their private label product offer meaning they may use a range of products from different country of origin to keep supply consistent. Research indicates that US consumers consider Australian product as aspirational and able to deliver ethical production claims on their grassfed beef purchases.
- Supermarkets are the main purchase channel for Australian beef, followed by independent and regional butchers, online retailers and warehouse club stores, reflecting the retail environment in the US
- Sustainability has become a topic of increasing significance, but it is not always top of mind, with only about half (52%) of consumers considering this when purchasing meat or poultry, as freshness cues (e.g. meat colour) and functional factors (e.g. date packed) take priority. More than half of consumers will seek out and support businesses that exhibit sustainable practices, but they expect companies and businesses to lead the way *(Source: Midan),* which represents a key opportunity for Australian red meat with our strong sustainability and traceability credentials.

Grocery retail sales by channel



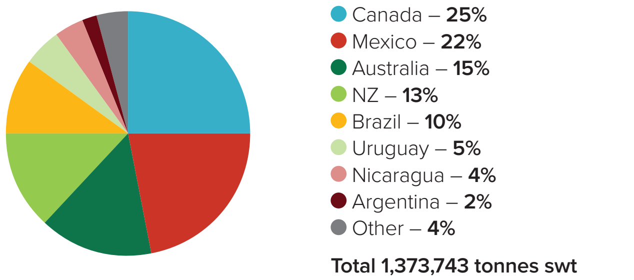
Source: IGD, Growth % = Compound annual growth rate (CAGR) 2024e–2027f

- Online shopping still tends to be elevated at 57% despite fewer households shopping in the past year, with those choosing to purchase meat online continuing to grow, especially among Gen Z and Millennials *(Source: Power of Meat 2024).*
- Online shoppers tend to be more focused on health and sustainability. Having this information easily accessible through product descriptions or nutritional information, as well as including an attractive product image will maximise appeal for these shoppers *(Source: Power of Meat 2024).*

COMPETITIVE LANDSCAPE

- The US has a large beef industry of its own so its domestic supply is one of the key competitors for Australian product with Canada and Mexico the main competitors for imported beef.

US beef imports by market share

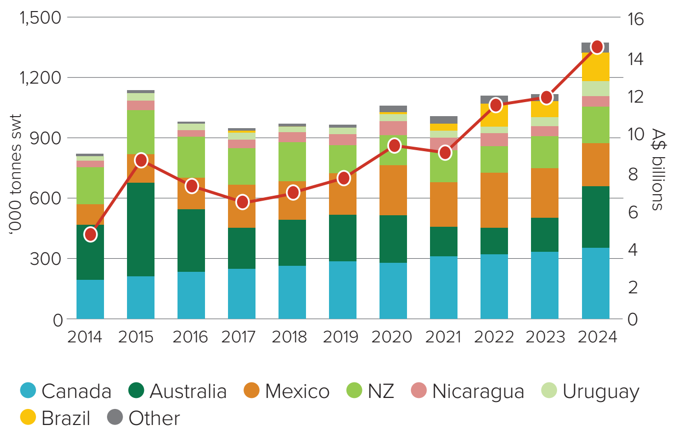


Total 1,373,743 tonnes swt

*Source: Trade Data Monitor (TDM), *MAT year ending August 2024*

- As most of the Australian beef entering the market is grassfed, the key competitors are New Zealand, and increasingly, the growing mobilisation of local US grassfed beef production. Other smaller suppliers include Brazil, Uruguay and Nicaragua, which have access to smaller quotas.
- Although New Zealand has historically been one of Australia's largest competitor for grassfed beef in the US market, NZ exports is majority manufacturing beef while Australia's portfolio of cuts are much more diverse with around one quarter being chilled cuts.
- US imports from South American countries that share the 'other country' quota have grown in volume. Brazil filled the majority of the 'other country' quota in the past few years and in 2024, continued to export into the US with tariff burden, despite filling the quota before the end of February.
- Australia maintains its preferred access status to the US, only behind the United States-Mexico-Canada Agreement (USMCA) partners (with Canada and Mexico having no quota restrictions). New Zealand has an annual quota of 213,000 tonnes shipped weight (swt), with an out-of-quota tariff of 26.4% (within quota 4.4¢/kg).

US beef imports by supplier



*Source: Trade Data Monitor (TDM), *MAT year ending August*

United States – Sheepmeat

CONSUMERS

- Lamb is a niche protein in the US with just under 40% of US consumers never before purchasing lamb. Despite the improved taste perceptions in the last few years, lack of familiarity and limited knowledge on how to prepare it remains the biggest barriers. However, US consumers are progressively more willing to try lamb, particularly the millennial generation *(Source: MLA Global Consumer Tracker 2024)*.
- Lamb is traditionally regarded as a seasonal food for specific holidays with large retail sales spikes during Easter and Christmas.
- The pandemic drove consumers to try a greater variety of proteins and, as such, there has been a huge increase in home consumption of lamb with 74% of US shoppers (versus only 43% in 2018). Within these home eating occasions, not only has special occasions meals risen to 52% (versus 34% in 2018) but those wanting to elevate an everyday meal has almost doubled (51% in 2022 versus 23% in 2018). There has also been an increase in those using lamb as part of their every day meal rotation (40% in 2022 versus 31% in 2018) *(Source: Voice of Shopper 2022)*.
- With limited knowledge of lamb, Americans are much more likely to consider source of protein, 'naturalness', sustainability and ease of preparation ahead of 'country of origin' when purchasing lamb *(Source: Voice of Shopper 2022)*.
- Consumers who purchase lamb frequently are generally premium shoppers, who spend more in store and prefer healthier, home cooked items. They also use the online channel more to purchase a greater variety of cuts *(Source: Midan Marketing)*.
- The top four opportunities to encourage trial of lamb are by offering tips on preparation or how to cook, a better price, trying a free sample and recipe ideas *(Source: MLA Global Consumer Tracker 2021)*.

Top associations for Australian lamb

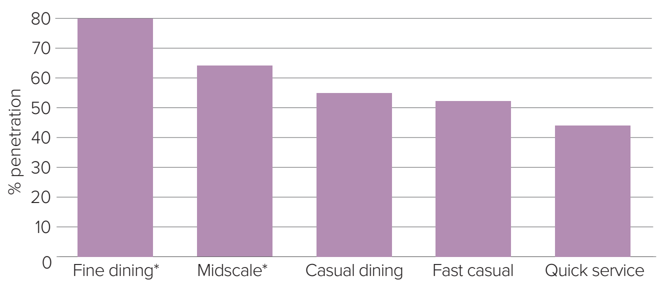
1. Consistent quality standards
2. Offers a variety of cuts that suit the meals I make
3. The meat is usually tender
4. Guaranteed safe to eat
5. Fresh
6. Animal is well-cared for
7. Industry is environmentally sustainable
8. More nutritious

Source: MLA Global Consumer Tracker 2024

FOODSERVICE

- Lamb penetration on US restaurant menus was steadily growing before 2019 but the pandemic forced operators to remove lamb from menus in order to streamline them *(Source: GlobalData)*. It is estimated the overall penetration for lamb is approximately 20%, featuring most often in fine dining restaurants, indicating room to expand and grow into other restaurant segments as well as into other cuisine menus *(Source: Menu Matters 2022)*.

Lamb menu penetration by channel



*Source: Menu Matters 2022, *Denotes small sample size*

- The top reasons foodservice operators choose Australian lamb is due to ease of sourcing and affordability. Lamb imports from other country of origin suppliers fall behind in quality and taste. There are opportunities to improve the perceptions of Australian lamb and create a stronger position *(Source: Menu Matters 2022)*.
- Nearly one third of foodservice operators are using lamb to target changing patron demographics. This shift in demographics means a more culturally diverse population is paving the way to demonstrate lamb's versatility through alternative cuts and more casual applications featuring lamb.
- Historically, protein oriented operators (e.g. steakhouses) and Indian restaurants have driven lamb menu penetration but there is an opportunity for Australian lamb to bring more diversity and unique flavour to menus, while delivering premium perceptions among diners for operators *(Source: Menu Matters 2022)*.

Lamb's versatility is underleveraged in foodservice – pictured 'Turkish Burger' (lamb burger in flatbread)

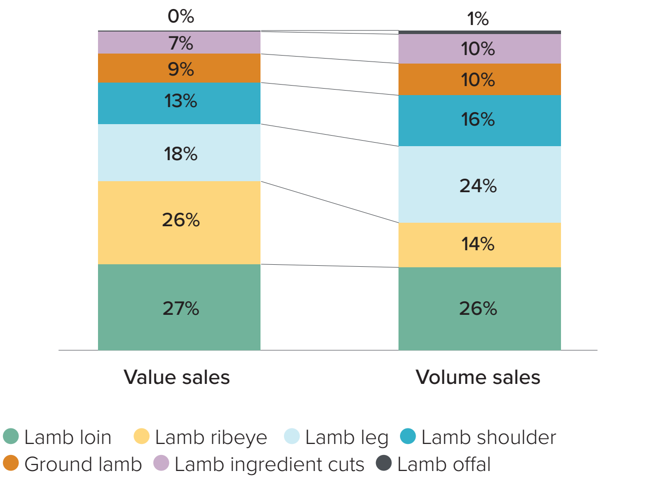
Lamb popularity increases

Lamb menu placement has largely been driven by international cuisines and upscale traditional American fare. The growing popularity of casual ethnic cuisines (particularly Middle Eastern, Mediterranean and North African) are likely to be key tools 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 underleveraged in foodservice *(Source: Datassential, Menu Matters)*.

RETAIL

- While supermarkets are still the main purchase channel for Australian lamb, sales are also highly skewed to online retailers and club store warehouses.
- As a niche protein in the US, lamb only accounts for just over 1% of total fresh meat sales, however it has shown sustained growth in the past five years with +1.5% value growth and +3.1% volume growth compared to the five year average. The most popular lamb cut at retail is loin, accounting for just over one quarter of lamb value and volume sales *(Source: Circana 52 weeks to June 2024).*

Retail lamb cuts share



Source: Circana, Integrated Fresh, Total US, MULO+ Data to 30 June 2024

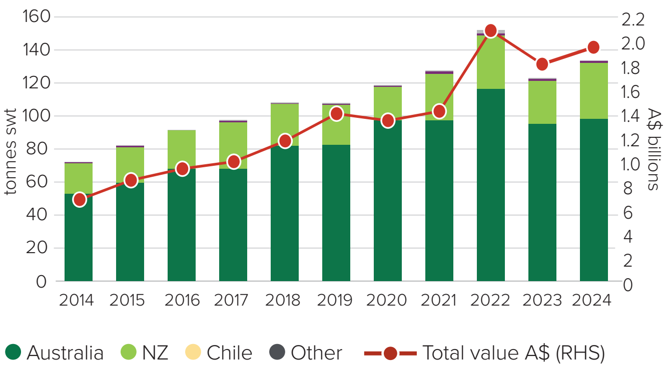
- Stores such as Costco attract a younger, more affluent consumer, seeking more ethnically diverse cuisine and more exciting 'non-traditional' flavours, with lamb recognised as a viable option.
- Lamb tends to have associations with 'special occasions' among American consumers *(Source: Voice of Shopper 2022)*. Younger consumers, particularly Gen Z and Millennials over-index in considering lamb as a Thanksgiving option, demonstrating opportunities to tap into a wider range of occasions *(Source: Power of Meat 2024)*.
- Online shoppers tend to be more engaged with lamb, with 42% shopping several times per week compared to 30% of in-store shoppers. These shoppers serve lamb more often for all occasions but particularly special occasions which represent 59% of occasions where lamb is served (+4% higher than in store shoppers). They also purchase a greater variety of different lamb cuts beyond chops. In order to engage these shoppers more, use of advertising, online reviews, reward programs and mobile phone apps tend to be what these shoppers are more receptive to *(Source: Voice of Shopper 2022)*.

Lamb loin is a popular retail cut, pictured with a Thai glaze served with sweet corn slaw

COMPETITIVE LANDSCAPE

- Imports make a significant contribution to the lamb and mutton supply in the US. Imports typically account for approximately 70% of total sheepmeat consumed in the US *(Source: GIRA).*

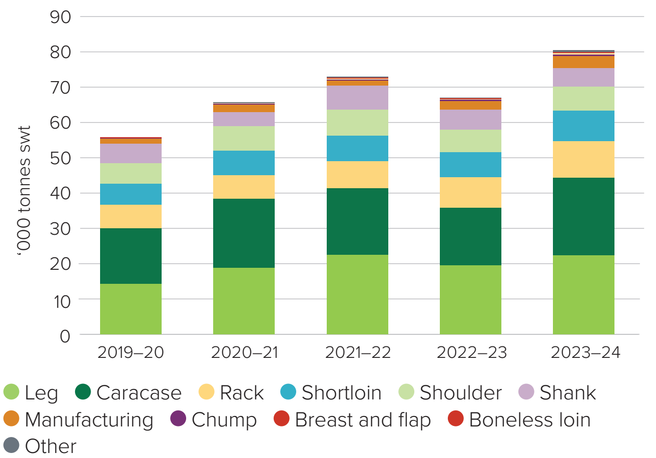
US sheepmeat imports by supplier*



*Source: S&P Global MI Global Trade Atlas (GTA), *MAT year ending August*

- Australia is the major supplier of lamb to the US, holding just under 80% market share on average. New Zealand is the second largest supplier which accounts for around 20% of the lamb imported by the US *(Source: Trade Data Monitor (TDM)*. However in the medium term, New Zealand's sheepmeat production is expected to decline by 0.4% from 2024 to 2028 *(Source: GIRA)*.

Australian lamb exports to US by cuts



Source: DAFF

Canada – Beef

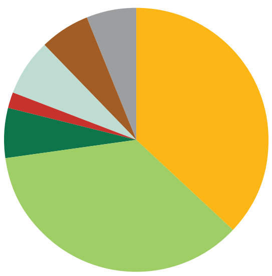
CONSUMERS

- Beef consumption in Canada at 23.9kg per capita in 2024, is well above The Organisation for Economic Co-operation and Development (OECD) average of 13.7kg per capita *(Source: GIRA 2024f, OECD)*. Although second to chicken in protein consumption, beef has strong associations with being superior, easy and convenient to purchase/prepare, a family favourite, and versatile, compared to other proteins *(Source: MLA Global Consumer Tracker 2022)*.
- Around 60% of Canadian consumers are aware of the 'country of origin' of the beef they purchase, with 43% purchasing imported beef at least monthly or more frequently. However, out of the 30% of consumers that are aware of Australian grassfed beef, only 12% would consider it as their first choice when purchasing beef. This means there are opportunities to continue building preference for Australian product among consumers in Canada *(Source: MLA Global Consumer Tracker 2022)*.
- Canadian beef buyers tend to be more price conscious compared to global beef buyers, however freshness (colour of meat) and naturalness (grassfed, no added hormones or antibiotics) are also important to them when considering which beef to purchase *(Source: Global Consumer Tracker 2022)*.
- Although Australian beef is considered highly trustworthy (after local and New Zealand beef), consumers don't have strong associations when comparing Australian grassfed beef against those from other countries. Around one third of consumers are unsure of the defining qualities of Australian grassfed beef, so there are continued opportunities in leveraging Australian beef's strengths to differentiate it from competitors *(Source: MLA Global Consumer Tracker 2022)*.

FOODSERVICE & RETAIL

- Limited-service restaurants (including fast casual and quick service) account for almost 50% of foodservice sales, while full-service (including casual dining, fine dining, and midscale dining) account for just over 40% *(Source: Statistics Canada)*.

Canada foodservice share and growth by segment – 2024e



- Quick service restaurants (+**5%**)
- Full service restaurants (+**4%**)
- Caterers (+**7%**)
- Drinking places (**–1%**)
- Accommodation foodservice (+**5%**)
- Insistutional foodservice (+**6%**)
- Other foodservice (+**5%**)

Total value CA$119bn

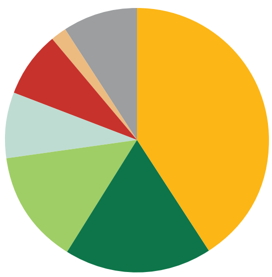
Source: Restaurants Canada, Statistics Canada, fsSTRATEGY Inc. and CBRE Hotels, Figures in brackets ( ) % growth versus 2023

- Consumer spend on restaurants and hotels is forecast to grow at a CAGR of +5% between 2024 to 2028 *(Source: Fitch Solutions)*. from a relatively flat 2024 due to inflationary pressures on consumers, however more robust growth is expected in 2025 with full service restaurants forecast to grow at +4.9% in 2025 *(Source: Restaurants Canada)*.
- Beef is the most valuable meat category for commercial foodservice operators (such as restaurants, cafés, hotels and leisure venues etc.) *(Source: GlobalData)*.
- The majority of imported Australian grassfed beef is manufacturing grade and is used in quick service restaurants.
- Supermarkets, which are the primary place of purchase for Australian beef, represent more than 40% of grocery market retail sales *(Source: IGD)*. Retail presence of Australian beef has been steadily growing since 2019 as COVID-19 saw some of the Australian product destined for foodservice redirected to retail. Reduced spend in retail due to cost pressures has continued to drive the presence of quality Australian product in retail.

COMPETITIVE LANDSCAPE

- The Comprehensive and Progressive Agreement for TransPacific 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 with a good trading environment and no tariff since 2023.
- While most Australian beef exports to Canada are grassfed and follow a similar trend to the US, the last few years have seen a shift in grainfed beef dynamics. Albeit from a small base, chilled grainfed volumes have grown at a CAGR of 12% between FY19 to FY24 *(Source: DAFF)*.
- The past five years have seen an average export volume of 1,394 tonnes of chilled grassfed beef to Canada but this grew 128% in FY24 to reach 4,482 tonnes. Frozen grassfed beef volumes and frozen grainfed beef exports also reached the highest levels since 2015–16 and 2014–15 respectively in FY24 *(Source: DAFF)*.
- The main competitors are US beef and product from New Zealand. Australia is a modest supplier of beef to Canada.

Canada beef imports by market share



- US – **41%**
- Australia – **18%**
- NZ – **14%**
- Uruguay – **8%**
- Mexico – **8%**
- Brazil – **2%**
- Other – **9%**

Total 157,613 tonnes swt

*Source: Trade Data Monitor (TDM), *MAT year ending August 2024*

Mexico – Beef

CONSUMERS

- While total beef consumption in Mexico is lower compared to the US and Canada, it is forecast to experience some growth at a CAGR of 0.5% for 2023–2028, forecast to reach 207,200 tonnes cwe in 2025 *(Source: GIRA)*. Steady economic growth at an average rate of 2.1% annually between 2025 to 2030, along with the continued strength of the Mexican peso, growing middle class and easing inflation are all expected to continue to drive demand *(Source: Fitch Solutions)*.
- Resilience and adaptability saw an early recovery for Mexico's foodservice sector from the impacts of the pandemic *(Source: Euromonitor)*. International tourist arrivals continued to rise in 2024 with tourist spend exceeding pre-pandemic levels. This continued momentum and enduring appeal to overseas visitors is expected to drive further growth in tourism which is one of the key sources of consumers of Australian product *(Source: National Institute of Statistics and Geography (INEGI))*.
- Beef is the second largest animal protein in Mexico in terms of value, following poultry *(Source: Fitch Solutions)*. Young, wealthy consumers are driving beef consumption growth in Mexico.
- Higher income households that have more than US$75,000 in disposable income per year, are expected to grow 21% between 2025 to 2028, meaning a growing pool of households will be able to afford premium Australian products. Among these consumers, there is a growing demand for products with a point of difference backed by a provenance story, which Australian product is well positioned to provide *(Source: Fitch Solutions)*.

FOODSERVICE & RETAIL

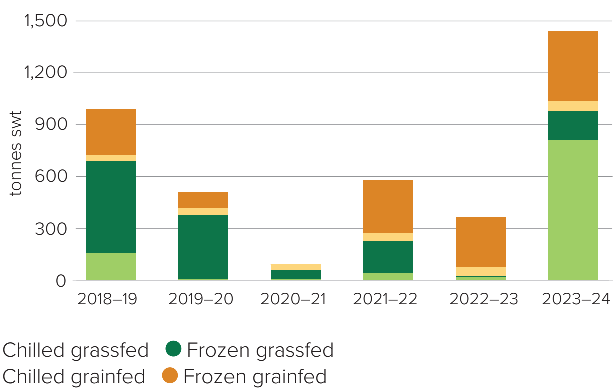
- It is estimated that restaurant and hotel spending in Mexico will grow 5% in 2025 and is expected to have sustained growth with a forecast CAGR of 6.8% between 2025 to 2028 *(Source: Fitch Solutions)*. Longer term, the growing working age population and urbanisation will continue to lift demand for foodservice *(Source: GlobalData)*.
- Full-service and quick service restaurants dominate the foodservice 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 become more receptive to higher value imported beef *(Source: GlobalData)*.
- Mexico has a strong street food culture that showcases its many regional cuisines and although this segment tends to use local product, its popularity has inspired full service restaurants to create their own interpretations using premium imported products as a point of difference *(Source: USDA)*.
- Top steakhouses are dominated by USDA-graded prime steaks, as grainfed product is preferred over grassfed. However, there is strong potential for Australian grassfed beef to enter the market, underpinned by a growing focus on 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 are expected to reach AU$369 billion in 2025 and grow with a CAGR of 4.8% between 2025 to 2028 *(Source: IGD)*.
- The main channel for beef in Mexico is through local butcher shops, which make up more than 50% of market share. The main products are steak (chuck and round) and ground beef, representing 59% of purchases. Retail stores have surpassed wet markets as the next largest channel, with 19% and 16% market share, respectively *(Source: USDA)*.

The most common cut for foodservice in Mexico, arrachera (hanger steak), is pictured here in tacos

COMPETITIVE LANDSCAPE

- Mexico is a member of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) which means there is some preferential access for Australia however there is still some restricted market access and a mixed trading environment.
- Larger volumes of beef are imported to Mexico from the US, Canada, Brazil and Argentina which are the key competitors, while Australia is a very small part of the beef market competing at the top end.
- Frozen grassfed beef typically makes up most of Australia's exports to Mexico but the past few years have seen growth in frozen and chilled grainfed export volumes with a CAGR of 15% for FY22 to FY24, albeit from a small base *(Source: DAFF)*.
- More recently, chilled grassfed beef has also been enjoying a lot of growth reaching 808 tonnes in FY24 with blade making up 80% of volume followed by thick flank/knuckle and rump *(Source: DAFF)*.

Australian beef exports to Mexico



Source: DAFF

Beef

US – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia-United States Free Trade Agreement **(AUSFTA)**	0% under AUSFTA	**Canada and Mexico:** USMCA, no quota **New Zealand:** 213,000 tonne quota, with an in-quota tariff of 4.4¢/kg, 26.4% out of quota tariff **Nicaragua, Honduras and Costa Rica:** CAFTADR with US, shares the same 65,005 tonnes with other countries, in quota 4.4¢/kg, 26.4% out of quota tariff **Uruguay and Argentina:** No FTA, quota of 20,000 tonnes each, tariff 4.4¢/kg in quota and 26.4% out of quota **Brazil:** No FTA, shares the same 65,005 tonnes with other eligible countries, in quota 4.4¢/kg, 26.4% out of quota tariff	No volume restrictions under AUSFTA restrictions under AUSFTA but safeguard exists which is highly unlikely to be triggered	*E. coli* and salmonella sampling programs, label approvals and port mark compliance Refer to DAFF MICOR* for current requirements

Best access — Major challenges

Source: Trade agreements DFAT, MLA

**Department of Agriculture, Fisheries and Forestry Manual Importing Country Requirements*

Canada – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership **(CPTPP)**	0% under CPTPP	**US and Mexico:** USMCA, no quota **New Zealand:** CPTPP, 0% import tariff **Uruguay:** Access under 11,809 tonnes other eligible country quota, 0% in quota tariff, 26.5% out of quota tariff	No volume restrictions under CPTPP	*E. coli* and salmonella sampling programs, label approvals and port mark compliance Refer to DAFF MICOR for current requirements

Best access — Major challenges

Source: Trade agreements DFAT, MLA

Mexico – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership **(CPTPP)**	Under **CPTPP**, 4% in 2025. Will be 0% from 1 January 2027	**US and Canada:** USMCA, no quota **New Zealand:** Same market access conditions as Australia under CPTPP, tariff of 4% in 2025	No volume restrictions under CPTPP	Labelling, restriction on ports of entry, extra information required for health certificates compared to other markets Refer to DAFF MICOR for current requirements

Best access — Major challenges

Source: Trade agreements DFAT, MLA

Sheepmeat

US – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia-United States Free Trade Agreement **(AUSFTA)**	0% under AUSFTA	**NZ, Uruguay and Chile:** Tariff of US 0.7¢/kg for lamb and US 2.8¢/kg for mutton	No volume restrictions under AUSFTA	Point of entry inspection, label approvals and port mark compliance Refer to DAFF MICOR for current requirements

Best access Major challenges

Source: Trade agreements, DFAT, MLA

Canada – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Comprehensive and Progressive Agreement for Trans-Pacific Partnership **(CPTPP)**	0% under CPTPP	**New Zealand:** Same access conditions as Australia under CPTPP	No volume restrictions under CPTPP	Point of entry inspection, label approvals and port mark compliance Refer to DAFF MICOR for current requirements

Best access Major challenges

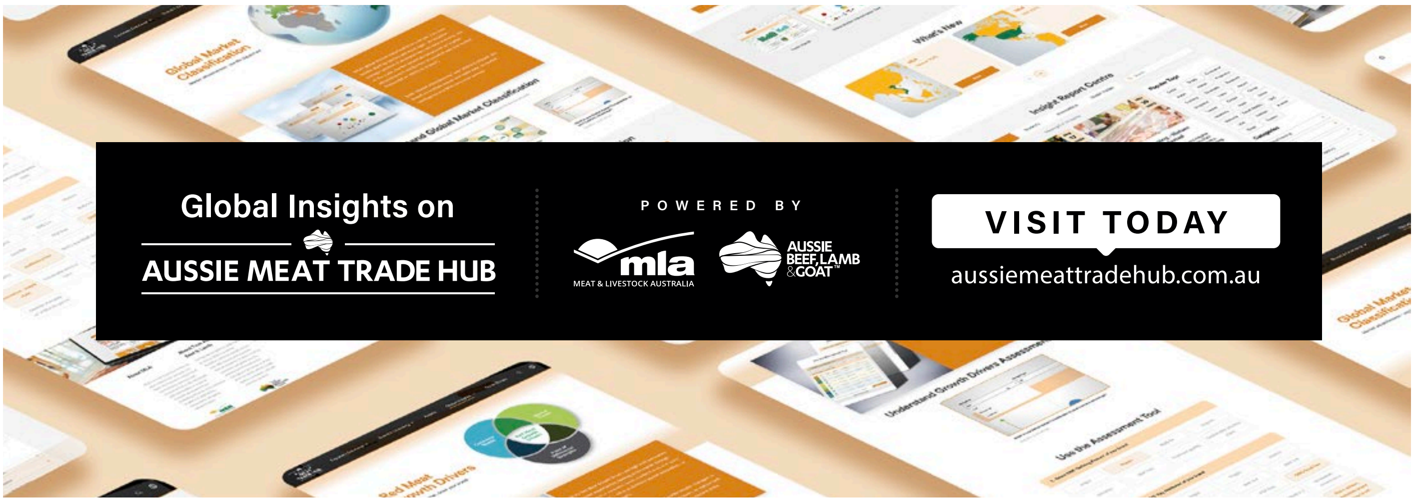
Source: Trade agreements, DFAT, MLA

Mexico – Market access overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia-United States Free Trade Agreement **(AUSFTA)**	0% under AUSFTA	**New Zealand:** Same access conditions as Australia under CPTPP	No volume restrictions under CPTPP	Labelling, restriction on ports of entry, extra information for health certificates required, flat stacking of carcases cannot be accommodated as with other countries Refer to DAFF MICOR for current requirements

Best access Major challenges

Source: Trade agreements, DFAT, MLA



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