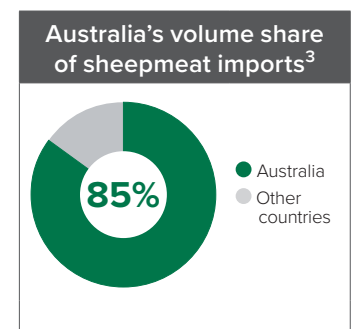
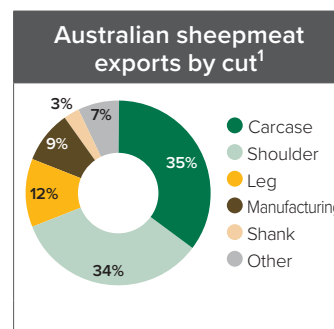
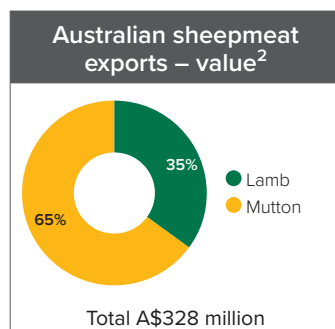
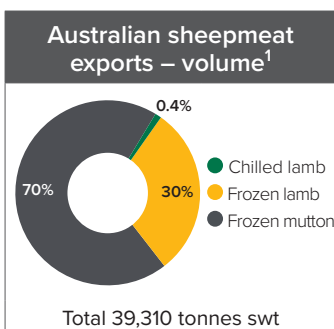
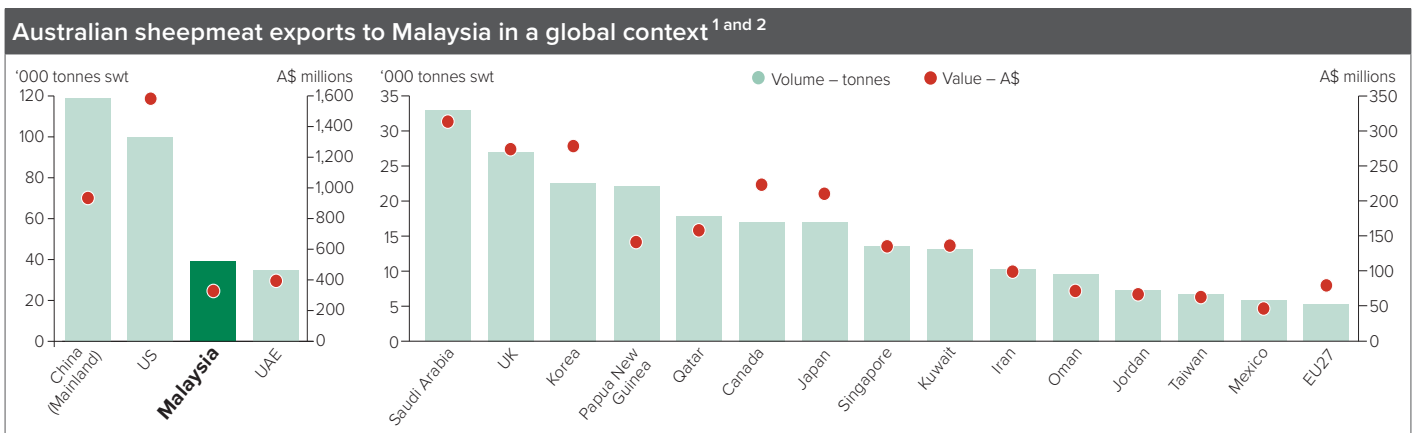
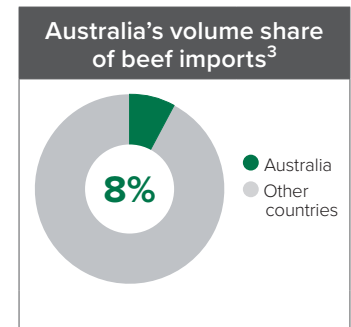
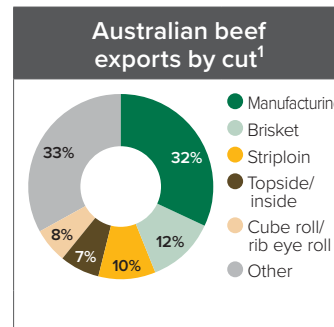
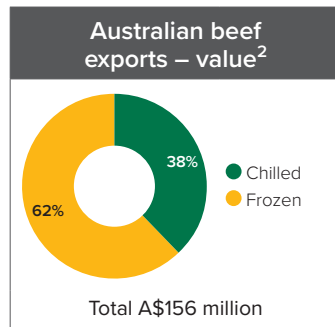
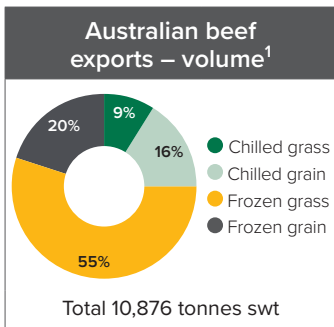
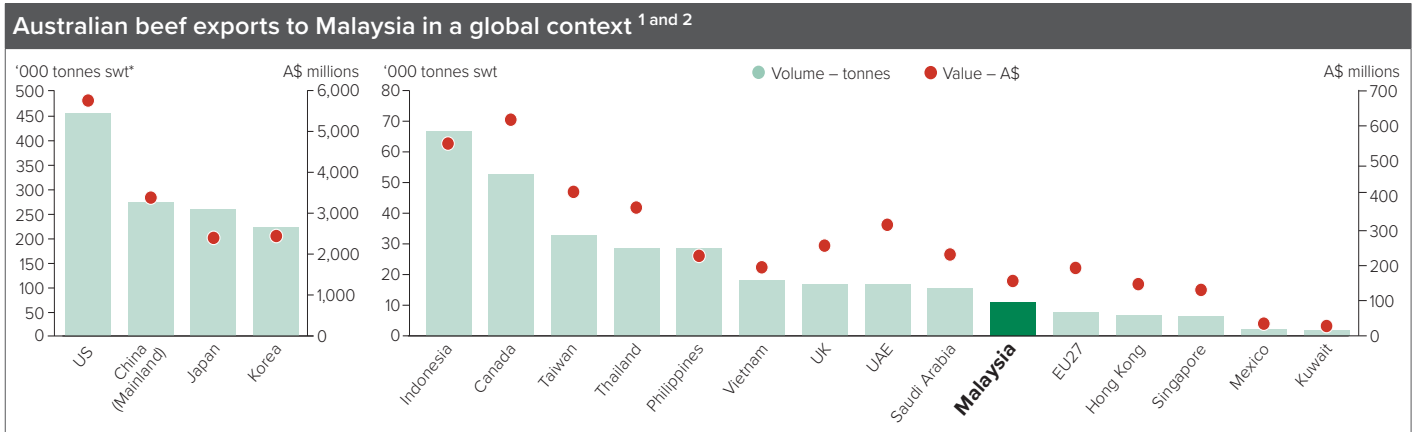


## MARKET SNAPSHOT | BEEF & SHEEPMEAT

**EXPORTS**  
Australia's second largest\* red meat export market in South-East Asia (SEA)  
\*By volume, after Indonesia

**CONSUMERS**  
Highest regional per capita beef consumption driven by high incomes; cultural preference boosts sheepmeat

**GROWTH**  
Demand for quality protein by affluent locals and during Muslim festive celebrations



Data source for charts: <sup>1</sup>Department of Agriculture, Forestry and Fisheries (DAFF) 2025, <sup>2</sup>Trade Data Monitor, LLC (TDM) Moving Annual Total (MAT) November 2025, \*swt = shipped weight



## CONSUMERS

- Malaysia has the second highest consumer purchasing power in the SEA region after Singapore. Malaysia's average per capita annual disposable income in 2025 was US\$7,981 compared to US\$4,612 average for the rest of SEA (excluding Singapore) (Source: Fitch Solutions).
- Similar to other SEA countries, Malaysian diets are dominated by chicken and fish. However, Malaysians have the highest per capita beef consumption among SEA markets at 8.6kg per person in 2025 (Source: Fitch Solutions).
- Among SEA, Malaysians are the most concerned about rising living costs (Source: GlobalData Global Consumer Survey Q3 2025), yet health continues to be a top priority. Health and wellbeing trends remain important for Malaysians, driven by growing obesity rates, with half of the population being overweight (Source: National Institute of Health). This has increased demand for beef perceived as natural and healthy, such as grassfed and organic beef (Source: MLA Global Consumer Tracker 2023). These trends present an opportunity for beef to leverage its strong nutritional image among consumers.
- Beef and lamb are considered premium proteins as they are perceived as the most superior meat, with consistently high quality, tenderness and delicious taste. These perceptions drive the willingness of Malaysians to pay more for these meats (Source: MLA Global Consumer Tracker 2023).
- Australian beef is considered the family's favourite imported beef, with consumers appreciating its consistent quality and good variety of cuts (Source: MLA Global Consumer Tracker 2023).
- Australian beef enjoys the highest awareness in Malaysia, reflecting its large shelf space in modern retail. Some 71% of Malaysian consumers claim to have eaten Australian beef, a similarly high consumption rate as local beef (Source: MLA Global Consumer Tracker 2023).
- For religious reasons, Halal is an important element in beef purchasing in Malaysia. Beef consumption typically spikes during the festive seasons both at home and in foodservice venues, particularly around the months of *Ramadan* and *Hari Raya Aidilfitri*, as well as at Christmas.

### Malaysia – Top five attributes when:

Selecting between proteins	Justifying a premium price
Fresh	Is the most superior meat
Cheaper	Tastes delicious
High nutritional value	My/my family's favourite meat
The industry is environmentally sustainable	The meat is usually tender
The animal is well cared for	The animal is well cared for

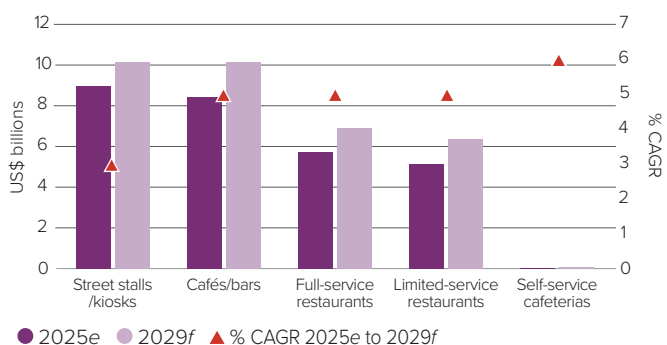
Source: MLA Global Consumer Tracker 2023

## FOODSERVICE



- Malaysia has an established and expanding foodservice sector, driven by changing consumer lifestyles, growing local and international tourism and increasing consumer spending.
- Australian beef is typically used in higher-end hotels and restaurants. Global recognition of Malaysia's fine dining sector continues with the third Michelin Guide edition in 2025, featuring new starred restaurants and the country's first Green Star for sustainability (Source: Michelin Guide 2025).
- Local Malaysian is the favourite cuisine, followed by Chinese. Japanese, Korean and Western cuisines are gaining popularity, mostly driven by young, educated and affluent consumers. Many affluent consumers who frequent the high-end foodservice sector are keen on Wagyu beef.
- Dine-in options are expected to continue expanding, fuelled by the evolving demand for social dining spaces and tourism growth. Visitors are increasingly looking for authentic Malaysian cuisine, as well as its unique influences from Mainland Chinese, Japanese and other international cuisines.
- Food delivery remains a major revenue stream, supported by cloud kitchens and partnerships with GrabFood, FoodPanda, and Bep.

### Malaysia foodservice segment value and growth



Source: Euromonitor International, Limited-service restaurant (fast food + 100% home delivery/ takeaway outlets), e = estimate, f = forecast, CAGR = compound annual growth rate

- Centred in Greater Kuala Lumpur in the Klang Valley, a vibrant foodservice sector offers a wide variety of choices from affordable local to luxury international cuisines. Klang Valley is home to approximately 200 shopping malls, which are popular destinations for food, drinks and social interactions in Malaysia. The region is seeing a growing number of contemporary,

culture-themed restaurants including Asian, European, American and Middle Eastern styles.

### Malaysia international tourist arrivals and receipts

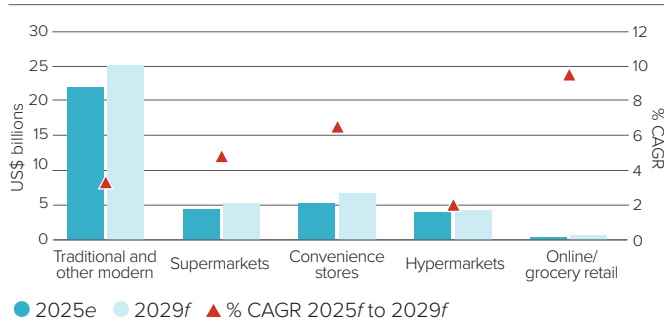


Source: Fitch Solutions



- Malaysia's grocery retail sector is fragmented, with modern retailers accounting for approximately 39% of the market. Despite a relatively high disposable income and urbanisation rate compared to other SEA markets, traditional channels such as wet markets are still dominant.

### Malaysia grocery retail sales and outlook by channel



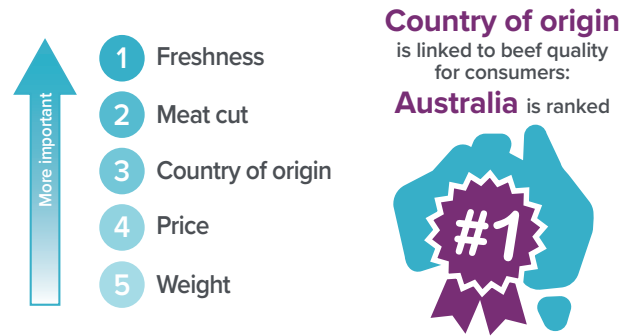
Source: IGD

- Most Malaysian consumers frequent traditional markets to buy local beef and Indian buffalo meat (IBM), and modern retail outlets such as supermarkets or hypermarkets for imported beef, including Australian. However, there is a growing trend of modern retailers offering self-service fresh meat counters to appeal to wet market customers.
- The retail landscape is evolving as larger stores lose their attractiveness to customers. Retailers are shifting to smaller-format supermarkets and convenience stores while adding marinated and ready to cook meat options to meet urban demand. As an example, international retailers, including Lotus

and Aeon, are planning to expand by opening more smaller supermarkets of approximately 1,000 square meters in size (Source: IGD).

- Premium retailers are also gaining popularity due to their superior food quality offerings, including higher proportions of imports and selections of naturally healthier products. This trend offers a growing avenue for premium beef such as that supplied by Australia.

### Most important factors when buying beef to eat at home



Source: MLA SEA Traceability Research 2024

- Halal slaughter practices are an important factor in influencing Muslim consumer decisions, and are tied up in consumers' perceptions of freshness, hygiene and safety. Beyond Halal, freshness is a very important factor influencing Malaysian consumers' beef purchasing decisions as it is thought to affect the taste of the dish.

## COMPETITIVE LANDSCAPE

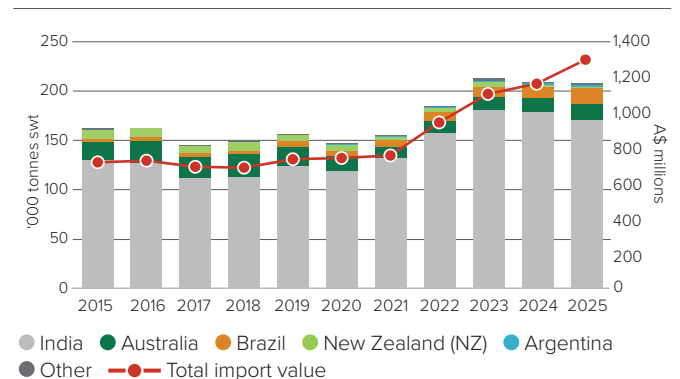


- Malaysia's domestic beef production system produces only 12% of the country's total consumption requirements, with imports filling the large gap (Source: GIRA). Overall, beef imports remained strong, exceeding 200,000 tonnes for the third consecutive year in the 12 months to August 2025, valued at more than A\$1 billion (Source: TDM), underscoring Malaysia's strong demand.
- India is by far the largest supplier, accounting for 82% of total import volume. In the 12 months ending in August 2025, imports of IBM reached 170,382 tonnes swt, a decline of 5% compared to the same period in the previous year (Source: TDM).
- In the 12 months ending in August 2025, Australia accounted for 8% of total imports at 16,522 tonnes swt, which marked a 16% increase on the previous year (Source: TDM). This demand for Australian product is supported by strong supply conditions from Australia, foodservice growth and modern retail expansion, where Australia enjoys a strong presence.
- Brazil is the third largest supplier, accounting for 8% of total imports. In the 12 months to August 2025, volumes increased 51% compared to the previous year, reaching 15,567 tonnes swt. Brazil's unit price dropped 10% in this period, positioning it at a lower price point compared to IBM (Source: TDM).
- Imports for premium chilled beef continued to grow, with Australia leading in the 12 months to August 2025, followed by Japan increasing its presence fueled by expanding Japanese investments. More than half of Japanese beef is imported chilled to supply retail and foodservice demand.
- Grainfed beef imports reached 3,471 tonnes swt in financial year (FY) 2025, which was a 38% increase compared to the previous year. This is driven by growing Japanese retail and

foodservice outlets seeking highly marbled beef. Australia is the largest supplier of grainfed beef to the market, competing against Japanese and United States (US) beef.

- Malaysia maintains strict Halal requirements for food products. Meat intended to be imported to Malaysia must be Halal. This means that meat plants must follow Halal protocols and be inspected and approved by the Malaysian Department of Islamic Development (JAKIM) and the Department of Veterinary Services (DVS) (Source: DVS).
- New suppliers are beginning to enter the market with Uruguay recently gaining market access, adding competitive pressure and further diversifying the supplier landscape.
- The United States may see improved access pending implementation of the US-Malaysia Reciprocal Trade Agreement, which includes measures expected to streamline halal certification processes for US exporters.

### Malaysia beef imports by supplier\*



Source: TDM, \*MAT year ending August



# Sheepmeat

## CONSUMERS



- At 1.3kg per capita, Malaysia's sheepmeat consumption is second highest among SEA countries (Source: GIRA). About one-third of consumers say they have bought lamb or mutton in the last month, well above Asia's average of 21% (Source: MLA Global Consumer Tracker 2023).
- Malaysia's cuisine is influenced by many different cultures including Malay, Chinese, Arabic, Indian, Indian Muslim, Javanese and European. Sheepmeat is not only popular among the Muslim and Indian communities, but is also enjoyed by many other groups. Sheepmeat is not restricted by most religions and hence can be enjoyed by many consumers.
- Sheepmeat has increasingly become a favourite meat for daily consumption among many families, in addition to being a favourite meat for special treats and occasions. Demand for sheepmeat typically spikes during the religious festive seasons, particularly during the months of *Diwali*, *Ramadan* and *Hari Raya Aidilfitri*.

- Malaysian consumers tend to eat sheepmeat more often than those in neighbouring countries, with younger consumers leading the trend. Around 80% of Malaysians aged 18–34 have eaten lamb recently, laying the foundation for future growth (Source: MLA Global Consumer Tracker 2023). Increased home cooking, partly driven by cost-of-living pressures and the rise of recipe sharing on social media, has exposed more consumers to lamb and sparked interest in new cooking styles.

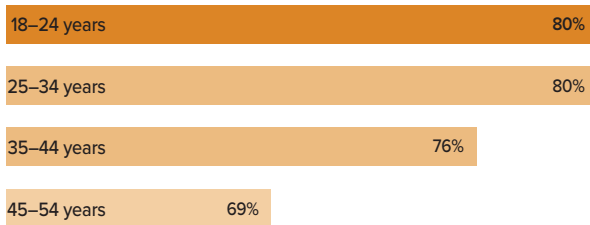
### Most important factors when buying lamb to eat at home

- 1 Freshness
- 2 Country of origin
- 3 Preferred cuts
- 4 Balanced fat levels
- 5 Clean packaging

For consumers, quality lamb delivers tender, flavourful results and builds trust, making it ideal for family meals and special occasions

Source: MLA SEA Traceability Research 2024

### Percentage of Malaysian lamb buyers by age



Source: MLA Global Consumer Tracker 2023, Q: Have ever bought lamb to cook at home

- Younger consumers experimenting with lamb at home have reduced traditional barriers such as taste and smell, supported by drivers like convenience, better value for money, and a desire for greater variety and unique flavours which are key reasons Malaysians choose to cook at home (Source: GlobalData Global Consumer Survey Q4 2022).

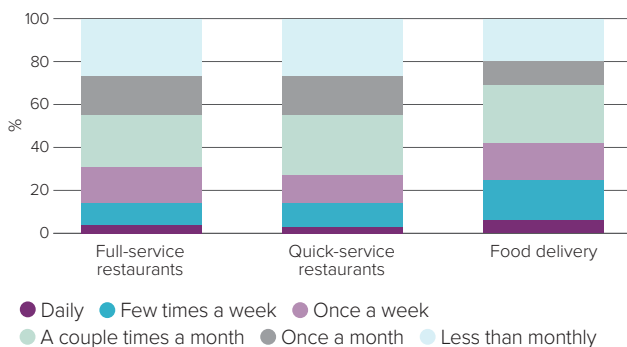
## FOODSERVICE



- Foodservice plays a significant role in growing sheepmeat consumption in Malaysia as a key driver of home cooking trials. About 28% of lamb consumers don't purchase it for eating at home, instead enjoying it when dining out (Source: MLA Global Consumer Tracker 2023).
- Australian lamb exported to Malaysia is primarily used in high-end and mid-tier hotels and restaurants, especially in Kuala Lumpur. This vibrant and ever-evolving foodservice segment offers a wide array of choices, spanning affordable local dishes and Japanese *shabu-shabu* (hot pot), Chinese hot pot, Middle Eastern specialties and luxurious international cuisines.

- As tourism rebounds, many foodservice providers have premiumised their offerings to attract both tourists and locals. At the same time, food delivery services like GrabFood and FoodPanda remain popular due to continued demand for convenience.
- Sheepmeat is widely served in many restaurants and there is a growing interest from Chinese restaurants to serve sheepmeat for stir fry, braised, stewed, clay pot and hot pot because of its versatility. Grilled and barbecue lamb chops are also growing in popularity on the menus of Asian buffet dining restaurants and pub restaurants, alongside a growing influence from mainland Chinese cuisine. Middle Eastern cuisines are also gaining popularity, with lamb dishes like kebabs and grills appearing on menus.

### Frequency of Malaysians ordering food from foodservice types



Source: GlobalData Global Consumer Survey Q3 2025



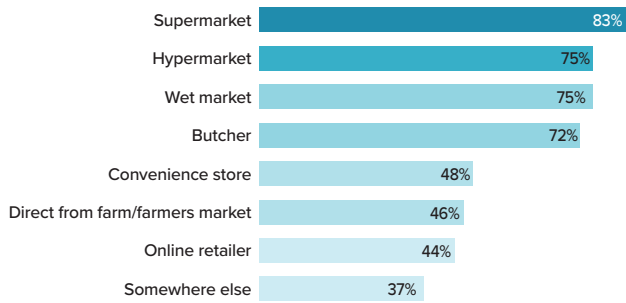
Soy-braised lamb in clay pot is often served at Chinese restaurants in Malaysia





- Malaysian consumers buy sheepmeat from multiple retail outlets, both modern and traditional. Supermarkets and hypermarkets remain the most common places to purchase imported sheepmeat products.

### Place of purchase for frequent lamb shoppers



Source: MLA Global Consumer Tracker 2023, Base: Malaysians who purchase lamb from these channels at least monthly

- Although still a small proportion of overall retail sales, e-commerce adoption continues to grow beyond the initial bump seen during the pandemic. Retailers are heavily investing in developing this channel by enhancing customer services, such as substantive return policies, to assuage consumer reticence to purchase perishable goods online.

- Roast, grill, stew, pan-fry, curry and barbecue are the most popular ways of cooking lamb at home. Malaysian consumers tend to use more pre-prepared ingredients such as marinades when cooking sheepmeat dishes to help make cooking sheepmeat easier.
- Capturing the growing need for convenient home cooking, pre-prepared 'ready-to-cook' lamb meals are increasingly sold through online platforms such as Shopee, Lazada and GrabMart, alongside traditional retailers.



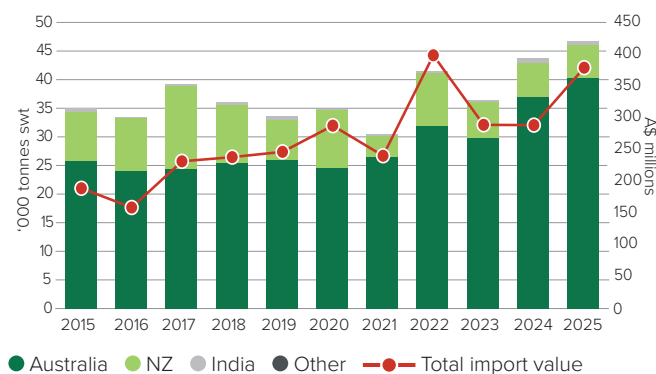
Sup kambing (mutton soup) is commonly served during Eid al Adha

# COMPETITIVE LANDSCAPE



- Malaysia produces only 9% of the total sheepmeat consumed, requiring imports to meet more than 90% of demand. (Source: GIRA).
- In the 12 months to August 2025, imports totaled 46,774 tonnes swt, valued at A\$379 million, up from 43,843 tonnes and A\$289 million the previous year. Australia remains the largest supplier, with a market share of 86%, followed by NZ at 13%, and very small volumes from India, Saudi Arabia, and China. Frozen bone-in sheepmeat cuts continue to account for the majority of imports (Source: TDM).

### Malaysia sheepmeat imports by supplier\*



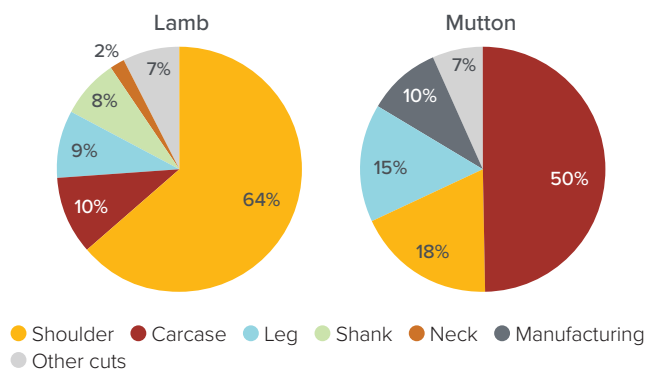
Source: TDM, \*MAT year ending August

- Australia has consistently increased exports to Malaysia, reaching 40,200 tonnes swt in the 12 months to August 2025, up from 36,930 tonnes the previous year (Source: TDM). During this same period, lamb made up 31% of Australian sheepmeat

to Malaysia, while mutton made up 69% at 26,587 tonnes swt, reinforcing Malaysia's position as Australia's fourth-largest sheepmeat market and second-largest mutton market after China (Source: DAFF).

- Most of Malaysia's sheepmeat imports consist of frozen products, with chilled lamb accounting for a relatively small volume. Among Australian exports, 64% of lamb were shoulder cuts, suitable for foodservice and adventurous home cooks, while 50% of mutton were carcasses, trunk meat, and trimmings commonly used in manufacturing (Source: DAFF).

### Australian sheepmeat exports to Malaysia – top cuts



Source: DAFF, FY25

- Aside from Australia and NZ, few other exporters play in the market. India and Saudi Arabia are the only other consistent suppliers, typically sending small volumes, averaging 237 tonnes per year in the past three years (Source: TDM).

# Beef



## Market access overview – beef

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Malaysia-Australia Free Trade Agreement ( <b>MAFTA</b> )  Trans-Pacific Partnership ( <b>CPTPP</b> )	Under <b>AANZFTA</b> , <b>MAFTA</b> : 0% for all product lines	<b>India:</b> 0%  <b>New Zealand:</b> Same conditions as Australia  <b>Brazil:</b> 0%  <b>United States:</b> Potential improved access pending implementation of reciprocal trade agreement	Zero	Maintains import regulations in accordance with Halal and health requirements  Malaysia now uses MYeHALAL digital certification and is adopting blockchain for halal traceability and food safety

Best access  Major challenges

Source: Trade agreements, Department of Foreign Affairs and Trade (DFAT), World Trade Organisation (WTO)

# Sheepmeat



## Market access overview – sheepmeat

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
ASEAN-Australia New Zealand Free Trade Agreement ( <b>AANZFTA</b> )  Malaysia-Australia Free Trade Agreement ( <b>MAFTA</b> )  Trans-Pacific Partnership ( <b>CPTPP</b> )	Under <b>AANZFTA</b> : 0% for all product lines	<b>New Zealand:</b> Same conditions as Australia	Zero	Maintains import regulations in accordance with Halal and health requirements  Malaysia now uses MYeHALAL digital certification and is adopting blockchain for halal traceability and food safety

Best access  Major challenges

Source: Trade agreements, DFAT

Global Insights on



**AUSSIE MEAT TRADE HUB**

POWERED BY




**VISIT TODAY**

[aussiemeattradehub.com.au](http://aussiemeattradehub.com.au)

© Meat & Livestock Australia, 2026. ABN 39 081 678 364. R1. Care has been taken to ensure the accuracy of the information contained in this publication. However, MLA, MDC and ISC ("MLA Group") do not accept responsibility for the accuracy, currency or completeness of the information or opinions contained in this publication. This publication is intended to provide general information only. It has been prepared without taking into account your specific circumstances, objectives, or needs. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.