

MARKET SNAPSHOT | BEEF & SHEEPMEAT



EXPORTS

Large and established region for sheepmeat, growing market for premium beef



CONSUMERS

Affluent locals, expats and tourists, high proportion of young consumers

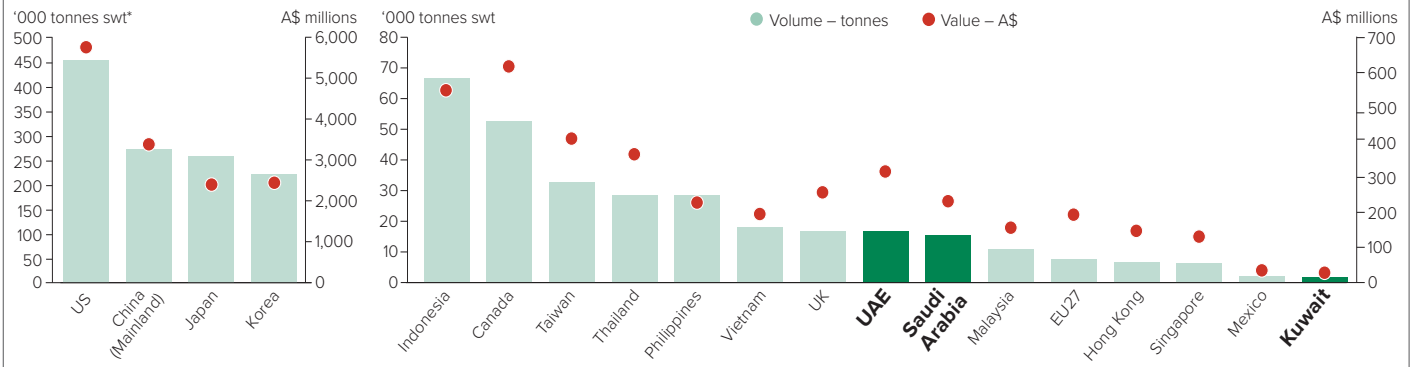


GROWTH

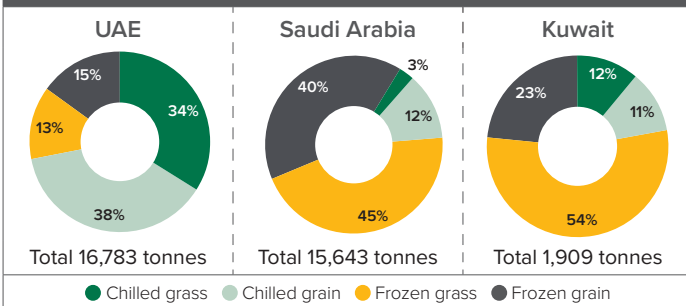
Growing appreciation for high quality red meat

Unless otherwise stated in this snapshot, MENA includes 12 markets: the six Gulf Cooperation markets of Bahrain, Oman, Kuwait, Qatar, Saudi Arabia and the United Arab Emirates (the UAE) plus Egypt, Jordan, Palestine/Israel, Iran, Iraq and Mauritius. These 12 markets have been identified as presenting the greatest opportunities for Australian red meat and livestock exports now and into the medium-term future.

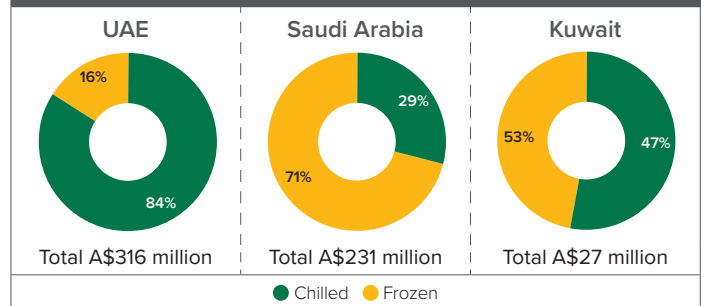
Australian beef exports to MENA in a global context^{1 and 2}



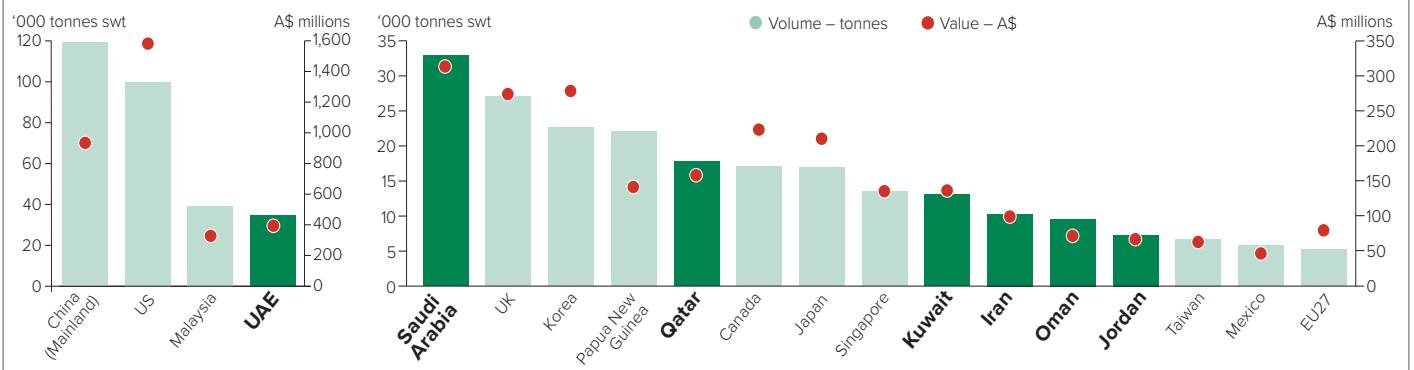
Australian beef exports – volume (swt)¹



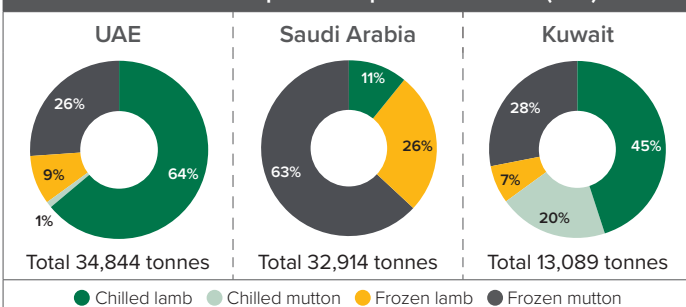
Australian beef exports – value²



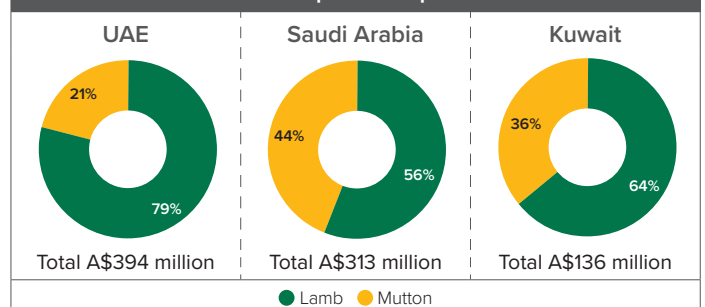
Australian sheepmeat exports to MENA in a global context^{1 and 2}



Australian sheepmeat exports – volume (swt)¹



Australian sheepmeat exports – value²



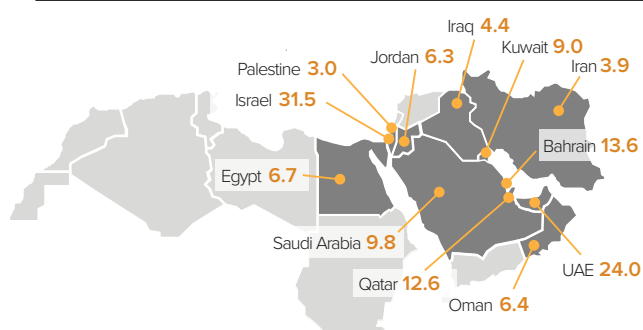
Data source for charts: ¹Department of Agriculture, Forestry and Fisheries (DAFF) 2025, ²Trade Data Monitor, LLC (TDM) Moving Annual Total (MAT) November 2025, *swt = shipped weight

CONSUMERS



- Across the Middle East and North Africa (MENA), beef is a popular meat enjoyed for its good taste. Consumers have access to a wide range of products, from lower grade, lean, local ex-dairy industry product and Indian buffalo meat, to locally slaughtered beef from live imports, as well as a range of boxed imports from all over the world.
- Total consumption of beef across the MENA region of 20 markets was estimated at around 4.8 million tonnes carcass weight equivalent (cwe) in 2025 and is forecast to grow at a compound annual growth rate (CAGR) of 1.7% from 2024 to 2029 (Source: GIRA, Fitch Solutions). This growth is being driven by several factors, such as increasing disposable incomes, a growing and young population, already-high urbanisation, shifting dietary habits, sizable wealthy expatriate populations and expanding leisure and tourism sectors.

MENA-12 markets – per capita beef consumption*



Source: GIRA 2025 forecast (f), *Includes beef and veal, kg cwe per person per year

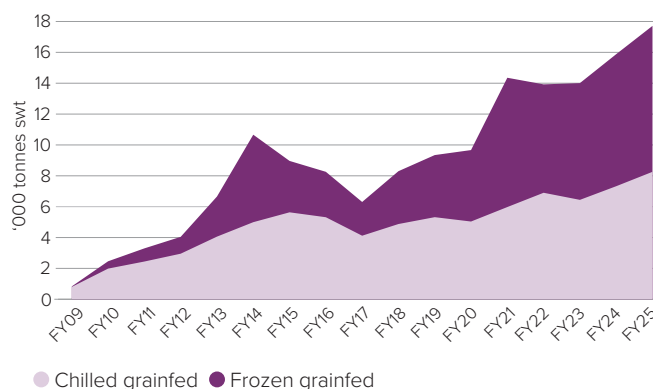
- Local consumers have traditionally preferred leaner meat which is considered best suited to slow wet cooking and the strong aromatic style of many local dishes. Mince is used in *kofta* (spiced, shaped ground meat), *kibbeh* (shaped bulgur and minced meat), pastry fillings and burgers. Grilled and fried beef dishes such as *kebabs*, *shawarma* (sliced meat cooked on a vertical rotisserie) and steak generally require beef with a somewhat higher fat content. Indeed, there is a growing appreciation for highly marbled product for grilling, as the product can be cooked well-done, which is the local preference, but will still offer a better eating quality experience than less marbled meat.
- After local beef, Australian beef generally has the highest awareness and regard compared to other suppliers. While domestic product tends to rate most strongly on important attributes such as freshness and Halal-certification, Australian beef is seen as offering strengths in other areas. These include a superior, tender and consistently high quality product in a range of cuts to meet cooking needs, produced sustainably and from well-cared for animals (Source: MLA Global Tracker 2023 to 2025).
- Across the Gulf, there is an annual slow-down in foodservice and retail sales during the peak summer months of July to August, when affluent locals and expats tend to leave. By contrast, the cooler months from November to February are peak season for barbecue and grilling outdoors.
- Conflict in the region since October 2023 has been negatively impacting on regional consumer sentiment and tourism, and has been disruptive to supply chains and trade.

FOODSERVICE



- Dining out is a vital part of social and business life in the region. The foodservice sector, in particular, has played a key role in expanding home meal repertoires.
- MLA estimates around 70% of Australian beef exports to the region are utilised in the foodservice sector, though this varies somewhat by market. Around 23% of Australian beef export volumes to MENA is frozen manufacturing product, mostly used in fast food and casual dining restaurants. American and Italian cuisines dominate this segment with beef items such as steak, burgers, pasta, pizza, wraps and sandwiches. Local, other Middle Eastern, Lebanese and Turkish cuisines are also very popular and have their own unique beef dishes.
- Higher value cuts are generally used in full-service restaurants. A 'premiumisation' trend in the category is illustrated by growing demand for Australian grainfed beef, particularly cube roll, rib and loin cuts. The average unit price of Australian beef exports to MENA increased at a CAGR of 6.1% in the five years from financial year (FY) 2020 to FY25, compared to 3.7% for our global export average, and was 49% higher than the global average in FY25 (Source: TDM).
- Affluent residents and tourists enjoy an increasing variety of cuisines when dining out, many of which utilise high quality beef. Full-service restaurants offer cuisines such as Chinese, Japanese, Thai and Mexican, which feature items such as steak, other meat mains, stews and *kebabs*. The entry of the Michelin Guide to Dubai and Abu Dhabi since 2022 and the first ever Guide anticipated to launch in Saudi Arabia in 2026, reflects the significant and growing number of premium quality dining establishments and top level chefs in the region.

Australian grainfed beef exports to MENA-12



Source: DAFF

- Markets in the region are developing their tourism industries, which is presenting new opportunities in foodservice and indirectly in retail as well. Tourist visitors to the region are currently forecast to increase at a CAGR of 4.8% from around 111 million in 2024 to 140 million in 2029, though this will depend on the security situation in the region, with Saudi Arabia, the United Arab Emirates (the UAE) and Egypt the top three tourist destinations. Tourists visiting Saudi Arabia, which continues to be a largely religious tourism market, mostly come from the MENA region as well as large Muslim markets in South-East and Southern Asia. Tourists visiting Egypt and the UAE come from a wider mix of regions from Asia Pacific, Europe and North America (Source: Fitch Solutions).



- Retail sector development varies across the region but is evolving and generally more advanced in the wealthier, more urbanised Gulf markets. While affluent locals and Arab expats in the region tend to shop for beef at a mix of channels including wet markets, butchers and supermarkets, most Australian beef that is available in the retail sector is purchased at modern outlets as branded and packaged product.

Top three things affluent* beef shoppers look for on-pack

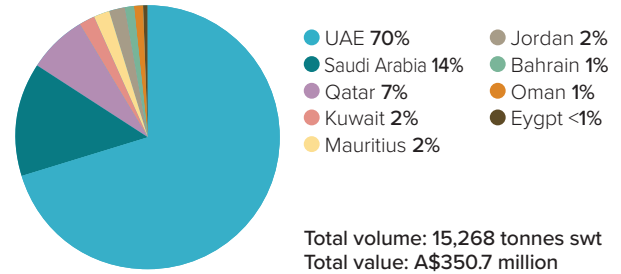
	UAE	Saudi Arabia	Qatar
1	Country of origin	100% natural	100% natural
2	Halal certification	Meat colour	Country of origin
3	Date packed	Freshness	Meat colour

Source: MLA Global Consumer Tracker: the UAE 2025, Saudi Arabia and Qatar 2022, *Affluent shoppers living in households earning United Arab Emirates Dirham (AED) 322,000+, Saudi Arabia Rial (SAR) 241,000+, Qatar Rial (QAR) 180,000+ per year

- Major retailers selling Australian beef and sheepmeat are Majid Al Futtaim/Carrefour and Lulu (across the region), Spinneys (UAE, Oman, Saudi Arabia), Choithrams (UAE), Monoprix (Qatar), Panda, Al Othaim Danube and Tamimi (Saudi Arabia), however they are available at a wide range of supermarkets and up-scale butchers.

- A high proportion of beef used in home-cooking is commodity type product but affluent consumers are increasingly seeking out premium imported primal cuts purchased at modern retail, particularly for Western-style dishes like steak, which are gaining a place in family meal repertoires.

Australian chilled beef export markets in MENA-12



Source: DAFF FY25, TDM, Percentage by exported volume, Grassfed and grainfed combined

- Whilst still low by global standards, women's workforce participation in the region has seen significant increases in most markets in recent years, increasing the need for food products and services that make life easier and save time, including meal kits, ready meals and a wide variety of pre-prepared and processed meat products.

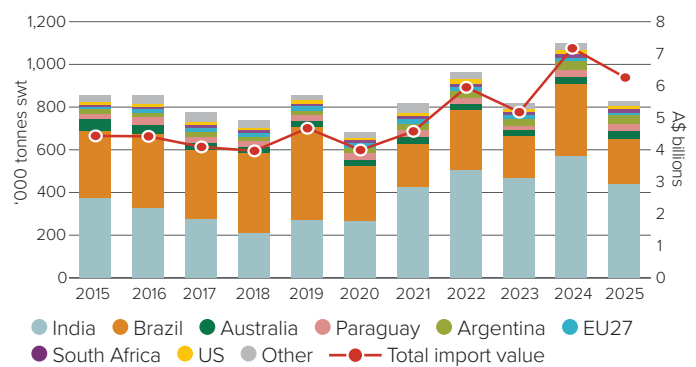
COMPETITIVE LANDSCAPE



- Beef import demand across the MENA region varies depending on domestic production and consumption habits. In some Gulf countries like the UAE, Kuwait, Oman, Qatar, Mauritius and Bahrain, almost all beef consumed is imported. In Saudi Arabia, Jordan, Egypt, Israel and Iran, generally more than half of beef consumed is imported, with the rest coming from both live imports and local production, primarily from the domestic dairy industry. Overall, the largest boxed beef importers by volume are Egypt, the UAE, Saudi Arabia, Israel and Iraq (Source: GIRA).
- The bulk of the region's beef imports come from India and Brazil, comprising mostly frozen boneless and lean cuts of beef and buffalo meat. MENA imported around 10% less volume of beef in FY25 year-on-year, reflecting a combination of higher global beef prices and a focus on market diversification by India. However, volume of Australian beef for this period was up 7% year-on-year due to resilient demand for quality beef and reduced presence of beef from North America.
- Australia is a key supplier of frozen veal carcasse to Saudi Arabia, making MENA Australia's largest veal export market globally, by a significant margin. Australia also exports notable volumes of bovine offal to the region, mostly liver, the bulk of which goes to Egypt, Saudi Arabia and the UAE (Source: DAFF).

- Competition for Australian grainfed beef comes mostly from the United States (US) and, to some extent, Canada, Japan and South Africa. Japan exports small but increasing volumes of Wagyu to the Gulf.

MENA-12 beef imports* by supplier**



Source: TDM, *Exporter reported totals excluding Pakistan, **MAT year ending August

- The region is generally forecast to increase beef imports over the next several years (Source: GIRA).

LIVESTOCK EXPORTS



- MENA is a major global market for live cattle. The broader region is forecast to import some 1.6 million head in 2025 but to decrease somewhat to 1.5 million head in 2029f (Source: GIRA).
- In FY25, Australia exported 20,216 head, down 64% year-on-year, valued at A\$37 million to the region. Jordan was Australia's largest live slaughter cattle export market in the region, while Israel continued to be a notable feeder cattle market (Source: DAFF, TDM).
- Australian live cattle exports to the MENA region have been on a long-term downward trend due to several factors, with

vessel availability and regional conflict presenting additional challenges in the past year.

- There is renewed interest in sourcing breeding cattle to support the growth of dairy production in the region.
- Significant regional live cattle importers include Turkiye, Iraq, Egypt, Morocco and Algeria.
- Key competitors in the MENA live cattle market are Brazil, Uruguay, Colombia and European countries such as Spain, Portugal, Romania and France. Significant regional live cattle importers include Turkiye, Iraq, Egypt, Morocco and Algeria (Source: GIRA, MLA).



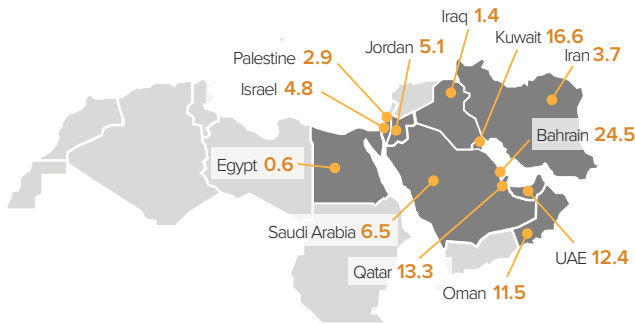
Sheepmeat

CONSUMERS



- Sheepmeat is a culturally important item in MENA. As a meat, lamb is considered a superior protein that is tender, juicy and tasty, making it a family favourite and a key ingredient in many local dishes. As a premium product, per capita consumption is low compared to chicken and fish but is notably higher in MENA compared to most countries in Europe, North America and Asia (Source: MLA, GIRA).
- Total sheepmeat consumption in Australia's main MENA markets of the Gulf Cooperation Council (GCC) is forecast to increase at a CAGR of 3.1% from 2024 to 2029 from around 555,000 to 647,000 tonnes cwe (Source: GIRA).

MENA-12 markets – per capita sheepmeat consumption*

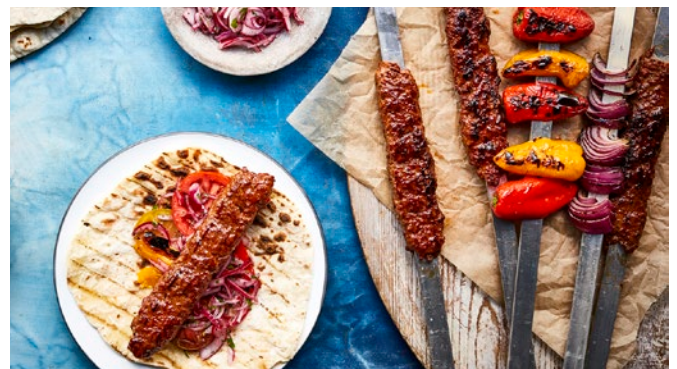


Source: GIRA 2025f, *Includes sheepmeat and goatmeat, kg cwe per person per year

- The region has significant demand for both lamb and mutton. Mutton is favoured over lamb in some sectors due to taste

preference and cooking styles, such as in Oman, Saudi Arabia and Kuwait. Frozen mutton is also used by the catering sector in countries with significant numbers of migrant workers, where it competes with frozen bobby veal.

- While the majority of the sheepmeat market is commodity product in carcass form, premium lamb consumption and imports have been growing, particularly in Gulf markets, driven by tourism growth, a young population and rising disposable incomes.
- Australia has been a key sheepmeat supplier to MENA markets for more than 50 years, with high awareness and a strong, positive reputation. Australian sheepmeat is particularly appreciated for its consistently high quality, good taste and naturalness (Source: MLA Global Consumer Tracker 2023, 2024 and 2025).



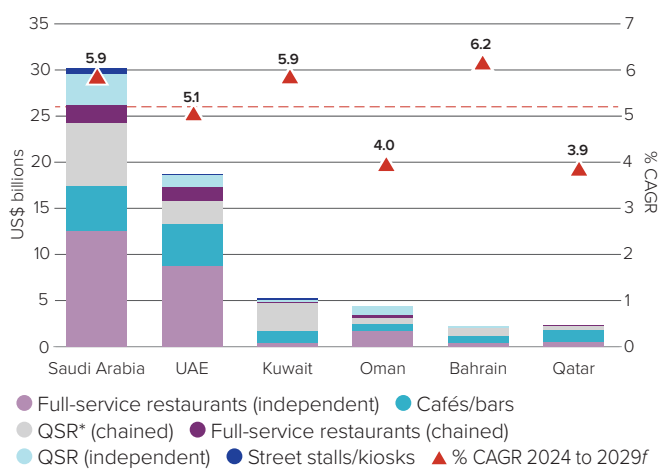
Grilled lamb kefta is a popular regional dish

FOODSERVICE



- More than half of Australian sheepmeat exports to the MENA region are utilised in the foodservice sector. With disposable incomes among the world's highest, affluent consumers frequently enjoy premium dining experiences, many of which include lamb.

Gulf foodservice sector overview

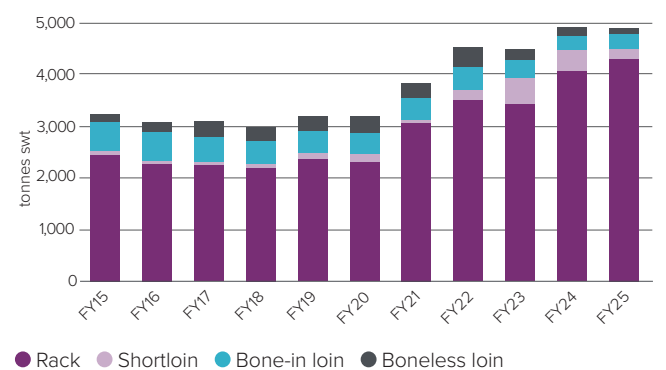


Source: Euromonitor International, 2025f, Gulf = Gulf Cooperation Council markets, Sales based on diners' total spend on food and beverages including taxes, CAGR = compound annual growth rate for the whole sector forecast from 2024 to 2029f, *QSR = quick/limited service restaurants

- Lamb features on menus at mostly full-service restaurants as well as some casual ones, particularly in local and other Middle Eastern, Indian and Chinese cuisine establishments

where it is found in various meat mains, kebabs, curries and wraps. While lamb is among the proteins of choice when dining at top-tier restaurants, there are opportunities to further develop premium lamb offerings, particularly in Western-style restaurants. In FY25, Australian premium lamb cuts volume was similar to the previous year, however premium mutton cuts increased due to higher lamb and lower mutton prices (Source: DAFF).

Australian premium lamb cuts exports to MENA-12



Source: DAFF, Chilled and frozen combined

- In markets with fast-growing tourism sectors such as the UAE, Saudi Arabia and Qatar, demand for Australian high value chilled lamb loin cuts in the high-end foodservice sector has been growing.



- As the modern retail sector develops across the region, new opportunities for Australian premium, packaged and branded lamb products are emerging.
- In most MENA countries, the majority of Australian packaged lamb is purchased from hypermarkets and supermarkets, while a significant proportion of unpackaged product, typically in the form of chilled carcass, is sold through butchers.
- Key retailers in the region where consumers purchase Australian sheepmeat are very similar to beef, including Majid Al-Futtaim/Carrefour, Lulu, Spinneys, Choithrams, Monoprix, Panda and Danube.
- MENA market consumers generally enjoy lamb at home more frequently than other markets. Target consumers in the UAE average two meals with lamb per week, compared to 1.5 in the UK, 1.1 in Malaysia, 0.8 in the US and 0.6 in Korea (Source: MLA Global Consumer Tracker).

Strongest associations with Australian premium lamb

The UAE	Saudi Arabia	Qatar
Animal is well-cared for	Consistent quality standards	Is my family's favourite lamb
Cuts variety to suit my meals	Guaranteed safe to eat	The meat is usually tender
More nutritious	Tender	Consistently high quality

Source: MLA Global Consumer Tracker UAE 2025, Qatar 2022, Saudi Arabia 2023, Based on percentage agreement scores, Affluent consumers living in households earning AED322,001+ (UAE), SAR241,000+ (KSA), QAR180,000+ (Qatar) per year

COMPETITIVE LANDSCAPE

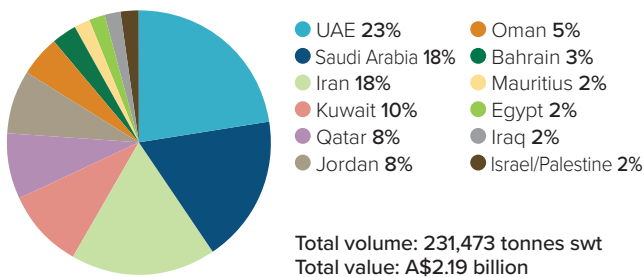


- Domestic sheep and goatmeat production in the broader MENA region, from both domestic and live imported animals, met around 90% of consumption in 2025. For the foreseeable future however, there will remain a gap that imports will need to fill, as production growth is limited due to various environmental constraints. Hence, both boxed and live imports will continue to rise to meet growing demand (Source: GIRA).

COVID-19 pandemic and shelf life improvements, Australia has increased seafreight exports of sheepmeat to the region, particularly frozen product (Source: DAFF).

- New Zealand (NZ), India and South Africa are also significant suppliers. Smaller but notable volumes are also supplied by Kenya, Europe, Uruguay and Kazakhstan, as the region seeks to diversify its supply base in line with enhancing food security (Source: TDM).
- NZ exports significant volumes of frozen bone-in lamb to Saudi Arabia and Jordan. India supplies mostly chilled mutton carcasses to the UAE and smaller volumes to Qatar and Kuwait.

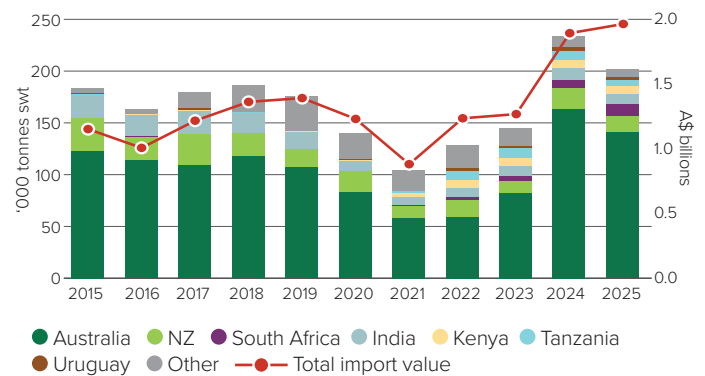
MENA-12 boxed sheepmeat import markets by volume share



Source: TDM, FY25, Data based on available supplier export data, All suppliers combined, Lamb and mutton combined, Excluding offal

- Total import volume in FY25 was around 13% lower year-on-year due to a combination of higher global sheepmeat prices and regional trade disruptions. Australian exports of mutton increased, while lamb decreased over this period.
- Australia is the region's largest and most consistent sheepmeat supplier with around 70% volume share in FY25. Since the

MENA-12 sheepmeat imports* by supplier**



Source: TDM, *Exporter reported totals excluding Pakistan, **MAT year ending August

LIVESTOCK EXPORTS



- MENA markets, particularly Saudi Arabia, have high demand for live sheep imports due to limited potential to significantly expand domestic flocks and a preference for local, freshly-slaughtered Halal meat for use in religious observances and daily diets.
- The broader region was forecast to import around 13 million head of live sheep and goats (234,000 tonnes cwe) in 2025 and is forecast to be just under 14.6 million head by 2029 (Source: GIRA).
- In FY25, the region remained Australia's top export destination for live sheep, exporting 407,490 head (a 19% year-on-year decline), valued at A\$50 million, with Kuwait taking 40% by volume and notable volumes also exported to Jordan, Saudi

Arabia and Qatar (Sources: DAFF, TDM). Export volumes in early 2025 were subdued, largely due to vessel availability challenges.

- Regulatory changes in Australia mean live sheep shipments are prohibited from departing Australia between June and September. The Australian Government's announcement to phase out live sheep exports by sea by 2028 has also impacted trade volumes, with producers reassessing their business models and importers seeking alternative suppliers.
- As a consequence, Australia has been facing increased competition from African markets such as Somalia, Sudan, Ethiopia and South Africa, as well as European suppliers such as Romania, Spain, Georgia and Armenia.



Market access overview – beef

The United Arab Emirates:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
The Australia-United Arab Emirates Comprehensive Economic Partnership Agreement (CEPA) entered into force on 1 October 2025	Zero	Brazil, South Africa, US: 0% for chilled meat and carcasses; 5% on frozen meat and carcasses, chilled and frozen bovine offal India, NZ*: Same access as Australia	Zero	Document legalisation, phytosanitary standards and quality inspections

Other Gulf Cooperation Council** (GCC) countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
Australia has been negotiating an Australia-GCC Free Trade Agreement (FTA) since 2007 (negotiations currently on hold but DFAT inviting stakeholder submissions to inform consideration of an FTA)	0% for chilled meat and carcasses 5% on frozen meat and carcasses, chilled and frozen bovine offal (5.5% on frozen boneless beef to Saudi Arabia)	India, Brazil, South Africa, US, NZ*: Same as Australia	Zero	Numerous barriers by country including shelf life, product labelling, coding, document legalisation, phytosanitary standards and quality inspections

Non-GCC MENA countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement	Australia to: Morocco: 30–200% duty on beef products Türkiye: 40–225% duty on beef products Iran: tariff rates vary significantly depending on demand Israel: 50% tariff on chilled bovine offal Tunisia: 36% on all meat and offals Egypt: 5% on bovine offal Jordan: 10% tariff on boneless meat; 2.5–5% on bovine offal	India, Brazil, South Africa, NZ*: Same as Australia EU-27, US: Preferential access (lower tariff rates) to some North African countries	Zero	Numerous barriers by country including differing requirements on shelf life, product labelling, product packaging, coding, document authorisation/legalisation, phytosanitary standards and quality inspections, restrictions on discharge areas, additional Halal certification requirements, maximum fat content requirements; EU requirements for Türkiye

Best access Major challenges

Source: Trade agreements, Department of Foreign Affairs and Trade (DFAT), MLA, *NZ-GCC FTA was finalised on 1 November 2024 but is yet to enter into force, **GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE



Sheepmeat



Market access overview – sheepmeat

The United Arab Emirates:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
The Australia-United Arab Emirates Comprehensive Economic Partnership Agreement (CEPA) entered into force on 1 October 2025	Zero	EU-27, Uruguay, Kenya, Kazakhstan: 0% for chilled meat and carcasses; 5% on frozen meat and carcasses, and frozen ovine offal, 2.5% on chilled ovine offal NZ*, India: Same access as Australia	Zero	Document legalisation, phytosanitary standards and quality inspections

Gulf Cooperation Council (GCC**) countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement but Australia has been negotiating a GCC-Australia Free Trade Agreement (FTA) since 2007	0% for chilled meat and carcasses 5% on frozen meat and carcasses, and frozen ovine offal, 2.5% on chilled ovine offal	NZ*, India, EU-27, Uruguay, Kenya, Kazakhstan: Same access as Australia	Zero	Numerous barriers by country including shelf life, product labelling, coding, document legalisation, quality inspections and phytosanitary standards

Non-GCC MENA countries:

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
No agreement	Australia to: Morocco: 30–200% duty on sheepmeat products Türkiye: 100–225% duty on sheepmeat products Iran: Tariff rates vary significantly depending on demand Israel: 60% tariff on chilled ovine offal Tunisia: 36% on all meat and offals Egypt: 0% on sheepmeat, 5% on ovine offal Israel: 0% on sheepmeat Jordan: 12.5% tariff on boneless meat, 5% on ovine offal	NZ, India: Same access as Australia EU-27: Preferential access (lower tariff rates) to some North African countries	Zero	Numerous barriers by country including shelf life, product labelling, item sizing and packing, coding, document legalisation, quality inspections and phytosanitary standards

Best access Major challenges

Source: Trade agreements, DFAT, MLA, *NZ-GCC FTA was finalised on 1 November 2024 but is yet to enter into force, **GCC includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE

Global Insights on

AUSSIE MEAT TRADE HUB

POWERED BY




VISIT TODAY

aussiemeattradehub.com.au

© Meat & Livestock Australia, 2026. ABN 39 081 678 364. 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.