North America

(United States, Canada and Mexico)

MLA MEAT & LIVESTOCK AUSTRALIA

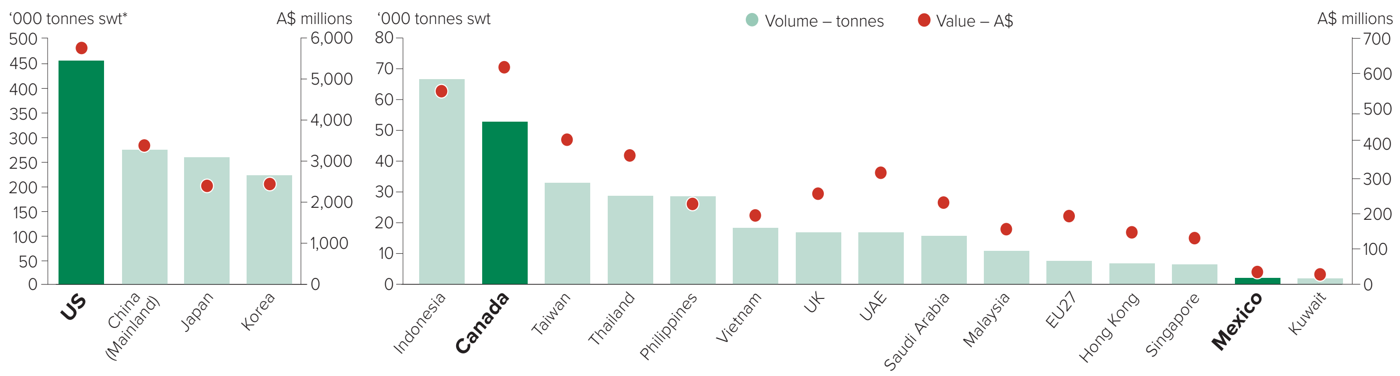
MARKET SNAPSHOT | BEEF & SHEEPMEAT

EXPORTS
Large and critical market for all Australian red meat products

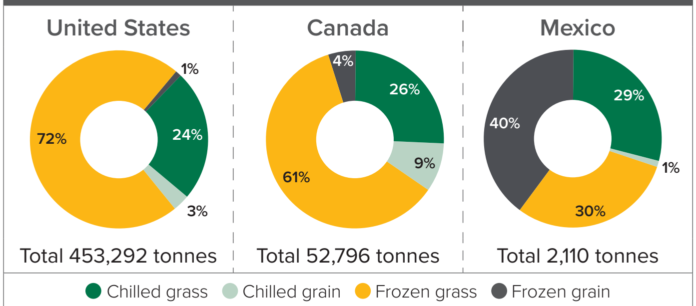
CONSUMERS
Largest pool of affluent and diverse consumers with high red meat consumption

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

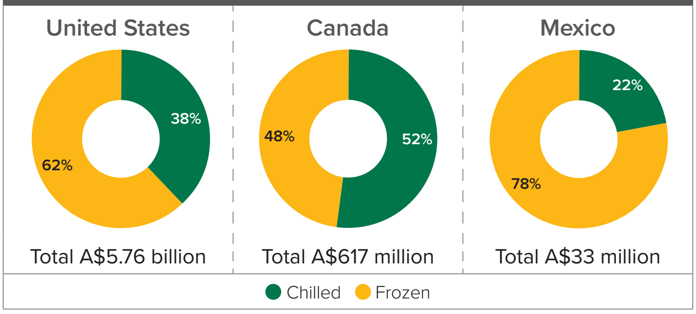
Australian beef exports to North America in a global context [1 and 2]



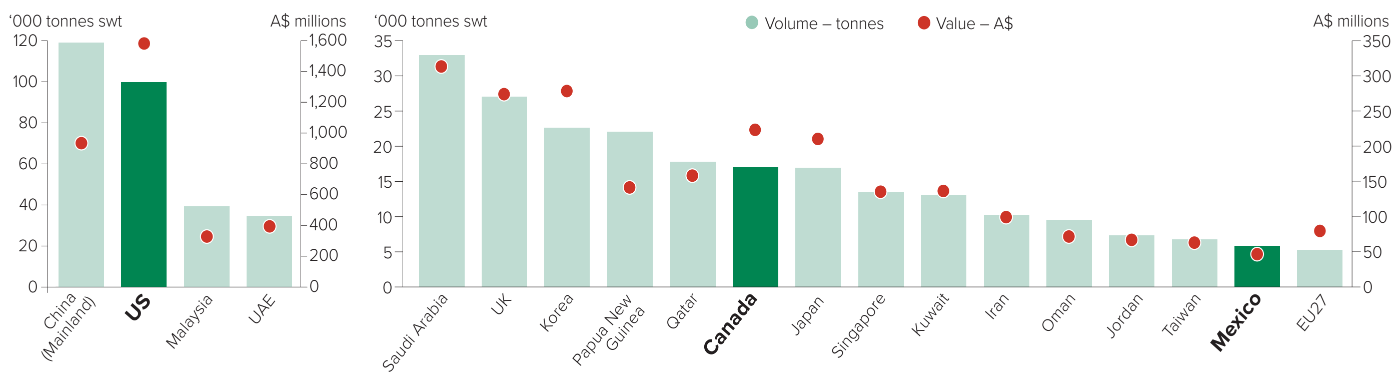
Australian beef exports – volume (swt)[1]



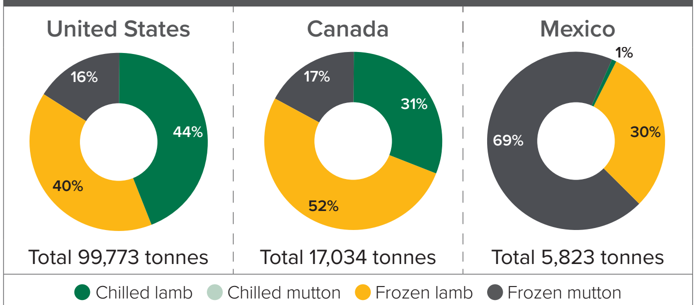
Australian beef exports – value[2]



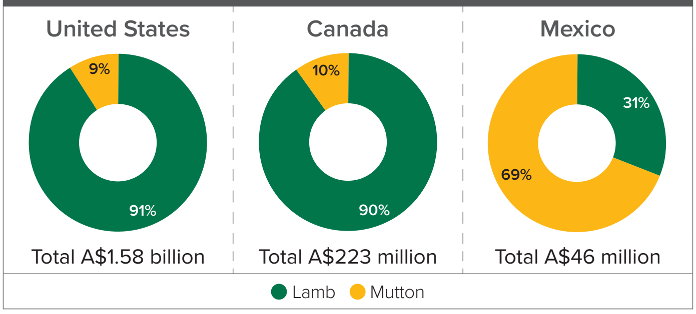
Australian sheepmeat exports to North America in a global context [1 and 2]



Australian sheepmeat exports – volume (swt)[1]



Australian sheepmeat exports – value[2]



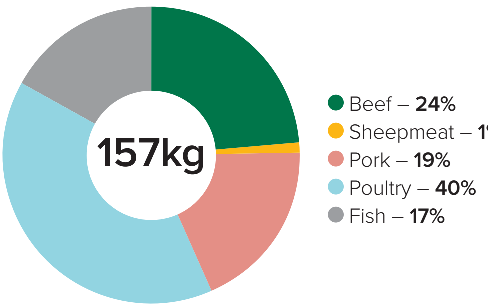
*Data source for charts: [1]Department of Agriculture, Forestry and Fisheries (DAFF) 2025, [2]Trade Data Monitor, LLC (TDM) Moving Annual Total (MAT) November 2025, *swt = shipped weight*

United States – Beef

CONSUMERS

- The United States (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.
- The US economy is expected to continue to grow modestly at 1.9% in 2026 *(Source: Fitch Solutions)*. Despite easing inflation, US consumer sentiment is cautious, so consumers may still be trading down in some areas however remain open to premium experiences when value is clear.

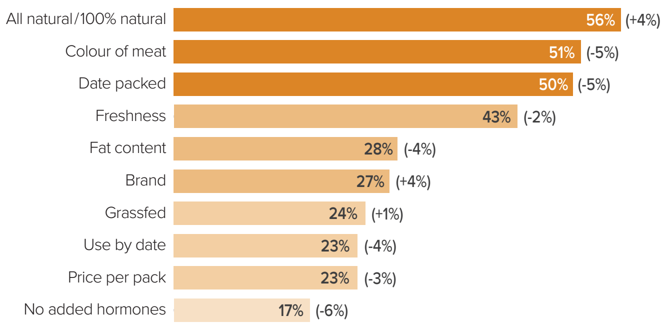
Meat consumption per capita



Source: GIRA, kg carcase weight equivalent (cwe) per year, 2025f, f = forecast

- While the 'buy local' movement remains influential, a significant majority (72%) of US consumers are still open to purchasing imported beef. Awareness of grassfed beef is also high (74%), despite most US beef being grainfed *(Source: MLA Global Consumer Tracker 2025)*.
- 67% 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 *(Source: 210 Analytics December 2024)*.
- 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

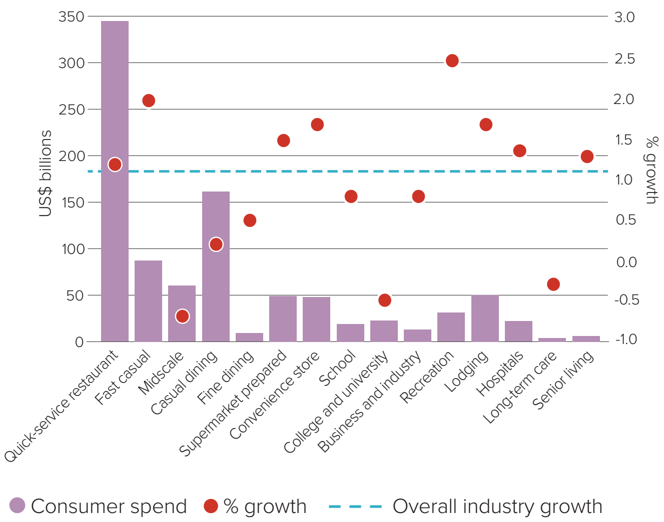


Source: MLA Global Consumer Tracker 2025, Figures in brackets ( ) % growth versus 2024

FOODSERVICE

- The US foodservice industry is forecast to reach US$978.8 billion in 2026. While inflation is driving most of the growth, this has eased compared to last year. More than half of foodservice operators have a positive outlook despite challenges of rising food costs, labour costs and labour recruitment and retainment *(Source: Datassential)*.

Consumer spend and growth by foodservice segment



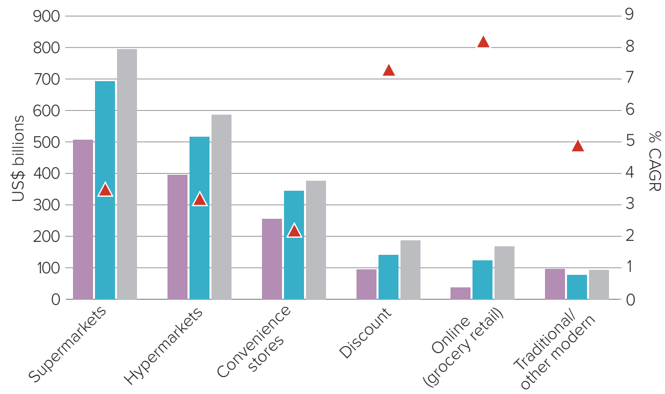
Source: Datassential 2026 Foodservice Forecast, Consumer spend on prepared food and non-alcoholic beverages, Projected growth is projected real growth rate (adjusted for inflation) between 2025 and 2026

- 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 5% between 2026 to 2029 *(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 40% of Australian beef exported to the US goes into the foodservice sector *(Source: MLA estimates 2025)*.
- 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 and fast food chains, casual chains and fine dining restaurants are tapping into this opportunity *(Source: Datassential)*. While burgers are a popular way to feature grassfed beef on menu *(Source: Menu Matters 2025)*, ribeye, striploin and tenderloin are also popular for chefs to use in their grassfed beef creations *(Source: MLA StarChefs Survey 2025)*.
- 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. The past year has also seen increasing diversity and volume of chilled grainfed cuts, meaning broader opportunities for Australian exporters are available.

RETAIL

- Inflation and cost of living have driven preparation of more meals at home. Consumers have sought a balance of value and indulgence which has seen premium segments like Wagyu, beef steaks and lamb roasts experience growth. Shoppers are willing to splurge on quality and convenience for holidays and special occasions *(Source: Power of Meat 2025)*.
- Most of the chilled grassfed beef from Australia is destined for retail, but while grassfed beef only accounts for around 5% of total beef sales through the US retail channel, sales have grown by 50% compared to the five-year average. Increased availability and range of grassfed beef at retail, along with lower prices, have narrowed the gap with conventional beef. As a result, more consumers are choosing grassfed beef, seeing it as a healthier option. 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 loin, rib eye and sirloin *(Source: Circana, Integrated Fresh, Total US, multi-outlet+ (MULO+) Data to 29 June 2025)*.
- The lack of mandatory country of origin labeling remains a challenge for growing awareness and preference of Australian beef. While from 1 January 2026, voluntary 'Product of USA' claims can only be used if animals were born raised, slaughtered and processed in the US, it's expected to have minimal impact on imports.
- Supermarkets are the main purchase channel for Australian beef, followed by independent and regional butchers, warehouse club stores and convenience stores, reflecting the retail environment in the US *(Source: MLA Global Consumer Tracker 2025)*.
- Sustainability for many consumers is a now an expectation, but it is not always top of mind. Only about half (52%) of consumers consider 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 Marketing)*, which represents a key opportunity for Australian red meat with our strong sustainability and traceability credentials.

Grocery retail sales by channel



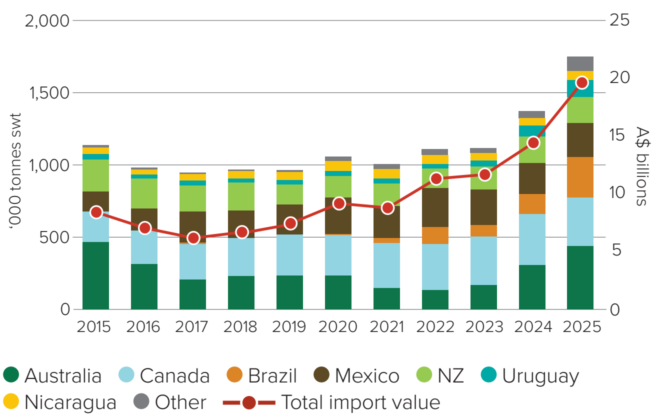
Source: IGD, e = estimate

- Online shopping continues to be elevated with 61% of households purchasing groceries online in the past year. More than half (51%) of meat shoppers purchase meat online with some regularity, particularly among Gen Z and Millennials *(Source: Power of Meat 2025)*.
- 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 2025)*.

COMPETITIVE LANDSCAPE

- The US beef industry remains large and well established, but domestic supply is still constrained as herd rebuilding continues, sustaining strong import demand. While a 10% tariff on Australian beef exports was briefly in place from April 2025 under reciprocal measures, this has now been removed for all affected countries, restoring zero-tariff access under the Australia-United States Free Trade Agreement (AUSFTA) and normal conditions for other suppliers. This reinforces Australia's competitive position in the US market.
- Brazil continues to aggressively fill the majority of the shared 52,005 tonne 'other country' quota early each year, often front-loading shipments into bonded storage. While global reciprocal tariffs have been removed, Brazil now only faces the 24.6% out-of-quota tariff after the 40% Brazil-specific tariff was removed on 13 November 2025.
- In 2026, the US has temporarily added 80,000 tonnes of in-quota access for lean beef trimmings, allocated solely to Argentina in quarterly tranches, to ease ground beef supply pressures.
- New Zealand (NZ) remains Australia's closest competitor in grassfed beef, but structural production declines continue to cap its growth potential. NZ also had its 15% reciprocal tariff removed, restoring normal access under its FTA, but this does not offset its supply constraints. While domestic US grassfed supply is expanding, it remains small-scale, reinforcing Australia's reputation for consistent, high quality grassfed beef with strong provenance credentials.
- With zero-tariff access reinstated under AUSFTA, Australia's competitive strengths are further reinforced. Australia leverages a diverse export mix – from manufacturing beef for foodservice to chilled grassfed and an increasing share of chilled grainfed cuts for retail and premium foodservice.
- These categories align closely with US consumer demand for quality, provenance and sustainability, underpinning Australia's strong position in the market.

US beef imports by supplier



*Source: TDM, *MAT year ending August*

United States – Sheepmeat

CONSUMERS

- Lamb is a niche protein in the US, with 36% 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 remain the biggest barriers. To drive trial recipe inspiration, cooking guidance and convenient value added formats are key to lowering barriers *(Source: MLA Global Consumer Tracker 2025)*.
- Millennials and Gen Z are willing to experiment with new proteins and cuisines, and international food trends have improved familiarity with lamb beyond its traditional role at Easter and Christmas. Holiday occasions continue to drive spikes in demand, but there is a growing interest in using lamb to elevate everyday meals *(Source: Voice of Shopper 2022)*, especially as consumers are dining in more at home due to cost pressures.
- 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)*.

Top associations for Australian lamb

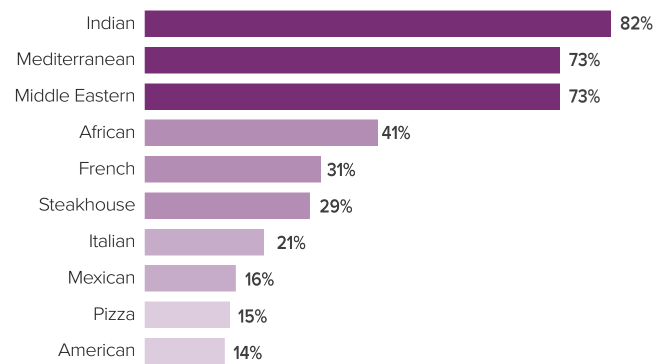
1. Guaranteed safe to eat
2. The meat is usually tender
3. Consistent quality standards
4. Fresh
5. Animal is well-cared for
6. Offers a variety of cuts that suit the meals I make
7. More nutritious
8. Low in fat

Source: MLA Global Consumer Tracker 2025, Based on % agree score

FOODSERVICE

- Lamb has dipped slightly to an estimated 19% of menu penetration, however, given the foodservice industry challenges, maintaining this share is a positive result. Lamb has become more common at casual dining restaurants than fine dining, suggesting it has moved into a more mainstream trend stage, which hopefully signals increased consumer awareness and adoption in the US *(Source: Menu Matters 2025)*.

Top cuisines featuring lamb on menu



Source: Menu Matters Menuing Report 2025

- Around one third of foodservice operators are using lamb to target changing patron demographics, signaling a more culturally diverse population which will help shift lamb more mainstream *(Source: Menu Matters)*.
- Foodservice operators choose Australian lamb due to its ease of sourcing and affordability but also its quality and taste. However, there are still opportunities to improve perceptions of Australian lamb and create a stronger premium position *(Source: Menu Matters)*.
- Although lamb is not broadly on menu in mainstream applications like burger restaurants or sandwich shops, it's extremely common at world cuisine restaurants (e.g. Indian, Mediterranean, Middle Eastern). These outlets have historically driven lamb penetration but there remains the opportunity for Australian lamb to bring more diversity and unique flavour to menus, while delivering premium perceptions among diners for operators *(Source: Menu Matters 2025)*.

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

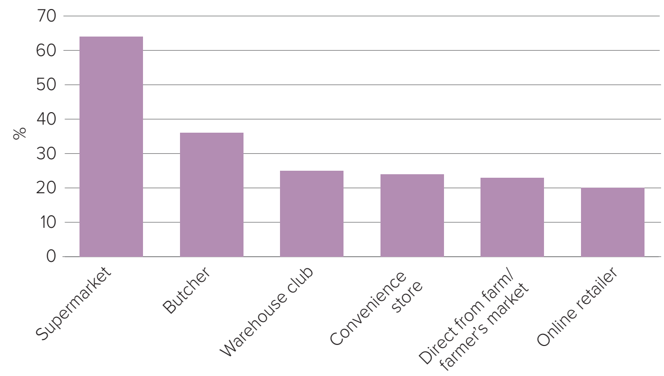
Lamb popularity increases

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 gained ground featuring in sandwiches and can continue to build momentum through other familiar and approachable applications like burgers or flatbreads *(Source: Datassential, Menu Matters)*.

RETAIL

- While most lamb (64%) is purchased at supermarkets, the retail channels used to purchase it are much broader compared to beef, highlighting the importance of these alternative channels to lamb *(Source: MLA Global Consumer Tracker 2025).*

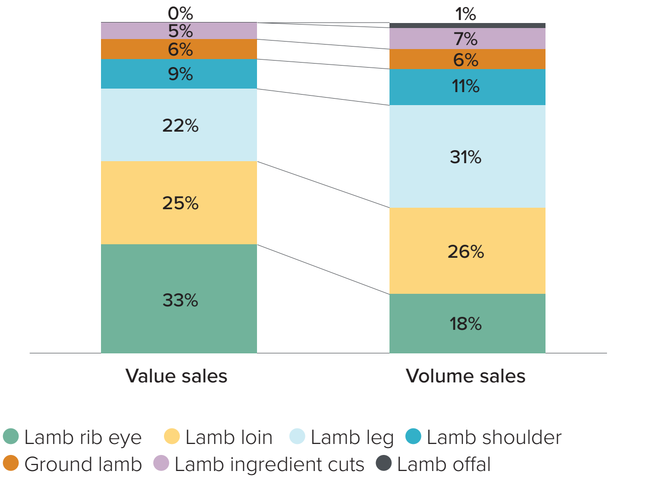
Where shoppers purchase lamb



Source: MLA Global Consumer Tracker 2025

- As a niche protein in the US, lamb only accounts for just over 1% of total fresh meat sales, however it has grown more than 10% in both value (11%) and volume (10%) compared to a year ago. While lamb loin accounts for around one quarter of lamb value and volume sales, lamb rib eye (racks of lamb and roasts) has overtaken lamb loin in value share in the past year. This is due to more consumers wanting to cook restaurant-quality meals at home *(Source: Circana, Integrated Fresh, Total US, MULO+ Data to 29 June 2025).*

Lamb cuts retail value and volume share



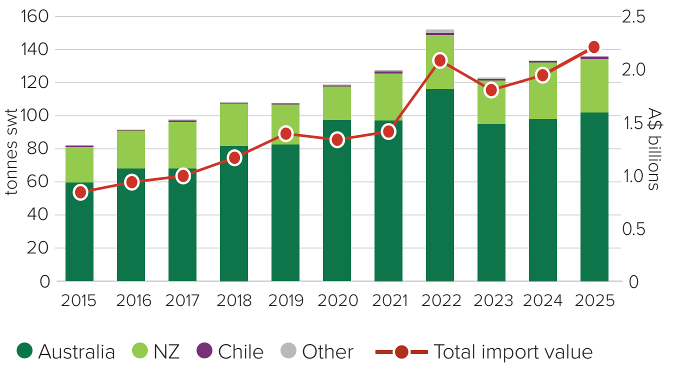
Source: Circana, Integrated Fresh, Total US, MULO+ Data to 29 June 2025

- 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. They also purchase a greater variety of different lamb cuts beyond chops, so ensuring a good online range is key *(Source: Voice of Shopper 2022).*

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 there *(Source: GIRA).*

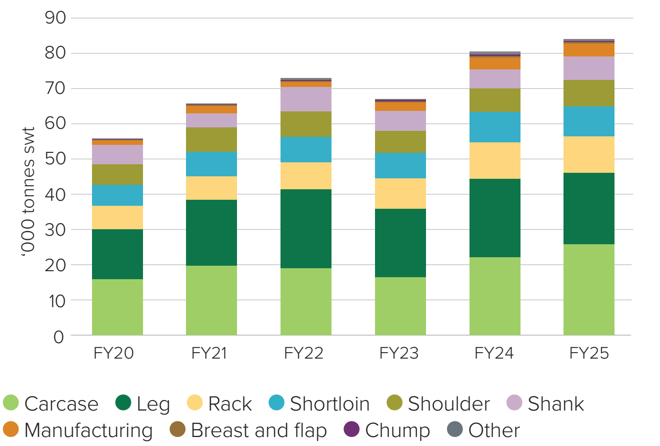
US sheepmeat imports by supplier*



*Source: TDM, *MAT year ending August*

- Australia is a major supplier, holding close to 80% market share, reflecting Australia's ability to supply consistent quality and scale. NZ is the second largest supplier, at around 20%.
- From April 2025, the US applied a 10% reciprocal tariff to Australian red meat imports, replacing prior tariff-free entry. While this was removed for beef in November 2025, sheepmeat is still subject to these tariffs.
- NZ remains Australia's main competitor in the US sheepmeat space, but forecast production declines of 0.7% from 2025 to 2029 *(Source: GIRA)* may constrain its export capacity. From November 2025, NZ sheepmeat is still subject to the 15% tariff. While this reduces competitive pressure, NZ continues to compete strongly in lamb racks and other premium cuts.

Australian lamb exports to US by cuts



Source: DAFF, FY = Financial year

Canada – Beef

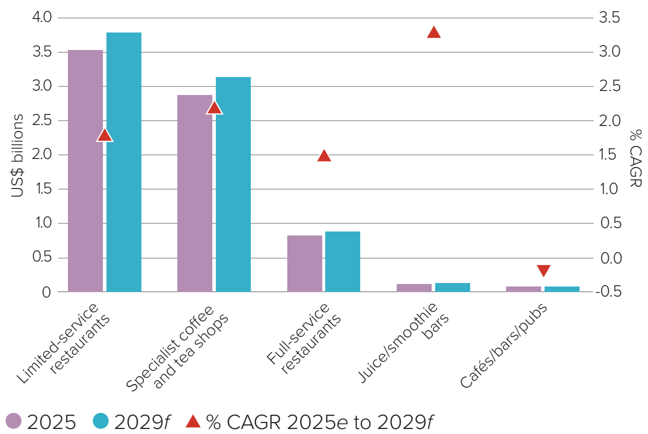
CONSUMERS

- Canadian households continue to face inflationary pressures, which are weighing on discretionary spending. Food price growth has moderated from its peak, but consumers remain cautious with their budgets. Consumers are seeking value and there is a divide between shoppers that are trading down and those still willing to pay for more premium beef experiences.
- Despite these economic pressures, beef consumption is well above the Organisation for Economic Co-operation and Development (OECD) average of 13.4kg per capita at 17.4kg per capita in 2025 *(Source: OECD)*.
- Canadians see beef as superior, easy and convenient to purchase, 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. While 30% of consumers 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)*.
- While Canadian consumers tend to be more price conscious compared to global beef buyers, purchase decisions are increasingly shaped by health, naturalness and provenance claims, which align with Australia's strengths *(Source: MLA Global Consumer Tracker 2022)*.
- Provenance and trust remain important differentiators. While Australian beef is considered safe and high quality, awareness of its defining characteristics still lags behind local or US beef. This presents opportunities to strengthen consumer perceptions of Australian beef, particularly among health conscious or premium shoppers *(Source: MLA Global Consumer Tracker 2022)*.

FOODSERVICE & RETAIL

- Foodservice recovery has continued, but operators face higher input costs and labour shortages, limiting margin recovery.
- Most Canadians (75%) are eating out less often due to cost pressures, but this figure rises to 81% for those aged 18–34 *(Source: Restaurants Canada)*. Consumers are more selective when eating out, with value dining formats resilient, while premium occasions are still growing among higher-income households. Despite this, consumer spend on restaurants and hotels is forecast to grow at a CAGR of 4% between 2025 to 2029 *(Source: Fitch Solutions)*.
- However, retail presence of Australian beef has been steadily growing in the past few years. Reduced spend in foodservice due to cost pressures has continued to drive the presence of quality Australian product in retail *(Source: MLA intelligence)*.
- Supermarkets, which are the primary place of purchase for Australian beef *(Source: MLA Global Consumer Tracker 2022)*, represent more than 40% of grocery market retail sales in Canada *(Source: IGD)*.

Canada foodservice share and growth by segment

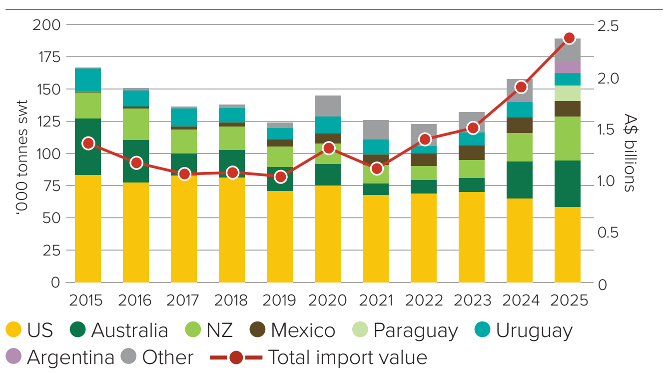


Source: Euromonitor International

COMPETITIVE LANDSCAPE

- Canada's beef imports are led by the US under the United States-Mexico-Canada Agreement (USMCA) and typically account for 40% of imports.
- Domestic production has been under pressure, with the Canadian cattle herd falling to its lowest level since 1988, underpinning strong reliance on imports.
- Australia holds around 20% of Canadian beef imports and benefits from 0% tariffs under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), giving it a competitive position relative to Uruguay and Brazil, which face quota limits and out of quota tariffs of 26.5%. NZ also competes in the grassfed segment with the same CPTPP tariff advantage, though from a smaller base.
- Recent trade tensions between the US and Canada have introduced new uncertainty into the beef import dynamic. In particular, concerns over rising input costs, potential tariff escalation and shifting consumer sentiment to 'Buy Canadian' has created headwinds for US supply and opportunity for Australia to strengthen its position as a high quality and trusted alternative.
- While most Australian exports have remained grassfed, the last three years have seen increasing chilled and frozen grainfed volumes, which grew at a CAGR of 32% and 44% respectively between FY19 and FY25 *(Source: DAFF)*. With Canadian consumers prioritising naturalness, quality and trustworthy sourcing, Australia is well placed to differentiate from other competitors.

Canada beef imports by supplier*



*Source: TDM, *MAT year ending August*

Mexico – Beef

CONSUMERS

- Mexico's beef market is poised for modest growth in 2025, supported by a population surpassing 130 million and rising dual-income households fueling demand for convenient, ready-to-eat processed beef products *(Source: Fitch Solutions, United States Department of Agriculture (USDA))*.
- Beef consumption is forecast to increase at a CAGR of 1% between 2025 and 2029 *(Source: GIRA)*. Inflationary pressures and reduced social program assistance this year have somewhat constrained consumption growth *(Source: USDA)*.
- Tourism continues to be a key driver behind beef demand in the hotel and restaurant sectors, benefiting from ongoing increases in international tourists, especially from the North America region, which are expected to increase at a CAGR of 5% between 2025 and 2029 *(Source: Fitch Solutions)*.
- Households with more than US$35,000 in annual disposable income are estimated to represent 8% of total households in 2025. This is forecast to reach 12% in 2029, growing at a 13% CAGR *(Source: Fitch Solutions)*. This reflects a growing pool of households able to afford premium Australian products. Among them, demand is rising for differentiated offerings with a provenance story, which Australian products are well placed to provide.

FOODSERVICE & RETAIL

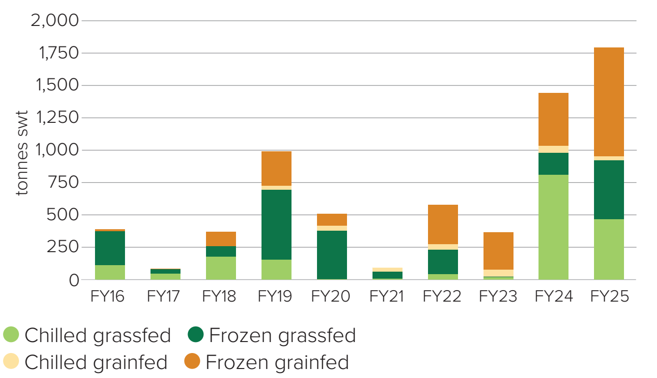
- Mexico's foodservice sector is estimated to grow 5% in 2025 *(Source: Euromonitor International)*, with full-service restaurants benefiting from rising disposable incomes and shifting consumer preferences toward premium imported beef *(Source: TrueWave Innovations)*.
- The continued expansion of the quick-service restaurants which primarily use manufacturing beef, is also expected to drive increased beef consumption *(Source: USDA)*.
- 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 wellbeing.
- Uniquely, in this market, the most common cut used in foodservice is *arrachera*, or hanger steak, normally marinated in spices and primarily used for making *tacos* or *fajitas* (meat and vegetables wrapped in tortillas and toppings).
- Total grocery retail sales in Mexico are expected to be US$284 billion in 2025 and grow with a CAGR of 5% between 2025 to 2029 *(Source: IGD)*.
- The main channel for beef in Mexico is 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's beef supply is increasingly met by a mix of growing domestic production and imports. Domestic industry expansion, supported by relatively lower feed costs, is expected to place more pressure on import growth over time *(Source: USDA)*.
- Australia benefits from CPTPP tariff reductions which will reach 0% in 2027. This provides a competitive cost advantage compared to non-CPTPP exporters.
- However, competition is intensifying with Brazil seeking greater access and Mexican authorities auditing more Brazilian meatpacking plants for export eligibility *(Source: Reuters)*. Brazil's scale and lower production costs pose a significant threat in commodity beef segments.
- While Australia has typically exported more grassfed beef to Mexico, between FY22 and FY25, grainfed volumes have grown at a 36% CAGR *(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** 10% reciprocal tariff applied from April 2025 (overriding **AUSFTA**) has since been removed from November 2025	**Canada, Mexico:** United State-Mexico-Canada Agreement **USMCA**, no quota **New Zealand:** 213,000 tonne quota, with an in-quota tariff of US4.4¢/kg, 26.4% out of quota tariff **Nicaragua, Honduras, Costa Rica:** Dominican Republic-Central America-United States Free Trade Agreement **(CAFTADR)** with US, shares the same 52,005 tonnes with other countries, in quota US4.4¢/kg, 26.4% out of quota tariff **Uruguay, Argentina:** No FTA, quota of 20,000 tonnes each, tariff US4.4¢/kg in quota and 26.4% out of quota. Argentina gained additional 80,000 tonnes of in-quota access for lean trimmings in 2026. **Brazil:** No FTA, shares the same 52,005 tonnes with other eligible countries, in quota US4.4¢/kg, 26.4% out of quota tariff	No volume 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 Voluntary US origin claims: From 1 January 2026, 'Product of USA' may only be used if animals were born, raised, slaughtered and processed in the US Refer to DAFF Manual of Importing Country Requirements (MICOR) for current requirements

Best access — Major challenges

Source: Trade agreements, Department of Foreign Affairs and Trade (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**	**US, Mexico:** United State-Mexico-Canada Agreement **(USMCA)**, no quota. Recent trade tensions between the US and Canada have led to tariff threats and retaliatory measures in other categories, while beef remains duty-free under **USMCA**, uncertainty could affect import dynamics **New Zealand: CPTPP**, 0% import tariff **Uruguay:** Supplies 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 Voluntary US origin claims: From 1 January 2026, 'Product of USA' may only be used if animals were born, raised, slaughtered and processed in the US Refer to DAFF Manual of Importing Country Requirements (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**, 2% in 2026 Will be 0% from 1 January 2027	**US, Canada:** United State-Mexico-Canada Agreement **(USMCA), no** quota **New Zealand:** Same market access conditions as Australia under **CPTPP**, tariff of 4% in 2025 **Brazil:** Brazilian plants approved for export to Mexico in 2025, expanding eligible supply base	No volume restrictions under **CPTPP**	Labelling, restriction on ports of entry, extra information required for health certificates compared to other markets Refer to DAFF Manual of Importing Country Requirements (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)**	10% baseline tariff (previously 0% under **AUSFTA**) Tariff implemented April 2025 still applies to sheepmeat from November 2025. AUSFTA provisions remain in place, but tariff overrides free access	**NZ, Uruguay, Chile:** tariff of US0.7¢/kg for lamb and US2.8¢/kg for mutton NZ is subject to 15% reciprocal tariff from November 2025	No volume restrictions under **AUSFTA**	Point of entry inspection, label approvals and port mark compliance Voluntary US origin claims: From 1 January 2026, 'Product of USA' may only be used if animals were born, raised, slaughtered and processed in the US Refer to DAFF Manual of Importing Country Require-ments (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 Manual of Importing Country Requirements (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)**	0% under **CPTPP**	**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 Manual of Importing Country Requirements (MICOR) for current requirements

Best access — Major challenges

Source: Trade agreements, DFAT, MLA