



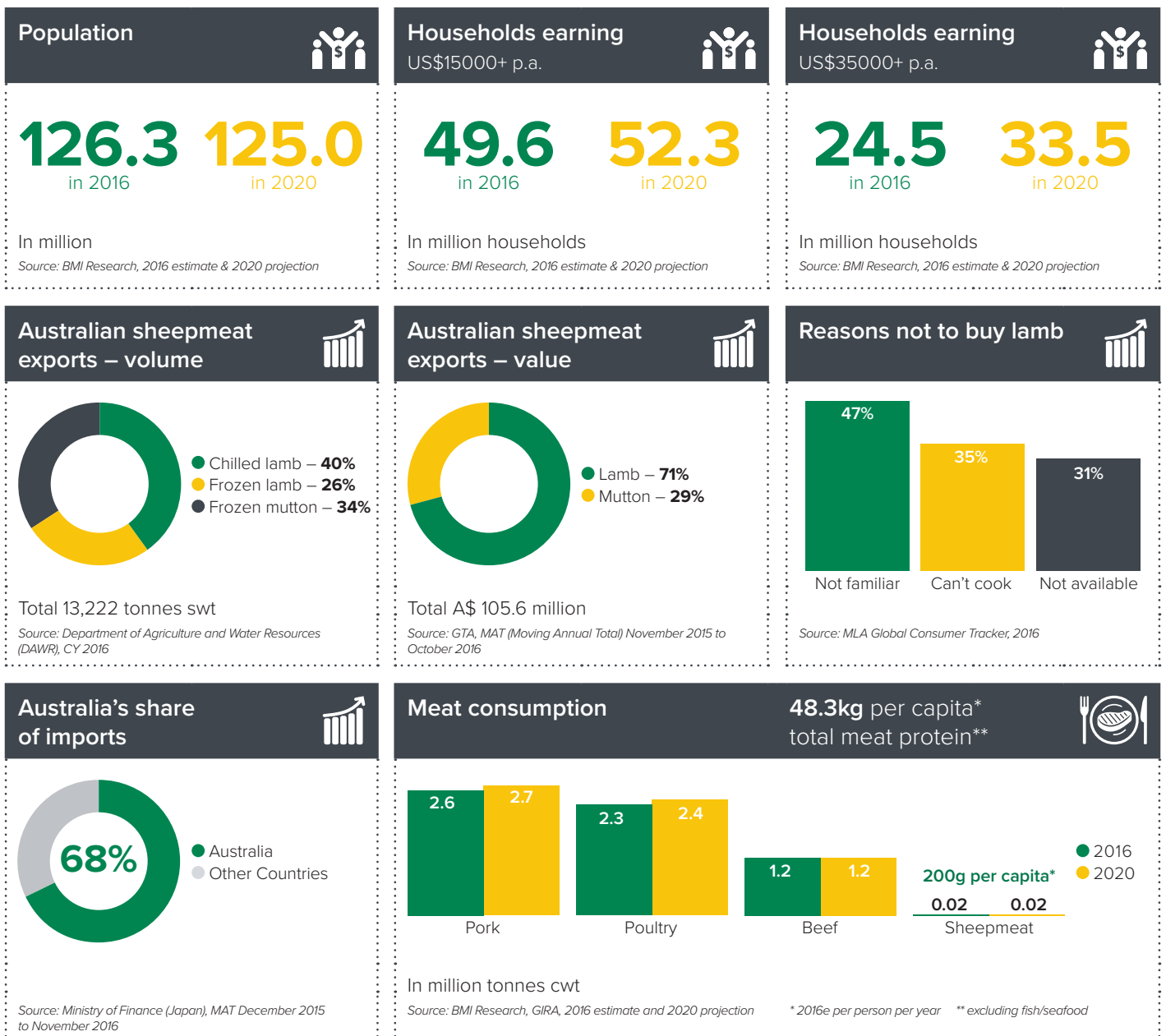
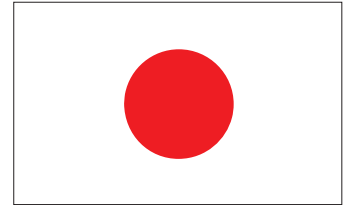
MARKET SNAPSHOT | SHEEPMEAT

Japan

Sheepmeat is a minor protein in Japan, yet Australia supplies 68% of imports into Japan, making it the largest export market in Asia for Australian chilled lamb. While Genghis Khan sheepmeat barbecue restaurants are the major outlet for sheepmeat overall, there is a trend emerging in modern foodservice to incorporate Australian lamb on menus as a point of difference.

Challenges and opportunities in Japan for Australian sheepmeat include:

- Competition from other proteins remains strong. However, any increase in sheepmeat demand will need to be met by an increase in imports, as the scale of Japan's local sheepmeat industry is limited.
- There is rising lamb awareness among businesses and consumers but overall awareness remains low compared to other markets.
- Japan has a highly sophisticated and competitive foodservice sector. In order to demonstrate their point of difference, innovative chefs in Japan are experimenting with Australian lamb in diverse cuisine styles including Italian, middle-eastern, Chinese and Japanese.



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Market Access Overview

Trade agreements	Import tariffs	Competitors	Volume restrictions	Technical access
JAPEA (Japan-Australia Economic Partnership Agreement)	NIL (for all countries)	NZ (same access conditions as Australia)	N/A	No major hurdles

Best access Major challenges

Source: Trade agreements, MOF, MLA



Australian sheepmeat exports to Japan – summary table

volume – in tonnes swt		2016	% out of total	2015	% out of total	5 year average (2011-2015)	% out of total	change 2016 vs 5-yr av.	
								%	in tonnes swt
Total		13,222	100	11,711	100	12,235	100	8	987
by storage	Chilled	5,289	40	5,176	44	5,214	43	1	75
	Frozen	7,933	60	6,534	56	7,021	57	13	912
by meat type	Lamb	8,640	65	7,977	68	8,174	67	6	466
	Mutton	4,582	35	3,733	32	4,061	33	13	521
by storage/ meat type	Chilled lamb	5,241	40	5,119	44	5,150	42	2	90
	Chilled mutton	48	0	57	0	64	1	-24	-16
	Frozen lamb	3,399	26	2,858	24	3,024	25	12	376
	Frozen mutton	4,534	34	3,676	31	3,997	33	13	537

Source: DAWR

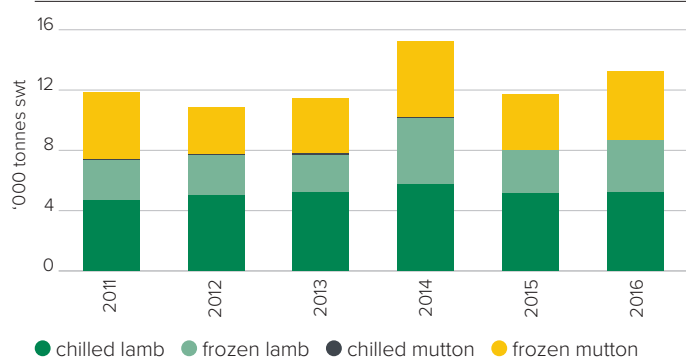
value – in A\$ 000								%	in A\$ 000
Total		105,587*	100	99,044	100	95,558	100	10	10,029
by meat type	Lamb	74,794*	71	72,929	74	69,103	72	8	5,691
	Mutton	30,793*	29	26,115	26	26,456	28	16	4,338

Source: ABS/GTA, 2016* = Moving Annual Total (MAT), November 2015 to October 2016.

Australian lamb exports to Japan – by major cut (in tonnes swt)								%	in tonnes swt
Shoulder		4,882	57	4,483	56	4,136	51	18	746
Manufacturing		1,864	22	1,837	23	2,458	30	-24	-593
Rack		714	8	624	8	650	8	10	64
Leg		626	7	492	6	534	7	17	91
Carcase		201	2	192	2	151	2	34	51
other		352	4	349	4	244	3	44	107
Total		8,640	100	7,977	100	8,174	100	6	466

Source: DAWR

Australian sheepmeat exports to Japan



Source: DAWR



Genghis Khan sheepmeat barbecue