

# Southeast Asia Market Update and Insights 2026

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Global Market Insights  
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# Australian Cattle Industry Projections

## KEY POINTS

- Highest slaughter since the 1970s.
- Herd remains above 30 million head.
- Record beef production forecast – close to 3 million tonnes.



 [Read the full Australian Cattle Projections Report](#)

## KEY 2026 NUMBERS



**Slaughter:**  
**9.45** million head



**Carcase weights:**  
**307.5** kg/head



**Production:**  
**2.9** million tonnes cwt\*



**Beef exports:**  
**2.3** million tonnes swt\*\*

Note: Graphic illustrates year-on-year change  
\*cwt = carcase weight, \*\*swt = shipped weight

# Australian Sheep Industry Projections

## KEY POINTS

- Challenging seasonal conditions continue to weigh on flock.
- Lower turn-off is set to tighten sheepmeat availability, while productivity gains continue to support output.
- Export conditions remain mixed, although tighter global supply continues to support demand for Australian sheep products.



## KEY 2026 NUMBERS



**Lamb slaughter:**

**21.86** million head



**Lamb production:**

**537,000** tonnes cwt\*



**Sheep slaughter:**

**7.13** million head



**Mutton production:**

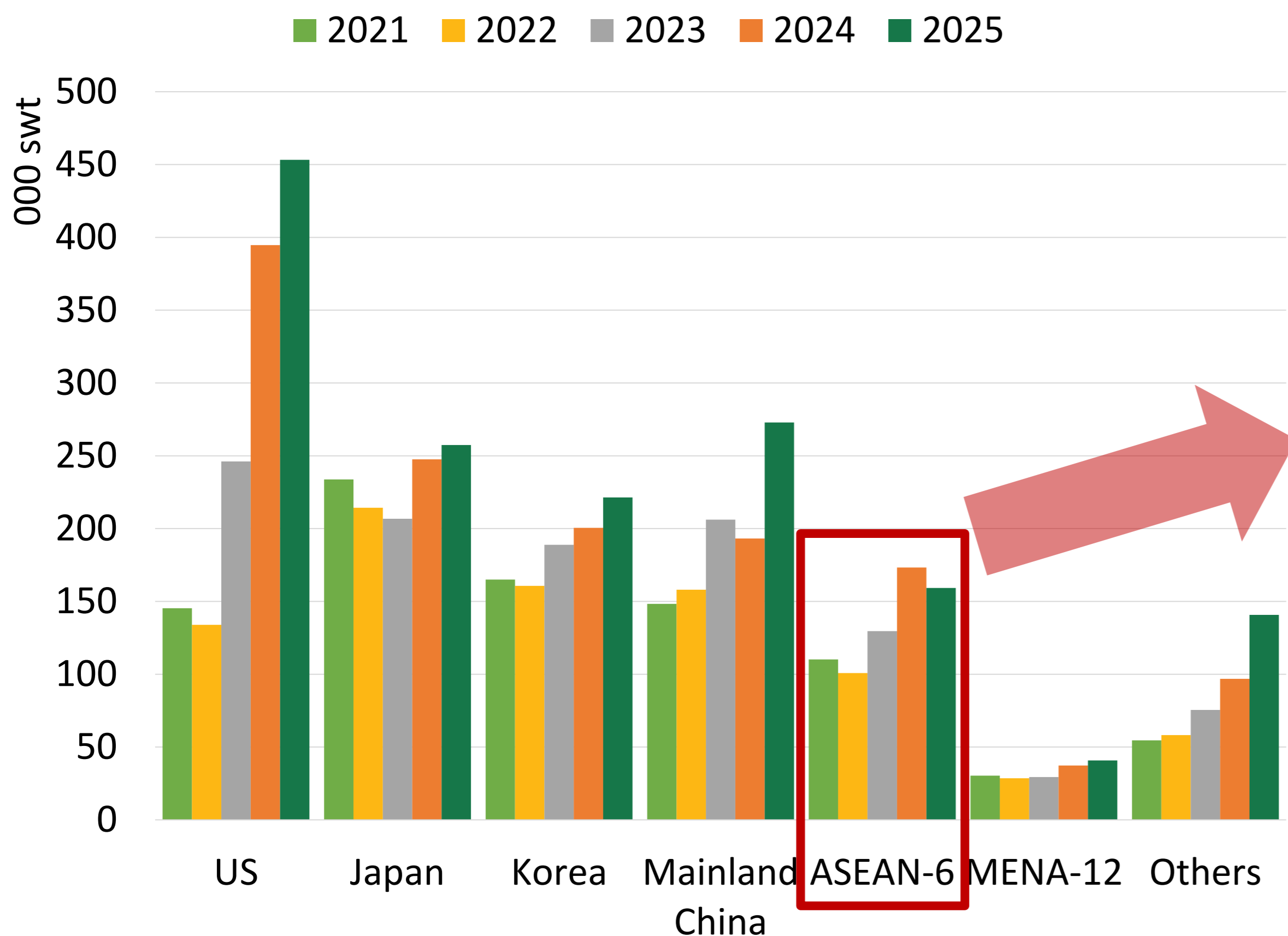
**184,770** tonnes cwt

Note: Graphic illustrates year-on-year change

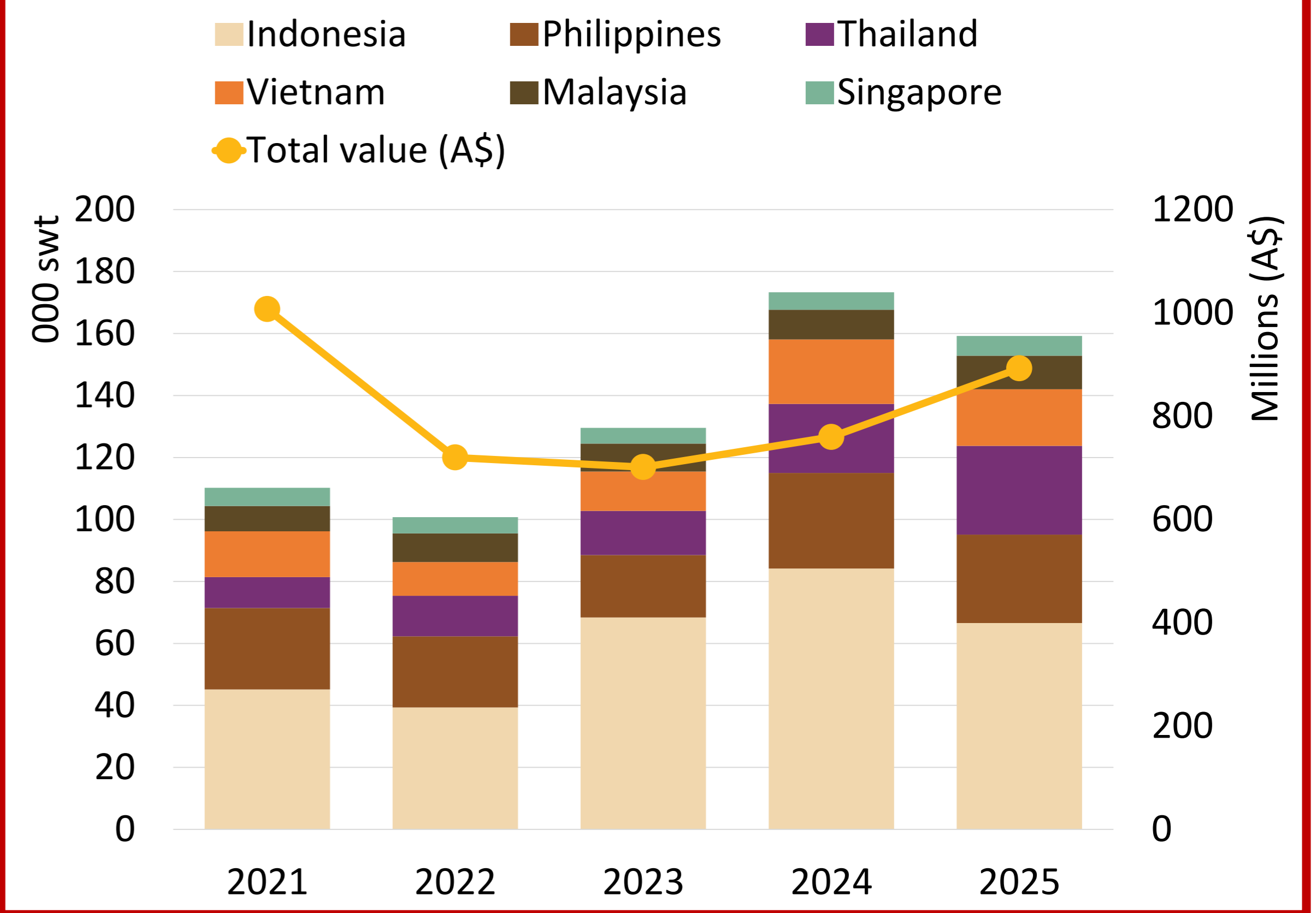
\*cwt = carcase weight

# SEA is Australia's 5<sup>th</sup> largest beef export market, growing 74% in the past 5 years

**Top Australian Beef Export Markets**

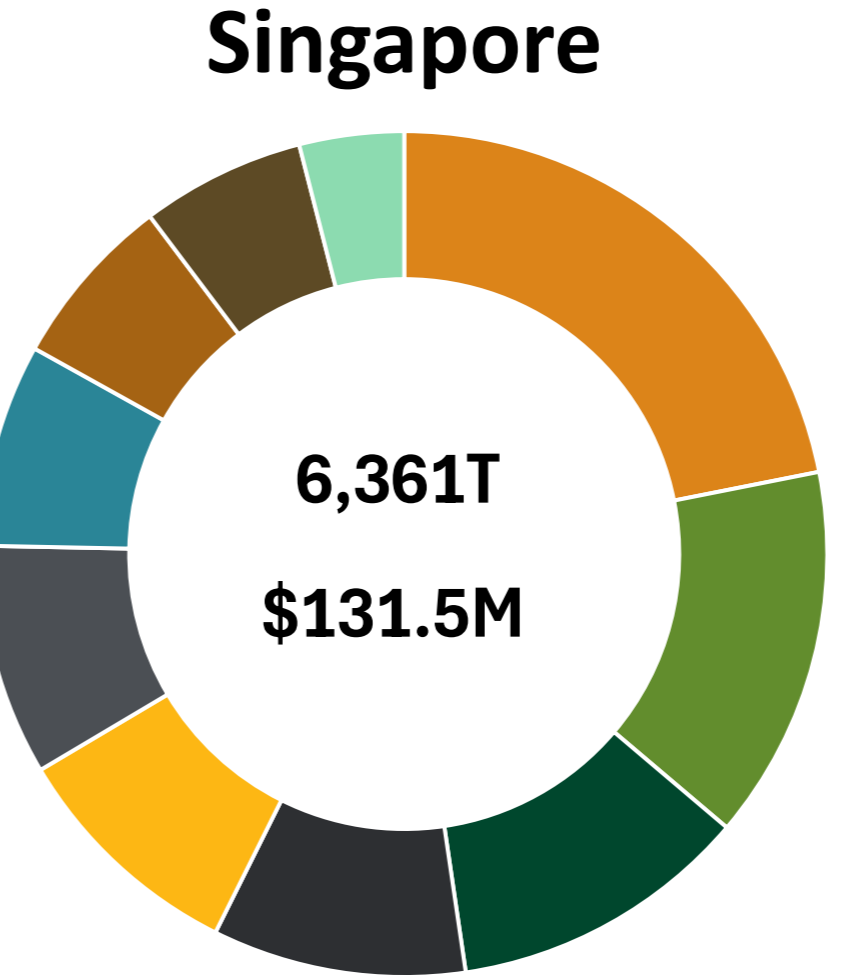
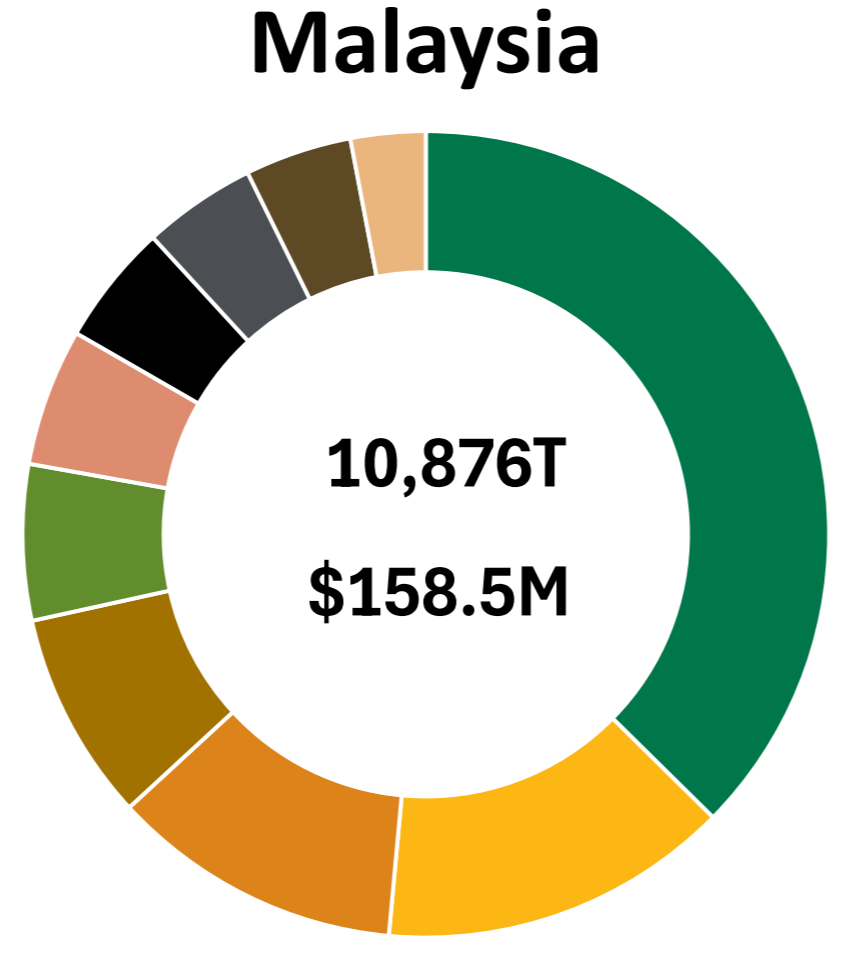
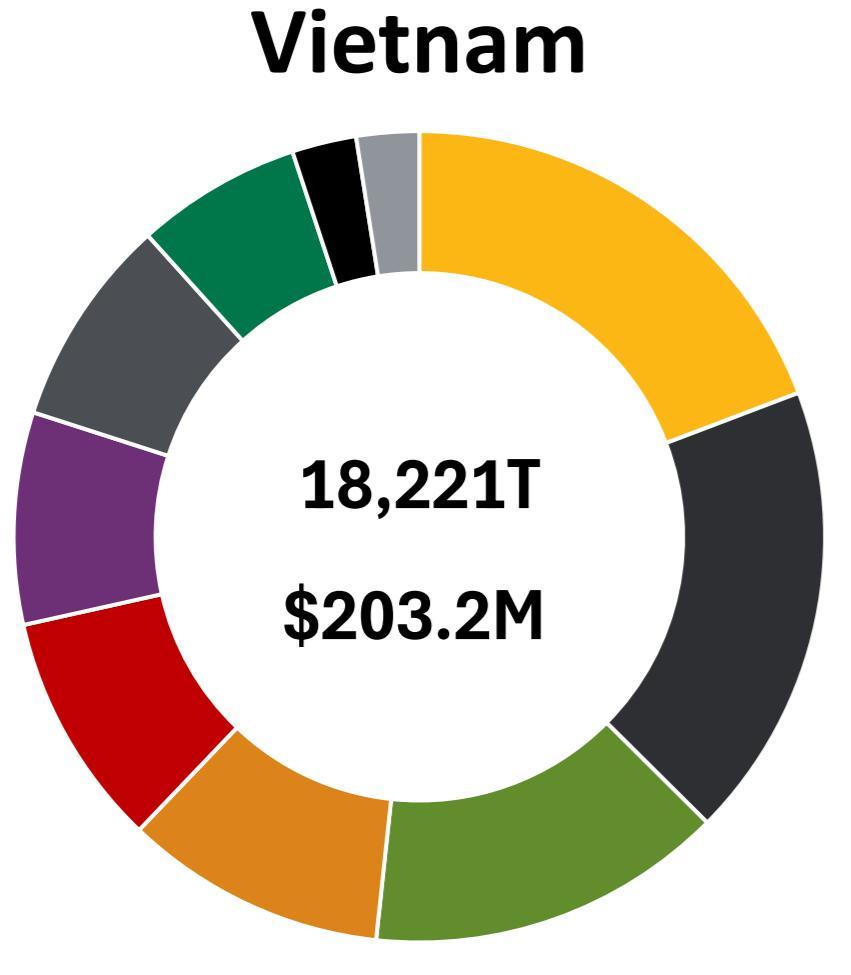
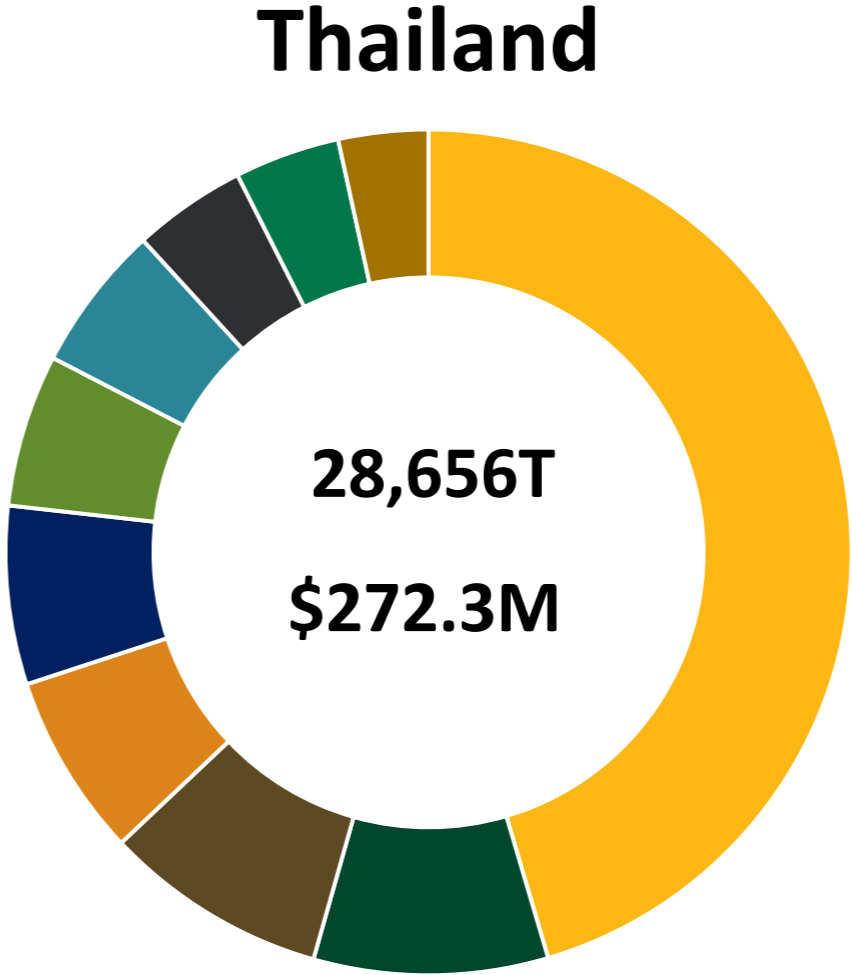
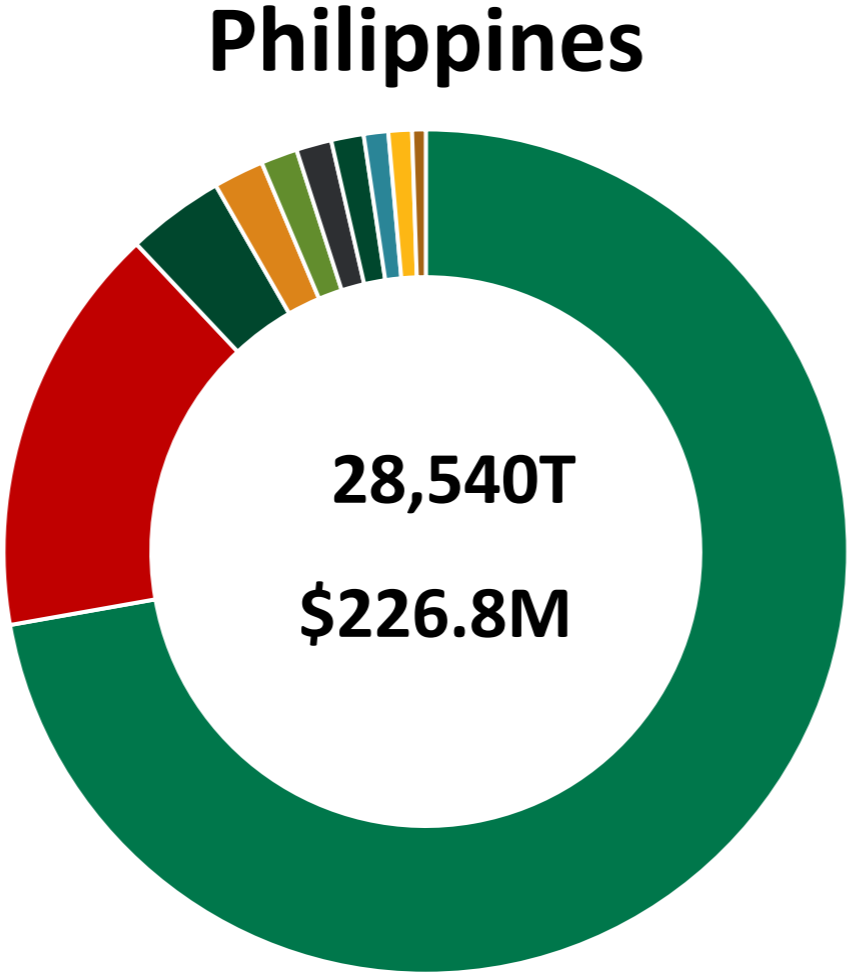
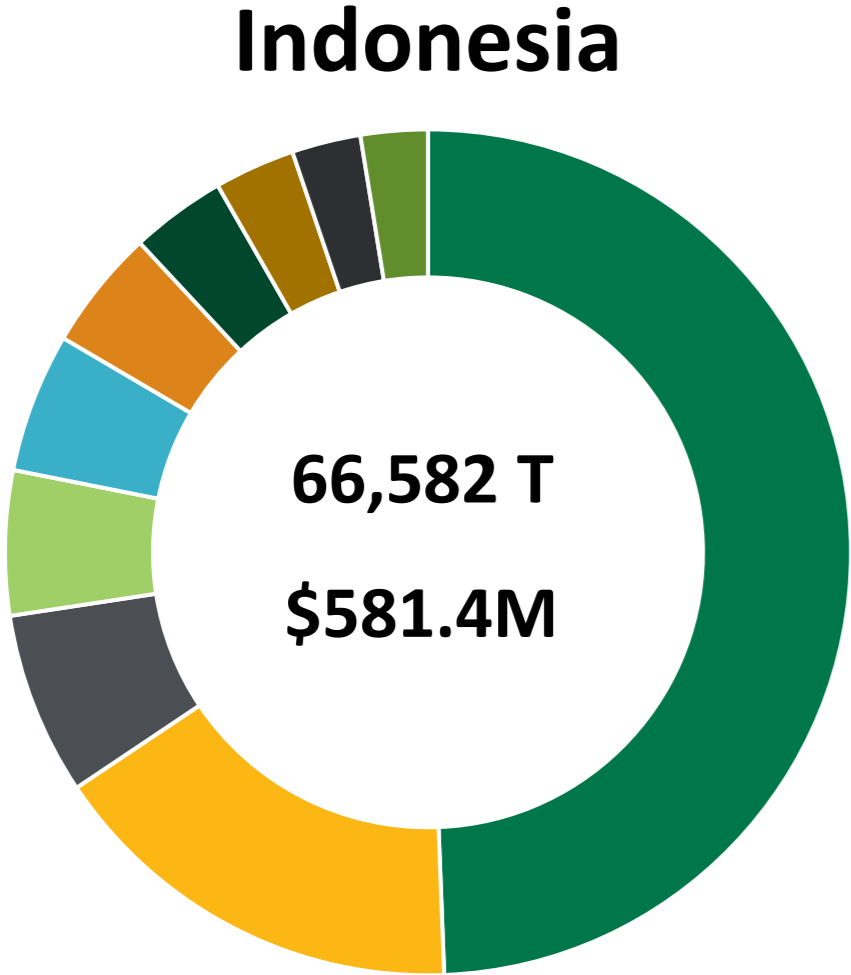


**Australian Beef Export to SEA**



Source: DAFF

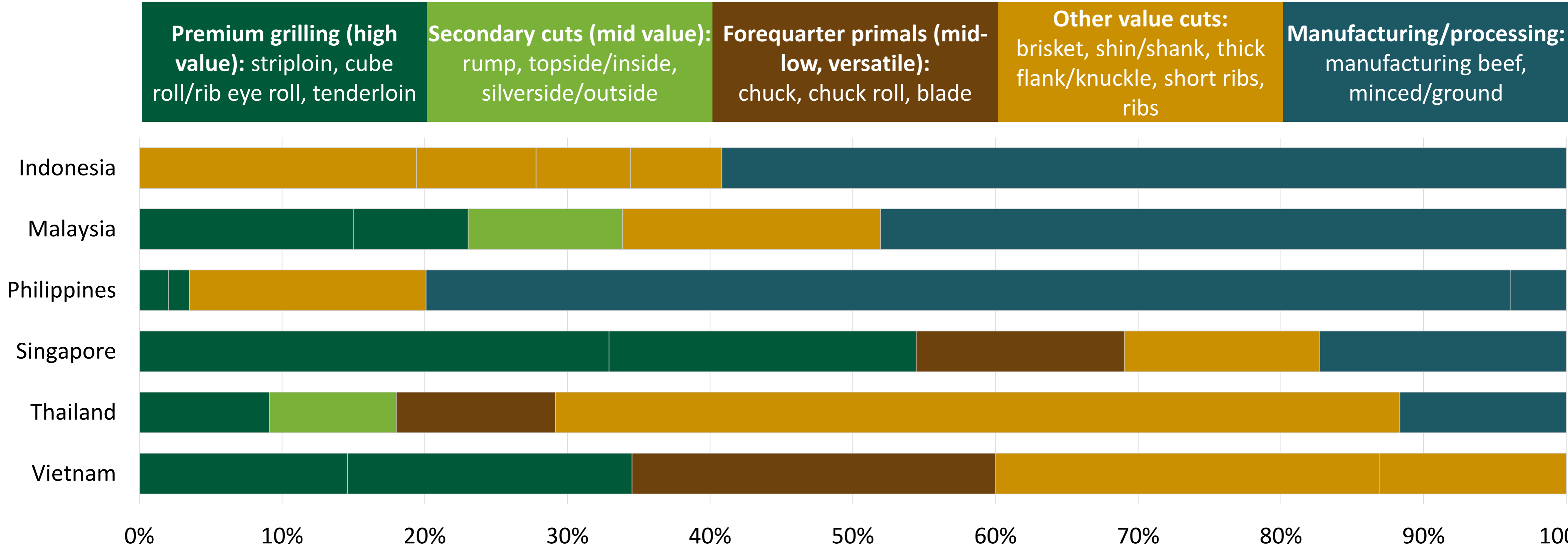
# Top 10 beef cuts by market



Source: DAFF, Trade Data Monitor (TDM), Volume: 2025. Value: 2025

# Beef cut demand across Southeast Asia reflects the diverse market needs with cut mix varying by market

**Top 5 Beef Cuts by Market (% Share of Market Volume)**



Source: DAFF, Trade Data Monitor (TDM), Volume: 2025. Value: 2025

# Beef Cuts Performance in SEA-6 – YTD March 2026

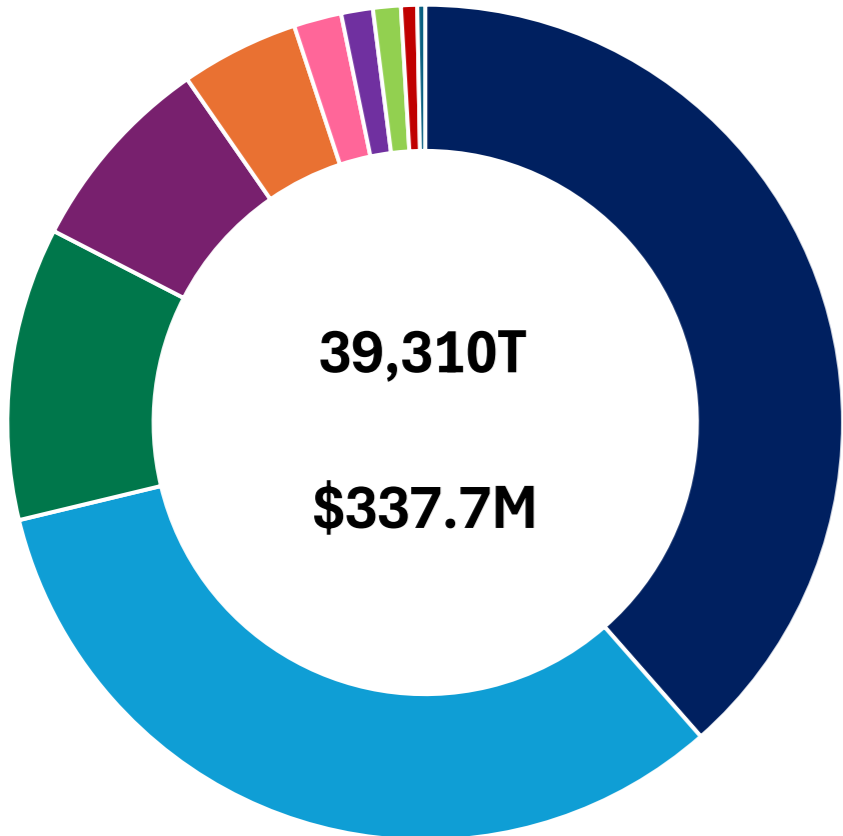
Tonnes	Indonesia			Malaysia			Philippines			Singapore			Thailand			Vietnam			TOTAL
	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	
Manufacturing	4,578	2,327	-49%	862	517	-40%	5,807	5,428	-7%	5	7	27%	113	324	186%	185	40	-79%	20,193
Brisket	1,425	664	-53%	221	544	146%	28	23	-18%	97	193	98%	2,568	2,414	-6%	1,124	1,813	61%	11,111
Striploin	395	126	-68%	248	248	0%	141	128	-9%	241	308	28%	457	543	19%	281	189	-33%	3,303
Other	559	358	-36%	26	31	19%	295	283	-4%	159	174	9%	612	641	5%	86	43	-50%	3,267
Cube Roll/Rib Eye Roll	325	89	-73%	132	135	2%	95	112	18%	151	183	21%	358	342	-5%	588	624	6%	3,135
Shin/Shank	160	6	-96%	13	16	21%	570	1,499	163%	33	31	-7%	43	18	-59%	348	364	5%	3,102
Blade	323	119	-63%	126	127	0%	56	103	86%	95	113	19%	213	296	39%	178	938	428%	2,686
Ribs	601	420	-30%	41	75	81%	1	1	-38%	29	43	47%	187	195	5%	87	288	230%	1,966
Chuck Roll	79	11	-86%	50	147	196%	18	92	421%	48	93	96%	533	644	21%	26	64	144%	1,805
Thick Flank/Knuckle	760	126	-83%	112	88	-21%	9	16	70%	91	110	21%	75	113	51%	182	89	-51%	1,771
Rump	150	76	-49%	52	47	-9%	55	56	2%	104	96	-7%	285	541	90%	59	106	79%	1,627
Short Ribs	459	606	32%	60	121	102%	15	31	111%	18	19	3%	45	35	-23%	46	113	146%	1,568
Topside/Inside	359	134	-63%	198	149	-25%	14	23	65%	34	57	66%	199	240	21%	41	78	93%	1,526
Silverside/Outside	69	47	-32%	71	86	22%	16	28	75%	46	29	-36%	376	660	75%	19	58	203%	1,505
Tenderloin	51	35	-30%	38	35	-7%	52	13	-74%	76	103	36%	283	300	6%	59	81	39%	1,126
Neck	279	251	-10%	85	198	131%	24	4	-82%	1	1	-24%	1	4	577%	0	0	603%	848
Chuck	62	71	15%	13	13	0%	14	24	67%	17	26	48%	90	31	-65%	131	273	109%	766
Intercostals	2	7	251%	8	6	-23%	3	5	60%	8	14	60%	9	33	263%	139	206	48%	440
Ribs Prepared	17	10	-42%	19	36	89%	9	15	64%	49	51	3%	61	53	-13%	14	21	49%	356
Flank Steak	3	3	-18%	7	11	58%	2	4	85%	37	39	4%	28	34	24%	14	13	-3%	196
Thin Flank	23		-100%							1	1	-11%		1		37	15	-61%	78
Skirt	3	1	-61%	4	6	71%	1	1	4%	5	4	-16%	7	12	70%	1	2	188%	47
Knuckle				5	6	27%	0	0	-33%	2	5	124%	1		-100%	0	0	35%	20
Carcase				2	7	246%		0		4	5	32%		0					17
Fullset					0					2	1	-41%							3
Loin	1	1	121%					0					0		-100%				2
Leg										0		-100%							0
Chuck & Blade								0			0								0
Shoulder																	0		0
Shortloin													0						0
Bone in Other										0		-100%							0
<b>TOTAL</b>	<b>10,680</b>	<b>5,488</b>	<b>-49%</b>	<b>2,392</b>	<b>2,648</b>	<b>11%</b>	<b>7,224</b>	<b>7,890</b>	<b>9%</b>	<b>1,356</b>	<b>1,707</b>	<b>26%</b>	<b>6,543</b>	<b>7,474</b>	<b>14%</b>	<b>3,643</b>	<b>5,419</b>	<b>49%</b>	<b>62,465</b>

Source: DAFF, Data is YTD March 2025 vs March 2026

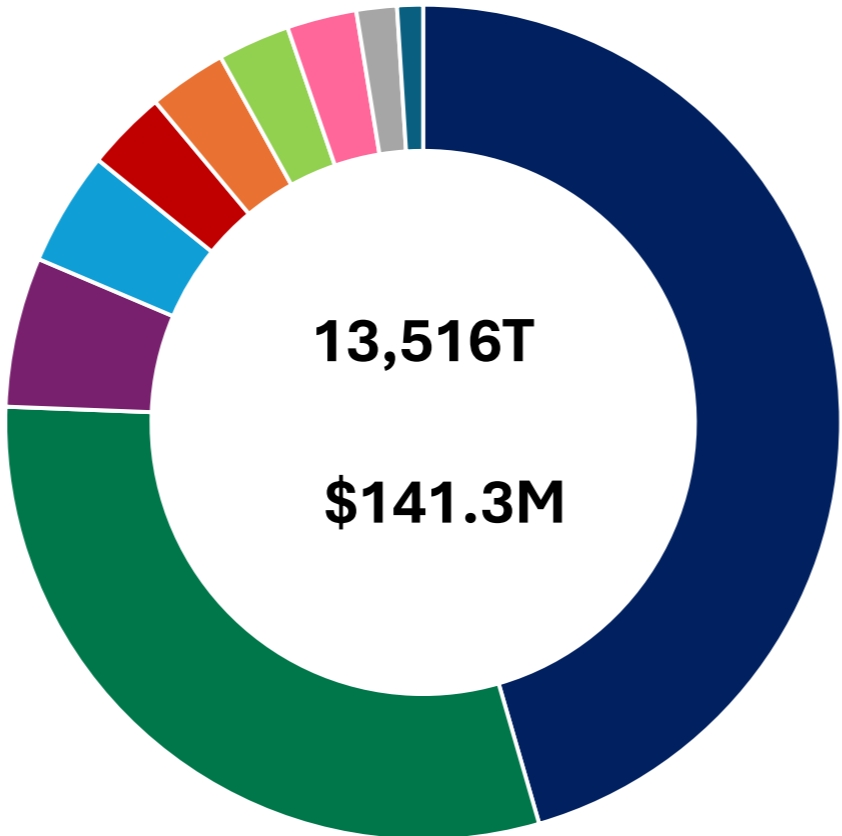
See the most up to date export stats, on [Global Trade Watch](#) on Aussie Meat Trade Hub

# Top 4 sheepmeat cuts by market

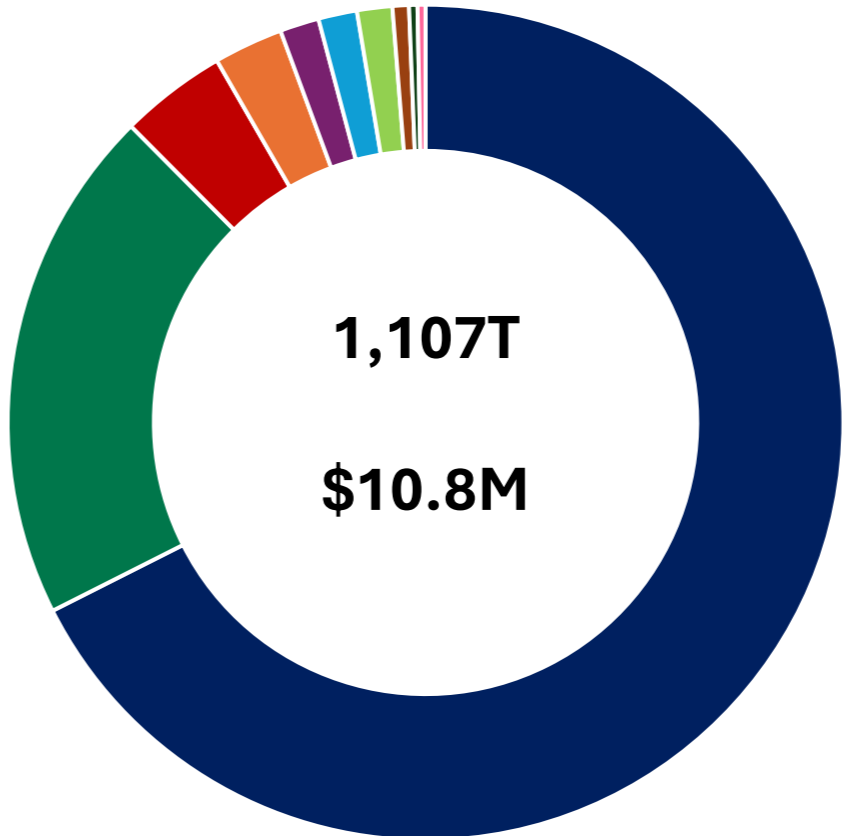
Malaysia



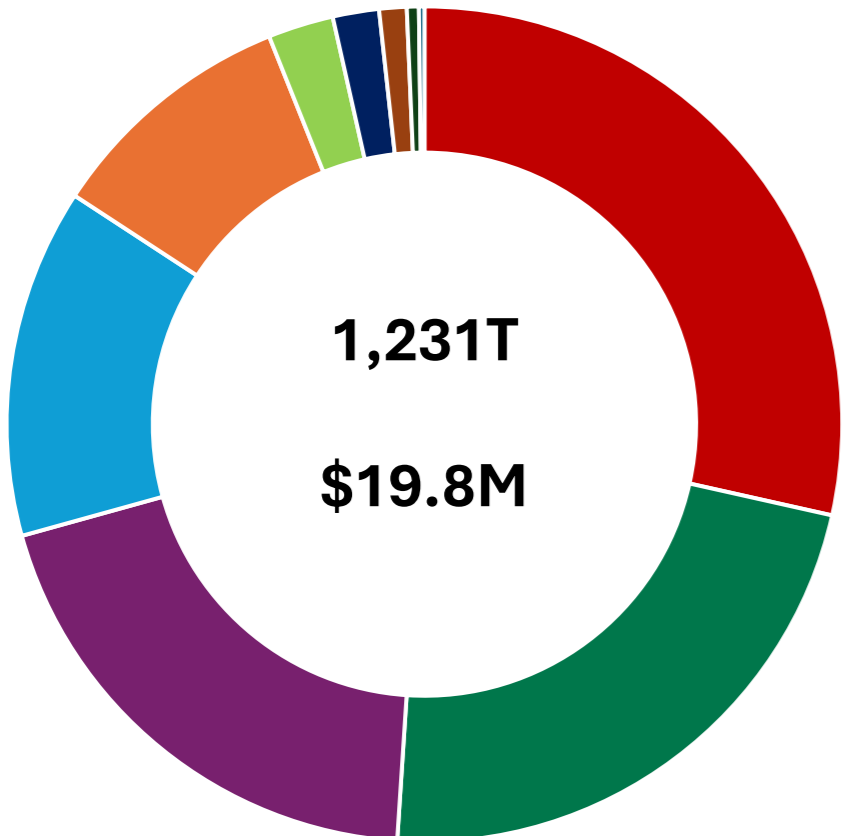
Singapore



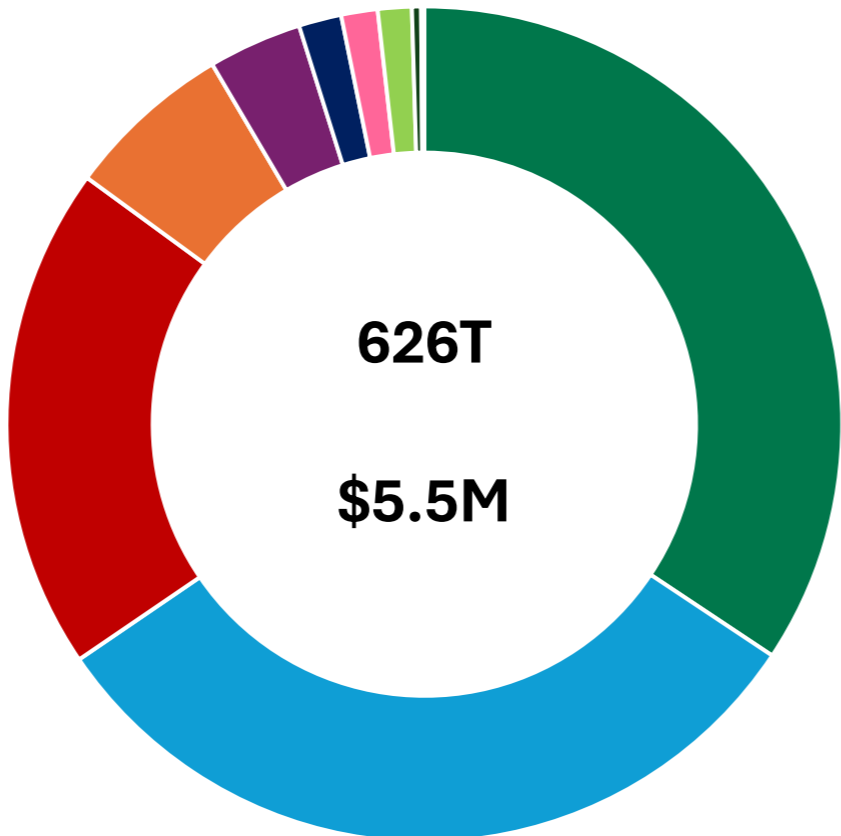
Indonesia



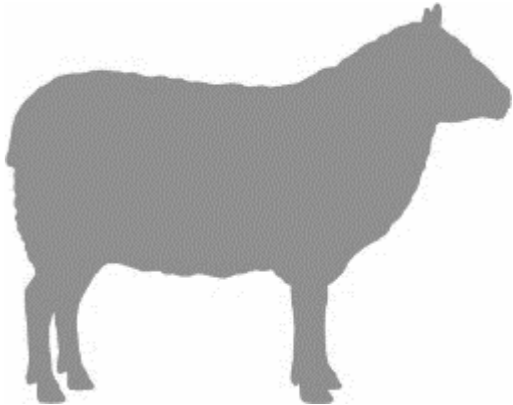
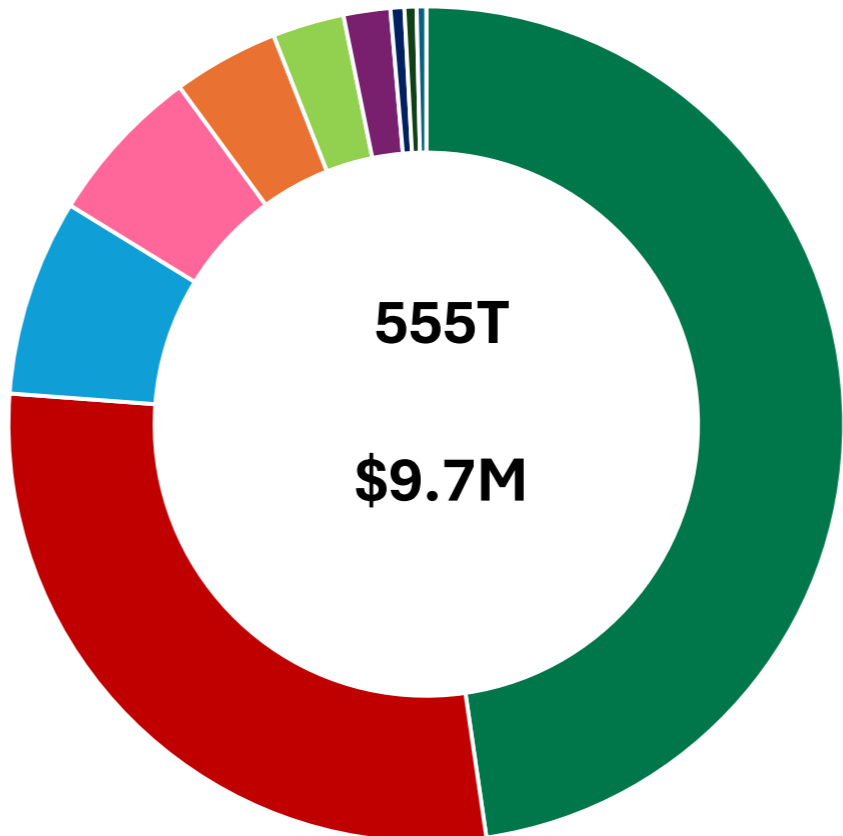
Thailand



Philippines



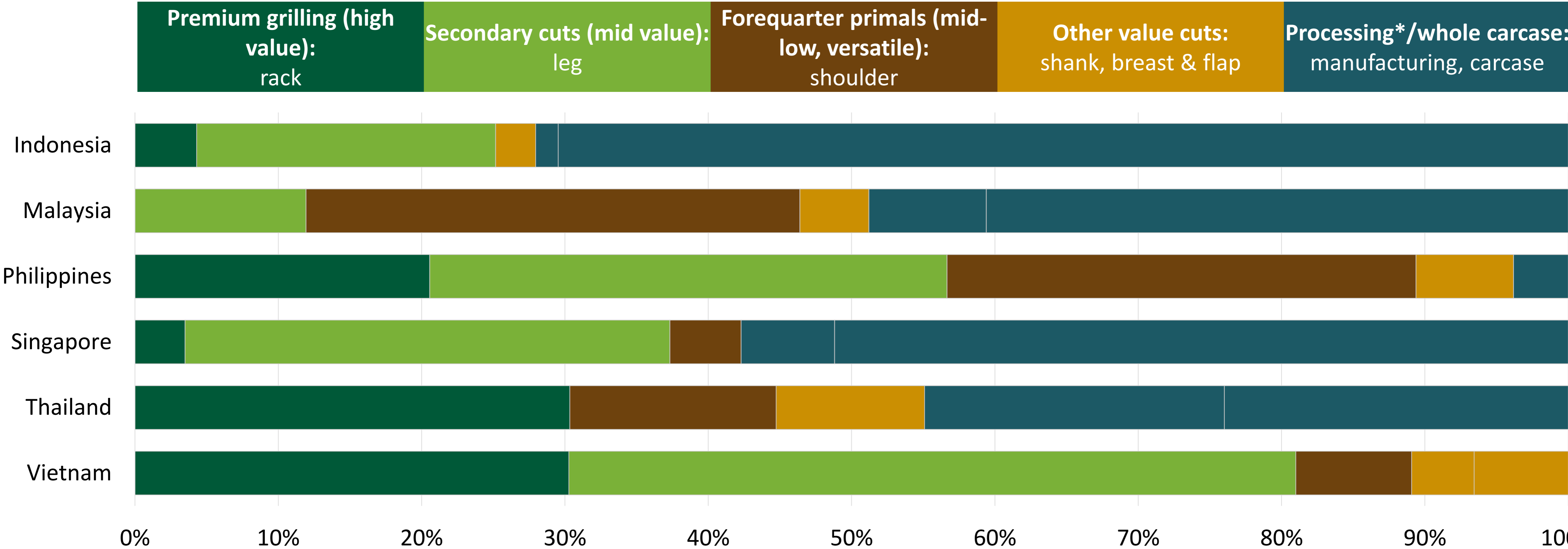
Vietnam



Source: DAFF, Trade Data Monitor (TDM), Volume: 2025. Value: 2025

# Sheepmeat demand is more value-led across Southeast Asia with selective premium demand

Top 5 Sheepmeat Cuts by Market (% Share of Market Volume)



Source: DAFF, Trade Data Monitor (TDM), Volume: 2025. Value: 2025, \*Manufacturing reflects import trade classifications and may include partially processed product, which varies by market

# Sheepmeat Cuts Performance in SEA-6 – YTD March 2026

Tonnes	Indonesia			Malaysia			Philippines			Singapore			Thailand			Vietnam			TOTAL
	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	2025	2026	% Change	
Carcase	237		-100%	4,195	3,128	-25%	1	1	23%	1,140	1,064	-7%	12	14	19%				9,791
Shoulder	22		-100%	4,219	3,598	-15%	51	59	15%	141	162	15%	28	109	294%	8	8	-6%	8,401
Leg	316	15	-95%	1,391	1,348	-3%	58	53	-10%	977	888	-9%	50	127	153%	43	80	87%	5,346
Manufacturing	13		-100%	964	634	-34%	12	2	-82%	227	194	-15%	30	44	48%	0		-100%	2,122
Shank	29		-100%	369	451	22%	5	12	143%	118	190	60%	26	62	138%	4	7	49%	1,273
Rack	45		-100%	45	70	55%	20	30	47%	106	133	26%	71	163	129%	23	41	75%	748
Breast & flap		10		164	192	17%	2	1	-38%	51	97	90%	2	1	-40%		11		531
Neck	1		-100%	111	251	125%	0		-100%	52	58	11%		0					474
Shortloin	11		-100%	132	113	-14%	3	1	-85%	18	128	619%	7	21	191%	0	3	840%	438
Bone-in Loin				120	5	-96%				36	2	-94%		0					164
Chump				53	37	-30%	4	4	-12%	2	3	52%	3	5	100%		0		110
Other				3		-100%				18	70	283%							91
Backstrap				29	3	-90%				40	1	-96%	0	1	217%				74
Ribs					8		5	1	-67%	7	10	45%	1	1	31%				33
Forequarter								0		4		-100%		7		2	2	-4%	14
Boneless Loin				1	1	40%	0	0	-1%	1	3	111%	1	3	95%	0		-100%	11
Striploin											0								0
Loin										0		-100%							0
<b>TOTAL</b>	<b>674</b>	<b>25</b>	<b>-96%</b>	<b>11,796</b>	<b>9,838</b>	<b>-17%</b>	<b>161</b>	<b>163</b>	<b>1%</b>	<b>2,939</b>	<b>3,003</b>	<b>2%</b>	<b>230</b>	<b>557</b>	<b>142%</b>	<b>82</b>	<b>152</b>	<b>85%</b>	<b>29,621</b>

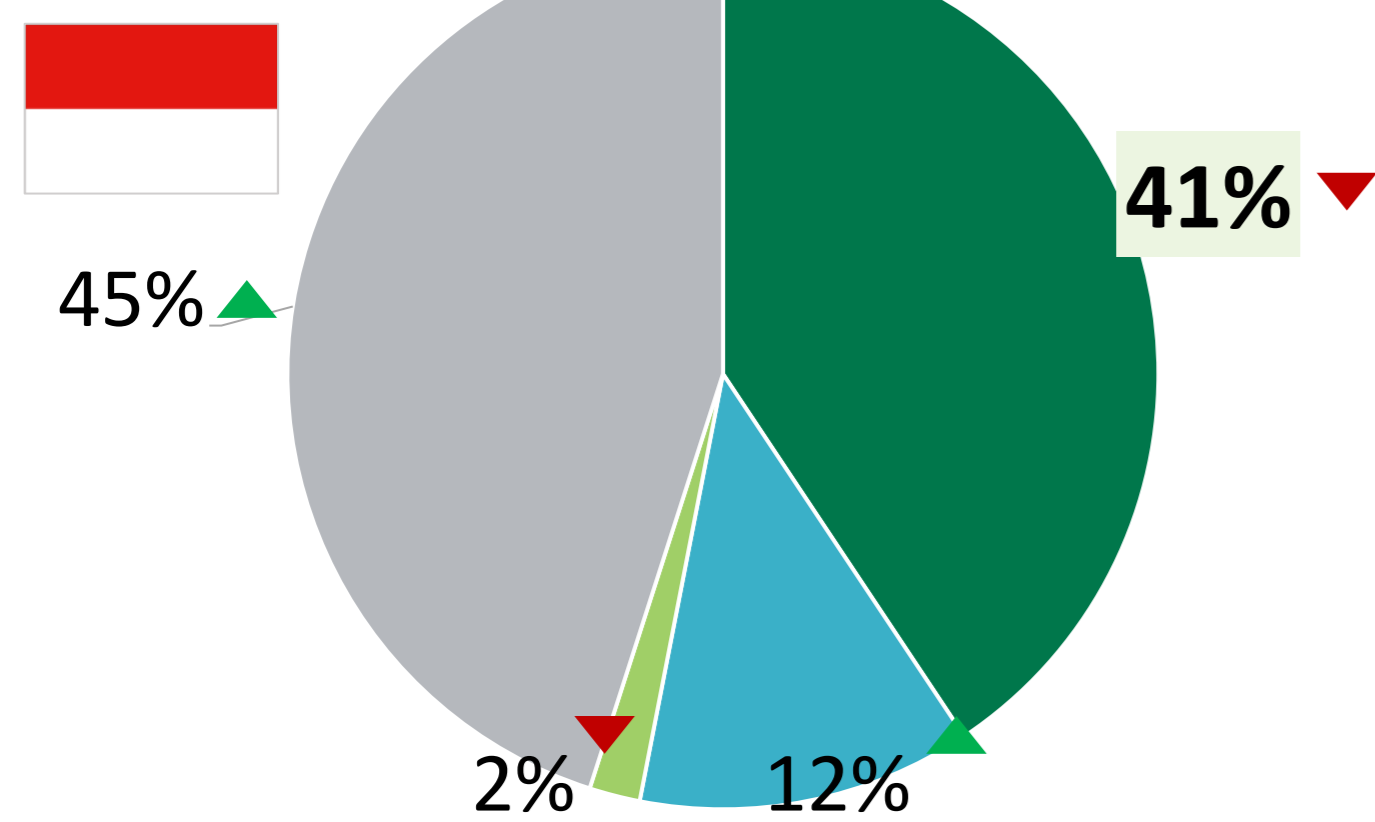


See the most up to date export stats, on [Global Trade Watch](#) on Aussie Meat Trade Hub

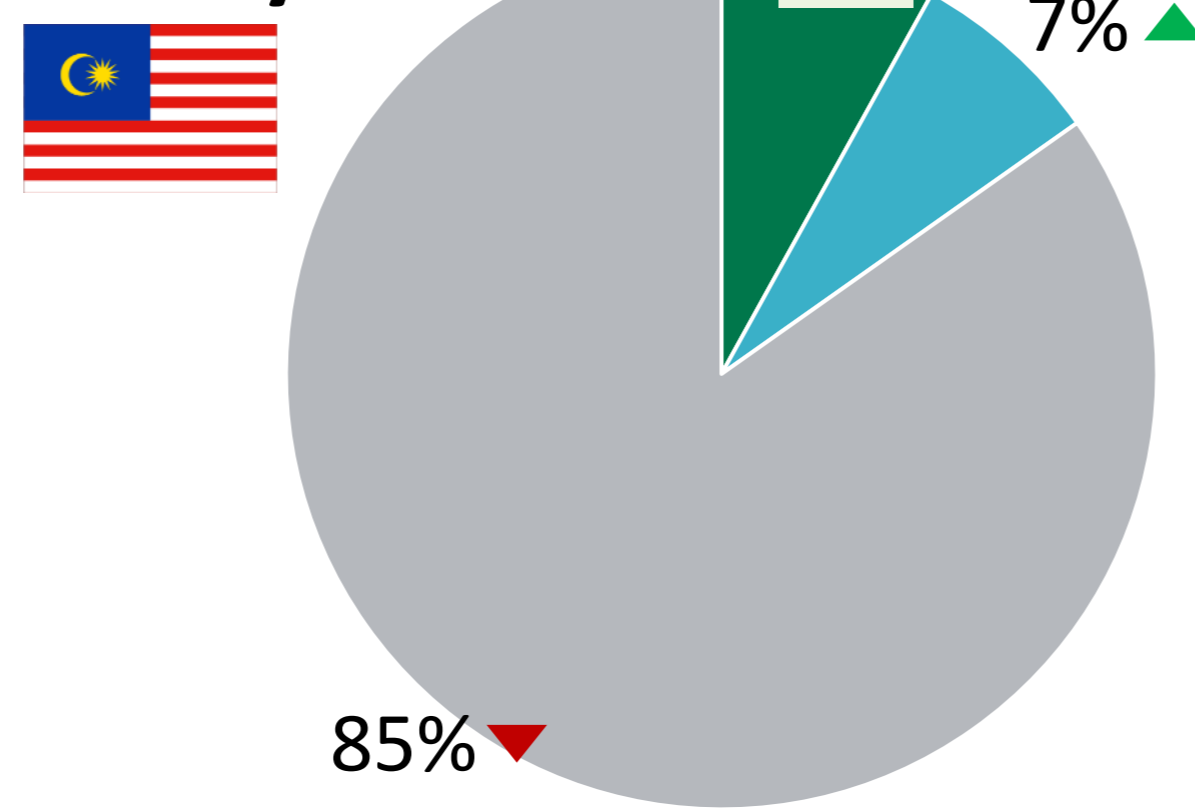
# Australia's competes within SEA's diverse supplier mix

## SEA beef imports by import country, 2025

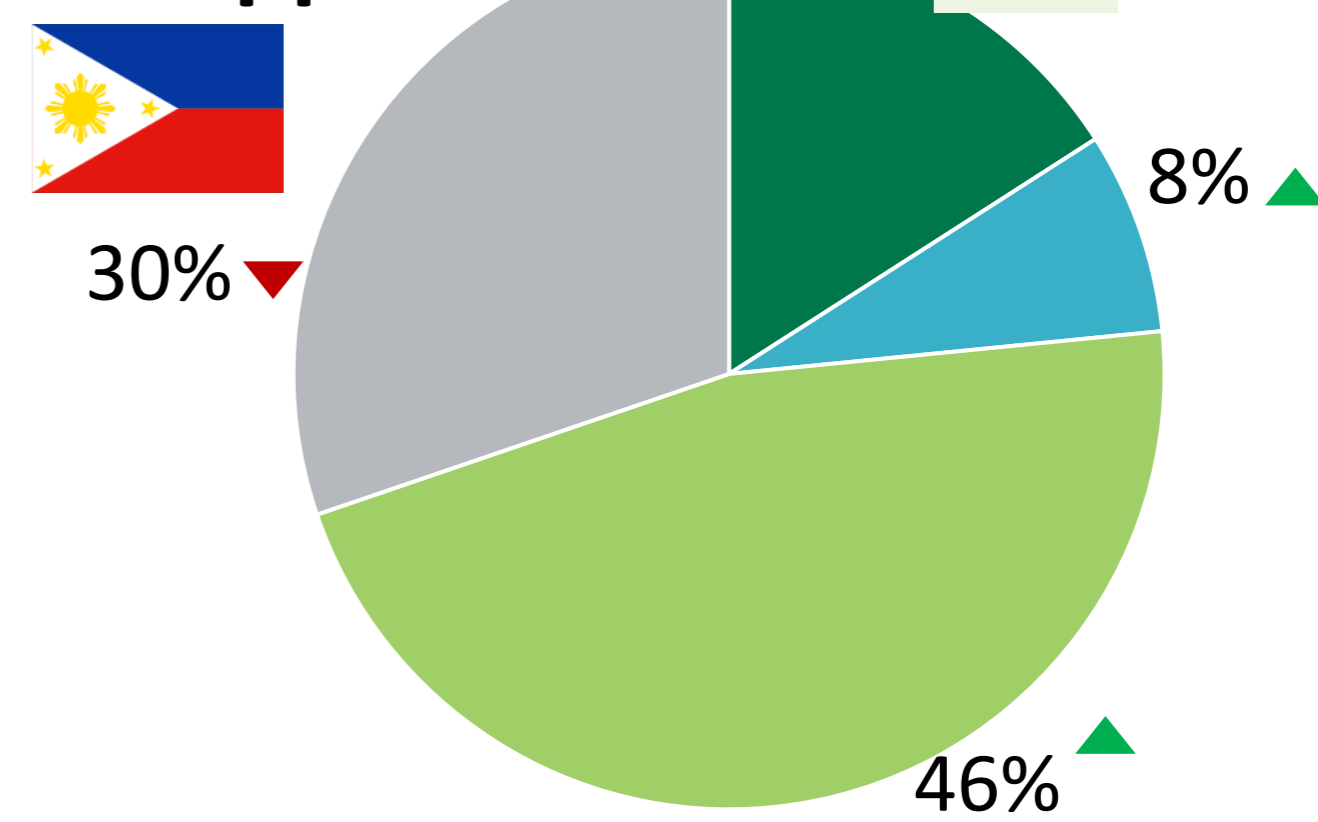
### Indonesia



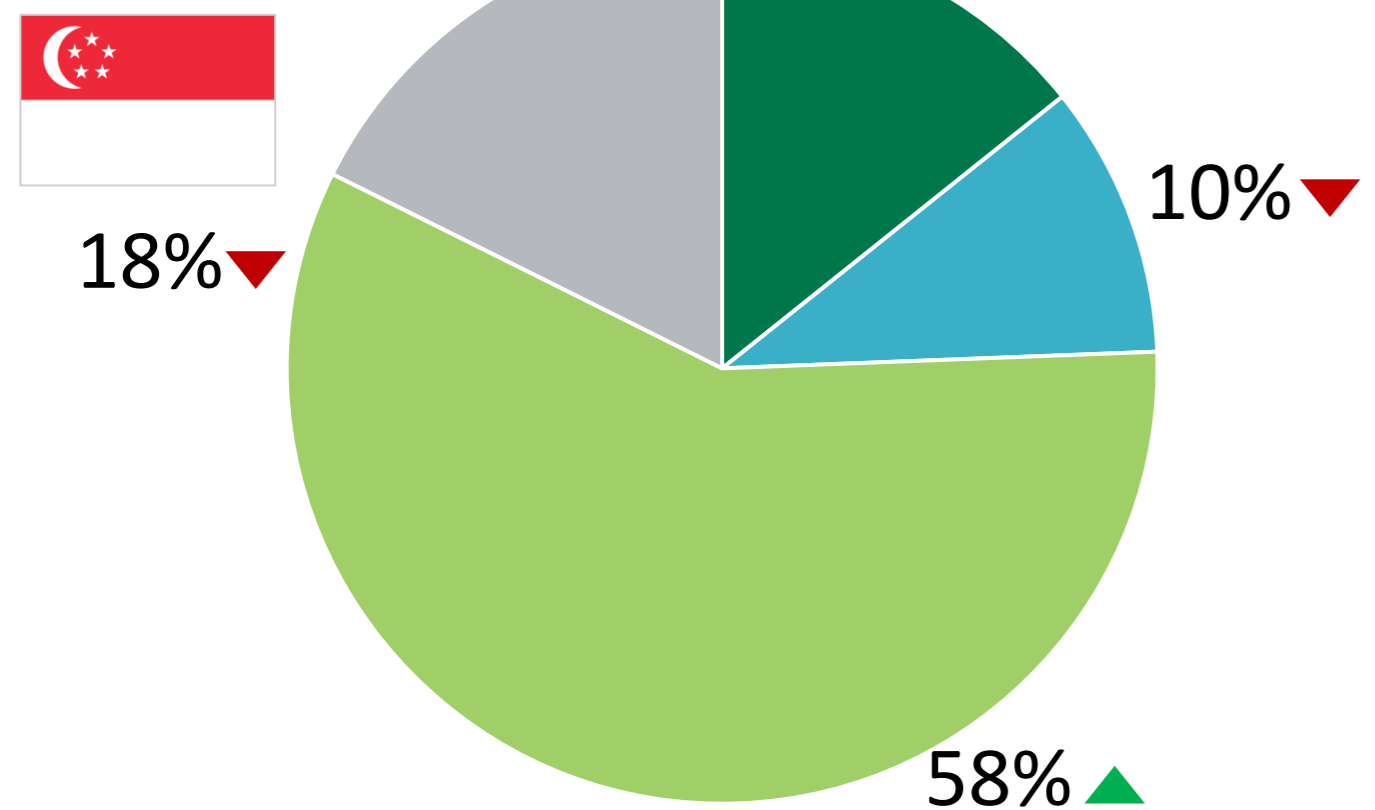
### Malaysia



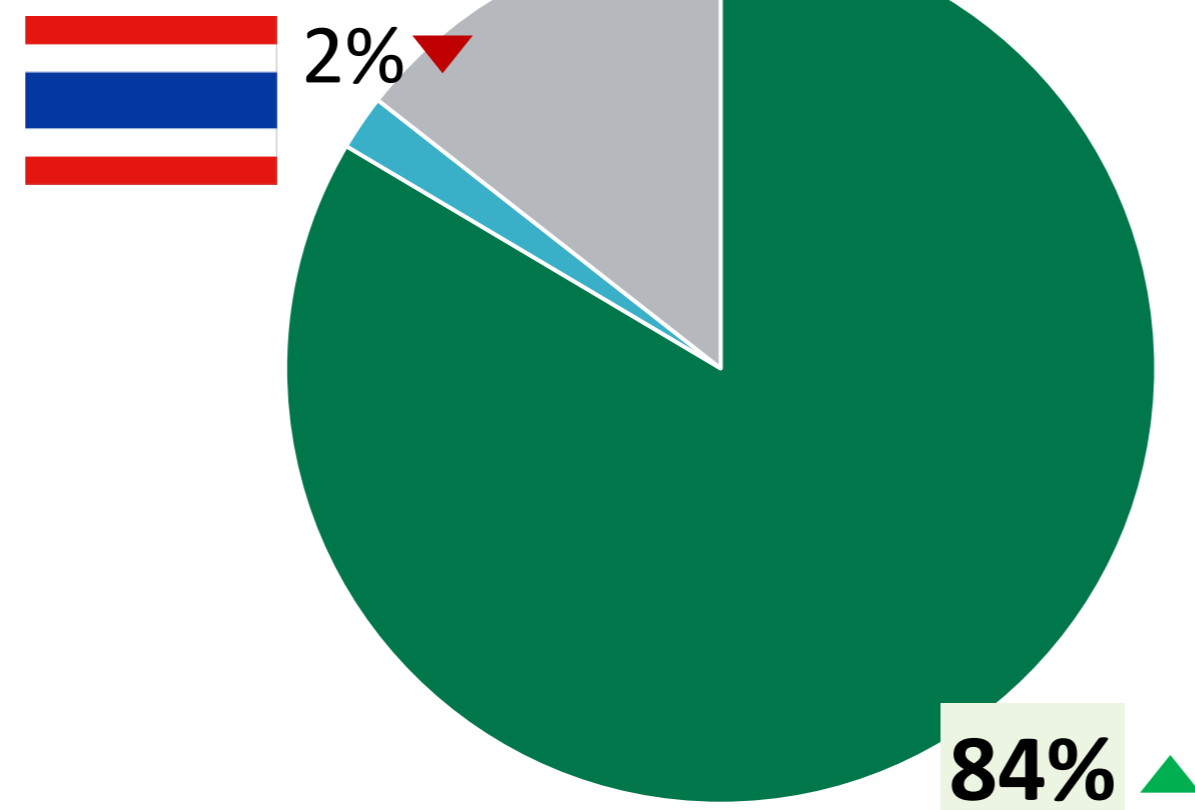
### Philippines



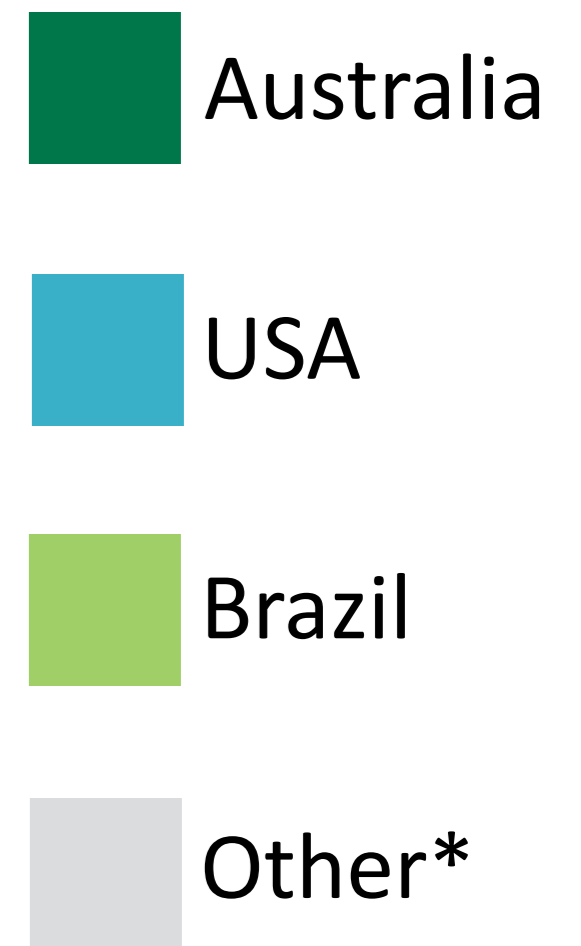
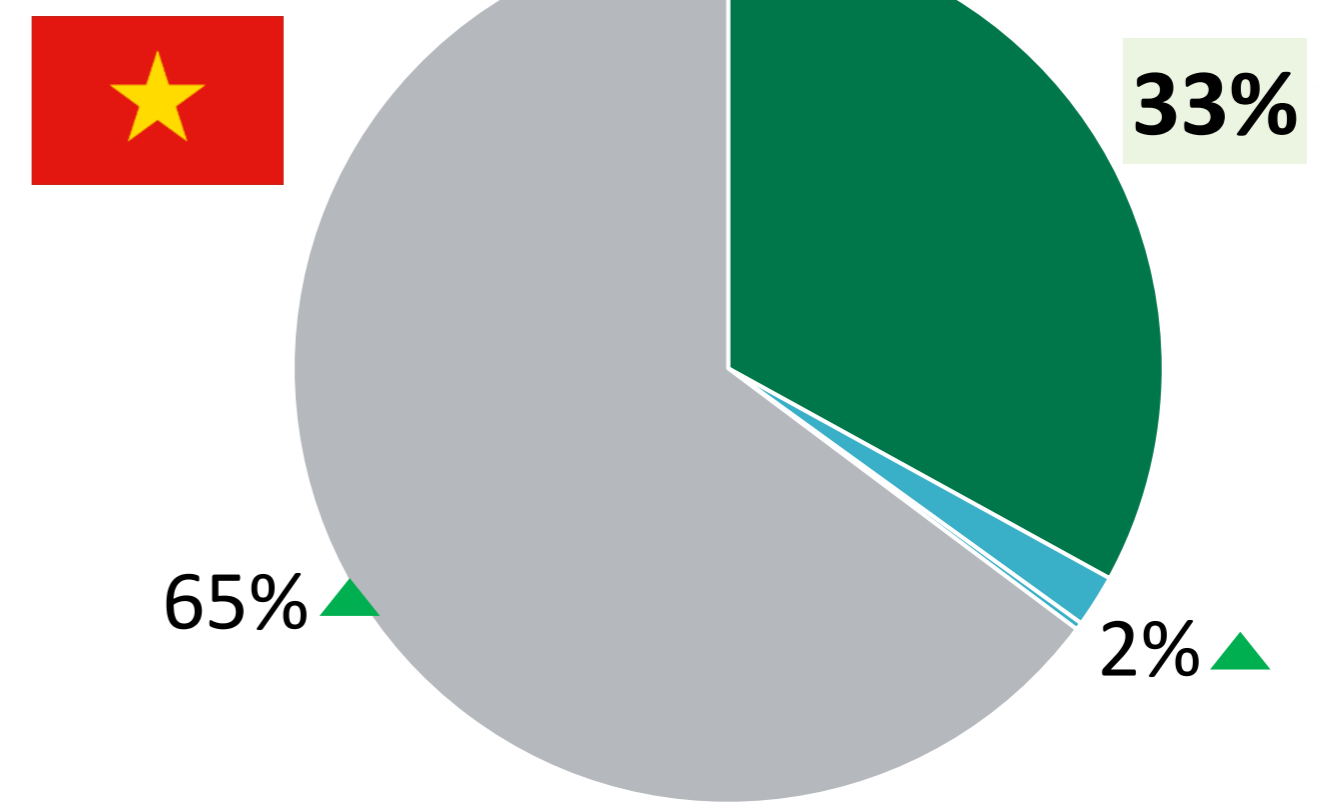
### Singapore



### Thailand









### Vietnam



Source: TDM, \*Indonesia Other = India (43%)/ NZ (2%), Malaysia Other = India (82%) / Argentina (1%) / NZ (1%), Philippines Others = India (21%) / NZ (4%), Singapore Others = India (8%) / NZ (3%), Thailand Others = NZ (10%) / Japan (3%) / Argentina (2%), Vietnam Others = India (40%) / Argentina (1%) / NZ (1%), Red/green arrows represent share movement vs 2024

# Structural demand drivers continue to support red meat demand in SEA

Economic + Demographic	Foodservice + Tourism	Consumer Expectations
 <p>Young, increasingly educated and urban population</p>  <p>Rising disposable incomes, growing middle class*</p>	 <p>Dining out is strong in SEA, embedded in social culture</p>  <p>Tourism rebounding, driving demand for a range of dining</p>	 <p>Demand for wide range of food experiences</p>  <p>Trusted, safe and halal influence willingness to pay</p>

Source: GIRA 2025, Fitch, \* households earning \$US 35,000 annual disposable income, GlobalData, MLA Traceability in Southeast Asia 2024 (conducted under DAFF grant)

# Health and protein trends reinforce quality perceptions

**61%**

of consumers globally are **increasing** their **protein** intake<sup>1</sup>

**74%**

say **eating meat** is **important** in their diet<sup>1</sup>

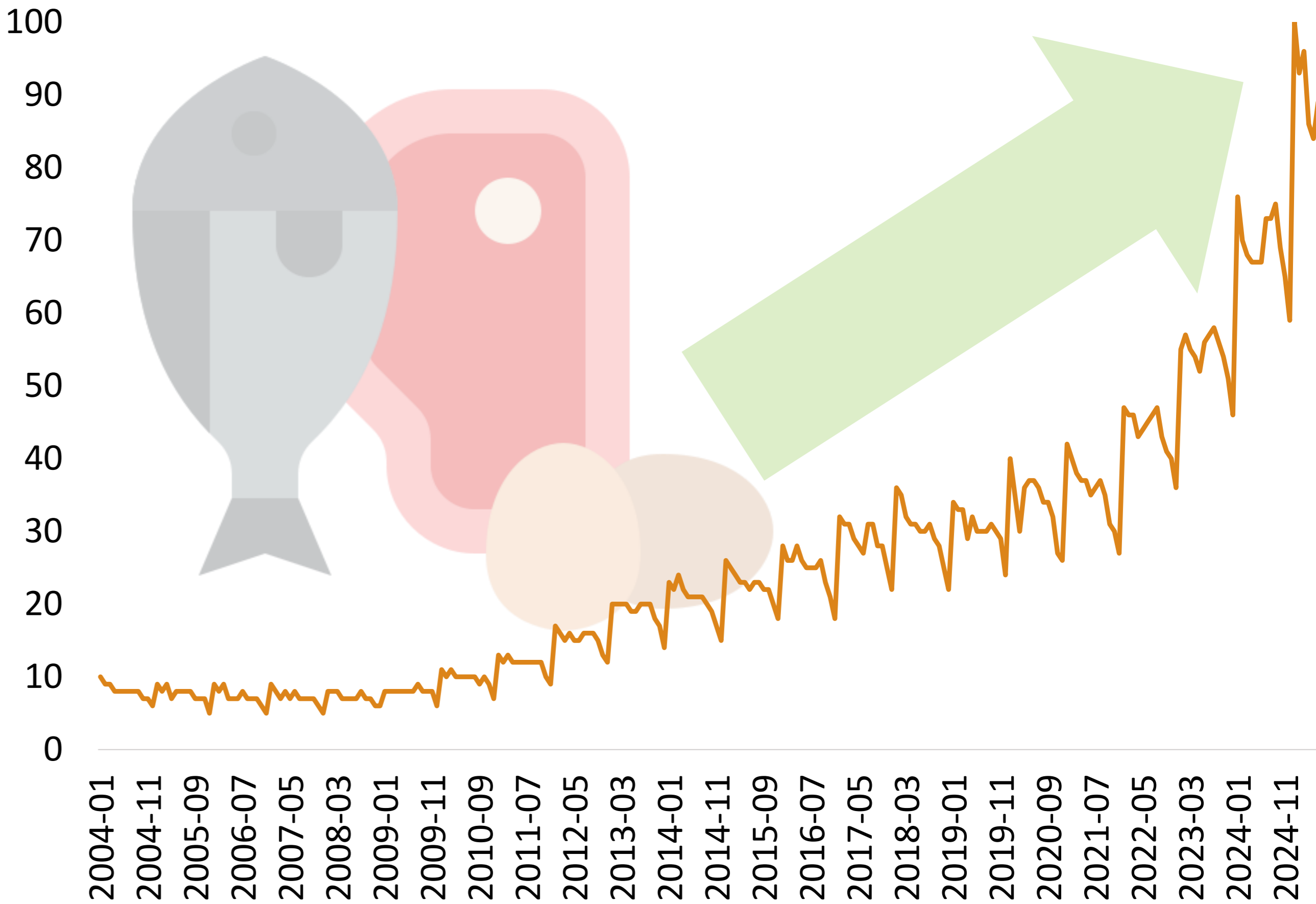
**30%**

of the global population have **iron deficiency**<sup>2</sup>

**+30%**

**more** paid among SEA consumers for **trusted meat**<sup>3</sup>

### Interest in 'Protein' in health and food/beverages



Source: <sup>1</sup>Cargill The Protein Profile 2025, <sup>2</sup>Aussie Red Meat Nutrition Deep Dive 2025, <sup>3</sup>SEA Traceability Study 2024, Google Trends, based on Google searches up to June 2025, The score is indexed from 0 to 100, with 100 representing the peak popularity for a given term within the specified time and location.

# While price matters, quality and country of origin are also important drivers of beef choice



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

- 1 Quality
- 2 Freshness
- 3 Country or origin
- 4 Intended usage
- 5 Price



**Most important factors when choosing beef out of home**

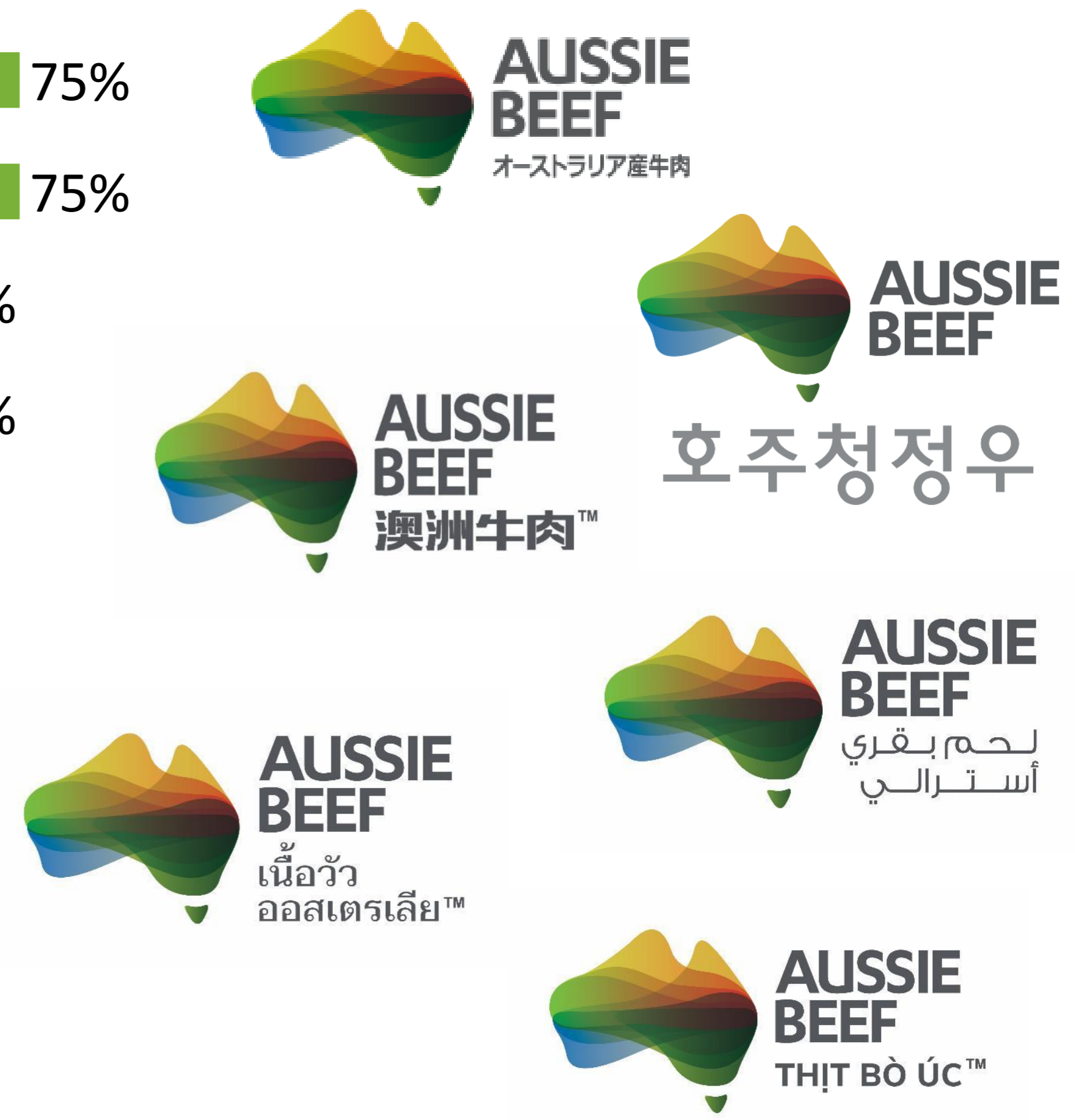
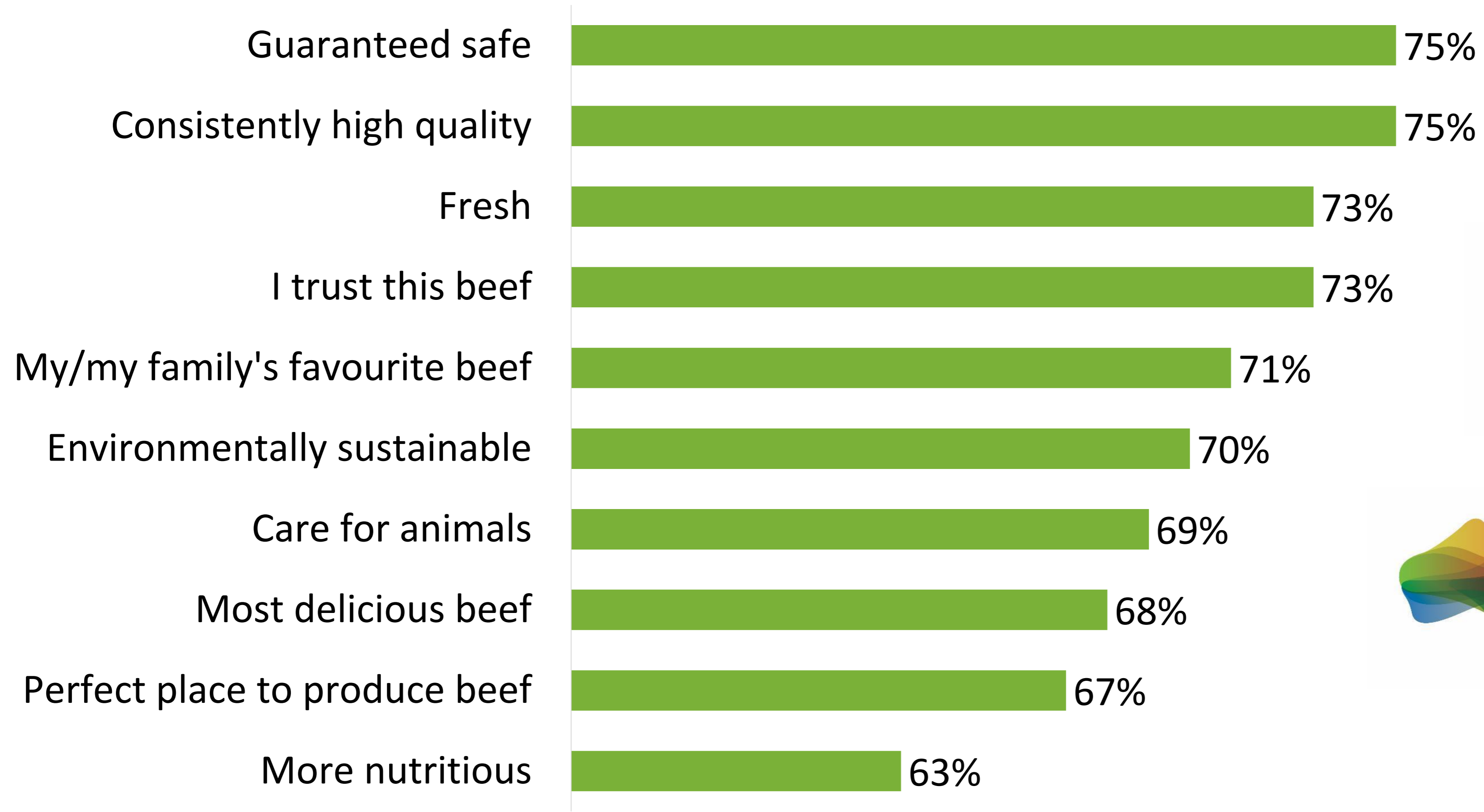


- 1 Restaurant reputation
- 2 Value
- 3 Dish variety
- 4 Country of origin
- 5 Reviews

Source: 2024 MLA research into consumer purchase decision drivers for imported red meat in South-East Asia, conducted under the DAFF grant "Building Trust in Australian Agricultural Traceability and Credentials in Southeast Asia"

# Aussie Beef stands for safety, quality, freshness and trust

## Associations with the Aussie Beef logo



Source: MLA Global Tracker 2024. Average of 6 markets: USA, the UAE, China, South Korea, Japan, Indonesia.  
 Question: Which of the following statements apply to Aussie Beef?

# Curated premium and volume concepts in Singapore



Open fire and theatre, secondary cuts elevated at **Burnt Ends**



Premium retail segment at **FairPrice Finest**



Premium Japanese BBQ chain, **Gyukaku** (across SEA)



Large format sharing cuts at **Meadsmoore**



Provenance driven storytelling at **Little Farms**



Fine-casual Filipino fare at **Hayop**

Source: Burnt Ends, Meadsmoore, FairPrice Finest, Little Farms, Gyukaku, Hayop

# Casual and social dining formats driving red meat demand in SEA



**Haidilao** is a world-renowned Sichuan hot pot chain



**Yakiniku Like**, Japanese BBQ chain specialising in solo dining



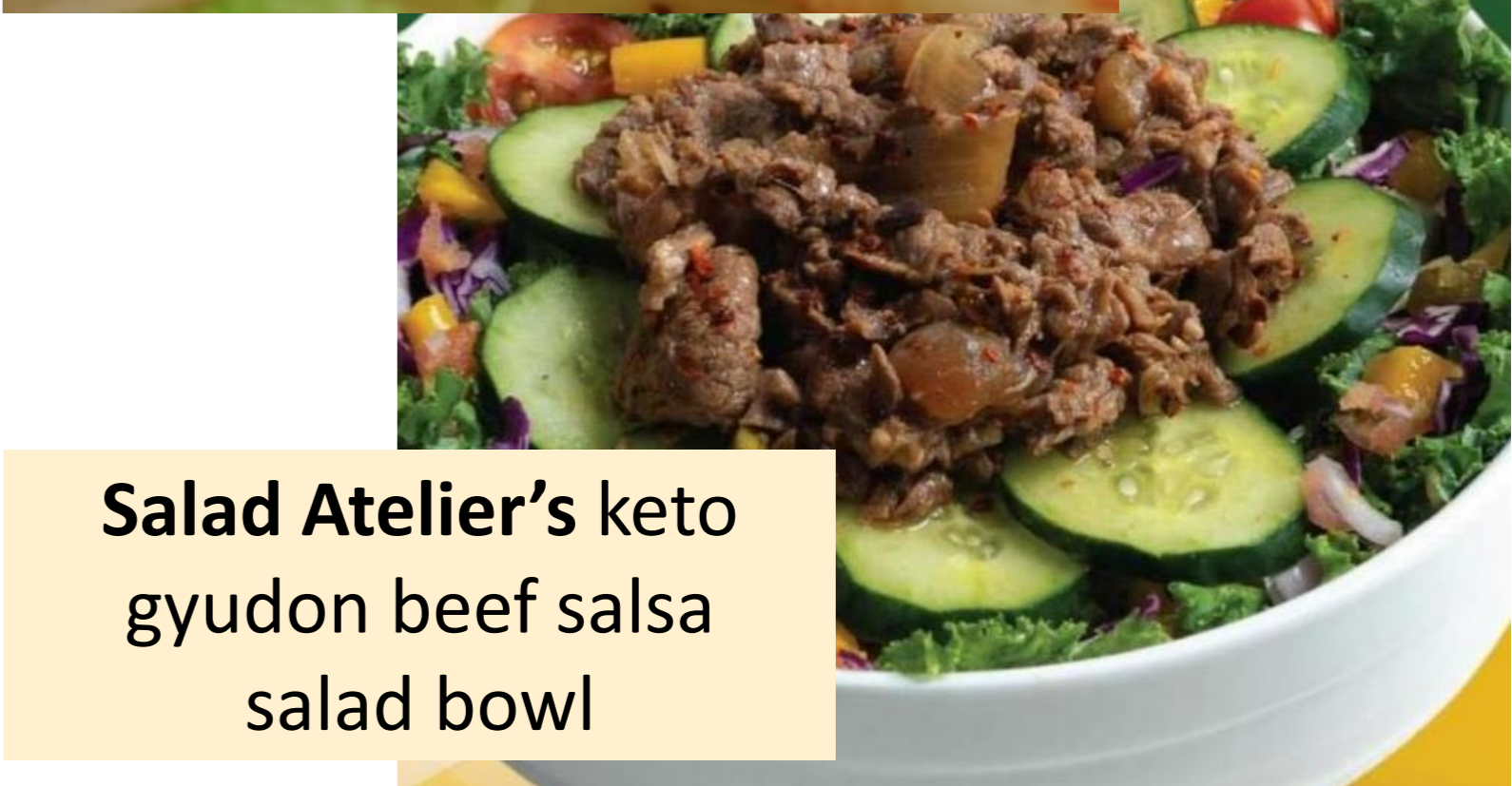
**Grainly's** viral slim toast + protein packed sous vide beef slices



**MK Restaurants**, a chain specialising Thai style suki (hot pot)



**GoGi House**, Korean BBQ chain focused on authenticity + quality



**Salad Atelier's** keto gyudon beef salsa salad bowl

Source: Haidilao (across SEA), MK Restaurants (Thailand), Yakinuki Like (across SEA), GoGi House (Vietnam), Grainly (Indonesia), Salad Atelier (Kuala Lumpur)

# Key Takeaways



**Strong Australian supply supports export growth amid rising competition**



**SEA offers diverse opportunities across products and channels**



**Red meat demand is supported by structural drivers across the region**



**Trust and consistency remain key advantage of Australian beef and lamb**

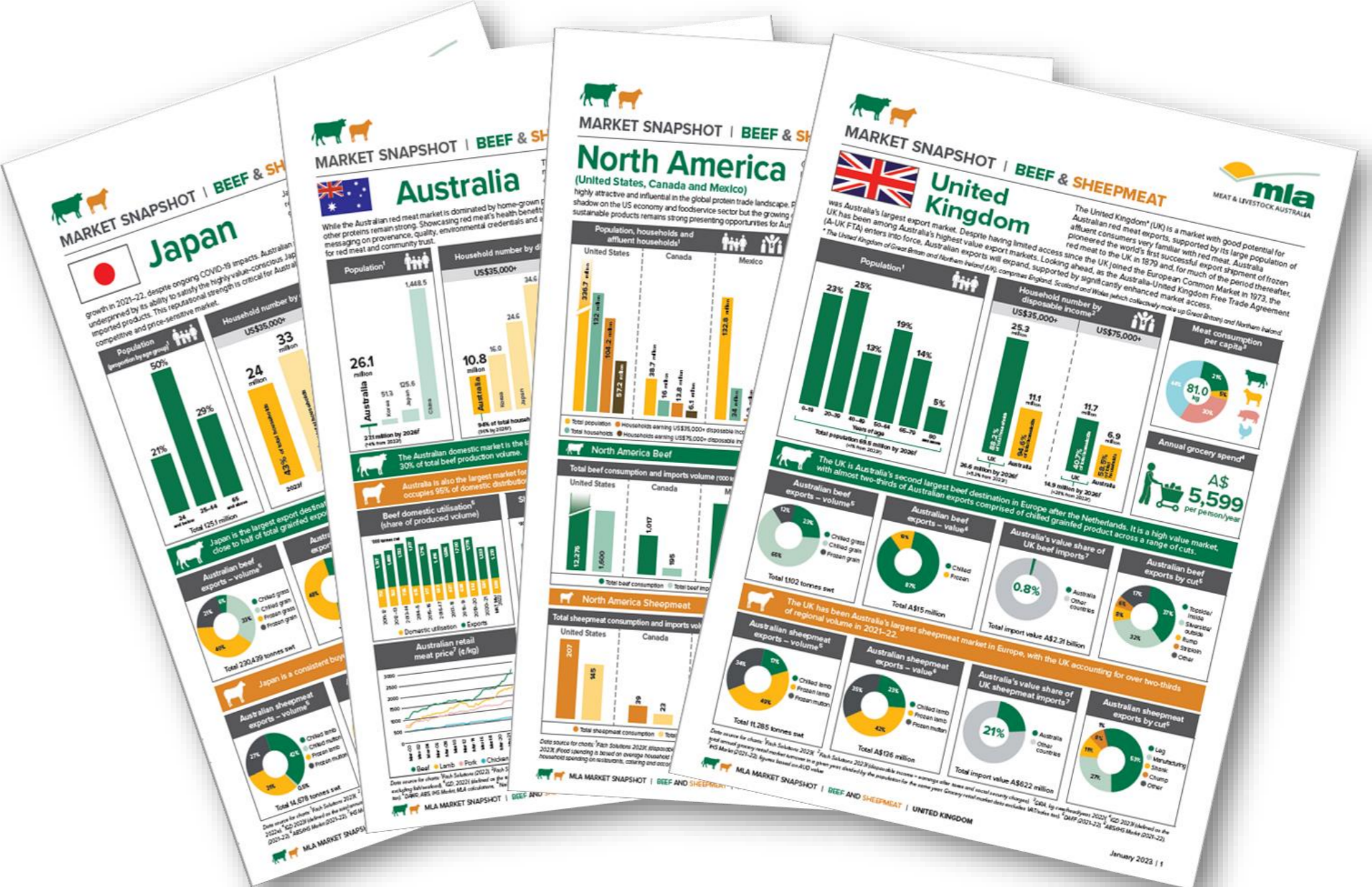
# Insights Tools & Resources: MLA website (*mla.com.au*)

Price & Markets > Overseas Market Data & Insights

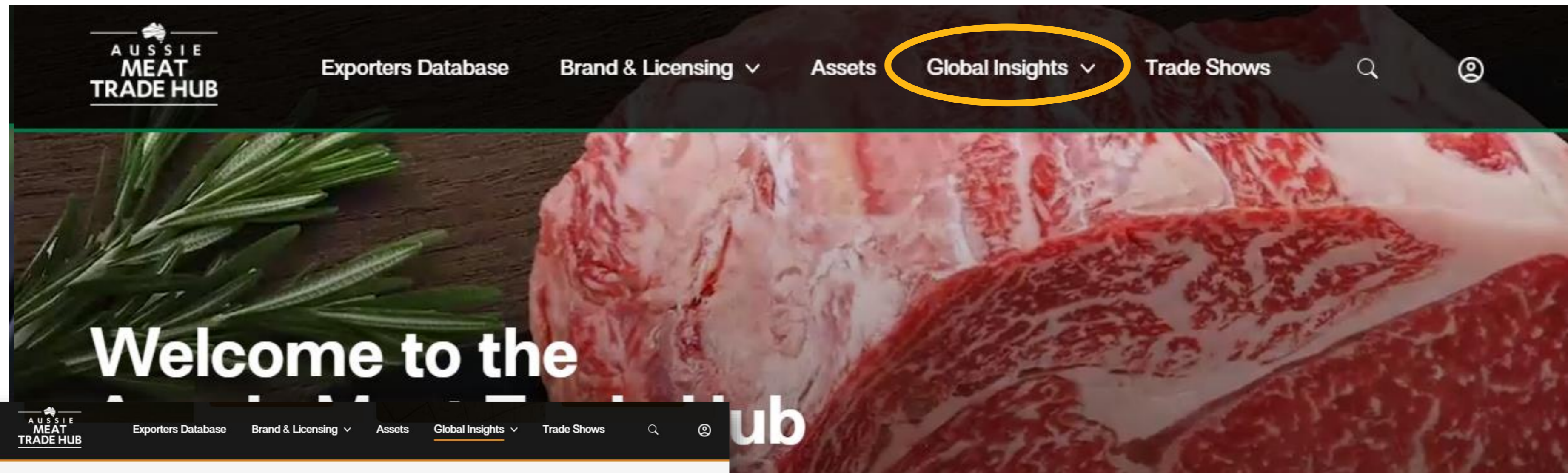
The screenshot shows the MLA website's navigation and content structure. At the top, there is a search bar and login options. The main navigation menu includes: Prices & Markets, Research & Development, Tools, Resources & Training, Integrity & Compliance, Marketing Beef & Lamb, News & Events, and About MLA. A sidebar on the left lists: Market Reports & Prices, Trends & Analysis, and Search Statistics Database. The main content area is titled 'Global market data and insights' and includes a description of the team's work. Below this, there are three report categories: 'Global reports' (with images of beef, goatmeat, and Australian goats), 'Market snapshot reports' (with a grid of country buttons), and 'Goatmeat reports' (highlighted in a yellow box).

**Goatmeat reports**

**Market snapshots**



# Insights Tools & Resources: Aussie Meat Trade Hub (*AussieMeatTradeHub.com*)



Open to public

**Insight Report Centre**

All Domestic International Global Tracker

Showing 6 of 7 results

**SEA Traceability Research Podcast** Jun 10 2025

**SEA Traceability Research Summary** May 21 2025

**Popular Tags**

Cattle	Sheep	Goat
Consumer	Retail	Market
Projection	Tracking	Domestic
Research	Snapshot	Trade
Report	Tracker	Global
China	Japan	Korea

- ✓ MLA website publications
- ✓ Unique reports, updates and insights
- ✓ Podcasts and webinars (summary versions)
- ✓ Materials for all visitors

# THANK YOU

For more information:

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☎ +61 2 9463 9129

**Aussie Meat Trade Hub**

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**MLA Global Market Data & Insights**

➤ <https://www.mla.com.au/prices-markets/overseas-markets/>



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