



Australian Government
Australian Trade and Investment Commission



India's Sheep Meat Landscape: The Market and Export Opportunity

2025



Acknowledgement of country

In the spirit of reconciliation, we acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

Engagement Context

This study was commissioned by the Australian Trade and Investment Commission (Austrade) to provide a comprehensive market analysis of India's sheep meat sector and assess opportunities for Australian exporters. The engagement was undertaken to support Austrade's global mission of connecting Australian businesses to opportunities and enhancing Australia's market position.

The implementation of AI-ECTA in December 2022 has fundamentally reshaped the competitive landscape for Australian sheep meat exports to India by eliminating 30% import tariffs, creating decisive competitive advantages over existing suppliers. This policy transformation, combined with India's robust domestic sheep meat production of approximately 10 million tonnes in 2023-24 and growing commercial demand, presents significant opportunities for Australian exporters to establish market presence and capture market share.

Scope of work: The research mandate encompassed six core deliverables:

1. **Market size and trend analysis:** Comprehensive assessment of India's sheep meat production landscape, domestic capabilities, and import dynamics
2. **Geographic market prioritisation:** Tiered market entry strategy identifying primary entry markets, secondary expansion markets, and specialised opportunity markets
3. **Consumer segment analysis:** Detailed profiling of five key segments—HORECA establishments, specialised caterers for luxury events and weddings, modern retail and premium supermarkets, e-commerce platforms, and meat processors
4. **Cold chain infrastructure assessment:** Analysis of India's 8,698 cold storage facilities with ~40 MMT capacity, regional distribution networks, and import logistics capabilities
5. **Competitive landscape analysis:** Australia's positioning versus other suppliers, including AI-ECTA tariff advantages and market penetration strategies
6. **Supply chain and distribution mapping:** Comprehensive analysis of import pathways, distributor networks, procurement contract types (CPCs), and partnership opportunities

Methodology: The research approach centred on comprehensive stakeholder engagement across India's sheep meat value chain. Over 60+ stakeholders—HORECA players, chefs, specialised caterers, retailers, importers, regional suppliers and meat processors were interviewed. Additionally, over 30+ individual consumers were interviewed to understand the prevailing awareness and perception about Australian sheep meat in the Indian market.

Expected outcomes: This study provides Australian exporters with actionable intelligence to:

1. Fully capitalise on the AI-ECTA tariff elimination (30% advantage over traditional competitors) to increase market share from the baseline of AUD 1.2 million (26% of imports) in 2023 and build upon the demonstrated 85% year-on-year growth in 2024 to establish Australia as the dominant premium sheep meat supplier.
2. Penetrate the 60% market share HORECA segment with premium pricing tolerance and consistent volume demand while establishing systematic market entry across prioritised regions.
3. Expand beyond the existing 180+ trained chefs and 80+ culinary students to create broader industry awareness and technical expertise.
4. Enable Australian exporters to build strategic relationships with established importers, distributors, and B2B processors for sustained market access.

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Abbreviations

AI-ECTA	Australia–India Economic Cooperation and Trade Agreement
SKUs	Stock Keeping Units
B2C	Business to Consumer
MLA	Meat and Livestock Australia
RTC	Ready To Cook
RTE	Ready To Eat
NCR	National Capital Region
HORECA	Hotels, Restaurants, and Catering
B2B	Business to Business
MICE	Meetings, Incentives, Conferences and Exhibitions
HICC	Hyderabad International Convention Centre
ITC	Indian Tobacco Company
HS	Harmonized System
IGST	Integrated Goods and Service Tax
NSW	New South Wales
FOB	Free On Board
BCD	Basic Customs Duty
CIF	Cost Insurance and Freight
AIDC	Agriculture Infrastructure and Development Cess
SWC	Social Welfare Charge
IEC	Importer Exporter Code
FSSAI	Food Safety and Standards Authority of India
NOC	No Objection Certificate
PGA	Participating Government Agencies
DAHD	Department of Animal Husbandry and Dairying
AQCS	Animal Quarantine and Certification Services
FCL	Full Container Load
L/C	Letter of Credit
JNPT	Jawaharlal Nehru Port Trust
CPC	Central Procurement Contract
CPP	Central Procurement Portals
APEDA	Agricultural and Processed Food Products Export Development Authority
DGFT	Directorate General of Foreign Trade
CDC	Chef de Cuisine
CDP	Chef de Partie
LTO	Limited Time Offer
UHNIs	Ultra High Net Worth Individuals
IQF	Individually Quick Frozen
F&B	Food and Beverages
HNIs	High Net-worth Individuals
SLA	Service Level Agreements
QSRs	Quick Service Restaurants
QR	Quick Response
POS	Point of Sale
GST	Goods and Service Tax
NMACC	Nita Mukesh Ambani Cultural Centre
BIEC	Bengaluru International Exhibition Centre
GPS	Global Positioning System
RGIA	Rajeev Gandhi International Airport
NRI	Non-Resident Indian
IHCL	The Indian Hotels Company Limited
GTM	Go-to-Market Strategy



“ This study reinforces what Austrade has consistently observed — India’s evolving food landscape presents a major growth opportunity for Australian sheep meat.

The findings validate the strong impact of AI-ECTA in creating a decisive advantage for Australian exporters, while revealing new and unanticipated opportunities across premium hospitality, catering, and retail channels.

As India’s appetite for premium protein grows, Austrade stands ready to support Australian suppliers by facilitating importer engagements, organizing chef and buyer interactions, and facilitating the localisation of lamb products to Indian culinary and operational needs. Austrade is eager to assist in converting these insights into tangible commercial success for Australia’s sheep meat industry. ”

Todd Miller,
Trade and Investment Commissioner (Food & Agribusiness)
Austrade South Asia



“ India is evolving into one of the most strategic growth markets for premium Australian sheep meat, and this report makes that opportunity both visible and actionable. Building on the structural advantage created by AI-ECTA’s tariff elimination, our analysis shows a clear, data-backed pathway for Australian suppliers to participate in a portfolio of high-value demand pools; from five-star hotels, luxury weddings, and institutional catering to modern retail and emerging B2B e-commerce channels in hubs such as Delhi-NCR, Bengaluru and Mumbai.

The central message is that success in India will not be driven by price alone, but by the ability to localise intelligently and execute consistently. That means calibrating cuts, pack sizes, and formats to Indian culinary and operational realities; investing in chef education and menu innovation; strengthening cold chain and supply reliability; and forging durable partnerships with importers, distributors, and hospitality groups who shape premium protein choices on the ground.

This study goes beyond high-level market optimism. It provides a granular view of trade flows, competitive positioning, buyer expectations, and on-the-ground constraints, and distils them into a practical agenda for industry participants — where to focus, which segments to prioritise, and what capabilities to build over the next five to ten years. If market entry into India is pursued with a long-term lens, the insights in this report can help Australian sheep meat producers and exporters to build a sustained and differentiated presence in one of the world’s most dynamic and demanding protein markets ”

Murray Spence
Trade and Investment Commissioner
Austrade South Asia

Executive Summary

Background: India's sheep meat industry

India plays a distinctive role in the global sheep meat sector, with domestic consumption reaching approximately 743,000 tonnes in 2023 and an expanded scale of 10 million tonnes in 2023-24, representing 5% growth over the previous year. While India ranks as the 8th largest meat-producing country globally, mutton, lamb, goat and sheep meat production accounts for only 5-10% of total meat production, with 90-95% of the market dominated by poultry.

The key sheep meat-producing states include Jammu and Kashmir, Rajasthan, Uttar Pradesh, Gujarat, and North-Eastern states, with state-wise production concentrated heavily in southern India, where Telangana leads at 26% of the national sheep population, followed by Andhra Pradesh at 24% and Karnataka at 15%.

India's sheep meat consumption is characterised by cultural and religious consumption patterns, with significant festival-driven spikes during Eid celebrations and wedding seasons, and a strong preference for fresh sheep meat over frozen alternatives. Key consuming industries include the HORECA sector, specialised caterers, and premium hospitality establishments, with growing demand driven by India's AUD 200 billion wedding industry and AUD 90 billion food services sector.

Despite being a major exporter with around AUD 140 million in exports in 2023, India's imports remain modest at AUD 4.6 million but have grown rapidly since the Australia-India Economic Cooperation and Trade Agreement (AI-ECTA) eliminated tariffs on Australian sheep meat in late 2022.

India's self-reliance with growing import potential for Australia

India operates from a position of export dominance in the sheep meat trade, with exports concentrated heavily in Middle Eastern markets, where the United Arab Emirates absorbs 74% of total exports, valued for India's halal certification capabilities and competitive pricing. However, the domestic market is experiencing notable shifts driven by changing consumer preferences and rising disposable incomes, particularly in urban areas, creating growing demand for premium imported varieties.

The imported premium sheep meat segment is projected to grow at approximately 15-20% annually over the next five years, supported by rising affluence and urbanisation among India's expanding middle and upper-middle class in tier-1 cities, who increasingly seek premium food experiences and are willing to pay premium prices for superior quality meat products.



India imports premium quality sheep meat primarily to meet quality and food safety consciousness among health-conscious consumers who are willing to pay for better quality assurance, standardised processing, and enhanced food safety protocols compared to traditional local supply chains. The restaurant and hospitality sector expansion has created consistent demand for high-quality imported meat, as establishments require standardised cuts and consistent quality for international cuisine preparations.

India imports from multiple sources, with New Zealand previously supplying 69% of imports (AUD 3.4 million) and Australia providing 26% (AUD 1.2 million) in 2023, though Australia's market position has transformed dramatically following AI-ECTA implementation.

Position of Australian Sheep Meat in India

Australian sheep meat has gained significant competitive positioning in India following the implementation of AI-ECTA in December 2022, which eliminated 30% import tariffs and fundamentally reshaped import market dynamics by creating decisive competitive advantages for Australian suppliers. While New Zealand continues facing full 36.5% total duties (30% basic customs duty plus 5% IGST), Australian lamb exports increased 85% year-on-year in 2024, demonstrating the immediate impact of preferential trade access.

Australian lamb is consistently recognised for its superior quality attributes, including enhanced marbling, robust cut thickness, and suitability for diverse cooking applications, making it particularly attractive for gourmet menus and premium HORECA establishments. However, the market currently faces critical challenges, including severe availability issues with stockouts lasting over one month at flagship outlets, disrupting regular menu cycle operations and forcing the removal of high-selling dishes from menus. Current supply inconsistency prevents the establishment of Central Procurement Contract (CPC) agreements, forcing procurement on a need-based basis rather than predictable contract frameworks.

Transportation and handling issues frequently compromise vacuum seal integrity during distribution, contrasting with New Zealand lamb, which generally maintains intact packaging and consistent quality throughout distribution. Despite AI-ECTA benefits, pricing advantages are not reaching end users due to pricing control by Indian suppliers, keeping Australian meat more expensive compared to New Zealand alternatives for HORECA players. The competitive landscape shows that while Australian sheep meat has quality advantages and preferential tariff access, New Zealand maintains a strong market presence through consistent supply reliability and established distribution networks, creating intense competition in the premium cuts segment.

Key consumer segments of Australian sheep meat

The HORECA segment represents the primary consumer segment for Australian sheep meat, accounting for 50% market share with a high priority rating, characterised by the largest and most consistent demand channel with premium pricing tolerance of AUD 50-55 per kilogram and annual volume consumption of 50-60 kg per premium establishment. This segment is volume-driven with chef-driven decision making requiring strategic relationship building, and includes luxury hotel chains like Taj Hotels, The Oberoi Group, ITC Hotels, Marriott, and Hyatt across major cities, standalone premium restaurants, and hospitality speciality groups operating multiple outlets.

The HORECA industry serves as the primary driver of institutional demand, with Indian consumers willing to spend AUD 40-50 per meal and eating out 4-5 times monthly, creating consistent demand for premium proteins.

Seasonal demand within HORECA is significantly driven by specialised caterers who serve India's booming MICE (Meetings, Incentives, Conferences, and Exhibitions) industry, where high-end events increasingly demand curated menus with imported ingredients, and quality is prioritised over price.

Specialised caterers represent a medium-high priority segment with 5% market share, offering the highest pricing potential of AUD 55-100 per rack during seasonal demand peaks, particularly during October-February wedding season with event-driven procurement cycles requiring 2-3-month planning. This segment is characterised by ultra-luxury positioning, where quality and events increasingly demand curated menus with imported ingredients, and quality is prioritised over price.

The remaining segments include modern retail (5% market share), focusing on affluent urban consumers and expatriates with premium positioning requirements, serving niche markets with

with price-sensitive consumers for special occasions, and meat processors (5% market share) representing limited opportunities primarily for B2B processors serving premium HORECA clients rather than mass-market applications.

E-commerce platforms, particularly B2B platforms and app-based meat retail platforms, are an upcoming consumer segment, as they gradually move towards internationalisation of their product portfolio.

8 key geographical clusters for focused market activation

Delhi-NCR serves as the primary entry point with 11,500+ restaurants, IGI Airport temperature-controlled logistics, major wholesale distribution networks, and average wedding costs of AUD 40,000+, functioning as a government and diplomatic hub that provides gateway access for pan-India expansion through hub-and-spoke distribution models.

Mumbai-Pune represents the market leadership hub with 141,000+ restaurants, JNPT handling 50%+ of containerised cargo, high-net-worth concentration, and Bollywood celebrity culture, offering India's most lucrative consumer segment with national trendsetter influence and superior logistics infrastructure providing celebrity endorsement potential.

Bengaluru (Karnataka) functions as the tech sector gateway with 250+ fine dining venues, strong corporate event infrastructure, and global business culture, featuring modern retail reach through tech-industry focused platforms and serving as a distribution hub for South India.

Hyderabad (Telangana) operates as a corporate hub with strong IT/pharma presence, rich meat-eating culture, and Chennai/Mangalore port connectivity, providing high-stakes business entertainment opportunities with cultural meat acceptance.

In the second tier, Punjab presents celebration market opportunities with a strong meat-eating culture, premium event catering, and proximity to Delhi networks, while Rajasthan offers ultra-premium positioning potential with 50,000+ weddings annually, a heritage tourism industry, and ultra-luxury hospitality infrastructure serving as India's premier destination wedding hub. West Bengal (Kolkata) provides cultural penetration opportunities through rich culinary heritage, port connectivity, and festival-driven demand, while Goa represents tourism excellence with an international tourism base, beachfront luxury resorts, and year-round demand supporting premium pricing opportunities.

Australia can utilise these clusters by establishing Delhi-NCR and Mumbai-Pune as immediate priority markets for partnership development, Bengaluru and Hyderabad as secondary expansion markets for corporate hospitality, and Punjab, Rajasthan, West Bengal, and Goa as specialised opportunity markets for meeting seasonal and cultural demand patterns.

Importers serve as the critical gateway and foundation of market entry.

Importers serve as the critical gateway and foundation of market entry for Australian suppliers, as no shipment can enter India without their licenses and regulatory clearances. They act as essential market facilitators, risk managers, and relationship builders who maintain direct connections with over 750 premium establishments while managing compliance with FSSAI regulations, customs clearance, and cold-chain logistics.

The most successful international suppliers in India have moved beyond transactional export models to embrace deep, integrated partnerships with Indian importers, combining local market presence, strategic importer relationships, and HORECA-focused demand generation to build lasting competitive advantages.

Key potential importers identified include Empire Foods (Mumbai) serving 300-500 sub-distributors and supplying to premium hotels, fine-dining restaurants, specialised caterers, and leading retail chains across India with high priority rating, Fortune Gourmet Specialties (Mumbai) operating 13 multi-temperature warehouses nationwide and supplying Australian lamb to HORECA including standalone restaurants and airline catering, and Skyfoods (Delhi NCR) specializing in Australian and New Zealand lamb with focus on high-demand cuts such as lamb chops and racks.

Importers provide regulatory navigation expertise in India's complex import regulations and FSSAI approvals, efficient logistics management of critical cold-chain infrastructure from port handling to warehousing and last-mile delivery, market access through long-standing networks with HORECA buyers and distributors, and risk mitigation by bridging cultural and business practice gaps.

Essential criteria for importer selection include established regional networks across primary consumption hubs, proven cold-chain infrastructure with -18°C temperature-controlled capabilities, valid import permits and demonstrated regulatory compliance, existing relationships with HORECA and premium channels, and financial stability to manage 2–3-month payment cycles required by hotel chains.

Tailoring products to meet Indian needs and market activation is key.

Success in the Indian market requires comprehensive product customisation and strategic market activation rather than simple product availability. Australian suppliers must transform their standard whole carcass approach to deliver precisely portioned, Indian-spice marinated, and institutionally-packaged lamb cuts that meet the specific operational needs of Indian restaurants, hotels, and catering operations, moving from commodity export to value-added, market-tailored solutions.

Primary cut focus should emphasise lamb racks (French-cut) in pre-trimmed racks, 2-4 rib portions, vacuum-packed format with target weight of 250g-500g per rack for portion control and value addition through ready-to-cook marinated variants and bulk cartons (5-10kg) with individual vacuum-sealed portions. Secondary offerings should include shanks in frozen bulk cartons for slow-cooking applications and chops/riblets in pre-marinated, ready-to-grill formats for QSR chains.

Key specifications must include temperature-controlled storage capability, halal certification with clear documentation, traceability from farm to plate, and consistent fat content and cookability standards.

Market activation emerges as the critical success factor requiring active engagement through targeted tastings, chef education, consistent supply assurance, and strategic relationship building with key decision-makers. This includes conducting curated chef sessions where culinary professionals can experience Australian lamb in dishes, they design themselves, providing culinary guidance and cut education on alternative cuts and preparation methods, organising in-kitchen trials with free trial volumes for chefs to test cooking performance under real service conditions, and implementing comprehensive product sampling and menu integration programs. Regional adaptation strategies should include North India, focusing on cuts suitable for tandoori and curry preparations with corresponding spice blends, South India adaptation for products working with coconut-based curries and traditional cooking methods, and metro-specific variations for Bangalore, Mumbai, and Delhi NCR based on local taste preferences.

The development of tiered SKU systems allows for easy customisation, including a base premium range with standard cuts in 300g-500g consumer-friendly portions, customizable elements such as marinades and spice blends adapted for regional Indian preferences, and occasion-specific packaging for festival seasons, weekend entertaining, and weeknight dinner solutions.

Way forward

The report outlines a systematic four-step market entry strategy focusing on strategic importer selection, geography prioritisation with Delhi-NCR and Mumbai-Pune as immediate markets, consumer segment targeting of luxury hotels and restaurants as primary channels and understanding procurement contract types, including Central Procurement Contracts and regional supply models.

Key recommendations include partnering with established importers like Empire Foods and Fortune Gourmet, tailoring products to caterer requirements, targeting premium establishments during August-September lean periods for sampling, and implementing chef-led approval processes through tastings and in-kitchen trials. Critical success factors emphasise consistent supply reliability, cold-chain integrity, comprehensive market activation through chef education, and exclusive importer arrangements for supply stability.

This report provides readers with comprehensive market intelligence including detailed analysis of India's sheep meat production and consumption landscape, competitive positioning analysis of Australian versus New Zealand suppliers post-AI-EFTA, in-depth consumer segment profiling with specific procurement patterns and volume requirements, geographical cluster assessment with strategic importance rankings and market entry recommendations, comprehensive stakeholder profiling including importers, distributors, and end-users, and actionable market entry strategies with specific partnership frameworks, product customisation guidelines, and implementation timelines for successful penetration of India's premium sheep meat market.

Key Highlights

Demand and impact of AI-ECTA

- ❖ India consumes 743,000 metric tonnes of sheep meat annually (~1 kg per capita), representing 10% of total meat consumption, with projections reaching 950,000 tonnes by 2030.
- ❖ Sheep meat demand surges during festivals (Eid), weddings (November-February), and regional celebrations, with prices rising AUD 1-5 per kg and monsoon patterns affecting seasonal supply.
- ❖ AI-ECTA's 30% tariff elimination boosted Australian lamb exports to India by 85% in 2024, overtaking New Zealand as the leading premium cut supplier.
- ❖ Industry investment through Austrade and MLA engagement trained 180+ chefs from top hotels and 80+ culinary students, has aided in building market awareness and technical expertise for Australian product utilisation, post AI-ECTA.

Consumer segments

- ❖ The HORECA industry drives 50% of India's premium imported sheep meat demand, with urban consumers spending AUD 40-50 per meal 4-5 times monthly, making premium hotels and restaurants primary targets for meat exporters seeking volume and sustained supply.
- ❖ Luxury weddings budgeted above AUD 50,000 and strategic partnerships between premium caterers and MICE venues have driven specialised catering to capture 15% of premium imported sheep meat consumption by volume.
- ❖ 20% of the premium sheep meat consumption is attributed to home consumption enabled by modern retail and e-commerce platforms. Both modern retail and e-commerce, therefore, have become key enablers of market activation and brand awareness creation with Cook-out boxes, recipe-guided portion-controlled SKUs.
- ❖ Meat processors, start-ups, and B2B players such as Hyperpure, Licious, Meatigo, Prasuma and others are pivoting towards internationalisation of their product portfolio. This is expected to drive demand in volume purchases in the next growth phase.
- ❖ 60% of the consumption demand is volume-driven, while 20% is seasonal.

Australia's market fit

- ❖ Australian lamb's superior marbling—enhanced intramuscular fat content between muscle fibres—delivers exceptional texture and versatility across all cuisines while ensuring optimal tenderness and flavour retention during cooking.
- ❖ Australian sheep meat's thick fat lining and lower meat content require fat capping to enhance flavour retention and align with Indian consumer preferences for high meat content, and chefs' needs for flavour retention during cooking.
- ❖ Australian lamb's milder odour provides a competitive advantage over New Zealand lamb, aligning with Indian consumer preferences for odourless meat.
- ❖ Customisation through 1kg portion packs, Indian cuisine-oriented marinades, and value-added products is essential for Australian sheep meat to successfully penetrate home consumption markets via e-commerce and modern retail channels.

Key challenges

- ❖ Australian lamb's compromised vacuum seal integrity during transportation due to handling inefficiencies undermines market reliability perceptions compared to New Zealand lamb's consistently intact packaging.
- ❖ Supply volatility and inconsistencies have resulted in diminished market confidence in Australian sheep meat, amongst Indian consumer segments.
- ❖ Transparent packaging revealing blood clots in Australian sheep meat creates negative visual perceptions among chefs and purchase managers, requiring packaging strategies that maintain premium appeal while preserving product integrity.
- ❖ Limited awareness of chilled Australian sheep meat among importers, suppliers, and consumers, combined with historical purchasing patterns favouring frozen formats, restricts market demand to frozen products only.

Learnings from competitor's success

- ❖ Australian suppliers can adopt competitor's holistic distribution model by integrating licensed importers, regional metro distributors, strategic cold storage facilities, and premium B2B e-commerce platforms to ensure comprehensive market coverage and consistent availability across all major consumer segments.
- ❖ Australian suppliers should establish India-based marketing and sales teams with specialist HORECA liaisons who directly engage chefs through kitchen trials and personal visits, building loyal culinary advocates and maintaining real-time control over distributor relations and quality concerns.
- ❖ Seasonal activation and education-driven marketing of the technical and commercial benefits of Australian lamb-higher yield, portion control, and consistent quality, will make it easier for Indian buyers to justify premium pricing to their management and customers.

Key considerations for Australian suppliers

- ❖ Securing a partnership with an importer with an established distribution network and regional supplier connections is key to establishing volume-driven supply contracts with major institutional consumer segments.
- ❖ Exporters and suppliers in India are looking for high order volumes and seek long-term pricing strategies or forward contracts to maintain consistent supply and pricing for premium institutional clients.
- ❖ Australian exporters can consider prioritising structured sampling and tasting sessions with flagship hotel properties to build chef relationships and gain visibility that can influence group-wide procurement and broader CPC inclusion.
- ❖ Australian suppliers must focus on customisation and market activation through strategic sampling during July-September lean periods to capture high demand and secure procurement contracts during the October-March peak season.



1. Market size and trends

India plays a distinctive role in the global sheep meat sector, with domestic consumption recorded at ~743,000 metric tonnes in 2023.¹—while domestic production largely caters to cultural and regional consumption, exports target premium Middle Eastern markets. Imports, though modest, have grown rapidly since the Australia–India Economic Cooperation and Trade Agreement (AI-ECTA) removed tariffs on Australian sheep meat in late 2022.

1.1 India's sheep meat production landscape spans traditional and commercial systems

Although India ranks as the 8th largest meat-producing country in the world, 90% to 95% of its market is dominated by poultry. India's total meat production reached a significant scale with 10 million tonnes in 2023-24, representing 5% growth over the previous year.²

- ❖ **Sheep meat production in total meat production accounts for only ~5% to 10%.** The key sheep meat-producing states are (a) Jammu and Kashmir, (b) Rajasthan, (c) Uttar Pradesh, (d) Gujarat and (e) North-Eastern states. State-wise production concentrates heavily in southern India, with Telangana leading at 26% of the national sheep population, followed by Andhra Pradesh at 24%, Karnataka at 15%, Rajasthan at 11%, and Tamil Nadu at 6%.³
- ❖ **Production systems remain predominantly traditional extensive grazing,** with approximately 95% reliance on natural vegetation rather than cultivated fodder. Around 500,000 sheep participate⁴ in permanent migration patterns in Rajasthan alone, following seasonal grazing opportunities across common lands and agricultural residues. Semi-intensive and commercial systems are emerging but represent a smaller portion of total production.

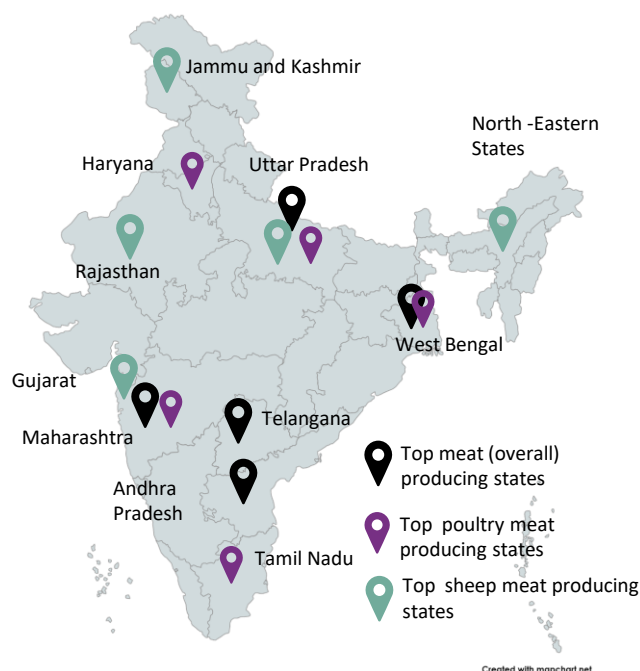
1. Statista report on Indian sheep meat production, 2025

2, 3, 4. Agricultural and Food Products Export Development Authority (APEDA), Ministry of Commerce and Industry, Government of India

Seasonal patterns significantly influence production flows, with breeding seasons typically occurring twice annually and lambing concentrated during favourable weather periods. Winter conditions create challenges, with newborn mortality rates reaching 25%⁵ in harsh conditions, while premium pricing during festive seasons provides income opportunities for producers.

The sector faces substantial challenges, including high disease mortality rates from pneumonia, sheep pox, and parasitic infections, shrinking grazing lands due to land use changes, extreme weather impacts from drought and heat stress, and limited access to veterinary services in remote areas. Market infrastructure remains inadequate, with only 21% processing capacity⁶ utilisation and deficient cold chain facilities constraining value addition opportunities.

Figure 1: Key Indian meat (overall), poultry and sheep meat producing states



1.2. Regional consumption patterns reveal cultural and demographic influences

India's sheep meat consumption totals approximately 743,000 metric tonnes annually, with per capita consumption of ~1 kg per year⁷ ranking 111th globally but showing steady growth from historical lows. This consumption represents roughly 10% of India's total meat consumption,⁸ indicating sheep meat's premium position within the protein hierarchy.⁹

Cultural and religious factors drive consumption patterns significantly, with 99% of Muslims consuming meat, 99% of Christians, 97% of Buddhists/Neo-Buddhists, compared to 75% of Hindus who consume meat. Regional variations are pronounced, with Telangana recording 98% meat-eaters, while vegetarian-majority states like Gujarat show minimal sheep meat consumption.¹⁰

Seasonal consumption exhibits dramatic festival-driven spikes, particularly during Eid al-Adha, Eid al-Fitr, and regional celebrations. Mutton prices increase by AUD 1 to 5 per kilogram during festival periods, with consumption volumes surging correspondingly. Wedding seasons (November-February) create additional demand peaks, while monsoon patterns affect both supply availability and consumption timing.

Indian market is dominated by the demand for fresh sheep meat as compared to frozen or chilled sheep meat. This is primarily because the meat landscape in India is dominated by wet markets and independent retailers.

The consumer profile for sheep meat can be divided into three categories — the religion-based consumer, the experience-seeking consumer, and the HORECA segment. The table below highlights on each of the consumer cohorts

5, 10. Agricultural and Food Products Export Development Authority (APEDA), Ministry of Commerce and Industry, Government of India

6. Food and Agriculture Organization of the United Nations

7, 8, 9. Statista report on Indian sheep meat production, 2025

Table 1: Broad segmentation of Indian consumers of sheep meat

Consumer Cohorts	Characteristics
The religion-based consumer	<ol style="list-style-type: none"> 1. Primarily comprises the Muslim population (estimated at 200 million). 2. Consumption spurts during festival seasons such as Eid, Ramadan. 3. Demand is primarily met by domestic production. 4. Consumption pockets include Jammu and Kashmir, Delhi, Telangana, Kerala, and West Bengal, amongst others.
The experience-seeking consumer	<ol style="list-style-type: none"> 1. Comprises population cohort that is not driven by religious restrictions on meat consumption and international tourists. 2. Demand primarily met by domestic production. 3. Consumption pockets maybe restricted to major tourism hotspots or cultural pockets with sheep meat as a part of their cuisine such as Rajasthan, Jammu and Kashmir, Telangana amongst others.
The HORECA segment	<ol style="list-style-type: none"> 1. Comprises major restaurants, cafes, and hotels. 2. Consumption demand primarily met by domestic production. However, potential for imports. 3. Demand from premium and luxury segments may be met by imported products. 4. Consumption pockets include major tourism hotspots of the country.

1.3. Commercial and institutional markets drive premium consumption growth

India's sheep meat sector represents a dynamic intersection of traditional agricultural practices and evolving commercial opportunities, characterised by robust domestic production capabilities, culturally-driven consumption patterns, and transformative trade developments. Recent policy developments, particularly the AI-EFTA implementation in December 2022, have fundamentally altered competitive dynamics by eliminating 30% import tariffs on Australian sheep meat, creating new market access opportunities and intensifying competition with traditional suppliers. This transformation occurs against a backdrop of expanding commercial demand driven by India's AUD 200 billion wedding industry, a AUD 90 billion food services sector growing at 8% annually and evolving consumer preferences toward premium protein options across urban markets.

- ❖ **The HORECA industry has been a primary driver of institutional demand for sheep meat.** Indian consumers are looking to experiment with global experiences. According to research by Redseer, an average urban Indian consumer is willing to spend ~AUD 40 to 50 per meal and eats outside as frequently as 4 to 5 times in a month. Premium and luxury hotel chains, standalone fine dining restaurants, and hospitality speciality groups have been the pioneers in making global cuisine accessible to the Indian consumers. The demand for sheep meat amongst HORECA players is characterised by volume and the need for a sustained supply, making them one of the primary target consumers for meat exporters to India.
- ❖ **India's booming MICE (Meetings, Incentives, Conferences, and Exhibitions) industry has reshaped the catering landscape, driving a strong preference for premium, specialised services.** High-end events increasingly demand curated menus with imported ingredients, where quality is prioritised over price. To meet this, leading five-star hotels have launched dedicated catering arms with teams of chefs who work hand-in-hand with venues and clients. For instance, TajSATS partners with the Jio World Convention Centre in Mumbai to offer bespoke gourmet catering for large-scale corporate events, while ITC collaborates with Hyderabad International Convention Centre (HICC) to provide customised banquet menus for global conferences. Similarly, The Oberoi Group's catering services extend to embassy events and luxury off-site venues in Delhi NCR, ensuring international standards in menu design. These institutional partnerships have expanded exposure to global cuisines and created consistent demand for premium proteins, with Australian sheep meat emerging as a preferred choice. Its quality, traceability, and versatility in gourmet menus make it especially attractive for MICE-driven catering, anchoring it as a trusted ingredient in India's evolving hospitality sector.

❖ **India’s wedding economy was valued at AUD 130 billion in 2024.**¹¹ 30% of this economy is accounted for by specialised and premium catering. While an average Indian wedding budget stands at AUD 65,000, luxury and high-end weddings—which contribute 10% to the wedding economy—are budgeted at AUD 180,000 to 200,000 above. In this upscale space, specialised caterers—often attached to luxury hotels or operating independently—craft bespoke menus featuring strategic imported ingredients, where quality reigns over cost, and each menu reflects the client’s distinct preferences. For instance, Oberoi Udaivilas in Udaipur serves as a marquee venue for destination weddings, offering exclusive, tailor-made culinary experiences for multi-day celebrations. Likewise, the ITC group’s luxury hotels—such as ITC Grand Chola in Chennai—are increasingly integrating dedicated wedding culinary studios that collaborate with couples and venues to design premium menus with refined ingredients.

1.4. Current trade dynamics and the impact of AI-ECTA

India operates from a position of export dominance in sheep meat trade, exporting AUD 140 million in 2023 while importing only **AUD 4.6 million**.¹² India’s export destinations are concentrated heavily on Middle Eastern markets, with the United Arab Emirates absorbing 74% of total exports, followed by Qatar (8%), Kuwait (7%), Mauritius (3%), and Maldives (2%).¹³ These markets value India's halal certification capabilities and competitive pricing relative to other global suppliers.

Import sources show recent competitive shifts, with New Zealand supplying AUD 3.4 million (69% of imports) and Australia providing AUD 1.2 million (26%) in 2023.¹⁴ However, Australia's imports grew 85% year-on-year from AUD 1.2 million to AUD 2.3 million in 2024, positioning Australia as the top exporter of frozen and chilled lamb to India following AI-ECTA implementation.¹⁵

1.4.1. AI-ECTA implementation transforms competitive landscape fundamentals

The Australia-India Economic Cooperation and Trade Agreement eliminated 30% import tariffs on Australian sheep meat effective December 29, 2022, fundamentally reshaping import market dynamics. This preferential access creates decisive competitive advantages for Australian suppliers while New Zealand continues facing full 36.5% total duties (30% basic customs duty plus 5% IGST).

AI-ECTA Duty (January 2024): 0%				
Non AI-ECTA Basic Customs Duty (January 2024): 30%				
HS CODE: 020442 (Frozen cuts of sheep, with bone (excluding carcasses and half carcasses))				
S. No.	Price Evolution Component	What is to be added?	Increased Value	Cumulative Product Value (AUD)
A	Consignment price at source port (FOB price)	100 (assumed value at NSW origin port)	Price Added	100 (assumed)
B	A+ Price at the destination port (CIF price)	Ocean Freight and Insurance cost* = 7% (Standard value)	7.0	107.0
C	B+ Basic Customs Duty (BCD)	30% (Levied on CIF price)	0.0	107.0
D	C+ AIDC	30% Levied on BCD	0.0	107.0
E	D+ CESS (Levied n CIF+BCD)	0.05%	0.1	107.1
F	E+ Social Welfare Charge (SWC)	10% Levied on BCD+AIDC+CESS	0.0	107.1
G	F+ IGST	5% Levied on CIF price+BCD+AIDC+CESS+SWC	5.4	112.4
Price to the importer/buying agents in India (Indicative)				112
H	G+ Agent Commission (standard rate)	Importer/Distributor's margin = ~10% (For HoReCa customers, it is 15% to 20%)	11.2	123.7
I	H + Logistics cost from Buying agent to end user	Standard cost for 20 ft container truck = 0.45% (1000kms standardised tansit)	0.6	124..2
Price to the trader/Processor in India (Indicative)				124

AI-ECTA channel

-AUD 124
Approximate final price for wholesale buyer

Vs

-AUD 177
Approximate final price for wholesale buyer

Non AI-ECTA channel

11. Indians spend twice as much on weddings than education, India Today, January 2025

12, 13. Directorate General of Foreign Trade, Government of India

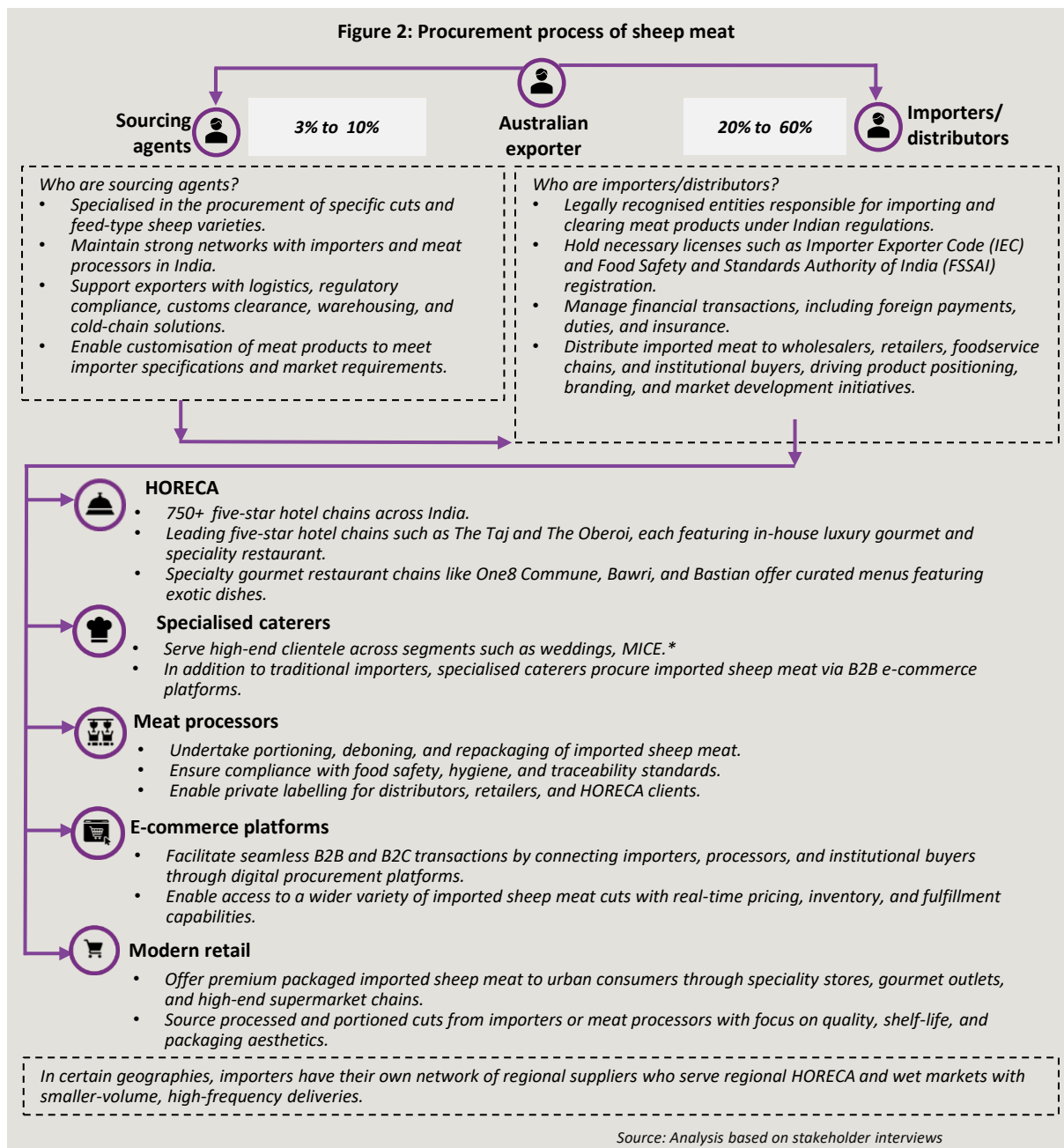
14, 15. Observatory of Economic Complexity

- Trade performance metrics demonstrate AI-ECTA's immediate impact, with Australian lamb exports increasing 85% year-on-year in 2024 while overtaking New Zealand as the leading supplier of premium cuts.
- Historical context emphasises the transformation's significance, as Australia exported only 111 tonnes over five years preceding AI-ECTA compared to the current growth trajectory.

Industry investment through Austrade and MLA engagement trained 180+ chefs from top hotels and 80+ culinary students, building market awareness and technical expertise for Australian product utilisation.

2. Value Chain Analysis

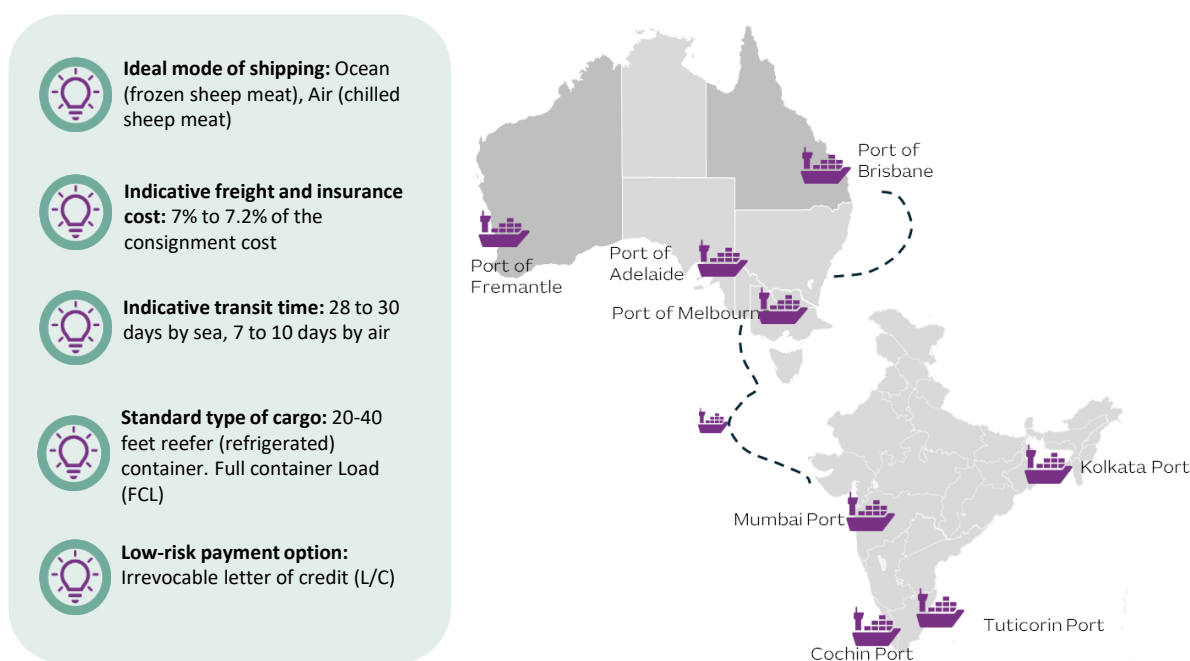
Sourcing agents manage global procurement, quality control, and logistics; importers/distributors handle domestic warehousing and supply to HORECA, specialised caterers, processors, and B2B platforms; suppliers ensure consistent product quality, consistent supply, and can also supply directly to end users like HORECA, specialised caterers, processors, and B2B platforms.



2.1. Major hubs for shipment

- ❖ Imported sheep meat typically enters India through key gateways such as major seaports (e.g., Nhava Sheva in Mumbai) or airports. Upon arrival, the cargo is offloaded and placed in customs-bonded cold storage facilities pending regulatory clearance.
 - ❖ For bulk consignments, transportation is handled via refrigerated trucks to maintain the cold chain. The end-to-end transit time is approximately 28–30 days when routed through seaports, and around 7–10 days when shipped via airports, reaching sourcing agents and importers/ distributors accordingly.
- ❖ Importers file a Bill of Entry with Indian Customs, declaring the contents and value of the consignment. Clearance requires obtaining a No Objection Certificate (NOC) from Participating Government Agencies (PGAs), such as the Department of Animal Husbandry and Dairying (DAHD).
 - ❖ Sheep meat imports must adhere to FSSAI and DAHD regulations, requiring a Sanitary Import Permit, strict temperature control, and a minimum 60% residual shelf life at clearance
 - ❖ Under the AI-ECTA, only meat wholly obtained or produced in Australia or India, supported by a valid Certificate of Origin, qualifies for preferential treatment
 - ❖ Imports must use exclusive, pristine, leak-proof packaging (carcass, cut, or ground meat only), with detailed labels per FSSAI norms
- ❖ Sheep meat, categorised as a perishable and high-value commodity, requires strict temperature-controlled logistics throughout its import journey.
- ❖ Key logistics practices include Cold Chain Management: Chilled meat is transported at 0–4°C, while frozen meat is maintained at -18°C or lower. Continuous cold chain integrity is crucial from the country of origin to final retail or processing points in India.
- ❖ Packaging Standards: Vacuum-sealed, shrink-wrapped, or tray-packed meat is placed in insulated containers with refrigerants for short hauls
- ❖ Bulk shipments are typically done in reefer containers (refrigerated containers) equipped with temperature logging
- ❖ Customs and Quarantine Coordination: Meat imports must pass through Animal Quarantine and Certification Services (AQCS) under the Ministry of Fisheries, Animal Husbandry and Dairying

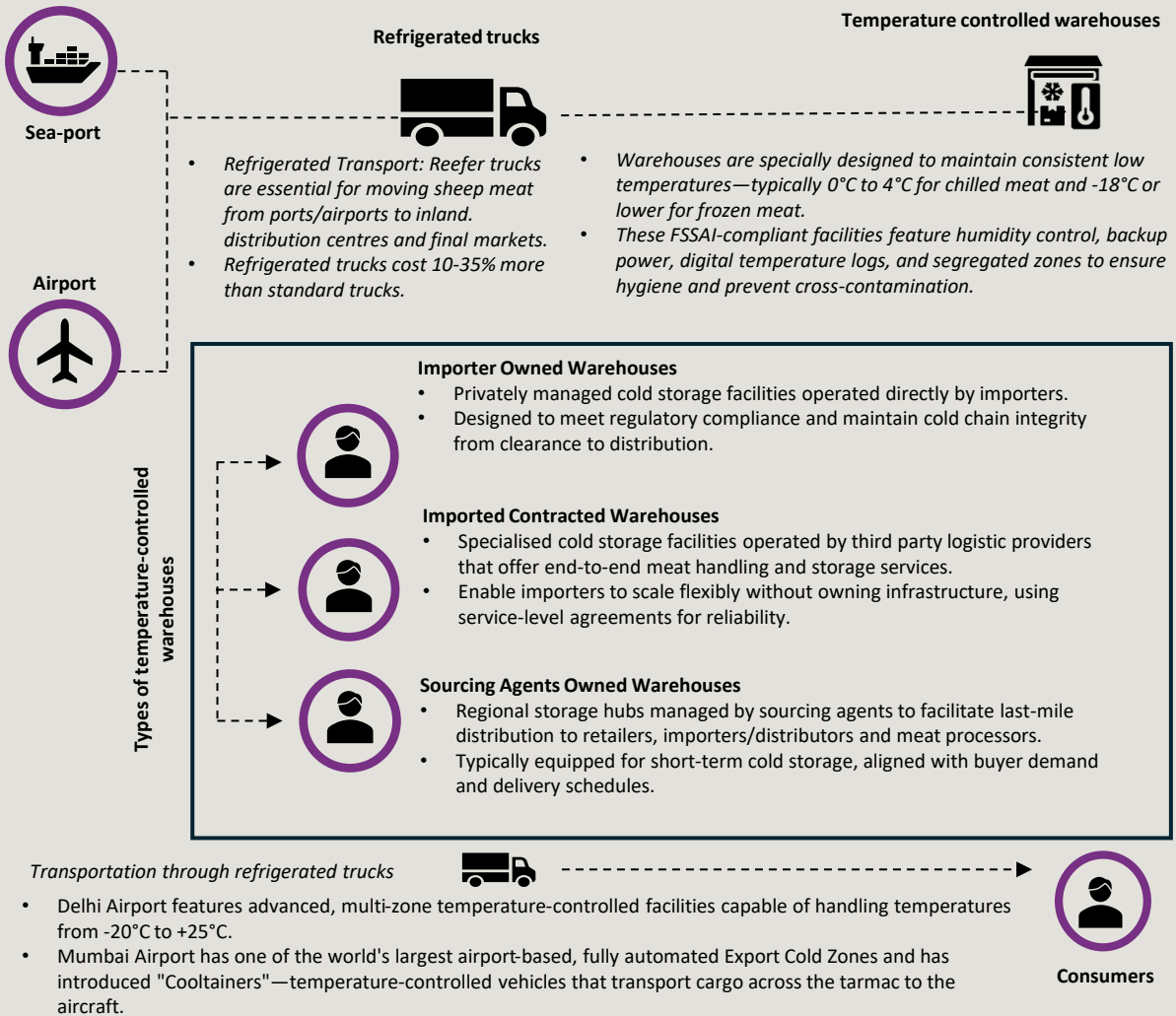
Figure 3: Major hubs of shipment



2.2. Port to plate: cold chain driving the efficiency of the sheep meat supply chain

Figure 4: Procurement process of sheep meat: Cold chain integrated

- Major container ports like Jawaharlal Nehru Port (JNPT) in Mumbai are equipped with reefer plugs to power refrigerated containers.
- Logistics players have also established port-centric cold storage facilities to enable the swift transfer of cargo, minimizing temperature shocks.



India's Cold Chain Infra: At A Glance

- As of 2024, India's cold storage infrastructure comprises 8,698 facilities with a total capacity of 40 million metric tonnes (MMT).
- The infrastructure, however, is not evenly distributed. A significant concentration of cold storage capacity is found in a few key states including Uttar Pradesh, West Bengal and Gujarat.

Source: Analysis based on stakeholder interviews



3. Consumer Segments

The Indian market for imported sheep meat presents significant opportunities for Australian exporters, with stakeholder interviews revealing five distinct consumer segments that represent the primary channels for market penetration. While Australian lamb is consistently recognised for its superior quality attributes—including enhanced marbling, robust cut thickness, and suitability for diverse cooking applications—the market currently faces critical challenges that are undermining its competitive position against New Zealand alternatives.

The identified consumer segments—HORECA establishments, specialised caterers, meat processors, e-commerce platforms, and modern retail—each present distinct characteristics, procurement processes, and growth opportunities. Understanding these segments' specific requirements, price sensitivities, and decision-making hierarchies is essential for Australian suppliers to develop targeted market entry strategies that leverage their quality advantages while addressing current market barriers.

3.1. HORECA - The perfectionist chef

Direct chef engagement through consistent supply, product sampling, and ongoing relationship management is essential for market penetration.

Target consumer profile:

- Premium five-star hotels and luxury restaurant chains
- Fine dining establishments and speciality restaurants
- Modern casual dining brands with premium positioning

Price profile:

- Lamb rack: AUD 55 per kg
- Lamb loin: AUD 50 per kg
- Lamb shank: AUD 55 per kg
- Annual volume: 50-60 kg per outlet (imported cuts only)

Geographic distribution:

Major metropolitan hubs Mumbai, Delhi-NCR, Bengaluru with expanding presence in Tier 1 and Tier 2 cities.

Procurement process:

- Chef-driven decision making (Executive Chef/Sous Chef approval required)
- Three-step process: Chef approval → Purchase department → Order placement
- Central Procurement Contracts (CPCs) issued in between February-March, annually
- Quality over price sensitivity

Key requirements:

- Consistent supply and pricing stability
- Superior marbling and visual appeal
- Precise cuts suitable for live cooking/presentation
- Halal certification mandatory
- Reliable cold-chain logistics

3.2. Specialised caterers - The elite event planner

Seasonal inventory planning, social media marketing, luxury hotel partnerships, and event-ready packaging are critical for capturing elite catering demand.

Target consumer profile:

- High-end wedding caterers serving elite clientele.
- Corporate event specialists.
- Destination wedding planners.

Price Profile:

- Premium pricing: AUD 55 to 100 per rack.
- Per-guest cost impact:
 - Standard menu AUD 27-45 per guest.
 - With imported lamb AUD 71-89 per guest.
- Seasonal demand peaks during wedding season (October-February).

Geographic distribution:

Delhi-NCR, Mumbai as primary markets with expansion in secondary markets like destination wedding locations.

Procurement process:

- Event-specific custom procurement.
- Relationship-based sourcing through trusted importers/suppliers, B2B platform sourcing.
- Quality assessment critical for menu positioning.

Key requirements:

- Reliable availability during peak seasons.
- Consistent portion sizes for large events.
- Extended shelf-life for event planning.
- Premium presentation quality.

3.3. Meat processors- The volume distributor

Standardized quality control, volume pricing, long-term partnerships, and reliable supply chains are essential for distributor success.

Target consumer profile:

- Licensed importers with processing capabilities.
- Value-added meat product manufacturers.
- Industrial-scale food processors.

Price profile:

- Bulk pricing for whole carcasses: AUD 8-10 per kg.
- Volume requirements: 10,000-11,000 kg annually (large processors).
- Processing margins: 15-25% markup to end users.

Geographic distribution:

Concentrated in major ports: Mumbai, Chennai, Kolkata with Processing facilities near consumption centers.

Procurement process:

- Import license requirements (high regulatory barriers).
- Direct relationships with Australian exporters.
- Cold-chain infrastructure investment.
- Bulk order processing and redistribution.

Key requirements:

- Reliable availability during peak seasons.
- Consistent portion sizes for large events.
- Extended shelf-life for event planning.
- Premium presentation quality.

3.4. E-commerce platforms- The digital-first consumer

Platform partnerships, digital brand storytelling, consumer education, and consistent packaging are key for e-commerce penetration.

Target consumer profile:

- Urban, affluent consumers aged 25-45.
- Tech-savvy households with disposable income.
- Quality-conscious buyers seeking convenience.

Price Profile:

- Premium pricing with 20-30% markup over wholesale.
- Growing acceptance of premium imported meat pricing.
- Subscription and bulk order models emerging.

Geographic distribution:

Major metropolitan hubs Mumbai, Delhi-NCR, Bengaluru with expanding presence in Tier 2 cities.

Procurement process:

- Platform-managed procurement from licensed importers.
- Real-time inventory management.
- Direct-to-consumer fulfilment models.
- Digital payment integration.

Key requirements:

- Consistent product availability.
- Reliable last-mile cold-chain delivery.
- Product traceability and certification.
- Attractive packaging and branding.



3.5. Modern retail - The gourmet retailer

Consumer marketing, retail-ready packaging, trade support, and point-of-sale education are essential for modern retail success.

Target consumer profile:

- Premium supermarket chains and gourmet stores.
- Elite urban consumers.
- Expatriate communities and international cuisine enthusiasts.

Price Profile:

- Retail markup of 40-60% over wholesale prices.
- Premium positioning versus local alternatives.
- Value-added packaging and portioning.

Geographic distribution:

- High-end retail locations in metro cities, premium malls and gourmet food sections, and airport retail.

Procurement process:

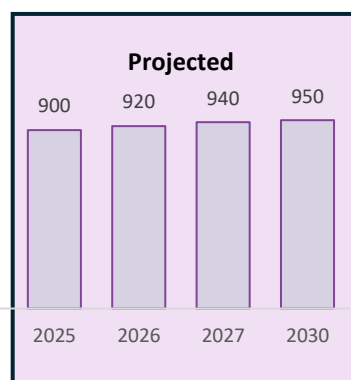
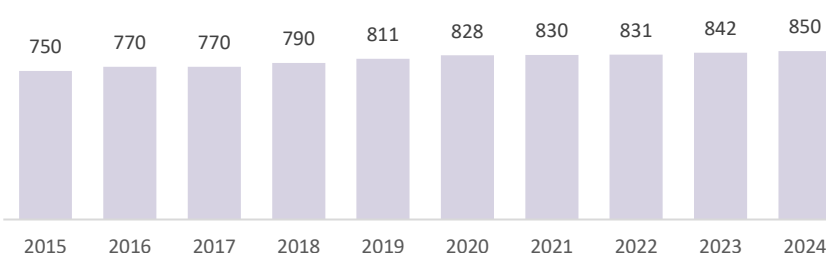
- Category management through established suppliers.
- Planogram-driven product placement.
- Private label and co-branding opportunities.
- Seasonal promotional campaigns.

Key requirements:

- Attractive retail packaging.
- Extended shelf-life for retail environment.
- Brand recognition and marketing support.
- Competitive pricing versus alternatives.

3.6. Consumer segment market share and projected growth

**Figure 5: Sheep meat consumption and projected growth
(In 1,000 metric tonnes)**



Source: Analysis based on data from OECD and FAO

India's sheep meat consumption has traditionally been dominated by domestic production, with goat meat being the primary red meat consumed across the country. However, the market is experiencing notable shifts driven by changing consumer preferences and rising disposable incomes, particularly in urban areas.

The Indian sheep meat market is witnessing a gradual but significant emergence of imported premium varieties, primarily from Australia, New Zealand, and select Middle Eastern countries. While domestic mutton remains the staple, imported sheep meat is carving out a niche segment focused on quality-conscious consumers in metropolitan cities like Mumbai, Delhi, Bangalore, and Chennai.

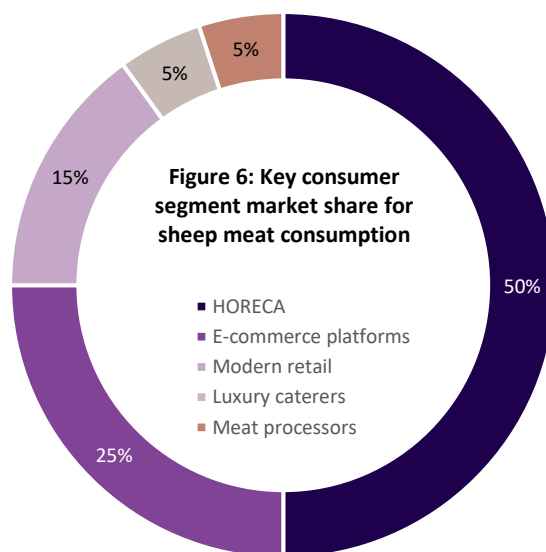
The imported premium sheep meat segment is projected to grow at approximately 15-20%

annually over the next five years, though from a relatively small base. This growth trajectory is supported by several converging factors that are reshaping India's meat consumption landscape.

- ❖ **Rising affluence and urbanisation:** India's expanding middle and upper-middle class, particularly in tier-1 cities, increasingly seeks premium food experiences. Higher disposable incomes have created a consumer base willing to pay premium prices for superior quality meat products.
- ❖ **Quality and food safety consciousness:** Imported sheep meat typically offers better quality assurance, standardised processing, and enhanced food safety protocols compared to traditional local supply chains. Health-conscious consumers are increasingly willing to pay for these assurances.
- ❖ **Restaurant and hospitality sector:** restaurants, international hotel chains, and premium food service establishments have created a consistent demand for high-quality imported meat. These establishments often require standardised cuts and consistent quality that imported products can provide.
- ❖ **Changing culinary preferences:** Exposure to international cuisines through travel, media, and globalisation has introduced Indian consumers to different preparations and cuts of sheep meat, creating demand for specific imported varieties and premium grades.
- ❖ **Cold chain infrastructure development:** Improvements in cold storage and logistics infrastructure across major Indian cities have made it more feasible to import and distribute frozen premium meat products, reducing wastage and ensuring quality maintenance.

Currently, HORECA represents the primary consumer segment for premium imported Australian sheep meat, commanding 50% of the market share. This segment generates the strongest and most consistent demand for exported products, offering substantial volume opportunities for Australian suppliers. The HORECA sector is characterised by institutional purchasing patterns, premium pricing tolerance of AUD 50-55 per kilogram, and annual consumption volumes of 50-60 kilograms per premium establishment.

E-commerce platforms and modern retail channels are emerging as supplementary consumer segments with growth potential. B2B players are expanding their product portfolios and exploring internationalisation strategies to strengthen their competitive positioning.



Source: Analysis based on interviews with stakeholders

To support sustained growth and operational capacity, these market participants are establishing direct partnerships with international suppliers and establishing formal agreements to ensure reliable supply chains.

Additional consumer segments include specialised catering services serving high-end weddings and corporate events, value-added processing operations for premium restaurants, and speciality quick-service restaurants (QSRs) and fine dining establishments requiring customized product offerings.



4. Focus Geographies

Delhi-NCR, Bengaluru, Hyderabad, and Mumbai emerge as top-priority markets for imported sheep meat in India, with a high concentration of premium HORECA players, established cold chain infrastructure, and strong presence of specialised caterers serving upscale weddings, corporate events, and diplomatic functions. Delhi-NCR leads with its institutional demand from luxury hotels and large-scale weddings in Gurugram, supported by proximity to import terminals. Bengaluru offers scale through tech park caterers, luxury hotels, and growing cloud kitchens. Hyderabad provides volume via traditional cuisine-focused weddings and iconic biryani outlets, while Mumbai combines premium hotel demand, event catering, and gourmet retail.

In the second tier, Rajasthan and Punjab present high-volume seasonal opportunities through destination weddings and traditional feast caterers. Goa serves boutique resorts and European dining with gourmet potential, and Kolkata (West Bengal) provides a culturally deep market through biryani houses, festive catering, and premium Bengali cuisine restaurants. Across these states, a targeted strategy aligning with the needs of importers, distributors, hotel procurement teams, and luxury F&B operators will be critical for successful market penetration.

Table 2: Key geographical clusters and its characteristics

Geography	Cities and Characteristics	Strategic Importance
Delhi-NCR	11,500+ restaurants, IGI Airport temperature-controlled logistics, major wholesale distribution networks, average wedding cost 40,000+ AUD, government and diplomatic hub.	Primary entry point - Hub-and-spoke distribution model, gateway for pan-India expansion, consistent premium demand, infrastructure foundation.
Mumbai-Pune	141,000+ restaurants, JNPT handles 50%+ containerized cargo, high-net-worth concentration, Bollywood celebrity culture, IT sector growth (Pune).	Market leadership hub - India's most lucrative consumer segment, national trendsetter influence, superior logistics infrastructure, celebrity endorsement potential.
Bengaluru	250+ fine dining venues, tech industry concentration, corporate event infrastructure, global business culture.	Tech sector gateway - Corporate catering volume, CSR-aligned positioning, southern India distribution, international business entertainment.

Geography	Key Market Characteristics	Strategic Importance
Hyderabad	Strong IT/pharma presence, rich meat-eating culture, Chennai/Mangalore port connectivity, premium dining venues, corporate hospitality demand.	Corporate hub - High-stakes business entertainment, cultural meat acceptance, alternative logistics routes, pharmaceutical sector demand.
Punjab	Strong meat-eating culture, premium event catering, proximity to Delhi networks, religious tourism (Amritsar), industrial prosperity (Ludhiana).	Celebration market - High-volume catering contracts, Delhi distribution leverage, cultural acceptance, diverse revenue streams.
Rajasthan	50,000+ weddings annually, heritage tourism industry, palace hotels and venues, ultra-luxury hospitality infrastructure, destination wedding hub.	Ultra-premium positioning - Highest pricing potential, global destination appeal, exclusive venue partnerships, brand prestige building.
West Bengal	Rich culinary heritage, port connectivity, festival-driven demand, institutional dining.	Cultural penetration - Festival season opportunities, institutional contracts, alternative import route, cultural acceptance building.
Goa	International tourism base, beachfront luxury resorts, year-round demand, compact geography.	Tourism excellence - International standards expectation, premium pricing opportunities, year-round consistency, quality differentiation.

4.1. Recommendations

The Indian sheep meat market presents significant opportunities for Australian suppliers, with eight key geographic markets identified through comprehensive stakeholder analysis. Success requires a tiered market entry approach, focusing on premium segments in tier-1 cities while building scalable distribution networks for tier-2 markets.

Immediate priority markets

Delhi NCR and Mumbai Pune corridor

Strategic approach for immediate priority markets:

Partnership strategy:

- Build relationships with established importers like Empire Foods and Fortune (Delhi-NCR) who possess regulatory compliance, cold storage facilities, and existing customer networks.
- Partner with specialised distributors in Mumbai-Pune who understand Bollywood catering, corporate hospitality, and luxury retail nuances.

Target customer segments:

- Secure contracts with international cuisine restaurants and five-star hotels catering to expatriate communities and affluent consumers.
- Focus on premium venues in Bandra-Kurla Complex and similar corporate districts requiring international-standard catering for executive functions.
- Target diplomatic functions, government hospitality, and luxury wedding markets.

Distribution hub development:

- Establish Delhi-NCR as primary distribution hub leveraging connectivity to supply secondary markets across northern and central India.
- Utilize Mumbai-Pune's sophisticated retail landscape for premium grocery chains and gourmet food stores.

Brand building opportunities:

- Leverage celebrity endorsement potential in Mumbai for nationwide brand impact
- Use success in Mumbai-Pune as demonstration effect to facilitate expansion into other metropolitan markets.
- Position both regions as trendsetters for premium consumer products across India.



Secondary expansion markets

Karnataka (Bengaluru) and Telangana (Hyderabad)

Strategic approach for secondary expansion markets:

Partnership strategy:

- Build relationships with established local distributors like who understand corporate catering and premium hospitality nuances.
- Partner with luxury hotels to ensure sustainable volume supply annually.

Target customer segments:

- Prioritise international hotels and conference venues that regularly host global tech companies and pharmaceutical conferences.
- Focus on venue managers at premium hotels catering to IT summits, international conferences, and high-stakes corporate events.
- Target executive dining and international business entertainment requirements.

Distribution:

- Develop retail presence through partnerships with gourmet food stores serving affluent professionals.
- Target corporate catering contracts for product launches, investor meetings, and international business events.

Market positioning:

- Position Australian sheep meat as preferred protein for executive dining and corporate hospitality.
- Leverage tech and pharma industries' preference for premium, traceable, and sustainably-sourced products that align with CSR initiatives.
- Establish as the choice for high-stakes business entertainment where quality and reliability are paramount.
- Emphasize quality, traceability, and sustainability credentials appealing to multinational corporation.
- Align with corporate social responsibility initiatives of tech and pharmaceutical companies.

Specialised opportunity markets

Punjab, Rajasthan, West Bengal and Goa

Strategic approach for special opportunity markets:

Market focus and positioning:

- Punjab-Rajasthan: Target luxury wedding and celebration market (50,000+ annual weddings in Rajasthan alone).
- West Bengal: Focus on cultural events, festivals (Durga Puja, Kali Puja), and institutional dining.
- Goa: Focus on resort and tourism market serving international clientele.

Partnership strategy:

- Punjab-Rajasthan: Build exclusive partnerships with heritage hotels, palace venues, and luxury wedding planners.
- West Bengal: Target cultural centres and festival catering organizations.
- Goa: Partner with beachfront luxury resorts, destination restaurants, and high-end hospitality venues.

Distribution advantages:

- Punjab: Leverage existing Delhi-NCR distribution networks via established air/road corridors.
- West Bengal: Utilise established import infrastructure through Port of Kolkata.
- Goa: Capitalise on compact geography and cold storage facilities near Dabolim Airport.

Value proposition:

- Position Australian sheep meat as essential element of luxury hospitality and premium dining experiences.
- Leverage international clientele's expectations for quality and authenticity.
- Capitalise on seasonal peaks for premium pricing during high-demand cultural and tourism periods.



5. Importers and regional suppliers

Importers and suppliers serve as the crucial bridge connecting Australian exporters with Indian stakeholders. They function as market facilitators, risk managers, and relationship builders across the complex Indian foodservice and retail ecosystem. Their strategic position makes them indispensable partners for Australian suppliers seeking sustainable market penetration.

5.1. Core capabilities and market functions

- ❖ Importers maintain comprehensive networks spanning over 750 premium establishments across India's hospitality sector. Examples include major importer Empire Foods, which operates integrated supply chains to luxury hotel groups, specialised caterers, and modern retail channels. Their procurement integration mechanisms include pre-approved vendor status within Central Procurement Portals (CPP) of major hotel chains, streamlining ordering processes and eliminating bureaucratic delays.
- ❖ Importers demonstrate operational flexibility across order scales, managing requirements from intimate 50-kilogram private gatherings to 500-kilogram destination weddings and large-scale celebrations. Their emergency delivery capabilities accommodate 24-48-hour fulfilment for high-profile events. Their specialised capabilities extend to precision logistics management.
- ❖ Importers absorb substantial working capital requirements by providing 2-3-month payment cycles aligned with major hotel chains' billing rhythms. This financial accommodation enables smaller establishments and caterers to participate in premium markets without carrying excessive inventory costs, effectively broadening the addressable market for Australian suppliers.

5.2. Strategic benefits

- ❖ Importers navigate India's complex regulatory environment, managing FSSAI licensing, halal certification, APEDA documentation, and customs duty optimisation under the Australia-India Economic Cooperation and Trade Agreement. This regulatory expertise eliminates compliance barriers that would render direct market entry impractical for most exporters.

- ❖ Importers coordinate sample approvals with executive chefs and procurement teams, benchmark Australian products against competitor offerings, and optimize packaging specifications for Indian market preferences.
- ❖ Importers facilitate Central Procurement Portal negotiations during February-March tender cycles, build relationships with executive chefs for product demonstrations, and align seasonal inventory planning with India's wedding calendar. This engagement supports efficient market activation and positions Australian products competitively during critical procurement windows.
- ❖ Importers also provide last-minute order fulfilment capabilities, manage custom packaging for high-volume events, and coordinate promotional campaigns with modern retail partners. These capabilities transform supplier relationships into consultative partnerships that drive mutual success in India's competitive premium dining market.
- ❖ Importers offer specialised advisory services covering portion-sizing strategies, cost optimization frameworks, and menu engineering principles that enable restaurants to achieve profitability targets while maintaining quality standards.

5.3. Recommendations

In India's complex and relationship-driven premium food service ecosystem, importers serve as the indispensable bridge connecting Australian lamb suppliers with the country's luxury hospitality sector. These specialised intermediaries function far beyond traditional distributors—they are market facilitators, risk managers, and strategic partners.

- Australian suppliers must prioritise long-term strategic partnerships over transactional relationships, seeking importers with specialised infrastructure for cold-chain logistics and regulatory compliance that can navigate India's demanding quality standards and bureaucratic requirements.
- The depth of these partnerships should extend to developing comprehensive procurement integration mechanisms that ensure seamless access to premium hospitality markets, including establishing pre-approved vendor status within Central Procurement Portals (CPP) of major hotel chains to streamline ordering processes and eliminate bureaucratic delays.
- Furthermore, successful partnerships require building well-defined sampling protocols with executive chefs and sous chefs that enable efficient product evaluation and integration into premium menus, transforming the importer relationship from a simple distribution arrangement into a strategic alliance that drives mutual success in India's competitive luxury dining market.

The success of key competitors in this market demonstrates the transformative power of moving beyond transactional export models to embrace deep, integrated partnerships with Indian importers. Rather than relying solely on third-party representation, competing exporters invested in direct market presence, built comprehensive importer relationships, and created value-added services that position their products as premium experiences rather than commodities.

For developing sustained supply and expansion in volume supplied to the HORECA segment, Australian lamb suppliers can follow the New Zealand model—an integrated approach that combines local market presence, strategic importer partnerships, and HORECA-focused demand generation—to build lasting competitive advantages in India.

Additionally, first, suppliers can direct expansion efforts toward establishing relationships with the growing e-commerce segment—particularly the B2B supply. This channel expansion complements the primary HORECA focus, alongside allowing Australian lamb suppliers to have a first-mover advantage in establishing strategic partnerships with players like Hyperpure, startups like Licious, Prasuma, Meatigo, and others.

Second, suppliers can collaborate with existing importer partners to develop strategic initiatives in two critical areas. These include conducting joint product development and value-addition studies to identify specialised SKUs tailored to e-commerce and modern retail requirements and exploring opportunities for enhanced value-added products such as marinated preparations, specialised cuts, or convenient portioning that differentiate offerings within these channels.



6. Opportunities in HORECA

6.1. Target consumer sub-segments

India's premium HORECA sector comprises three strategically significant sub-segments—luxury hotel chains, standalone premium restaurants, and hospitality speciality groups—each with distinct procurement patterns, volume requirements, and quality standards.

These establishments function as market gatekeepers and brand amplifiers, shaping consumer awareness and culinary trends that extend beyond their immediate operations. For Australian lamb suppliers, differentiated strategies targeting each segment's unique operational model and procurement methodology are essential to establishing sustainable distribution partnerships and achieving market penetration in India's premium food service landscape.

Table 3: Characteristics of consumer sub-segments in HORECA

Luxury hotel chains	
Characteristics	<ul style="list-style-type: none"> • Annual consumption: 10,000-11,000 kg of sheep/lamb meat per restaurant per hotel. • High-volume procurement through centralized systems. • Premium pricing tolerance due to luxury positioning.
Stringent quality considerations	<ul style="list-style-type: none"> • Stringent quality control with zero compromise policies. • Strict no-substitution policies even during supply disruptions.
Operational infrastructure	<ul style="list-style-type: none"> • In-house butchery operations for quality control and custom processing. • Professional meat processing units within hotel premises with dedicated cold storage and handling facilities.
Procurement process	<ul style="list-style-type: none"> • Hierarchical decision structure with Executive Chef as the primary decision maker. • CPP for tender application. • Annual CPCs issued between February-March.
Preference for cuts	<ul style="list-style-type: none"> • Lamb chops, shanks, racks, tender loins in whole cuts.

Standalone premium restaurants	
Characteristics	<ul style="list-style-type: none"> Independent fine dining establishments with strong brand identity with celebrity chef associations and culinary innovation focus. High average check values and discerning clientele. Annual lamb rack consumption: 50-60 kg for specialised applications.
Stringent quality considerations	<ul style="list-style-type: none"> Premium pricing acceptance for superior quality as ingredient authenticity and provenance storytelling is the focus. Innovation-driven menu development therefore no-substitution policies maintaining brand integrity.
Operational infrastructure	<ul style="list-style-type: none"> Single or limited outlet operations with focused cuisine concepts. Premium ingredient sourcing as competitive differentiation. Flexible menu development and seasonal offerings.
Procurement process	<ul style="list-style-type: none"> All suppliers must present samples directly to executive chefs. Chef-approved products transferred to purchase department. Direct supplier partnerships with Hyperpure, Farmland and others.
Preference for cuts	<ul style="list-style-type: none"> Lamb chops, shanks, racks, tender loins in ready-to-cook format, pre-portioned cuts, value added portions and whole cuts.
Hospitality speciality groups	
Characteristics	<ul style="list-style-type: none"> Multiple brand portfolio gives scale benefits, brand diversification opportunities, geographic reach, and operational efficiency to Australian suppliers.
Stringent quality considerations	<ul style="list-style-type: none"> Groups provide ready-made marketing platforms including social media presence, event hosting capabilities, and cross-promotional opportunities across their entire portfolio.
Operational infrastructure	<ul style="list-style-type: none"> Immediate access to diverse consumer segments across multiple restaurant concepts, locations, and price points. Each group serves different demographic segments - from casual diners to luxury clientele - providing comprehensive market penetration.
Procurement process	<ul style="list-style-type: none"> Centralized procurement system with multiple executive chefs evaluating and endorsing products. Direct relationship with hospitality group management. Group-specific supply arrangements.
Preference for cuts	<ul style="list-style-type: none"> Premium cuts (racks and chops), traditional cuts (shanks), versatile cuts (loins), and pre-marinated products.

6.2. Specific requirements

Australian lamb has garnered recognition from culinary professionals across India's premium dining establishments, consistently earning acclaim as "one of the best lambs" encountered throughout extensive professional careers. Chefs demonstrate a marked preference for Australian lamb over other international varieties, particularly New Zealand lamb, citing superior attributes in flavour profile, texture consistency, and presentation quality that align with professional kitchen standards.

- ❖ Australian lamb is well-suited for Indian cuisine applications, with its characteristics closely complementing the Indian palate.
- ❖ Professional chefs consistently evaluate Australian sheep meat as superior to New Zealand alternatives, with market availability spanning approximately 14 distinct cuts distributed across 5-6 established brands. Brands such as South Pure have particularly distinguished themselves through strong relationships with professional kitchens, demonstrating consistent reliability in quality delivery and culinary performance.
- ❖ Within the HORECA segment, chefs are increasingly leveraging menu descriptions as educational platforms to highlight provenance and origin storytelling, reflecting a growing commitment to building consumer awareness around premium sourcing practices. While consumer awareness of meat origin remains limited, professional chefs are driving market education through strategic menu positioning and descriptive presentations that emphasise quality differentiation and sourcing excellence.

6.2.1. Key selection criteria

Marbling and tenderness characteristics

- ❖ Superior marbling with enhanced intramuscular fat content contributes significantly to both tenderness and flavour retention during cooking. This marbling characteristic is particularly high in Australian lamb, whereas it remains low in both Indian and New Zealand lamb varieties.
- ❖ The fat content between muscle fibres creates ideal cooking characteristics for premium dining applications. Australian lamb contains high fat content due to slaughter at approximately one year of age, compared to New Zealand lamb slaughtered at 8-10 months, resulting in leaner cuts with less fat content.

Visual appeal standards

- ❖ High-quality lamb must exhibit bright red colour characteristics with clearly defined fat layers essential for premium presentation. Neatly trimmed bones indicate proper processing standards, with visual features serving as both presentation elements and quality/freshness indicators.
- ❖ Professional kitchens evaluate lamb cuts based on consistent rack sizes and fat coverage, which directly influences both perceived and actual quality of the final dish. The availability of uniform sizing supports portion control and presentation consistency across service periods.

Processing standards requirements

- ❖ Premium lamb must be completely free from residual hair with minimal blood leakage during butchering. Clean processing ensures higher hygiene standards and facilitates ease of preparation in commercial kitchen environments. Professional chefs expect processing standards that eliminate handling inefficiencies commonly encountered during transportation.
- ❖ Australian lamb frequently faces challenges with vacuum seal integrity during transportation, affecting product quality. This contrasts with New Zealand lamb, which generally maintains intact packaging and consistent quality throughout the supply chain.

Suitability for live cooking applications

- ❖ Lamb's fat distribution must be ideal for live cooking techniques. Australian lamb provides optimum fat distribution, particularly well-suited for robata grilling and front-of-house cooking methods.
- ❖ Visual clarity and even cooking properties are essential for open kitchen environments where cuts must cook evenly while maintaining visual appeal during preparation.
- ❖ The superior marbling and cut precision of Australian lamb enable innovative format incorporation in contemporary cuisine applications, supporting diverse cooking techniques from precision grilling to slow-braising applications.

6.2.2. Types of cuts in demand

Table 4: Types of sheep meat cuts in demand in HORECA

Type of cut	Common applications by chefs	Procurement format preferences
Lamb racks	Primary premium cut for fine dining applications, most commonly procured as whole cuts for in-house portioning.	<ul style="list-style-type: none"> ❖ Individual pre-cut portions are increasingly demanded for quick-turnaround dish applications.
Shanks	Specialised for slow-cooking applications and traditional preparations.	<ul style="list-style-type: none"> ❖ Hotel kitchens often possess infrastructure and manpower for full butchering operations, whereas restaurant formats favor streamlined, ready-to-cook formats that maintain quality while supporting operational agility.
Chops	Often served as a centre piece grilled or pan-seared with reductions, jus, or herb crusts. Also popular for outdoor grilling, Mediterranean mezze platters, or Middle Eastern mixed grills.	<ul style="list-style-type: none"> ❖ Professional establishments demonstrate clear preference for imported lamb racks, shanks, and chops owing to their superior tenderness, uniform fat marbling, and precise butchery standards. These attributes are crucial for maintaining consistency in high-end menu offerings.

The most sought-after lamb cuts in luxury establishments are lamb chops (ribs) and lamb shanks, typically featured in à la carte menus as speciality offerings rather than daily buffets. These premium cuts command elevated pricing and serve as cornerstone ingredients for signature dishes.

Lamb racks emerge as the highest preference cut due to superior presentation value and fine dining suitability. Shanks are popular for slow-cooking applications and traditional preparations, while chops are valued for portion control and consistent presentation standards.

6.3. Product to market-fit of Australian sheep meat

- ❖ **Australian lamb chops consistently rank among the best-selling dishes across premium outlets**, appreciated for exceptional tenderness and premium presentation capabilities. These dishes demonstrate strong customer appeal and contribute significantly to restaurant revenue streams.
- ❖ **High-performance menu applications:** Seco Norteño—a complete lamb shank Peruvian delicacy commonly prepared and offered in premium menus—showcases the versatility of slow-cooked lamb preparations and highlights Australian lamb's suitability for international cuisine applications.
- ❖ **Traditional cuisine integration:**
 - ❖ Australian lamb is a preferred ingredient for refined Rogan Josh, representing successful elevation of traditional Indian flavours with premium inputs.
 - ❖ Australian lamb's milder odour provides a competitive advantage over New Zealand lamb, aligning with Indian consumer preferences for odourless meat.
- ❖ **Cooking methods compatibility:** Australian lamb proves suitable for extended cooking applications, making it ideal for traditional Indian and Middle Eastern dishes. The higher marbling texture supports traditional cooking methods and facilitates spice integration. Extended cooking times of 10 minutes each side for well-done preparations allow full flavour development and optimal tenderness.
- ❖ **Existing curated dishes in the market:** Fine dining restaurants like Masala Library, Bo Tai, Swan, O Pedro, amongst others, have curated specific dishes to incorporate Australian lamb as a part of the menu. Pistachio Crumb Lamb Rack with Lamb Juice serves as a signature preparation specially curated to serve Australian lamb.

6.4. Procurement process

Luxury and premium hotel chains and hospitality speciality groups in India operate under a standardised annual procurement cycle aligned to the financial year (April to March).

- ❖ The process commences with Central Procurement Contract (CPC) tenders that establish suppliers for the entire financial year.
- ❖ Between June and September, chefs and key decision-makers participate in blind tastings featuring complementary product samples from prospective suppliers.
- ❖ Successful suppliers progress to the September-January phase, during which pop-up menus enable real-world testing of product variants.
- ❖ Products demonstrating strong menu acceptance advance to formal tender submission in February, culminating in the finalisation of annual supply contracts.

However, a few hotel chains like Hyatt operate a decentralised procurement model (**Regional Supply Contracts**), with regional teams independently managing supplier relationships and maintaining vetted supplier lists.

Some luxury chains like Leela and Oberoi use a **hybrid model—central premium contracts and regional fresh/local sourcing**—to balance consistency with local authenticity.

The procurement process follows a structured three-step sequence designed to maintain both culinary integrity and operational efficiency:

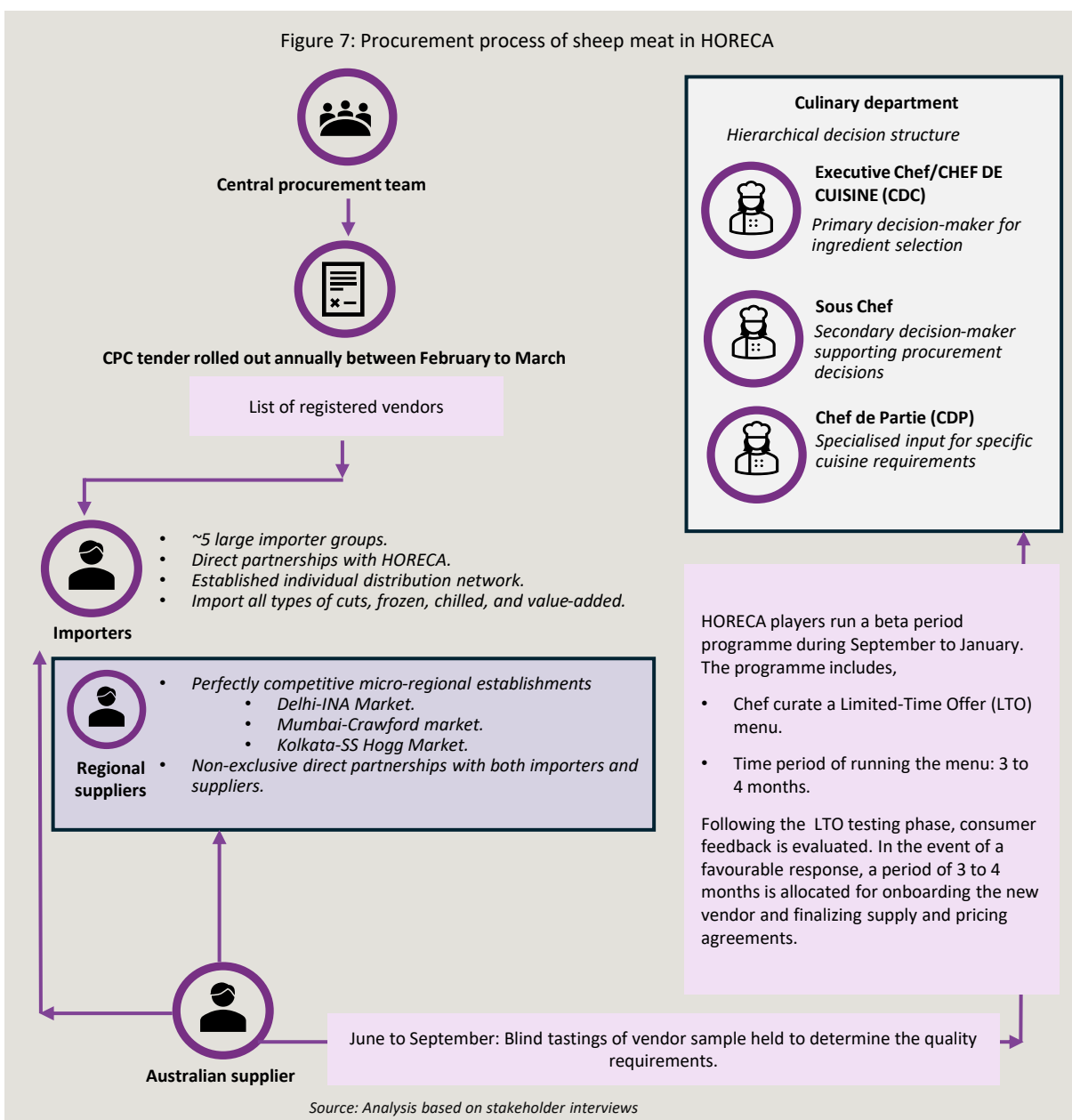
1. Initial Chef Evaluation: Suppliers present samples directly to executive chefs for quality assessment based on culinary standards and menu requirements
2. Procurement Team Handoff: Chef-approved products transfer to purchase departments with established quality specifications
3. Commercial Finalisation: Procurement teams lead price negotiations and coordinate final order placement.

Contract Frameworks

Procurement arrangements are governed by pre-agreed monthly supply contracts between restaurants and importers/distributors. These contracts provide operational stability and predictable supply schedules essential for menu planning.

Key supplier selection criteria include flexible payment terms, competitive pricing, and reliability in delivery performance and quality standards. New suppliers must offer product samples for quality assessment, with commercial terms such as credit lines considered essential for onboarding.

Figure 7: Procurement process of sheep meat in HORECA



6.5. Opportunities and challenges

Opportunities

- ❖ Direct consumer engagement platforms: Premium restaurants provide ready-made platforms for consumer education through guided tastings where chefs describe cuts, marination techniques, and cooking methods. These interactions build direct appreciation for premium ingredient characteristics. For example, Swan maintains a strong Instagram presence, providing a ready-made platform for visually appealing marketing campaigns, influencer collaborations, and event highlight documentation that can significantly boost consumer engagement.
- ❖ Experimental marketing formats:
 - Pop-up menu concepts are identified as highly effective strategies for introducing new meat options in HORECA environments. Month-long themed menus exclusively featuring Australian lamb dishes create focused consumer education and engagement opportunities.
 - Interactive tasting sessions with chef-led descriptions of preparation methods provide direct consumer education on marination techniques and cooking methods, building understanding of premium ingredient characteristics.
 - Educational masterclasses through live demonstrations highlight dish preparation and lamb handling, positioning Australian lamb as a premium, technique-driven ingredient requiring specialised knowledge.
- ❖ Cross-promotional opportunities:
 - Wine Pairing Dinner Events offer curated experiences pairing Australian wines with lamb-based mains, enhancing storytelling around provenance and cultural connection while supporting premium positioning through sophisticated pairing concepts.
 - Cross-Brand Collaboration opportunities exist with other premium dining brands, enabling joint hosting of special events to amplify market visibility while sharing marketing costs and expanding consumer reach.
- ❖ Operational opportunities:
 - Restaurant groups maintain established procurement systems with CPCs issued annually between February and March. These contracts provide predictable demand patterns and revenue streams for approved suppliers.
 - Partnership with established restaurant groups provides credibility and market validation for Australian lamb suppliers. Association with premium dining brands enhances product positioning and consumer perception of quality.
 - Fine-dining restaurants and restaurant groups operate multiple outlets across major cities, providing significant volume opportunities. Consumption demand is approximately 10,000-11,000 kilograms of sheep/lamb meat annually. Annual import volumes for premium cuts like lamb racks typically range between 50-60 kilograms per establishment, with potential for significant scaling across multiple outlets within restaurant groups.

Challenges

- ❖ Critical supply chain disruptions: Australian lamb faces severe availability challenges with stockouts lasting over one month at flagship outlets like Swan. This prolonged unavailability disrupts regular menu cycle operations and forces the removal of high-selling dishes from menus. Current supply inconsistency prevents the establishment of CPC agreements, forcing procurement on a need-based basis rather than predictable contract frameworks. Chefs manage between 1,200-1,500 SKUs, making quick substitution inevitable when Australian lamb becomes unavailable.
- ❖ Transportation and handling issues
 - Vacuum seal integrity is frequently compromised during transportation, affecting product quality due to handling inefficiencies on the Indian side of the supply chain. This contrasts sharply with New Zealand lamb, which generally maintains intact packaging and consistent quality throughout distribution.
 - Cold chain infrastructure constraints create high spoilage risk for low-volume, high-value imports like Australian lamb. India's fragmented cold-chain network leads to underinvestment in temperature-controlled capacity for niche SKUs, causing distributors to prioritise fast-moving product lines.

- ❖ Pricing volatility and AI-EFTA impact
 - Although sheep meat prices decreased following AI-EFTA implementation, benefits are not reaching end users due to pricing control by Indian suppliers. For HORECA players, Australian meat remains more expensive compared to New Zealand alternatives despite policy improvements.
 - Price fluctuations impact menu pricing, which cannot be easily revised once finalised. When key ingredients are frequently unavailable, restaurants are forced to either remove dishes from menus or use substitutes, leading chefs to opt for alternative meat sources.
- ❖ Brand recognition deficits
 - Limited awareness of chilled Australian sheep meat among importers, suppliers, and consumers, combined with historical purchasing patterns favouring frozen formats, restricts market demand to frozen products only.
 - While 20% of consumers recognise and appreciate New Zealand lamb's specific qualities, Australian lamb lacks equivalent marketing narrative development and market positioning.
- ❖ High fat content and visible blood in packaging affects chef perceptions
 - Australian sheep meat's thick fat lining and lower meat content require fat capping to enhance flavour retention and align with Indian consumer preferences for high meat content, and chefs' needs for flavour retention during cooking.
 - Transparent packaging revealing blood clots in Australian sheep meat creates negative visual perceptions among chefs and purchase managers, requiring packaging strategies that maintain premium appeal while preserving product integrity.

6.6. Recommendations

Currently, the HORECA segment represents the primary consumer segment for Australian sheep meat exports. Australia's market activation has successfully resulted in deep market penetration in the top-tier HORECA players of the country, spanning the major metro cities-Delhi, Mumbai, and Bengaluru.

For the next phase of growth, there is a need to expand supply to the next tier of HORECA players—hospitality speciality groups and standalone premium restaurants—like Swan, BoTai, Kikli, Naar, Bawri, Masala Library, Bastian, Mizu, Kuraku, and Indian Accent, amongst others. However, expansion efforts hinge on strategic market activation and establishing relationships with executive chefs, sous chefs, procurement teams, and specialised importers.

Australian suppliers must address specific operational and product requirements within this segment to achieve successful market penetration.

- Product quality and presentation standards are paramount. Visible blood clots create unfavourable aesthetic perceptions among chefs, necessitating rigorous quality control measures and transparent vacuum-sealed packaging throughout the supply chain to ensure product integrity during transportation.
- Culinary preferences in the Indian market differ markedly from traditional importing markets. Indian chefs demonstrate a preference for leaner cuts with minimal fat lining and maximum meat yield. Current imported sheep meat typically requires substantial fat capping, which diminishes usable meat content and restricts applicability to continental cuisine only. Australian suppliers should develop specialised cut profiles featuring reduced fat content to expand product versatility and enable integration into authentic Indian culinary applications.

Market development within this segment requires strategic investment in complementary product sampling.

Suppliers should view sampling initiatives as foundational investments in building sustained demand rather than operational costs, recognising their critical role in product evaluation and chef approval processes.

Market activation remains instrumental for segment expansion. Australian suppliers should explore structured marketing initiatives, including curated wine and lamb pairing experiences across premium restaurant venues, leveraging proven models similar to successful Australian macadamia promotion campaigns to establish brand presence and culinary credibility.

6.6.1. Steps to consider

Step 1: Identify and partner with : importers and suppliers Securing importer and supplier partnerships is the prerequisite for market entry. This step is not optional; without it, demand creation efforts will fail to convert into market presence, reaffirming its status as the single most critical starting point. An importer or supplier will help with,

- **Regulatory navigation** – Importers are well-versed in India’s complex import regulations, FSSAI approvals, and documentation requirements, reducing compliance risks.
- **Efficient logistics** – They manage the critical cold-chain infrastructure, from port handling to warehousing and last-mile delivery, ensuring product quality and shelf-life.
- **Market access** – Local suppliers have long-standing networks with HORECA buyers, retailers, and distributors, enabling immediate access to established demand channels.
- **Risk mitigation** – Trusted partners help bridge cultural and business practice gaps, lowering entry risks and ensuring smoother market penetration.

Step 2: Understand hotel procurement contract types: Australian exporters must analyse the procurement model adopted by each hotel or luxury restaurant to determine the best approach for engagement.

Types of contracts

- **Central Procurement Contracts (CPC):** Common among chains like IHCL and Marriott, where annual tenders are rolled out to select suppliers for the entire financial year.
- **Regional supply contracts:** Used by hotels such as Hyatt, which follow a decentralised procurement model. Regional teams independently manage supplier relationships and maintain vetted supplier lists, offering flexibility for targeted engagement.
- **Hybrid contracts:** Adopted by chains like The Leela and Oberoi Hotels, combining central premium contracts with regional sourcing for fresh or local produce.
- **Short-term contracts:** Typically used for perishables to address immediate operational needs.

Large-volume supply contracts are typically structured through CPCs, making them ideal for suppliers seeking scale and consistent off-take. Regional agreements allow suppliers to test market demand, adapt supply strategies across geographies, and gradually build brand presence.

Step 3: Timing is the key: Australian suppliers should prioritise early engagement, strategically leveraging the August–September lean season for chef samplings, limited-time offering menus, and guest trials to position Australian lamb ahead of the festive demand surge.

- **Timing:** Conduct sampling and tasting sessions between August and September, coinciding with the lean period before festivities.
- **Limited-Time Offer (LTO) menus:** Leverage LTO menus curated by chefs to introduce new dishes and gauge market response.
- **Product trials:** Reserve portions for trial with guests, factoring in free sampling costs in the marketing budget.

Step 4: Chef-led product approval: In India's premium HORECA segment, executive chefs, sous chefs, and butchery teams serve as the gatekeepers of meat procurement decisions. These culinary professionals hold ultimate authority over product selection, determining not only initial product listing but also repeat orders and eventual menu scaling. Their endorsement is the critical bottleneck that transforms distributor interest and competitive pricing into sustained market demand - without securing their professional approval and confidence, no amount of favourable economics can guarantee consistent product adoption or long-term market success.

Stakeholder Engagement:

- **Executive chefs and sous chefs:** These culinary leaders drive menu innovation and premium dish development, serving as primary influencers in product selection and integration into high-value menu offerings.
- **Procurement department and butchery teams:** Operating as practical gatekeepers, these teams assess operational feasibility, including portion yields, kitchen workflow compatibility, and handling efficiency. Critical alignment areas encompass contract structures, supply planning, packaging specifications (vacuum-packed or portion-cut options), pricing frameworks, service level expectations, and service level agreements.
- **Targeted tastings and dinners:** Organise curated sessions where chefs can experience Australian lamb in dishes, they design themselves.
- **Culinary guidance and cut education:** Provide knowledge on alternative cuts, trim levels, and preparation methods to highlight versatility.
- **In-kitchen trials:** Allocate free trial volumes for chefs to test cooking performance, consistency, and plating outcomes under real service conditions.

Step 5: Market activation: Market activation is the most critical determinant of success in India's HORECA sector.

- **Active engagement:** Regular sampling, tasting sessions, and chef interactions are essential to create demand, build trust, and integrate Australian sheep meat into premium menus.
- **Marketing integration:** Market activation should complement contract strategy, chef engagement, and procurement negotiations, forming a holistic approach to capture the HORECA segment effectively.
- **Consistent supply:** Ensure stable supply in terms of quality, quantity, and pricing. Reliable and consistent deliveries from Australian suppliers are essential to establish trust and drive adoption in the market.
- **Product optimisation:** Trim external fat to increase usable meat yield, maximising value for restaurants and driving repeat orders.



7. Opportunities in specialised catering

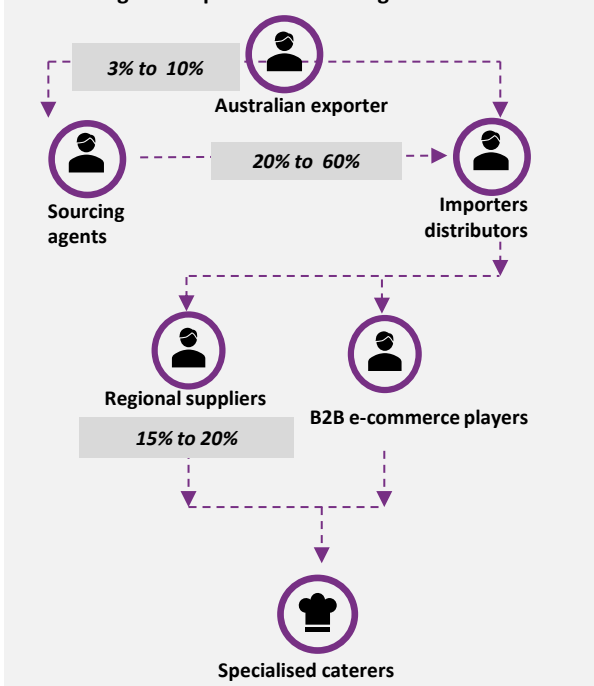
7.1. Value chain analysis

Specialised caterers are premium food service providers specialising in high-end, customised culinary experiences for private events, weddings, corporate galas, and elite gatherings. They combine gourmet cuisine, fine-dining service, aesthetic presentation, and hospitality excellence — delivering restaurant-quality or better experiences in off-site, event-based settings. Many operate with a boutique model, offering curated menus, imported ingredients, and personalised service for ultra-discerning clients.

Key characteristics of this consumer segment are,

- **Event-driven demand:** The luxury catering sector is characterised by high-value events, including premium weddings, corporate galas, exclusive private celebrations, and diplomatic functions. These events typically accommodate guest counts ranging from 200 to over 2,000 attendees, requiring substantial logistical coordination and premium ingredient sourcing to meet elevated service expectations.

Figure 8: Specialised catering value chain



- **Pan-India reach with operational mobility:** Leading specialised caterers demonstrate significant operational flexibility through pan-India and international service capabilities. These premium operators routinely deploy culinary teams and specialised equipment across multiple cities and countries to execute destination events, reflecting the mobile nature of their affluent clientele and the global scope of luxury event planning.
- **Culinary differentiation and menu innovation:** Market differentiation is achieved through tailored menu curation featuring diverse global cuisines, including Mediterranean, Pan-Asian, and Modern Indian preparations alongside regional specialities. This culinary versatility enables caterers to meet diverse client preferences while maintaining premium positioning through innovative flavour profiles and presentation techniques.
- **Experience-centric service delivery:** This segment emphasises immersive dining experiences through live cooking counters, precision-plated service, thematic presentation concepts, and gourmet experiences comparable to fine-dining establishments. This focus on experiential elements distinguishes luxury catering from conventional food service and justifies premium pricing structures.
- **Integrated business model integration:** Many elite catering operations maintain dual business models, operating flagship restaurants or boutique food brands alongside their event services. Notable examples include DIVA Catering by Chef Ritu Dalmia, which leverages the established reputation of the DIVA restaurant chain to enhance catering credibility and market positioning.
- **Advanced procurement standards:** Luxury has a strong preference for premium, traceable ingredients, often sourced internationally. This procurement sophistication reflects client expectations for quality assurance and supports the premium positioning of luxury catering services in the competitive marketplace.
- **Strategic partnership networks:** This segment is characterised by frequent collaborative partnerships with celebrity chefs, luxury hotels, and international food consultants to elevate service offerings and maintain competitive differentiation. These partnerships enable access to specialised expertise, enhance brand credibility, and provide opportunities for menu innovation and market expansion.
- **Premium market position:** The primary clientele consists of ultra-high-net-worth individuals (UHNIs), diplomatic circles, luxury wedding planners, and premium event management firms. This concentrated target market demands exceptional service standards, innovative culinary offerings, and seamless execution, driving the sector's focus on premium ingredients and sophisticated operational capabilities.

7.2. Procurement process

The procurement process in luxury catering follows structured frameworks designed to balance quality requirements with operational efficiency:

- ❖ **Centralised contract-based procurement:** Most specialised caterers operate centralised procurement systems with contractual arrangements renewed annually or biannually. Contracts are typically signed at the start of the financial year, with vendors categorised based on specific product categories. This system provides price stability and supply assurance while maintaining quality standards.
- ❖ **Quality-first evaluation process:** The procurement sequence begins with the supplier presentation of samples for evaluation by culinary teams. Quality assessment precedes all commercial considerations, ensuring only products meeting culinary standards advance through the procurement pipeline. Comparative evaluation and price negotiations follow successful quality approval.
- ❖ **Flexibility within structure:** While CPCs standardise procurement processes, flexibility exists for sourcing alternatives when higher-quality products are identified or when fixed suppliers face availability issues. This dual approach ensures operational continuity while maintaining quality standards.
- ❖ **Multi-stakeholder coordination:** Procurement teams typically include heads of procurement, floor managers, and vendor liaison coordinators. Quality monitoring remains with chef teams, while procurement teams manage sourcing, negotiation, and vendor coordination.

Figure 9: Procurement process of specialised caterers



Procurement team

- Procurement is carried out on a need basis through pre-approved, registered vendors.
- Registered vendors primarily consist of regional suppliers, importers, or e-commerce marketplaces specialising in high-quality imported sheep meat.



Registered vendors

- All vendors must be registered with the caterers through the formal onboarding process before any procurement engagement.
- Registered vendors are briefed on the specific quality standards and cut specifications for imported sheep meat
- Vendors are requested to submit representative product samples.



Sampling

- Culinary department conducts a blind tasting evaluation of the submitted samples to ensure compliance with quality expectations and organoleptic standards.
- Upon successful quality evaluation, the procurement team engages in negotiations with the selected vendors to finalise product pricing based on the approved specifications.



Final product selection

- Upon approval, procurement and legal teams jointly review and finalise commercial terms, including delivery schedules, payment terms, shelf-life guarantees, and packaging standards.
- Based on a composite assessment of the product, the final vendor is selected and approved for procurement.

Sourcing ecosystem for specialised caterers

- **Dependence on regional suppliers:** Specialised caterers primarily procure imported lamb through regional suppliers/distributors. This dependence arises due to fragmented demand, with caterers typically managing event-based or niche requirements, making regional suppliers better suited to provide flexible, smaller-volume deliveries.
- **Specialised B2B platforms:** Partners such as Hyperpure and Sweetstuff enable rapid, small-batch deliveries, catering to high-frequency, short-lead-time event requirements
- **Quality-driven supplier selection:** Procurement decisions prioritise reliability, consistent quality, assured lead times, and temperature-controlled handling over lowest-cost options
- **Blended sourcing approaches:** Some caterers adopt hybrid models that integrate both imported and domestic lamb based on menu complexity, guest profiles, and event budgets
- **Supply chain mix:** To address over-dependence on any stakeholder, caterers maintain alternative regional sourcing channels, importers sourcing and direct B2B procurement, offering greater flexibility and risk hedging

7.3. Types of cuts in demand

Table 5: Types of sheep meat cuts in demand in specialised catering

Type of cut	Common applications by chefs	Procurement format preferences
Shoulder and chops	High in connective tissue and marbled fat, the shoulder becomes rich and fork-tender when slow-cooked—perfect for deep, spiced gravies and rustic stews. Indian Dishes: Rogan Josh, Bhuna Gosht	Whole primal or bone-in portions, vacuum-packed.
Shank	The shank’s bone marrow and collagen release intense flavour and texture into slow-simmered dishes, enhancing richness and mouthfeel Indian Dishes: Laal maas, Hyderabad Murg.	Individually packed bone-in cuts, skinless, cryovac or vacuum-sealed.
Minced lamb	Finely ground meat allows for uniform seasoning and texture, essential in soft kebabs or layered casseroles. The high fat ratio adds succulence Indian Dishes: Kebabs (For instance, galouti kebab and shami kebab).	Frozen, vacuum-packed or Individually Quick Frozen (IQF) pouches (500g–2kg units).

7.4. Product to market-fit of Australian sheep meat

- ❖ **Halal compliant, grain finished options:** Australian lamb exports to India are Halal-certified, aligning with religious dietary preferences in high-end events. Grain-finished options provide enhanced marbling and flavour preferred by chefs for kebabs, roasts, and stews.
- ❖ **Cross cuisine versatility:** Australian lamb's balanced fat profile, tender texture, and clean flavour makes it highly adaptable across Western, Middle Eastern, Mediterranean and modern Indian cuisines. Chefs are willing to feature it in everything from Moroccan tagines and Italian ossobuco to Korean lamb bulgogi and French-style herb-crusted racks.
- ❖ **Clean taste profile for culinary adaptability:** Compared to some regional lamb varieties with stronger gamey notes, Australian lamb has a mild, clean flavour that readily absorbs spices, marinades, and global seasoning profiles — from Middle Eastern sumac and za'atar to Indian rogan josh.
- ❖ **Excellent for premium presentation and plating:** With uniform muscle structure and minimal shrinkage during cooking, Australian lamb delivers superior plate appeal — critical for luxury formats such as plated fine dining, live carving stations, and gourmet canapé bars. Cuts like lamb racks and loins present beautifully across Western, fusion, and Asian menus.
- ❖ **Marbling supporting versatility and low odor fits well with Indian consumer's pallet:** lamb's superior marbling—enhanced intramuscular fat content between muscle fibers—delivers exceptional texture and versatility across all cuisines while ensuring optimal tenderness and flavour retention during cooking. Australian lamb's milder odor provides a competitive advantage over New Zealand lamb, aligning with Indian consumer preferences for odourless meat.

7.5. Seasonality drives demand in specialised catering

Imported lamb demand in luxury catering demonstrates a strong correlation with India's wedding calendar and cultural event cycles, creating supply pressure and pricing volatility during these periods. High-profile events, destination weddings, and corporate galas drive sporadic demand spikes outside traditional wedding seasons, often requiring specialised cuts and presentation formats that create additional complexity in demand forecasting. These seasonal demand patterns significantly influence distributor stocking strategies.

Wedding and festive seasons drive peak demand

- ❖ Demand for imported lamb surges during India's major wedding seasons (**typically Oct–Dec and Feb–Mar**) and festivals like Eid, Christmas, and New Year.
- ❖ Specialised caterers plan elaborate menus featuring high-value meats during this season. These events often involve large guest counts and global cuisines, making imported lamb a preferred premium protein.

Cold-weather menus favour lamb

- ❖ In colder months (**November to February**), chefs are more likely to include braised, roasted, and grilled lamb dishes in menus.
- ❖ These comfort-style preparations align with seasonal preferences, further pushing up imported lamb usage across banquets and fine-dining formats.

Tourism-driven demand in coastal and metro markets

- ❖ In destinations like **Goa, Kerala, Rajasthan**, and major metros, international tourist arrivals — peaking during **Oct to Mar** — fuel demand from luxury hotels and resorts offering Western and Mediterranean lamb dishes.
- ❖ Off-season months see a decline in imported meat usage, especially in resort-based Food and Beverages (F&B) operations.



MICE events create demand spikes in business hubs

- ❖ Large-scale MICE events — particularly in metros like Delhi-NCR, Mumbai, Bengaluru, and Hyderabad — generate short-term but high-volume demand for premium lamb dishes at corporate galas, banquets, and delegate dinners.
- ❖ These events often require international-standard menus, prompting caterers and hotels to source imported lamb.
- ❖ The unpredictability and clustering of MICE bookings lead to sudden demand surges.

Table 6: Preferable months for imported lamb/sheep demand in specialised catering

Month	Demand outlook	Key drivers
January	High	Peak wedding season, New Year events, cool weather menus
February	High	Continued weddings, Valentine's, MICE season
March	Moderate to high	Pre-summer weddings, corporate events, tourism flow remains active
April	Moderate	Early summer weddings; start of religious fasting (Ramadan/Navratri)
May	Low	Hot weather, fewer events, wedding off-season
June	Low	Monsoon onset, reduced catering, low MICE activity
July	Low	Continued monsoon, low event activity, Hindu fasting period
August	Moderate	Slight recovery with Independence Day, corporate demand begins rising
September	Moderate	Pre-festive planning starts, MICE resumes, end of monsoon
October	High	Major festivals (Navratri, Dussehra), wedding season starts
November	Peak	Diwali, destination weddings, tourism surge
December	Peak	Christmas, New Year, year-end weddings, MICE, winter menus

7.6. Need for market activation for Australian sheep meat

Current market activation efforts for Australian lamb in the luxury catering sector reveal significant gaps,

- ❖ **Limited digital marketing presence:** Australian lamb suffers from minimal targeted promotion through digital channels, including blogs, YouTube, and influencer marketing. This contrasts sharply with New Zealand lamb's extensive digital marketing framework featuring influential food blogs, YouTube tasting channels, and chef-led social media content.
- ❖ **Engagement pathway requirements:** For product promotions or new product placements, engagement should be directed to marketing teams and general managers of individual catering operations. These stakeholders manage market-facing initiatives and can support product visibility across both catering and restaurant channels.
- ❖ **Word-of-mouth amplification needs:** Social media buzz, including Instagram posts of celebrity chefs and food vloggers, significantly influences host perceptions of premium meat dishes. Australian suppliers need to develop partnerships with luxury hotels where guest-shared photos and stories can act as powerful endorsements.
- ❖ **Event-based activation opportunities:** Food and beverage expos provide hands-on sampling opportunities that lower trial barriers and amplify buzz within the catering community. These platforms offer direct access to decision-makers and enable immediate product experience.
- ❖ **Educational content gaps:** Limited storytelling around Australian lamb's taste, quality attributes, and eco-friendly credentials compared to competitors. Market education opportunities exist for communicating superior marbling, processing standards, and breeding quality advantages.

For product promotions or new product placements, engagement should be directed to marketing teams and general managers of individual catering operations. These stakeholders manage market-facing initiatives and can support product visibility across both catering and restaurant channels.

The most common market activation formats for specialised catering include,

- ❖ Behind-the-scenes content with culinary social media influencers.
- ❖ Tasting sessions at B2B gourmet events.
- ❖ Co-branded luxury wedding showcases.
- ❖ Experience-based gifting for decision-makers.

7.7. Opportunities and challenges

Opportunities

- ❖ **Cross product integration:** Speciality caterers create cohesive culinary narratives through strategic cross-product integration. Designed wine-paired dinners and regional cuisine showcases, where Australian lamb preparations can be expertly matched with Australian wines, can create authentic provenance stories, enhancing the perceived value and exclusivity of the dining experience. Marketing of Australian lamb's versatility across diverse cuisine styles will further enable scalability in the seamless integration of the product into various menu formats.
- ❖ **Seasonal menu alignment:** Creating seasonal menu concepts that align with India's wedding calendar and cultural celebration patterns demonstrates understanding of market dynamics and provides caterers with ready-made solutions for their peak demand periods. Specialised caterers constantly seek innovative menu concepts that can be adapted for different event types and seasonal celebrations, making Australian lamb suppliers who develop India-specific seasonal offerings particularly valuable partners. This approach not only addresses the practical challenges of demand forecasting but also positions Australian lamb as an ingredient that understands and respects local cultural contexts, enhancing its appeal among luxury event hosts who value cultural sensitivity and authentic dining experiences.
- ❖ **Cross-brand collaboration benefits and market amplification:** Cross-brand collaboration opportunities with established premium dining brands, luxury hotels, and celebrity chef partnerships provide Australian suppliers with accelerated market entry and enhanced credibility within India's competitive culinary landscape. These collaborations enable joint hosting of special events that amplify market visibility while distributing marketing costs across multiple partners, making high-impact promotional activities financially viable for suppliers entering new markets. Specialised caterers often seek innovative partnership opportunities to differentiate their offerings and attract high-profile clients, creating natural alignment with Australian suppliers who can provide unique products and compelling origin stories. For suppliers, these partnerships offer access to established customer bases, professional kitchen environments for product demonstrations, and association with respected culinary brands that enhance credibility and market acceptance. The collaborative approach also enables suppliers to leverage partner expertise in local market dynamics, client preferences, and operational requirements while building relationships with multiple industry stakeholders simultaneously. Additionally, cross-brand events create content opportunities for social media marketing, food photography, and influencer engagement that extend promotional reach beyond the immediate event audience, generating sustained awareness and interest among target demographics.

Challenges

- ❖ **Intermittent Stock-Outs:** Australian lamb faces frequent sell-outs on key platforms like Hyperpure, owing to lower stocking volumes and importers' reluctance to tie up cold-storage space on niche SKUs. These stock-outs force caterers to pivot to New Zealand lamb or adjust menus at short notice. Therefore, suppliers to the specialised catering segment seek long-term pricing strategies or forward contracts to maintain consistent pricing for premium clients.
- ❖ **High fat content and visible blood in packaging affects chef perceptions**
 - ❖ Australian sheep meat's thick fat lining and lower meat content, requiring fat capping to match Indian preferences for high meat content, often results in wastage and drives
 - ❖ consumer preference toward New Zealand lamb's higher meat content.
 - ❖ Transparent packaging revealing blood clots in Australian sheep meat creates negative visual perceptions among chefs and purchase managers, requiring packaging strategies that maintain premium appeal while preserving product integrity.

❖ Supply Chain Unpredictability:

- ❖ The unpredictability of Australian lamb availability erodes caterer confidence in menu planning and forces reliance on alternative products. This uncertainty complicates both operational planning and guest experience consistency.
- ❖ Fluctuations in shipping timelines, or last-minute stockouts, can make it difficult for caterers to guarantee the availability of specific lamb cuts for tightly scheduled events. This unpredictability undermines trust and leads chefs to opt for more readily available products to avoid last-minute menu changes or compromises in guest experience.

7.8. Recommendations

Specialised catering represents a complementary and distinct sales channel for Australian suppliers seeking portfolio diversification. This segment prioritises quality, provenance, and distinctive culinary experiences; however, it is characterised by lower transaction volumes and pronounced seasonal concentration in demand.

The specialised catering sector operates with event-specific requirements, necessitating customised product specifications.

- ❖ Catering professionals require precisely tailored cuts and portion sizes aligned with occasion-specific culinary applications. Australian suppliers must collaborate with distribution partners to develop flexible SKU configurations addressing these specialised demands.
- ❖ Primary product recommendations include shoulder and chops marketed as whole primals or bone-in portions in vacuum-sealed packaging for traditional preparations; shanks presented as individually packaged bone-in cuts suitable for slow-braised applications and marrow-forward dishes; and minced lamb offered in frozen, vacuum-sealed, or individually quick-frozen formats in unit sizes ranging from 500g to 2kg to accommodate kebab preparations and layered casserole applications.

Market development within this segment requires strategic investment in complementary product sampling. Suppliers should view sampling initiatives as foundational investments in building sustained demand rather than operational costs, recognising their critical role in product evaluation and catering to professional approval processes.

6.7.1 Steps to consider

Step 1: Partner with regional distributors/B2B Platforms: Specialised caterers typically procure ingredients and meat from regional suppliers. Therefore, Australian suppliers must establish a regional supply network in order to capture the seasonal consumption needs of this consumer segment.

- Focus on established regional hubs: Delhi-NCR, Mumbai, Bengaluru, Kolkata, and emerging markets in Punjab, Rajasthan, and Goa.
- Leverage platforms like Hyperpure and Sweetstuff for rapid, small-batch deliveries.



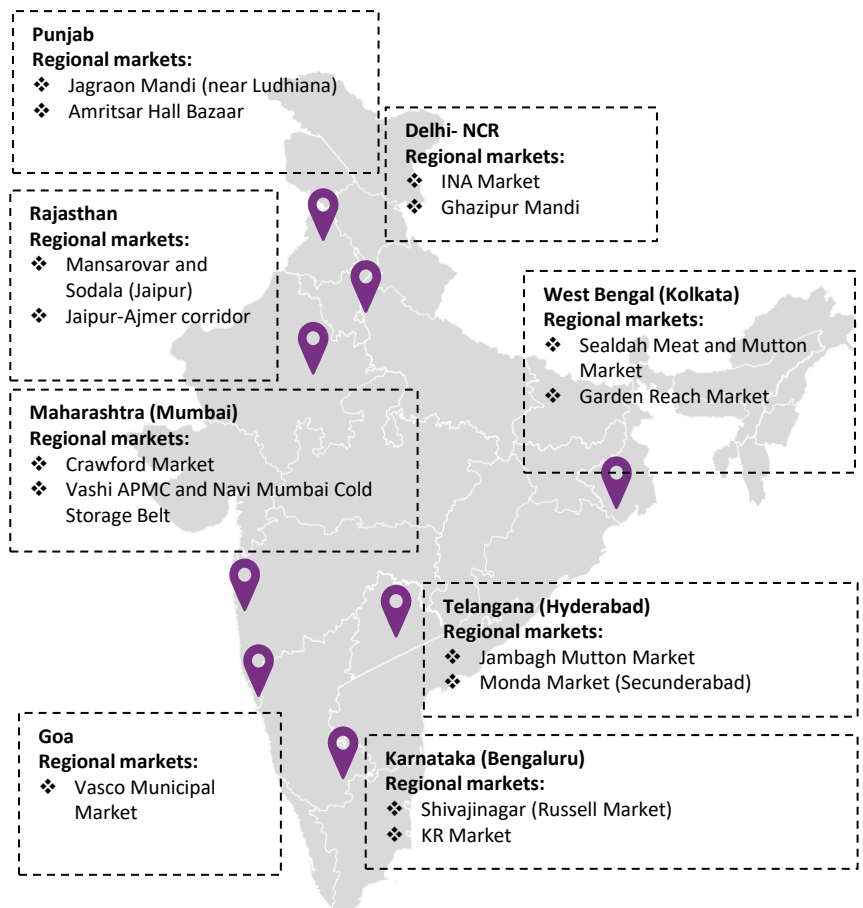
Step 2: Tailoring cuts and sizes: Specialised caterers have reported that they require specific cuts and sizes as per the needs of the occasion. Therefore, Australian suppliers must work with their partner suppliers to tailor cuts and sizes as required.

- Shoulder and chops: Market as whole primal or bone-in portions, vacuum-packed for dishes like Rogan Josh and Bhuna Gosht.
- Shank: Promote individually packed bone-in cuts for slow-simmered dishes and marrow-rich preparations.
- Minced lamb: Focus on frozen, vacuum-packed, or IQF pouches (500g-2kg units) for kebabs and layered casseroles.

Step 3: Sampling before peak demand season: Specialised caterers plan elaborate menus 2-3 months in advance for the peak winter wedding season (November-February). Therefore, Australian suppliers must execute intensive sampling programs during August-September-October to capture seasonal requirements and secure contracts for the high-demand winter period.

- **Free sampling protocol:** Provide complimentary premium cuts to head chefs and culinary teams for menu development and signature dish creation.
- **Joint engagement approach:** Combine chef sampling sessions with dedicated sales representative interactions to ensure both culinary and commercial alignment.
- **Decision-maker targeting:** Engage both procurement teams and culinary leadership simultaneously during sampling events.
- **Menu integration support:** Offer technical culinary support to help chefs incorporate Australian lamb into their existing specialities and seasonal offerings.

Figure 10: Key regional supplier hubs in target geographies



Australian suppliers must budget for complimentary sampling as a necessary market development cost rather than a revenue activity.

- Free sampling during July-September should be viewed as a customer acquisition investment to secure high-value winter season contracts, with suppliers expecting sampling costs to convert into procurement contracts for the peak November-February period, generating returns 2-4 months post-sampling.
- This strategic investment approach recognises that specialised caterers require hands-on product experience before committing to premium ingredient procurement, making upfront sampling costs essential for market entry and long-term contract acquisition in India's luxury catering segment.



8. Opportunities in E-commerce

8.1. Value chain analysis

The rise of e-commerce platforms—spanning both B2B and B2C models—has created a digital distribution infrastructure capable of handling imported meat products, complete with cold-chain logistics, product traceability, and tailored customer engagement. E-commerce has, thus, become a critical enabler for exporters seeking structured access to Indian buyers across the HORECA sector, specialised catering sector, and urban households.

Key characteristics of the e-commerce segment include:

- ❖ **High SKU customisation and consumer packaging:** This segment demands pre-portioned, retail-ready SKUs (typically 250g to 1kg) tailored to urban household preferences, alongside small to medium portion formats for the HORECA and specialised catering applications. Imported lamb is often sold as chops, shanks, mince, or gourmet cuts, with a strong emphasis on vacuum-sealed, hygienic packaging that enhances shelf life and consumer trust.

Figure 11: E-commerce value chain



Source: T&A analysis based on stakeholder interviews

- ❖ Lamb is often sold as chops, shanks, mince, or gourmet cuts, with a strong emphasis on vacuum-sealed, hygienic packaging that enhances shelf life and consumer trust.
- ❖ Data-driven product planning and seasonal campaigns: Platform operators use consumer data analytics to inform product availability, cross-selling strategies, and promotional timing. Demand for imported lamb often peaks during the Indian wedding season and festive seasons such as Eid and Christmas, and long weekends, prompting targeted campaigns and curated selections.
- ❖ Multi-city operational footprint with micro-fulfilment capabilities: Leading platforms such as Licious, Freshthome, and Meatigo operate across 10–20 urban markets with decentralised cold-chain fulfilment hubs. This allows timely replenishment of stock and efficient last-mile delivery to households, enhancing their reliability as volume-driven buyers.
- ❖ Private label development and upstream control: Several e-commerce meat brands are investing in private labels and in-house processing capabilities to develop value-added products such as lamb burger patties. This vertical integration requires a predictable and high-quality input supply.
- ❖ Brand-centric consumer engagement: These platforms differentiate through brand storytelling, chef-led recipe content, social media marketing, and influencer partnerships. The provenance, traceability, and quality credentials of imported lamb are core to consumer trust and brand equity, making storytelling and quality consistency key expectations from exporters.

Key micro-drivers of the rising opportunity in the e-commerce sector

- ❖ **Rising premiumisation** in consumer and institutional food choices.
- ❖ **Digitisation of procurement and retail** across food services and households.
- ❖ **Expansion of cold-chain and last-mile logistics**, enabling frozen and chilled meat delivery.
- ❖ **Increasing acceptance of imported meats** in gourmet restaurants and e-commerce.

8.2. Target consumer sub-segments within e-commerce

The Indian e-commerce landscape for sheep meat and lamb is multi-layered, comprising distinct sub-consumer segments with differing volume needs, quality standards, and sourcing preferences.

E-commerce platforms—both B2B and B2C—serve as procurement and delivery enablers for a range of customer archetypes, from institutional buyers to urban households.

Three key sub-segments emerge as high-potential end-users for imported sheep meat and lamb across e-commerce channels: specialised caterers (MICE, weddings, and private events), mid-to-premium restaurants and cafés, and standalone household consumers. Each segment plays a unique role in shaping product demand, cut preferences, and distribution economics.

Table 7: Characteristics of consumer sub-segments in E-commerce

Specialised caterers for MICE, weddings, and private events	
Characteristics	<ul style="list-style-type: none"> • Event-driven, bulk procurement of premium cuts for curated dining at destination weddings, corporate galas, and UHNI private parties. • Menu innovation and exclusivity are critical differentiators. • Preference for imported lamb due to prestige value and presentation quality.
Sourcing considerations	<ul style="list-style-type: none"> • Typically source via B2B e-commerce platforms or boutique suppliers in urban clusters. • Require cold-chain integrity, labelling compliance, and flexible delivery scheduling. • Some high-end caterers procure informally from local speciality meat shops on an as-needed basis.
Preference for cuts	<ul style="list-style-type: none"> • French-trimmed racks, bone-in chops, tenderloins. • Whole loins for carving stations, shanks for plated mains. • Vacuum-sealed.

Mid-to-premium restaurants and cafés

Characteristics	<ul style="list-style-type: none"> Independent and branded restaurants with curated global menus (For instance European grills and Mediterranean bistros). Use lamb as a centrepiece in chef-led dishes or seasonal specials. Lower volumes than specialised caterers but with higher frequency and menu stability.
Sourcing considerations	<ul style="list-style-type: none"> Seek consistency in cut size, fat content, and cookability. Expect predictable delivery timelines and back-end digital tracking from platforms. Growing interest in ready-to-cook formats that reduce kitchen prep time.
Preference for cuts	<ul style="list-style-type: none"> Chops, loins, and boneless cubes. Ready-to-cook marinated lamb skewers or steaks. Cost-effective pre-portioned formats for controlled menu pricing.

Standalone household consumers

Characteristics	<ul style="list-style-type: none"> Urban, upper-middle-income families in Tier-1 cities (Delhi NCR, Mumbai, Bengaluru, Hyderabad, Pune). Expats and High Net Worth Individuals (HNIs). Purchase imported lamb occasionally for weekend indulgence, private parties or festive cooking.
Platform usage	<ul style="list-style-type: none"> Purchase through B2C e-commerce platforms such as Meatigo, Licious and Artisan Meat App-based ordering with preference for convenience, clean packaging, and next-day delivery. Require product storytelling, recipe guides, and clear labelling.
Sourcing considerations	<ul style="list-style-type: none"> Imported lamb is rarely part of routine basket; limited to premium cuts for celebrations Preference for small packs (250g–500g) due to cost and experimentation. Some consumers rely on house help or chefs to source meat from known local stores.
Preference for cuts	<ul style="list-style-type: none"> Lamb chops, French racks (in smaller SKUs). Boneless loins and mince. Pre-marinated chops or burger patties.

8.3. B2B e-commerce meets institutional and event-driven demand

The B2B e-commerce landscape for sheep meat and lamb is anchored in the institutional food services market, comprising luxury hotels, fine-dining restaurants, gourmet caterers, and the rapidly evolving luxury wedding segment. These customers demand consistent quality, safety certifications, and traceable supply chains—making imported lamb an increasingly attractive option.

B2B e-commerce — The ‘trusted backend’ for India’s foodservice operators

- ❖ **Consistent availability:** Imported lamb SKUs are integrated into centralised procurement menus and guaranteed for availability across geographies, helping kitchens maintain consistency in menu offerings.
- ❖ **Operational predictability:** Through fixed delivery schedules, digital ordering interfaces, and fulfilment Service Level Agreements (SLAs), B2B platforms reduce variability and last-minute supply disruptions, improving kitchen operations.
- ❖ **Customisation at scale:** Platforms enable clients to choose from a curated range of imported lamb products—cuts, sizes, packaging—tailored to culinary requirements, whether for plated service, buffets, or banquets.
- ❖ **Supplier trust and traceability:** As intermediaries, these platforms validate product origin, certifications (such as Halal, country of origin), and cold chain history, fostering trust between kitchens and global exporters.

Procurement trends and format preferences

- ❖ **Portion-controlled vacuum packs** of lamb racks and chops are preferred for ease of inventory planning, reduced wastage, and operational speed.

Figure 12: Procurement process and value chain of B2B e-commerce platforms**Strategic sourcing and supplier onboarding**

- Procurement team identifies approved exporters of chilled or frozen lamb.
- Suppliers are evaluated for compliance with Indian import standards, reliability of cold chain infrastructure, and ability to provide traceability documentation.
- Once approved, procurement contracts are established highlighting terms around minimum order quantities, delivery timelines, temperature integrity, documentation and penalties for deviation.
- In certain cases, frozen and chilled lamb is also sourced through large scale importers such as Fortune Gourmet.

**Import compliance and regional distribution**

- Upon arrival in the country, consignments are routed through the regulatory compliance procedures as per the FSSAI norms.
- Products are temporarily stored in refrigerated warehouses near ports and airports under temperature monitored conditions.
- Frozen lamb products are moved via refrigerated vehicles to e-commerce platform's zonal warehouses located in major metro cities such as Bengaluru, Delhi and Mumbai.

**Product customisation and SKU preparation**

- Depending on end-client requirements, lamb may be retained in bulk or portioned into foodservice-specific SKUs (such as 2kg vacuum-sealed blocks, chops, or racks).
- Products undergo visual inspection, temperature verification, and random microbial testing at distribution centers before they are released for last-mile delivery.

**Fulfilment to institutional clients**

- Tech-driven order management where restaurant and cloud kitchen clients place orders via the platform's digital interface, which reflects real-time inventory.
- Orders are consolidated and dispatched using refrigerated vehicles to ensure temperature integrity until delivery at kitchen sites.
- Institutional buyers are typically serviced with daily or scheduled deliveries under predefined Service Level Agreements (SLAs), including delivery cut-off times, batch traceability, and cold chain validation.

- ❖ Ready-to-cook (RTC) formats, including marinated chops and portioned boneless cuts, are gaining traction among cloud kitchens and mid-scale restaurants looking to reduce back-end prep time.
- ❖ Bulk frozen cartons (5–10 kg) of loins, shanks, and trimmings are commonly procured by central commissaries and cloud kitchen aggregators for redistribution across multiple kitchen locations.
- ❖ High emphasis on uniformity and shelf life, as fulfilment hubs stock imported lamb in advance and dispatch across geographies with minimal handling at the last mile.

Types of cuts in demand on B2B e-commerce platforms**Table 8: Types of sheep meat cuts in demand on B2B e-commerce platforms**

Type of cut	Common applications by institutional buyers	Procurement format preferences
Lamb rack	Popular in premium restaurants for plated preparations.	<ul style="list-style-type: none"> ❖ Pre-trimmed racks (French-cut), 2–4 rib portions. ❖ vacuum-packed for extended shelf life.
Shank	Used for bulk preparation in banquets for slow simmered dishes.	<ul style="list-style-type: none"> ❖ Frozen shanks in bulk cartons or individually sealed pouches. ❖ Ideal for slow-cooking applications.
Chops and riblets	Common in Quick Service Restaurants (QSR)-style menus, grill kits, and combo meals.	<ul style="list-style-type: none"> ❖ Ready-to-cook pre-marinated variants. increasingly offered by integrated processors.

Source: T&A analysis based on stakeholder interviews

8.4. B2C e-commerce: Capturing the premium urban consumer

Urban-centric opportunity with a niche for imported lamb and sheep meat

India's B2C e-commerce ecosystem—comprising app-based meat delivery platforms, online verticals of modern retail chains, and integrated food tech aggregators—has significantly transformed access to hygienic, packaged, and value-added meat products. These platforms have capitalised on urban consumer demand for quality assurance, convenience, and traceability, offering a more curated alternative to unorganised wet markets and local butchers.

App-based meat delivery platforms have positioned themselves as the driver of the next phase of growth in demand for imported sheep meat in India. Players like Prasuma, Meatigo, Artisinal Meats, Licious, amongst others, are moving towards internationalisation of their product portfolio. In the next five years, these platforms plan to onboard imported meat both in frozen cut formats and value-added products.

However, while these platforms have enabled the premiumization of meat retail, the specific consumer interest in imported sheep and lamb meat remains nascent, price-sensitive, and highly metro-concentrated.

Niche consumer pulls in B2C e-commerce for imported sheep and lamb meat

While B2C e-commerce platforms have transformed meat retail in India by providing urban consumers with convenient access to hygienic and branded protein options, sheep and lamb meat remains a niche with limited yet strategically relevant traction in this channel.

Despite its premium quality and international positioning, the categories struggles to gain commercial momentum among everyday Indian consumers. The reasons for the same have been elaborated below:

- ❖ **High price sensitivity and low volume turnover:** Imported lamb is already priced at a premium due to sourcing, logistics, and compliance costs. This challenge is further amplified by high platform margins on B2C e-commerce and modern retail channels, low frequency of purchase by end consumers.
- ❖ **Rare and occasion-led consumption behaviour:** Insights from consumer interactions revealed that imported lamb is purchased only on rare, occasion-driven events, such as private luxury dinners, high-end house parties, or chef-led celebrations. Even in such cases, sourcing is often done through modern retail or e-commerce channels:
 - Imported chops or racks are typically procured from e-commerce platforms and modern retail stores operating in premium neighbourhoods
 - Chefs or domestic staff familiar with product origin and preparation techniques usually manage sourcing on behalf of affluent households.

Concentrated demand among expats and HNIs:

The limited but consistent demand that exists is concentrated among high-net-worth individuals (HNIs) and expatriate residents in the metro cities of India. This segment demonstrates a higher willingness to pay a premium for provenance, cut quality (especially racks and chops), and international consistency. These consumers prefer to source from premium omnichannel e-commerce platforms such as Foodstories, which curate globally sourced meats and offer ready access to high-end cuts with doorstep delivery.

7.7. Opportunities and challenges

Opportunities

- ❖ **B2B e-commerce as the core upcoming opportunity**
 - ❖ Given the absence of consistent customer pull in B2C channels, the real commercial opportunity for imported sheep and lamb meat in India lies within B2B e-commerce—targeting institutional buyers who value quality consistency, are willing to absorb higher costs for premium service offerings, and use imported cuts for curated experiences in fine-dining restaurants, luxury weddings, and high-end catering operations.

- ❖ Platforms such as Hyperpure and Bigsams serve as structured entry points for exporters seeking predictable volumes, centralised procurement, and repeat institutional demand. B2B e-commerce platforms like Hyperpure represent a strategically valuable distribution channel for Australian sheep meat suppliers, offering direct market access that bypasses traditional importer intermediaries while leveraging established HORECA relationships. These platforms operate through Terms of Trade (TOT) contracts that provide predictable demand patterns and have dedicated account managers who actively educate chefs and purchase managers about new products, creating built-in market activation capabilities.
- ❖ Hyperpure's willingness to send its meat category team to Australia for facility inspections and direct relationship building demonstrates the potential for strategic partnerships that eliminate middlemen, improve price stability, enhance margins, and enable more competitive pricing for end customers. This direct-to-platform model allows Australian suppliers to maintain greater control over their value chain while benefiting from the platform's extensive HORECA network and professional sales infrastructure, positioning B2B e-commerce as a complementary channel that can accelerate market penetration alongside traditional importer partnerships.
- ❖ **Private Labelling by India's B2C e-commerce platforms:** India's B2C e-commerce platforms increasingly employ private labelling strategies, processing fresh meat into ready-to-cook (RTC) and ready-to-eat (RTE) products under proprietary brands. While domestic sourcing currently dominates processed lamb offerings, internationalisation trends are expected to drive import adoption within five years. Burger patties represent the most prevalent RTC format; however, imported lamb remains commercially unviable due to substantially higher input costs that would inflate final product pricing beyond mainstream consumer affordability. Additionally, end consumers typically perceive minimal differentiation between imported and domestic lamb in processed formats, further undermining the commercial case for imported raw materials in this application.
- ❖ **Favourable price dynamics of Australian lamb and sheep meat:** Recent upward pricing trends for New Zealand lamb—where retail prices have doubled in the last few months—have created a whitespace for competitively priced alternatives. Australian exporters can capitalise on the opportunity and offer high-quality lamb at more stable and attractive pricing, especially to price-sensitive but quality-conscious B2C platforms.
- ❖ **Untapped niche premium segments in metro cities:** A small but influential urban consumer base—comprising HNIs, expats, specialised caterers, and gourmet chefs—actively seeks imported lamb for occasion-based consumption. Australian exporters can position their lamb as a reliable, traceable, and chef-preferred brand in this niche, leveraging storytelling, quality certifications, and curated cuts tailored to Indian culinary needs.

Challenges

- ❖ **Inconsistent availability and supply constraints:** A key pain point highlighted by e-commerce platforms is the inconsistent availability of Australian lamb. Stockouts are frequent, and many platforms list Australian-origin SKUs as "currently unavailable," limiting consumer trial and brand retention. Without consistent, predictable supply volumes, platform partners face reputational and fulfilment risks.

Stakeholder perspectives and market feedback

Standardised cuts needed: Oversized cuts require additional trimming and portioning, slowing kitchen operations.

- ❑ **Action point: Producing smaller, uniform cut—especially boneless curry cuts addresses chef pain points, improves portion control, and increases repeat orders.**

Bulk packaging: Current 25 kg bulk packs are unsuitable for mid-tier restaurants, boutique cafés, and niche caterers.

- ❑ **Action point: Smaller 1 kg vacuum-sealed packs in cartons of 25 enable easier storage, reduce wastage, and expand market penetration.**

Direct supply partnerships: Stakeholders favour bypassing intermediaries to ensure price stability and protect against market fluctuations

- ❑ **Action point: Align product specifications (cuts, fat content, packaging) with Indian market needs and build long-term strategic partnerships directly with e-commerce platforms.**

- ❖ **High cost to serve and narrow consumer pull:** Even under AI-EFTA benefits, Australian lamb remains a premium product with limited mainstream appeal in B2C e-commerce. The high platform margin structures inflate shelf prices—discouraging regular household purchase and confining demand to sporadic, occasion-based consumption.
- ❖ **Imported lamb infeasible for private label processing:** Private labelling of processed products such as lamb patties remains economically unviable when using imported meat. Due to the high input cost of imported lamb and additional processing challenges linked to its soft texture, e-commerce platforms rely almost entirely on domestically sourced lamb for value-added SKUs. The cost-to-serve for imported lamb makes it incompatible with the price points required for mass-market RTC/RTE formats. As a result, imported lamb remains confined to whole-cut offerings, limiting product innovation and private label expansion within the category.

8.7. Recommendations

The Indian e-commerce market for sheep meat presents a limited but scalable opportunity for Australian suppliers, with distinct pathways through B2B and B2C channels.

Australian sheep meat suppliers can pursue differentiated strategies across India's e-commerce ecosystem.

B2B e-commerce platforms represent the next growth frontier, enabling scalable market penetration through institutional and event-driven solutions, while B2C brand-building establishes long-term consumer loyalty in India's increasingly quality-conscious market.

- The B2B channel offers immediate opportunities through tailored institutional solutions—customised cuts, Indian-spice marinades, and value-added formats—leveraging partnerships with platforms like Hyperpure and BigSams.
- The B2C channel requires cultural culinary integration, with authentic Indian marinades (Tandoori, Seekh Kebab, Raithani Laal Maas) alongside international fusion options, supported by premium brand positioning that emphasises Australia's ethical farming practices and culinary heritage through storytelling and chef endorsements.
- Curated experiential offerings—such as "Australian BBQ Experience" boxes and "Festive Celebration Boxes"—create emotional brand connections and differentiate Australian lamb from domestic alternatives.

Success requires tailored approaches addressing specific SKU requirements, value addition, and premium positioning through digital storytelling and curated experiences.

B2B channel – Target institutional and event-driven solutions with tailored offerings

Customisation of products for India-specific demand: Australian suppliers must transform their standard whole carcass approach to deliver precisely portioned, Indian-spice marinated, and institutionally-packaged lamb cuts that meet the specific operational needs of Indian restaurants, hotels, and catering operations—moving from commodity export to value-added, market-tailored solutions.

Primary cut focus: lamb racks (French-cut)

- **Format:** Pre-trimmed racks, 2-4 rib portions, vacuum-packed.
- **Target weight:** 250g-500g per rack for portion control.
- **Value addition:** Ready-to-cook marinated variants.
- **Packaging:** Bulk cartons (5-10kg) with individual vacuum-sealed portions.

Secondary offerings:

- **Shanks:** Frozen bulk cartons for slow-cooking applications.
- **Chops and riblets:** Pre-marinated, ready-to-grill formats for QSR chains.

Key specifications required include halal certification with clear documentation, traceability from farm to plate, and consistent fat content and cookability standards.

B2B partnerships – Value addition specifically tailored for at-home consumption

Australian suppliers must leverage co-branding with established Indian B2B platforms like Hyperpure and BigSams to build trusted "Australian Premium" recognition in the institutional market, using platform credibility and customer relationships to establish brand equity before investing in independent brand development.

Co-branding opportunities:

- Partner with established platforms (Hyperpure, BigSams, Fresh Home).
- Develop "Australian Premium" sub-brands.
- Create platform-exclusive SKUs with custom specifications.

White label manufacturing:

- Provide processing capabilities for platform private labels.
- Maintain quality standards while allowing brand customisation.
- Flexible minimum order quantities for emerging platforms.

B2C channel – Value addition specifically tailored for at-home consumption

Cultural culinary integration is essential: Australian suppliers must develop authentic Indian marinades like Tandoori and Laal Maas alongside fusion flavours to transform premium lamb from an occasional restaurant experience into a familiar, accessible protein choice for everyday Indian home cooking—making Australian lamb culturally relevant for domestic kitchens.

Indian-inspired marinades:

- **Tandoori lamb chops:** Traditional spice blend with yoghurt base.
- **Seekh kebab mix:** Ground lamb with authentic spices.
- **Rajasthani laal maas:** Spicy red chilli marinade.
- **Hyderabadi biryani cut:** Bone-in pieces for traditional cooking.

International fusion:

- **Mediterranean herb:** Rosemary, thyme, and garlic marinade.
- **Asian five-spice:** For urban cosmopolitan palates.
- **BBQ ready:** American-style preparation.

RTC range:

- Pre-portioned vacuum-sealed cuts.
- Temperature and time-controlled marinades.
- Cooking instruction cards with each pack.
- QR codes linking to video recipes.

B2C platform utilisation for brand development

Premium brand differentiation is crucial: Australian suppliers must create distinctive premium brands like "Outback Premium" and "Southern Cross Lamb" that leverage Australia's clean, ethical farming reputation and culinary heritage to command higher prices and build consumer loyalty in India's increasingly quality-conscious B2C market, distinguishing Australian lamb from lower-priced domestic alternatives.

Premium positioning strategy:

- "Outback Premium" - Heritage and authenticity focus.
- "Southern Cross Lamb" - Quality and provenance emphasis.
- "Chef's Choice Australian" - Professional-grade positioning.

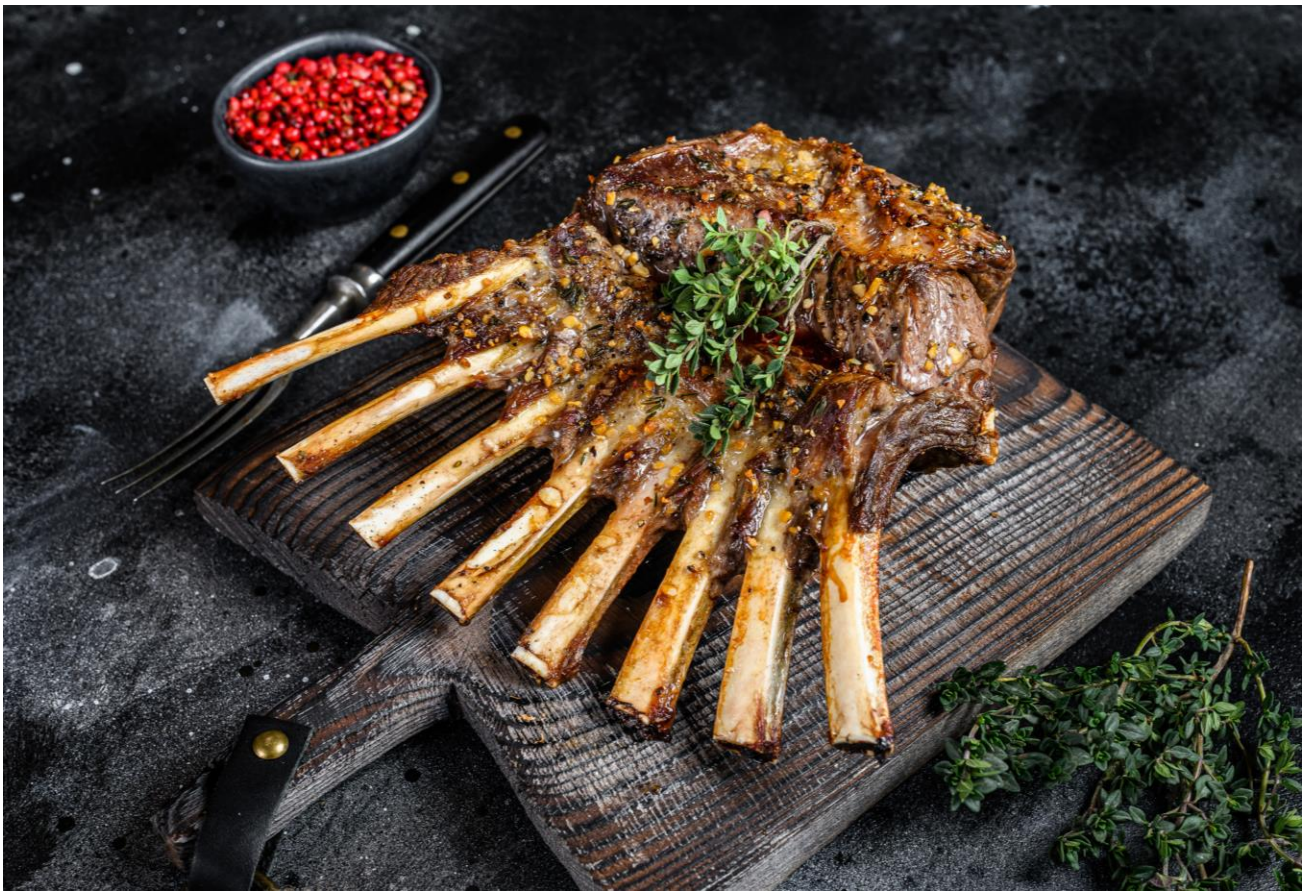
Brand storytelling elements:

- Farm-to-fork traceability stories.
- Sustainability and ethical farming practices.
- Australian culinary heritage and expertise.
- Chef endorsements and recipe development.

Curated cook-out boxes in partnership with B2C platforms for experiential cooking

Experiential Brand Building Through Curated Offerings: Australian suppliers must create comprehensive experience boxes like "Australian BBQ Experience" and festival-specific packages that transform lamb purchase from a simple transaction into a memorable cultural and culinary journey, building emotional brand connections and establishing Australian lamb as the premium choice for special occasions and celebrations in Indian households.

- Australian suppliers can consider bundling premium lamb chops with authentic BBQ sauce, grilling tools, and step-by-step guides to create a comprehensive "Australian BBQ Experience" that educates Indian consumers on Australian cooking methods while building brand loyalty through memorable, restaurant-quality home dining experiences.
- Australian suppliers can create premium "Festive Celebration Boxes" with varied cuts, Indian spice blends, and culturally-relevant recipe stories to position Australian lamb as the ideal gift for Indian festivals and celebrations, building brand prestige through meaningful cultural connections and premium presentation.



9. Opportunities in modern retail

9.1. Modern retail's strategic position in the value chain

Modern retail — comprising supermarkets, hypermarkets, and premium food chains — plays a pivotal role in the value chain of imported sheep meat in India. Positioned between suppliers/distributors and the end consumer, these retailers act as the primary interface for affluent urban households seeking convenience, hygiene, and international quality assurance.

- ❖ Modern retail operates downstream of importers and regional suppliers/distributors, sourcing directly through established supplier/wholesaler networks to fulfil critical functions in the imported sheep meat value chain. These retailers serve as demand aggregators by offering predictable purchase volumes that justify import-led inventory planning for suppliers. They simultaneously extend the cold chain infrastructure through co-investments in in-store refrigeration systems and strategic logistics partnerships. Their role as consumer educators proves invaluable through in-store promotions, cooking demonstrations, and knowledgeable staff who help demystify imported sheep meat cuts and cooking techniques for unfamiliar consumers.
- ❖ Additionally, modern retail functions as a brand enabler by providing premium shelf space to imported meat labels, creating essential visibility and fostering brand loyalty among affluent urban consumers seeking international quality products.
- ❖ Modern retail outlets have emerged as the 'one-stop shop' for India's growing segment of upper-middle and high-income consumers, particularly in metros like Mumbai, Delhi NCR, Bengaluru, and Hyderabad, where they serve as the default destination for premium meat shopping. These retailers offer a wide assortment that extends beyond traditional mutton to bundle lamb and sheep meat with complementary products, including herbs, marinades, cooking sauces, and wines, enabling consumers to purchase complete meal baskets in a single visit. They provide critical assurance of quality through traceability systems, superior hygiene standards, and consistent product offerings that far exceed what wet markets or traditional butchers can deliver, meeting the modern consumer's heightened expectations. The convenience factor is paramount, with extended operating hours, curated meat sections, and online delivery capabilities that align perfectly with busy urban lifestyles.

While many outlets recreate a global shopping environment that positions imported meat as part of a broader aspiration-driven environment that positions imported meat as part of a broader aspiration-driven lifestyle experience.

Key characteristics of modern retail

Direct consumer communication channel:

- Modern retailers provide shelf space and in-store promotions that enable direct brand storytelling
- QR-coded traceability systems allow suppliers to communicate origin, quality standards, and preparation methods
- Point-of-sale materials, recipe cards, and educational content create consumer awareness about Australian lamb's superior marbling and quality

Consumer perception development:

- Modern retail outlets help position Australian lamb as a premium and aspirational import
- The retail environment reinforces perceptions of safety, hygiene, and international quality standards
- In-store demonstrations and cooking shows allow consumers to experience Australian lamb's versatility across both Western and Indian cuisine applications

Market activation platform:

- Retailers offer experiential marketing opportunities, including wine pairing events, meat tasting sessions, and chef collaborations
- Seasonal showcases and promotional campaigns can highlight Australian lamb's advantages over competitors
- Cross-merchandising with complementary products (wines, marinades, cooking sauces) creates complete meal solutions

9.2. The consumer connection-target consumer profiles and preferences

Modern retail sales of sheep meat serve as a critical indicator for determining consumption patterns across India, as these outlets capture the purchasing behaviours of affluent urban consumers who drive premium meat demand trends nationwide.

Through comprehensive analysis of stakeholders and consumer interactions, two primary consumer personas have been identified with distinct preference profiles: the "Elite Gourmet Specialist" representing ultra-high-income households (AUD 70,000 annually) who seek curated cuts like French racks with emphasis on traceability and origin labeling, and the "Premium Lifestyle Consumer" comprising upper-middle-class families (AUD 15,000 to 70,000 annually) who prioritise convenience, health consciousness, and value-based offerings.

However, despite the presence of these well-defined target consumer segments, purchasing patterns remain largely occasional rather than regular, driven by special occasions, entertaining needs, or experimental cooking adventures. This occasional consumption behaviour has created strong demand for value-added meat products such as pre-marinated cuts, ready-to-cook formats, and portion-controlled packaging that simplify preparation processes, alongside popular cuts like boneless lamb leg, shanks, and chops that offer versatility across both Western and Indian cooking applications, enabling retailers to cater to time-constrained urban consumers seeking premium protein experiences without extensive culinary expertise.

Table 9: Characteristics of consumer sub-segments in modern retail

Elite gourmet specialists

- Prefers curated cuts like French racks and boneless lamb leg.
- Willing to pay premium for traceability and origin labelling.
- Shops at Foodhall, Nature's Basket Signature, Le Gourmet.
- Influences: Wine pairing compatibility, organic credentials, experiential marketing.

Elite gourmet specialists

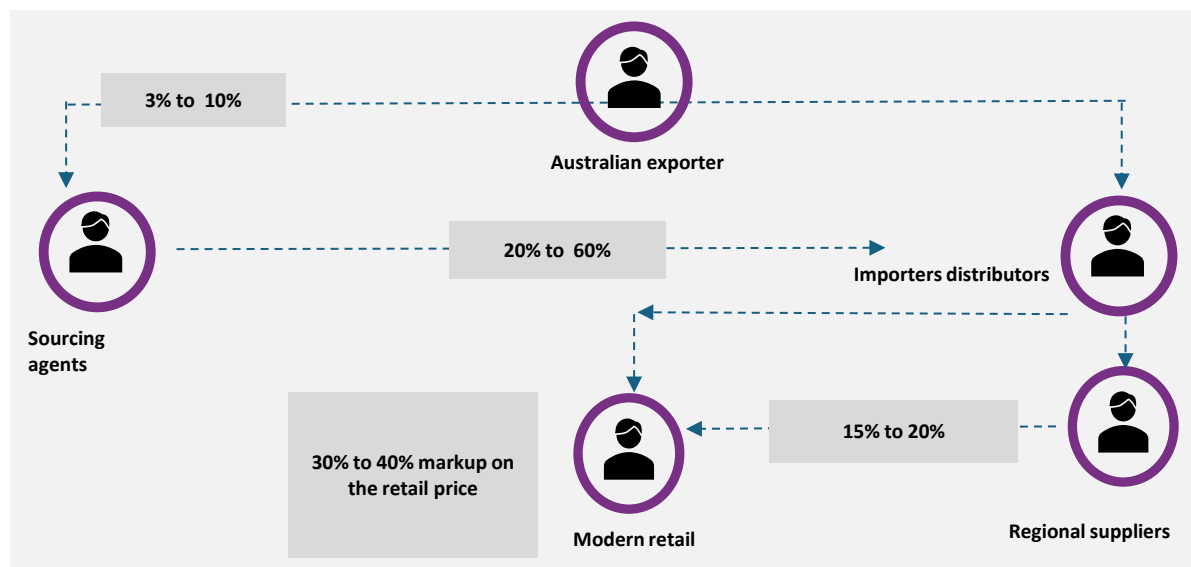
- Family-oriented, health-conscious with semi-global palate
- Prefers frozen over fresh for safety and shelf life
- Responds to combo packs and value-based offerings
- Shops at Nature's Basket, Smart Bazaar, Spar Hypermarket
- Influences: Recipe cards, cooking demonstrations, influencer endorsements

Table 10: Preference for cuts in demand in modern retail

Type of cut	Common applications by institutional buyers
Frenched lamb rack	<ul style="list-style-type: none"> • Description: Bone-in rib cut with cleanly trimmed bones for presentation. • Why popular: High visual appeal; ideal for fine dining or home-chef plating. • Target audience: Affluent home cooks, gourmet consumers, HNIs. • Retail example: Common at Foodhall, Nature’s Basket Signature, Le Marche.
Boneless lamb leg	<ul style="list-style-type: none"> • Description: Lean, tender cut from the hind leg, often sold whole or in slices. • Why popular: Versatile — used for roasting, grilling, or Indian-style curry. • Target audience: Families, weekend roasters, fusion cooks. • Retail example: Available at both premium and mid-premium stores.
Lamb shanks	<ul style="list-style-type: none"> • Description: Lower leg cut, typically bone-in and slow-cooked. • Why popular: Appeals to Indian consumers for rich gravies (like raan). • Target audience: Traditional Indian cooks, slow food enthusiasts. • Retail example: Common in gourmet baskets and “braising kits.”
Lamb shoulder (bone-in or boneless)	<ul style="list-style-type: none"> • Description: Rich, marbled cut used for curries or pulled lamb recipes. • Why popular: Good for stews and Indian masala cooking. • Target audience: Families, mid-level experimental cooks. • Retail example: Found in Spar, Nature’s Basket, Modern Bazaar.
Lamb chops (cutlets)	<ul style="list-style-type: none"> • Description: Individual rib cuts, tender and flavourful. • Why popular: Grill-friendly; a favourite for BBQs and marinated formats. • Target audience: Young urban professionals, expats, food influencers. • Retail example: Found in both chilled and frozen formats, often pre-marinated.

9.3. Procurement process

Figure 13: Procurement process for modern retail



The modern retail procurement flow for imported sheep meat follows a structured three-stage process that ensures quality, compliance, and profitability throughout the supply chain.

- ❖ Sourcing begins with direct procurement relationships established with major importers, including Empire Foods, Fortune Gourmet, and Hyperpure, who serve as primary suppliers providing consistent access to international meat products while handling customs clearance, regulatory compliance, and initial cold chain logistics.

- ❖ Inventory management operates on substantial 30-40% retail margins that not only support the premium positioning of imported sheep meat but also justify the significant investments required for maintaining sophisticated cold chain infrastructure, including specialised refrigeration systems, temperature monitoring, and logistics partnerships essential for preserving product quality from warehouse to point-of-sale.
- ❖ Quality assurance forms the foundation of the procurement process through stringent compliance with FSSAI norms and mandatory Halal certification requirements, ensuring that all imported sheep meat meets both regulatory standards and diverse consumer expectations, while modern retailers often implement additional quality control measures including traceability systems, batch tracking, and regular quality audits to maintain their reputation for premium, safe, and consistent meat products.

9.4. Product to market-fit for Australian sheep meat

Hygiene and compliance advantages:

- Processed under stringent biosecurity and Halal standards meeting Indian FSSAI requirements.
- Vacuum-sealed frozen cuts align with modern retail's cold chain infrastructure.
- Superior quality compared to local alternatives builds consumer trust.

Packaging and convenience:

- Retail-ready formats in consumer-friendly packs (300g-1kg) support in-store display.
- Pre-portioned cuts cater to urban households with limited preparation time.
- Frozen format offers inventory flexibility and reduced shrinkage for retailers.

Cross-cuisine versatility:

- Suitable for both Western-style cooking (roasts, grills) and Indian dishes (curries, biryanis).
- Cuts like shanks and shoulders have broad cross-cuisine appeal.
- Superior marbling makes Australian lamb ideal for both traditional slow-cooking and precision cooking methods.

Premium positioning alignment:

- Fits with modern retail's strategy of bundling premium meats with imported sauces and wines.
- Reinforces "one-stop gourmet shop" positioning for affluent consumers.
- Enables pan-India reach via regional distribution hubs, including Tier-2 cities.

9.5. Opportunities and challenges

Modern retail serves as a powerful market activation platform through multiple integrated mechanisms that transform passive shopping environments into dynamic consumer education and brand-building ecosystems.

Opportunities

- ❖ **Educational hub for consumers:** As an educational hub, modern retail outlets function as learning centres where in-store cooking demonstrations conducted by professional chefs or trained staff demystify the preparation techniques for imported sheep meat, showing consumers how to properly handle, season, and cook unfamiliar cuts like lamb racks or shanks, thereby reducing purchase hesitation and building cooking confidence. Knowledgeable staff members, often trained on product specifications and culinary applications, provide personalised guidance on cut selection based on cooking methods, family size, and cuisine preferences, while also offering cooking tips and recipe suggestions that maximise the value of premium purchases. Recipe cards strategically placed near meat sections and QR-coded content accessible through smartphones create an omnichannel educational experience, allowing consumers to access detailed information about Australian lamb's superior marbling, nutritional benefits, origin story, and step-by-step cooking instructions, effectively transforming point-of-purchase moments into comprehensive product education opportunities.
- ❖ **Brand-building platform:** Modern retail functions as a sophisticated brand-building platform where strategic shelf space positioning alongside established premium international brands like

Norwegian salmon or New Zealand beef creates quality associations and premium perception through visual merchandising and category adjacency. Cross-merchandising opportunities become particularly powerful when Australian lamb is displayed with complementary Australian products such as wines, creating a cohesive country-of-origin story that reinforces quality perceptions while encouraging larger basket sizes and introducing consumers to the broader Australian food and beverage portfolio. Point-of-sale materials, including shelf talkers, product information cards, and digital displays, strategically reinforce quality messaging through compelling origin storytelling that highlights Australia's pristine environment, advanced farming practices, and superior processing standards, while visual elements like Australian flags, farm imagery, and quality certifications create immediate brand recognition and differentiate Australian products from competitors in crowded meat sections.

9.6. Recommendations

India's modern retail landscape presents unique opportunities for Australian sheep meat suppliers to establish premium market positioning in one of the world's fastest-growing consumer markets.

The convergence of India's growing upper-middle class, their preference for convenient shopping experiences, and modern retail's role as a brand-building platform creates a perfect channel for Australian suppliers to not only utilise modern retail outlets as a retail channel but also leverage their position as a market activator.

Success in the market requires more than simply placing products on shelves.

It demands a nuanced understanding of diverse regional preferences, strategic SKU development for specific consumer segments, and innovative digital storytelling that transforms Australia's natural advantages into compelling brand narratives.

Embrace premium positioning with purpose:

Australian suppliers can consider leveraging modern retail's role as a premium brand enabler by developing products that align with the "aspirational import" positioning. Focus on cuts that demonstrate clear quality differentiation - French racks, boneless lamb legs, and pre-marinated options that showcase Australian farming practices and processing standards.

Primary cut focus: lamb racks (French-cut)

- **Format:** Pre-trimmed racks, 2-4 rib portions, vacuum-packed.
- **Target weight:** 250g-500g per rack for portion control.
- **Value addition:** Ready-to-cook marinated variants.
- **Packaging:** Bulk cartons (5-10kg) with individual vacuum-sealed portions.

Secondary offerings:

- **Shanks:** Frozen bulk cartons for slow-cooking applications.
- **Chops and riblets:** Pre-marinated, ready-to-grill formats for QSR chains.

Customisation is key: Australian suppliers can consider implementing a modular product architecture to develop a tiered SKU system that allows for easy customisation alongside regional adaptation to include consumer segments from India's diverse culinary landscape.

Tiered SKU system:

- **Base Premium Range:** Standard cuts (French racks, boneless legs, shoulder cuts) in 300g-500g consumer-friendly portions.
- **Customizable Elements:** Marinades, spice blends, and cooking instructions that can be adapted for regional Indian preferences.
- **Occasion-Specific Packaging:** Festival seasons, weekend entertaining, and weeknight dinner solutions.

Regional adaption:

- **North India Focus:** Cuts suitable for tandoor and curry preparations with corresponding spice blends.
- **South India Adaptation:** Products that work with coconut-based curries and traditional cooking methods.
- **Metro-Specific:** Bangalore, Mumbai, Delhi NCR variations based on local taste.

Market activation and brand awareness creation: Leverage modern retail's brand-building platform capabilities through:

Multi-Channel Educational Content

- **In-Store Elements:** QR codes linking to farm stories, cooking demonstrations, and nutritional information.
- **Digital Integration:** Smartphone-accessible content featuring Australian farm practices, environmental sustainability, and animal welfare standards.
- **Chef Partnerships:** Collaborate with Indian celebrity chefs for cooking demonstrations and recipe development.

Traceability as Brand Differentiator: Transform mandatory traceability into a compelling premium brand narrative by showcasing specific Australian farms, processing facilities, and quality controls through QR codes and in-store displays and highlighting clean environment, sustainable farming practices, and low carbon footprint as key differentiators.

Key considerations: Australian suppliers must keep the following under consideration while choosing modern retail as a retail channels.

- Scope of market activation.
- Retail promotions typically run for **one month per product** in premium stores.
- Activation scope includes **in-store branding, visibility** (via Point-of-Sale (POS) materials such as danglers, wobblers, shelf-talkers), and shopper engagement.
- Retailers provide **store space and placement** while exporters or partners provide promotional content and marketing materials.
- **Single-product or bundled multi-product promotions** can be structured based on campaign goals.

Market activation cost framework

- **Standard Cost:** The cost is fixed per store and per product for a one-month activation, providing predictable budgeting for promotional campaigns.
- **Bundled Offerings:** Multi-product activations can be negotiated at the same rate, allowing companies to optimise costs across several products simultaneously.
- **Coverage:** Promotional efforts are typically concentrated on top-performing premium outlets to maximise brand visibility and drive higher customer footfall.
- **Payment terms:** Usually, an upfront payment of 50% is required to initiate the promotion, with the remaining balance due within one week of campaign completion.

Table 11: Illustrative cost scenarios for market activation in modern retail

No. of stores	Rate per store (AUD)	Duration	Total cost (AUD)	Goods and Services Tax (GST)- 18%	Grand total	Payment terms
3 Stores	~3,550	1 Month	~10,650	~1,917	~12,567	50% advance, 50% post-campaign
5 Stores	~3,550	1 Month	~17,750	~3,195	~20,945	50% advance, 50% post-campaign
10 Stores	~3,550	1 Month	~35,500	~6,390	~41,890	50% advance, 50% post-campaign



10. Opportunities in meat processing

The Indian meat processing sector plays a critical intermediary role between meat producers and end consumers, particularly in the B2B HORECA segment. Processors focus on procuring and processing meat from domestic and international suppliers to produce value-added products such as kebabs, burger patties, and portioned cuts tailored to specific culinary applications. The majority of meat processors in India process domestic sheep meat and export value-added products, serving both domestic and international markets.

10.1. Role of meat processors

- ❖ **Sourcing domestic sheep meat:** Meat processors primarily source domestic sheep meat to produce ready-to-cook and ready-to-eat products, catering to the operational needs of restaurants, QSRs, catering companies, and household consumption. By relying on domestic suppliers, processors can secure a consistent supply, manage costs effectively, and meet the volume requirements of both mass-market and institutional clients.
- ❖ **Value-added processing:** Processors play a crucial role in converting whole carcasses into value-added products, including marinated cuts, burger patties, kebabs, and portioned steaks. These offerings are designed to reduce preparation time for chefs while ensuring consistent quality and presentation standards across menus. In addition to serving the HORECA segment, processors also cater to household consumers through B2C retail channels, supplying pre-packaged, RTC meat products that combine convenience with culinary versatility.
- ❖ **Selective import of premium sheep meat:** While domestic meat dominates the market, a select group of premium processors, such as Oh Deli, import international sheep meat carcasses. These processors target luxury restaurant chains and high-end HORECA clients that demand superior meat quality, specific cuts, and consistency in product specifications. In these cases, processors provide specialised services such as customised portioning, marination, and packaging to meet the precise operational and culinary requirements of their clients, allowing them to create differentiated value-added products that command a premium price point.

10.2. Opportunities

Imported sheep meat processing for India's B2C mass-market segment remains economically unviable due to prohibitive input costs, volume consistency requirements, and logistical complexities that domestic sourcing readily addresses.

However, there is a well-defined opportunity for imported Australian sheep meat among a few B2B processors that use imported meat to serve premium HORECA clients. These processors focus on hotels, fine-dining restaurants, luxury restaurant chains, and high-end catering businesses, where product quality and consistency are critical.

- ❖ By sourcing imported sheep meat, processors can produce differentiated, value-added products such as premium burger patties, kebabs, portioned cuts, marinated meats, and other RTC or RTE offerings.
- ❖ Such value-added products help restaurants and hotels reduce in-house preparation time, maintain culinary consistency, and meet the high standards expected by discerning customers.
- ❖ Additionally, imported sheep meat allows processors to cater to menu innovation, seasonal offerings, and speciality dishes that cannot be consistently executed with domestic meat due to variability in taste, size, or quality.

The B2B segment, therefore, represents a strategically attractive channel for Australian sheep meat suppliers, where the emphasis is not on volume but on premium quality, traceability, and customised product specifications. Processors in this segment are willing to engage directly with overseas suppliers to ensure product consistency, align with restaurant requirements, and create bespoke value-added offerings that command a price premium in the Indian market.

Oh Deli: Example of opportunity in value-added sheep meat supply

Oh Deli is a gourmet food brand based in Delhi, specialising in high-quality meats, seafood, cheeses, and pantry essentials. The company sources both domestic and imported products and primarily supplies frozen foods to B2B clients, including restaurants, QSRs, cinemas, and catering companies. Oh Deli provides customised processing services such as portion cuts, marination, and ready-to-cook products.



- ❖ **Product and specification requirements:** Oh Deli requires 6-way carcass lamb/sheep meat from Australia to produce multiple cuts and value-added products.
- ❖ **Processing capabilities and product range:** Specialised in creating value-added products for the HORECA sector from both domestic and imported meat. Product portfolio includes kebabs and burger patties crafted from premium cuts, including imported lamb, tenderloin steaks and assorted portioned cuts prepared to precise specifications, and marinated meats
- ❖ **Direct engagement with suppliers:** Oh Deli actively imports premium meats for its HORECA clients and prefers direct engagement with Australian suppliers to streamline the supply chain, ensure consistent quality, and improve price competitiveness.

The company is willing to conduct supplier visits in Australia to evaluate processing facilities, quality control measures, and customise product specifications for the Indian market, including specific carcass weights, fat caps, and portion cuts.

10.3. Recommendations

- **Focus on B2B processors:** Given the limited scope for imported sheep meat among processors serving B2C retail—who predominantly rely on lower-cost domestic meat—Australian exporters should target processors catering to the B2B HORECA segment.
- **Strategic product alignment:** Exporters should focus on supplying whole sheep meat carcasses and cuts suited for value-added processing, allowing B2B processors to efficiently create products that meet HORECA quality and menu specifications.
- **Digital visibility for B2B adoption:** Australian exporters should leverage B2C e-commerce platforms to build brand awareness and showcase product quality, origin, and suitability for premium HORECA and catering applications, supporting adoption among B2B processors.



11. Decoding the Indian Consumers

A group of 30 consumers—who commonly purchase and cook imported meat at home—were interviewed to understand the perception of imported sheep meat and the prevalent perception about Australian sheep meat in India. Imported sheep meat in India represents a premium, occasion-driven market segment rather than a staple protein choice. Indian consumers primarily purchase imported sheep meat for special occasions like weekends, festivals, and celebratory meals, demonstrating that it occupies a luxury position in the market.

The survey reveals strong consumer preferences for curry cuts and bone-in pieces that align with traditional Indian cooking methods, while modern retail channels and e-commerce platforms are increasingly important for reaching younger, urban consumers.

Despite price sensitivity concerns—with consumers reluctant to pay significant premiums over domestic alternatives—there remains notable demand driven by perceptions of superior quality and food safety standards. However, the research indicates limited brand awareness and country-of-origin recognition among consumers, who prioritise freshness, taste, and price over provenance when making purchasing decisions.

These findings suggest that Australian exporters have opportunities to capitalise on the premium positioning while addressing price concerns through smaller packaging formats and building stronger brand recognition through targeted marketing campaigns that highlight Australia's quality and safety credentials.

11.1. Consumer perception of imported sheep meat in India

Assessment Parameters	Consumer response	Key insights	Recommendation for Australian exporter
Frequency of purchases	Consumers buy sheep meat occasionally, mostly for weekends, festivals, or special meals.	Suggests imported sheep meat is still a premium/indulgent choice rather than part of routine consumption.	<ul style="list-style-type: none"> Position for celebratory occasions. Introduce smaller packs to encourage trial and repeat purchase.
Type of cuts preferences	Strong preference for curry cuts and bone-in pieces suited for gravies and Indian dishes. Chops are also preferred by a few culinary enthusiasts who actively experiment with premium ingredients at home for speciality cooking.	Reflects dominance of curry-based home cooking over Western-style roasts or steaks.	<ul style="list-style-type: none"> Supply bone-in curry cuts and family packs. Gradually introduce premium cuts with cooking and recipe education.
Mode of purchase	Reliance on modern retail stores, omni-channel retailers and e-commerce platforms.	Modern retail and online platforms resonate with younger, urban consumers who prioritise convenience, hygiene, and branded choices. Many of these consumers are first introduced to premium products in HORECA settings and later seek to replicate the same experiences at home.	<ul style="list-style-type: none"> Partner with gourmet modern retail stores and conduct market activation promoting Australian sheep meat. Build niche presence on premium e-commerce platforms with curated cook-out-boxes.
Price- range preference	Price sensitivity- high; consumers are unwilling to pay a very high premium for imported sheep meat over local meat.	Domestic sheep meat is abundant hence consumers need justification for paying extra (30% premium over domestic sheep meat is perceived acceptable by majority of culinary enthusiasts).	<ul style="list-style-type: none"> Offer smaller packs, highlight superior quality, safety, and Australian origin to justify premium.
Home-cooking vs. eating outside	Imported sheep meat is more often consumed in HORECA than in home kitchens.	Current demand is majorly HORECA driven; households hesitant to cook due to price and unfamiliarity.	<ul style="list-style-type: none"> Build HORECA partnerships for visibility and run recipe demos. Sampling and tasting campaigns for home consumers.
Awareness of Australian brand names	Very limited awareness of specific brands and country specific meat.	Majority of consumers show limited concern for origin or traceability, focusing instead on freshness, taste, and price when purchasing meat.	<ul style="list-style-type: none"> Invest in branding and awareness campaigns to leverage provenance storytelling, highlighting Australia's farm-to-fork journey through visuals and narratives. Promote Australia's quality, safety, and sustainability story.



12. Route to Market Entry

Australian sheep meat suppliers must pursue market entry through strategic partnerships with licensed Indian importers possessing regulatory compliance, established cold-chain infrastructure, and existing HORECA networks across primary markets (Delhi, Mumbai) and secondary hubs (Bengaluru, Hyderabad).

Entry strategy should prioritise luxury hotel chains and standalone premium restaurants through Central Procurement Contracts, with specialised catering as a complementary channel, while allocating complimentary sampling budgets during the July-September lean period to facilitate chef approvals ahead of February tender cycles.

Importer selection criteria must emphasise regulatory expertise, proven cold-storage capabilities, financial stability to manage hotel payment cycles, and exclusivity arrangements to ensure supply reliability and market commitment.

Successful market penetration depends on this foundational partnership framework rather than direct-to-consumer models, reflecting India's complex regulatory environment and relationship-driven business culture.

12.1. Steps for considering market entry route

STEP 1: Strategic importer selection and partnership development

Strategic Partnership Framework:

- Long-term exclusive agreements ensuring supply stability and market commitment.
- Comprehensive procurement integration mechanisms providing seamless access to premium hospitality markets.
- Pre-approved vendor status within Central Procurement Portals (CPP) of major hotel chains.
- Joint investment in market activation, chef education, and brand-building initiatives.

Key considerations for partnership with importers and distributors

- Established regional networks across primary consumption hubs (Delhi NCR, Mumbai, Bengaluru, Chennai, Hyderabad).
- Proven cold-chain infrastructure with -18°C temperature-controlled capabilities.
- Valid import permits, FSSAI clearances, and demonstrated regulatory compliance.
- Existing relationships with HORECA, modern retail, and premium e-commerce channels.
- Financial stability to manage 2-3 month payment cycles required by hotel chains.

STEP 2: Key geography selection and market prioritisation

- Primary entry markets (immediate priority): Delhi and Mumbai.
- Secondary expansion market (complementary to primary markets): Bengaluru, Hyderabad.
- Specialised opportunity market (for meeting seasonal demand): Punjab, Rajasthan, West Bengal, and Goa.

STEP 3: Consumer segment prioritisation and targeting

- Primary target: Luxury hotel chains, standalone restaurants, hospitality groups.
- Secondary target (complementary to primary target): Specialised catering.
- Emerging consumer segments: E-commerce, modern retail.
- Low priority segment: Meat processors.

Table 8: Consumer segment ranking according to market share and demand

Consumer Segment	Market Share	Priority Rating
HORECA	50%	High Priority ★★★★★
E-commerce	25%	Medium-High Priority ★★★★★
Modern Retail (Premium Supermarkets)	15%	Medium Priority ★★★★☆
Luxury caterers	5%	Medium Priority ★★★★★
Meat Processors (Value-Added Products)	5%	Low Priority ★★★★★

STEP 4: Identify and understand procurement contract types

- CPCs are a streamlined, volume-driven procurement system commonly followed by luxury and premium hotel chains.
- Certain HORECA players procure from regional suppliers.
- Specialised caterers utilise their established network with regional suppliers for seasonal procurement.

Key considerations while establishing procurement contracts:

- CPC requirements,
- Annual CPC tenders are issued in February-March for the financial year supplier selection.
 - Volume commitments typically range from 50-60 kg annually per premium establishment.
 - Quality specifications and pricing stability are a must throughout the contract period.

STEP 5: Sampling for high-volume procurement is a must

Australian suppliers must budget for complimentary sampling as a necessary market development cost rather than a revenue activity.
Free sampling during July-September to target the lean period preceding festivals and the wedding season, and specialised caterers.

12.3. Potential importers and regional suppliers

Checklist for choosing and Indian importer

Regulatory and compliance

- Holds valid import permits and FSSAI clearances.
- Demonstrated compliance with cold-chain and food safety standards.
- Track record of managing customs duties, tariffs, and import logistics.

Market reach and distribution

- Established presence in key metro and Tier 2 cities.
- Strong networks with HORECA, specialised caterers, and modern retail/ e-commerce platforms.
- Ability to service premium and niche customer segments.

Operational capabilities

- Proven cold storage and distribution infrastructure.
- Experience in handling premium imported meats.
- Reliable logistics for timely delivery and consistency.

Entry point for Australian exporters:

- Importers are the *first and most critical gateway* into India, as no shipment can enter without their licenses and regulatory clearances.
- They act as the foundation of the value chain, bridging Australia's supply with India's demand.
- A strong importer relationship ensures credibility, compliance, and a smooth launch into the Indian market.
- Build exclusivity arrangements with reliable importers to secure loyalty and supply stability.

Table 9: Potential importers for partnership

Name of stakeholder	Location	Rationale	Rating
Empire Foods	Mumbai, Maharashtra	Serves 300–500 sub-distributors and supplies to premium hotels, fine-dining restaurants, specialised caterers, and leading retail chains across India. It deals in frozen lamb meat covering racks, tenderloins, and boneless cuts.	High ★★★★★
Fortune Gourmet Specialties Private Limited	Mumbai, Maharashtra	Operates 13 multi-temperature warehouses nationwide and supplies Australian lamb to HORECA, including standalone restaurants (via CPC and individual contracts), gourmet caterers, and airline catering.	High ★★★★★
Skyfoods	New Delhi, Delhi NCR	Importer and distributor of premium frozen meats, specialising in Australian and New Zealand lamb. It supplies to wholesalers and HORECA clients, with a focus on high-demand cuts such as lamb chops and racks.	High ★★★★★
CaspianCaviar & Fine Food Pvt. Ltd.	New Delhi, Delhi NCR	CaspianCaviar currently imports seafood from CASSAL, Australia, and has expressed interest in importing sheep meat. The company is also planning to open a food processing unit.	Medium ★★★★
Foodsmith	New Delhi, Delhi NCR	Distributor of meat and lamb, sourcing from major importers such as Empire and Fortune Gourmet. Supplies B2C and online channels in India and is observing a strong growth in demand for Australian meat.	Medium ★★★★

Conclusion

❖ The time for Australian suppliers is now

Australian sheep meat suppliers must recognise that India's premium food service market represents a critical growth opportunity requiring immediate and strategic action. With other suppliers experiencing recent supply disruptions and price increases, a structural gap has emerged in the Indian market, positioning Australian lamb as both a natural alternative supplier and competitively priced premium substitute. The Indian market's preference for quality over price, demonstrated through consistent demand for premium imported cuts despite higher costs, creates an ideal environment for Australian suppliers to establish their presence. The current market dynamics, combined with India's growing affluent consumer base and expanding luxury hospitality sector, present a time-sensitive opportunity that demands rapid yet strategic market entry to capture market share before competitors fill the void.

❖ Importer partnership is the key to cracking the Indian market

Success in India's sheep meat market hinges absolutely on establishing strategic partnerships with sophisticated Indian importers who serve as indispensable gateways to the market. Unlike direct-to-consumer markets, India's complex regulatory environment, fragmented distribution networks, and relationship-driven business culture makes importers essential for market entry. These importers function as market facilitators, risk managers, and strategic partners who maintain direct relationships with over 750 premium establishments while navigating India's intricate regulatory landscape and demanding cold-chain requirements.

Australian suppliers must prioritise long-term strategic partnerships over transactional relationships, seeking importers with established networks serving luxury establishments, integrated supply capabilities, specialised infrastructure for cold-chain logistics, and comprehensive regulatory compliance experience.

❖ HORECA commands consumption by volume and remains the key consumer segment

The HORECA sector anchors current market demand, commanding 50% market share and delivering the largest and most consistent demand channel with premium pricing tolerance (AUD 50-55/kg) and annual volumes of 50-60kg per premium establishment. Australian suppliers have achieved significant market penetration among top-tier HORECA players across Delhi, Mumbai, and Bengaluru. Sustained growth requires expansion into secondary-tier establishments—specialised hospitality groups and standalone premium restaurants, including Swan, BoTai, Kikli, Naar, Bawri, Masala Library, Bastian, Mizu, Kuraku, and Indian Accent—contingent upon targeted market activation and relationship development with executive chefs, sous chefs, procurement teams, and distribution partners.

❖ B2B e-commerce players and app-based meat-selling platforms will control the next phase of growth in demand

App-based meat delivery platforms represent the emerging growth opportunity, with providers including Prasuma, Meatigo, Artisanal Meats, and Licious progressively internationalising their product portfolios to incorporate imported frozen cuts and value-added offerings. Within the next five years, these platforms anticipate significant imported of meat across their catalogues.



Despite enabling meat sector premiumization, consumer demand for imported sheep meat within these channels remains in its nascent stage, characterised by price sensitivity and geographic concentration within metropolitan markets, necessitating parallel brand-building and consumer education initiatives to unlock this emerging segment's potential.

Specialised caterers, modern retail and meat processors constitute the secondary target segment and are the visibility engine.

❖ **The priority consumer segment is volume-driven, while other consumer segments want customisation.**

The HORECA segment, as the priority consumer segment, operates on volume-driven procurement models with standardised requirements including consistent supply, pricing stability, superior marbling, precise cuts suitable for live cooking presentations, and reliable cold-chain logistics. In contrast, specialised caterers and luxury catering segments demand extensive customisation, including event-specific procurement, tailored menu curation, premium presentation quality, and flexible portion sizing for large events. Modern retail and e-commerce segments require different customisation approaches, focusing on premium packaging, brand positioning, and consumer-ready formats, while maintaining the quality standards expected by affluent urban consumers and expatriates.

❖ **Suppliers must understand procurement contracts and target timelines accordingly.**

Australian suppliers must analyse and adapt to India's diverse procurement models to ensure effective market engagement. Central Procurement Contracts (CPCs) are issued annually between February and March by major hotel chains like IHCL and Marriott for the entire financial year supplier selection, requiring suppliers to align their market entry timeline with these annual cycles. Regional Supply Contracts, used by chains like Hyatt, follow decentralised procurement models where regional teams independently manage supplier relationships, offering flexibility for targeted engagement. Hybrid models employed by luxury chains like Leela and Oberoi combine central premium contracts with regional fresh sourcing, requiring suppliers to understand both centralised and localised procurement approaches.

❖ **Customisation and tailoring products are key to the Indian market.**

Product customisation emerges as a critical success factor across all market segments, requiring suppliers to move beyond standard export models to embrace Indian market-specific requirements. For HORECA establishments, this includes transitioning from bulk 25kg packs to smaller 1kg packs suitable for boutique restaurants and B2B e-commerce platforms, providing vacuum-sealed or portion-cut options based on kitchen requirements, and offering alternative cuts with varied trim levels to highlight versatility. For luxury catering, customisation involves developing premium presentation formats, extended shelf-life options for event planning, and consistent portion sizes for large events. The market demands that suppliers provide technical culinary support to help chefs incorporate Australian lamb into existing specialities and seasonal offerings.

❖ **Premium packaging standards for visual appeal and perception management**

Australian suppliers must prioritise sophisticated packaging solutions that address India's premium market aesthetic expectations and perception management requirements. The experience with Fletcher's packaging transition from opaque golden to transparent packaging demonstrates how visual presentation directly impacts customer satisfaction in high-end B2B sales environments. While transparent packaging may reveal naturally occurring blood clots or fluid pooling in frozen meat—which, though food-safe—creates perception issues among chefs and purchase managers. Suppliers must develop packaging strategies that maintain premium visual appeal without compromising product integrity. This includes utilising opaque or semi-opaque premium packaging materials that conceal natural meat fluids while conveying quality and sophistication, implementing advanced vacuum-sealing techniques that minimise fluid accumulation, and ensuring packaging aesthetics align with the expectations of premium hotel kitchens and open-display freezers where visual presentation is paramount to maintaining brand reputation and customer confidence.

❖ **Sampling and testing are a must for market activation.**

Comprehensive sampling protocols represent an essential market development investment rather than a revenue activity. Australian suppliers must budget for complimentary sampling as a necessary market development cost, with free sampling during July-September viewed as a customer acquisition investment to secure high-value winter season contracts. The sampling process requires providing complimentary premium cuts to head chefs and culinary teams for menu development, combining chef sampling sessions with dedicated sales representative interactions, engaging both procurement teams and culinary leadership simultaneously, and offering technical culinary support for menu integration. This strategic investment approach recognises that specialised caterers and HORECA establishments require hands-on product experience before committing to premium ingredient procurement.

❖ **Sustenance of supply is key.**

- Supply consistency emerges as the single most critical factor for long-term market success, as current supply inconsistencies prevent the establishment of reliable CPC agreements and force procurement on a need-based basis rather than predictable contract frameworks. Australian suppliers must address severe availability challenges that have plagued the market, with stockouts lasting over one month at flagship outlets, disrupting regular menu operations and forcing the removal of high-selling dishes.
- Establishing reliable supply chains requires developing comprehensive contingency planning protocols, maintaining strategic inventory levels near key consumption hubs, and creating backup sourcing options to prevent supply disruptions during critical periods. Supply consistency directly impacts menu pricing stability and restaurant planning capabilities, making it fundamental to building long-term customer relationships.
- To counteract inconsistency in supply, Australian suppliers should consider establishing direct relationships with major B2B platforms like Hyperpure through facility inspections and transparent value chains to achieve better price stability and competitive rates, while also developing long-term pricing strategies and forward contracts with importers to ensure sustained supply for premium institutional clients like 5-star hotels and top-tier restaurants.

❖ **Market activation is required to capture the market.**

Market activation represents the make-or-break factor in India's premium HORECA landscape, requiring a holistic approach that encompasses active engagement through targeted tastings, chef education, consistent supply assurance, and strategic relationship building with key decision-makers. New Zealand's success demonstrates the transformative power of moving beyond transactional export models to embrace deep, integrated partnerships with Indian importers, direct market presence, and comprehensive value-added services. Australian suppliers must replicate this integrated approach, combining local market presence, strategic importer partnerships, and HORECA-focused demand generation to build lasting competitive advantages rather than competing solely on price.

❖ **Route to market entry**

- Market entry must follow a systematic approach beginning with strategic importer selection and partnership development, focusing on importers with established regional networks across primary consumption hubs, proven cold-chain infrastructure, valid regulatory clearances, and existing HORECA relationships.
- Key geography selection should prioritise Delhi and Mumbai as primary entry markets, with Bengaluru and Hyderabad as secondary expansion markets, and Punjab, Rajasthan, West Bengal, and Goa as specialised opportunity markets for seasonal demand. Consumer segment prioritisation should target luxury hotel chains and standalone restaurants as primary targets, with specialised catering as secondary targets, and emerging e-commerce and modern retail as complementary opportunities.

❖ **Implementation framework**

- The implementation framework requires a phased approach, starting with immediate importer partnership establishment and regulatory compliance, followed by product customisation and market-specific adaptations, comprehensive sampling programs aligned with seasonal procurement cycles, and sustained market activation through chef education and relationship building.
- Timeline considerations include August-September for intensive sampling programs, February-March alignment with CPC tender cycles, and November-February preparation for peak catering season demand. Success metrics should focus on securing CPC agreements with major hotel chains, establishing relationships with 5-10 premium restaurants per city, achieving consistent monthly supply volumes, and building brand recognition among executive chefs and procurement teams.
- In conclusion, Australian sheep meat suppliers must act decisively to capture India's premium market opportunity through strategic importer partnerships, comprehensive market activation, and sustained supply commitment, recognising that success requires moving beyond traditional export models to embrace localised market engagement and relationship-driven business approaches that align with India's unique procurement landscape and cultural preferences.



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