

MLA Red Meat Factbook: Grainfed beef

Global Market Insights

April 2026



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Important note:

Figures in this report are current as at 8 April 2026. Given rapidly evolving market conditions, not all recent developments may be reflected.



MLA Red Meat Factbook: Grainfed beef

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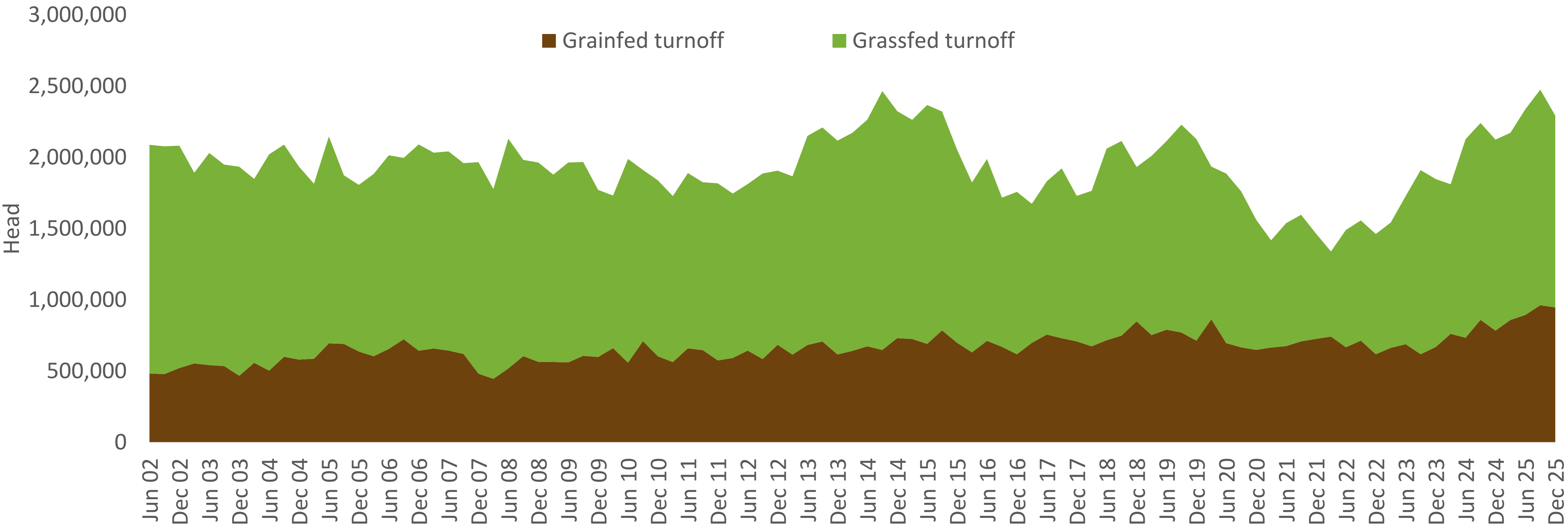
-  **Supply insights**
-  **Global Grainfed beef trade**
-  **Global demand for grainfed beef**
-  **Key markets for Australian grainfed beef**



Australian grainfed beef supply insights

Long-term growth in grainfed slaughter underpins Australia's beef supply mix

Grainfed and grassfed cattle turn off

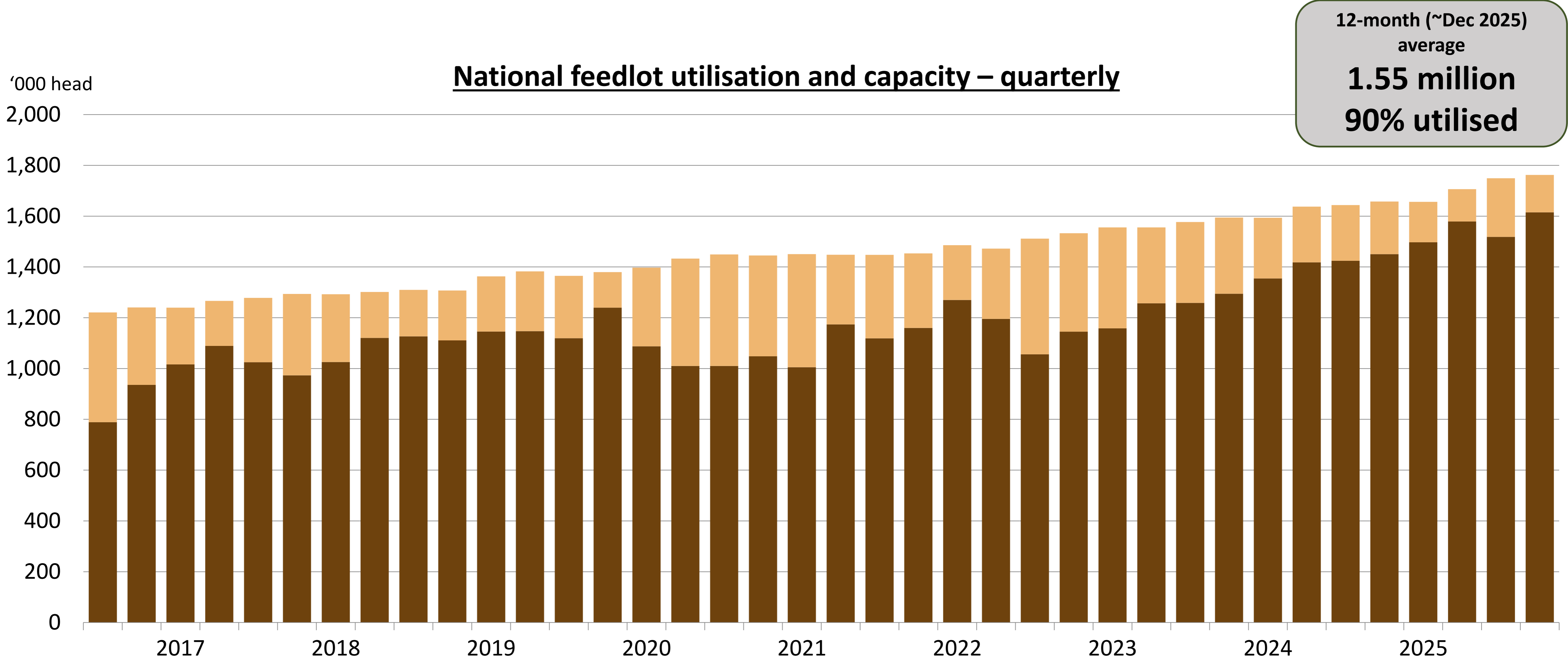


Definition:
 Grainfed = cattle fed and exited from feedlot for slaughter
 Grassfed = cattle didn't enter feedlot

Source: MLA, ABS, ALFA



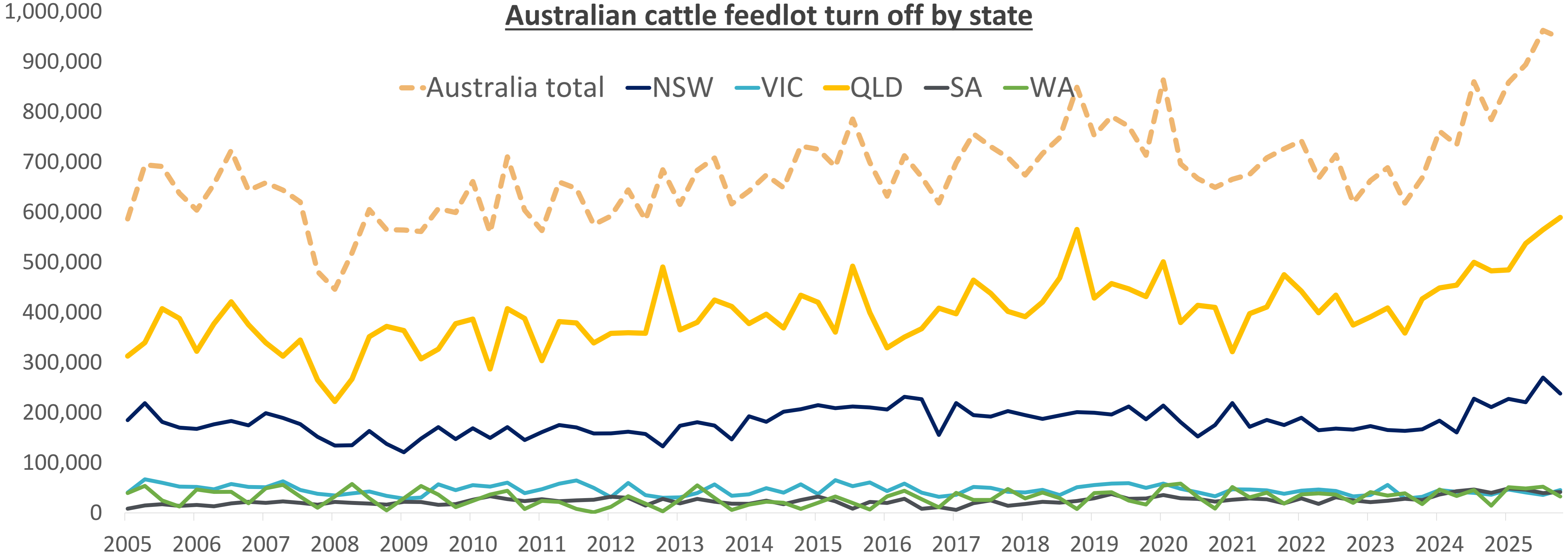
Feedlot capacity growth reflects the rising role of grainfed production



Source: MLA, ALFA

Queensland and NSW underpin growth in feedlot cattle turnoff

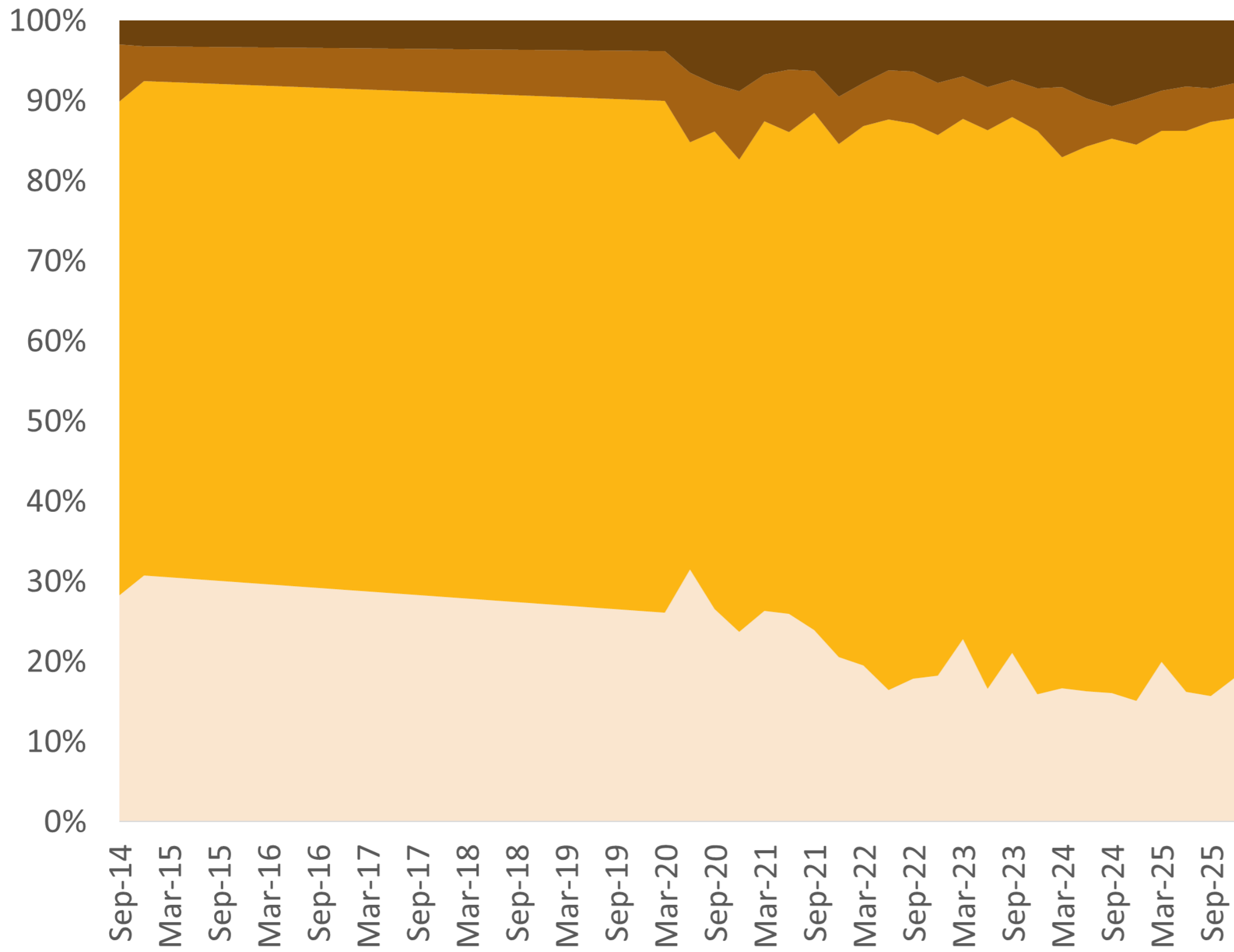
Australian cattle feedlot turn off by state



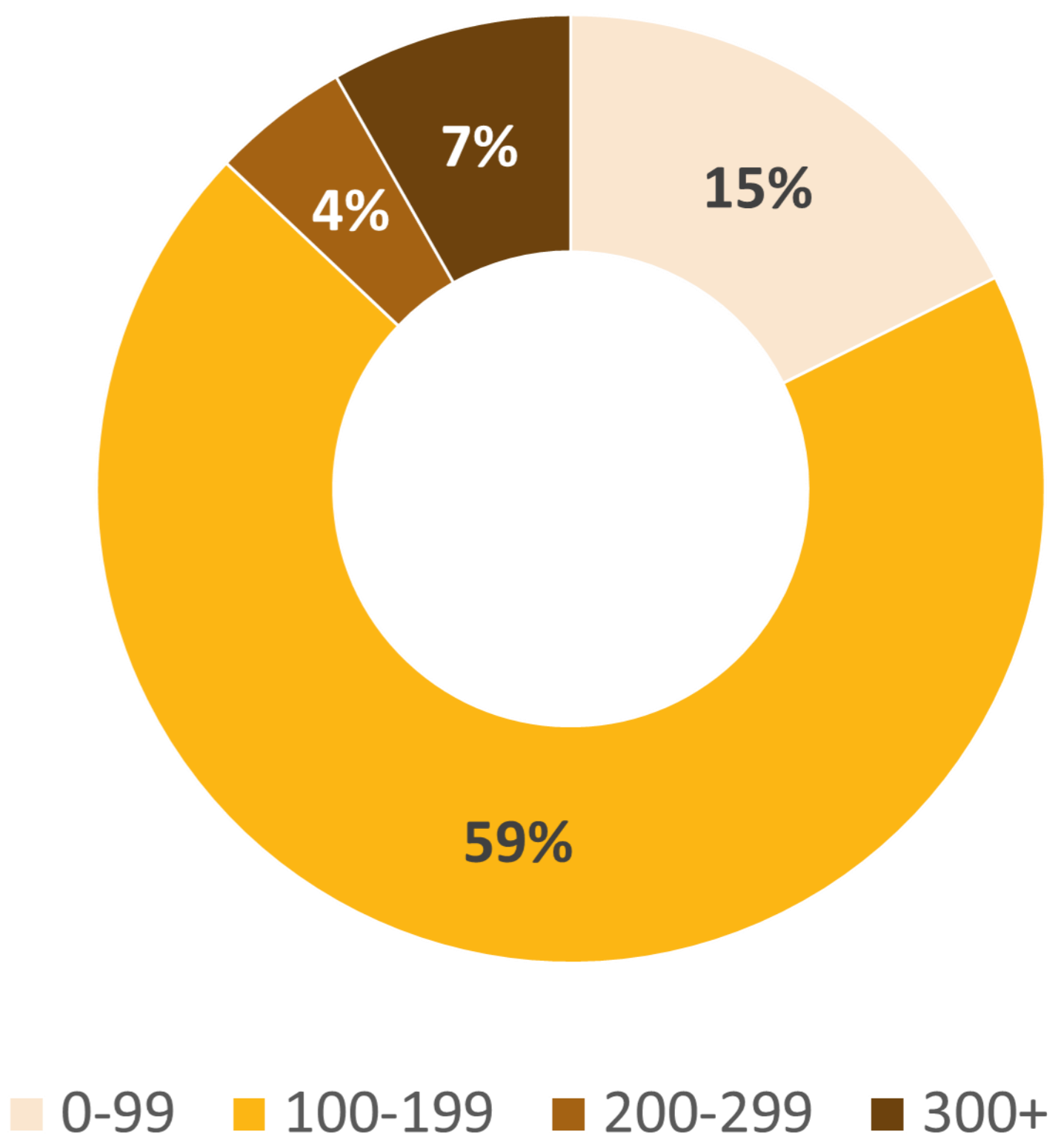
Source: ALFA/MLA Feedlot survey

100-199 Days on feed (DOF) program underpin grainfed beef sector, largely driven by demand from export markets

Quarterly turnoff by program: Historical trend



Quarterly turnoff by program: Dec 25 data



0-99 DOF
 100 - 199 DOF
 200 - 299 DOF
 300 or more DOF

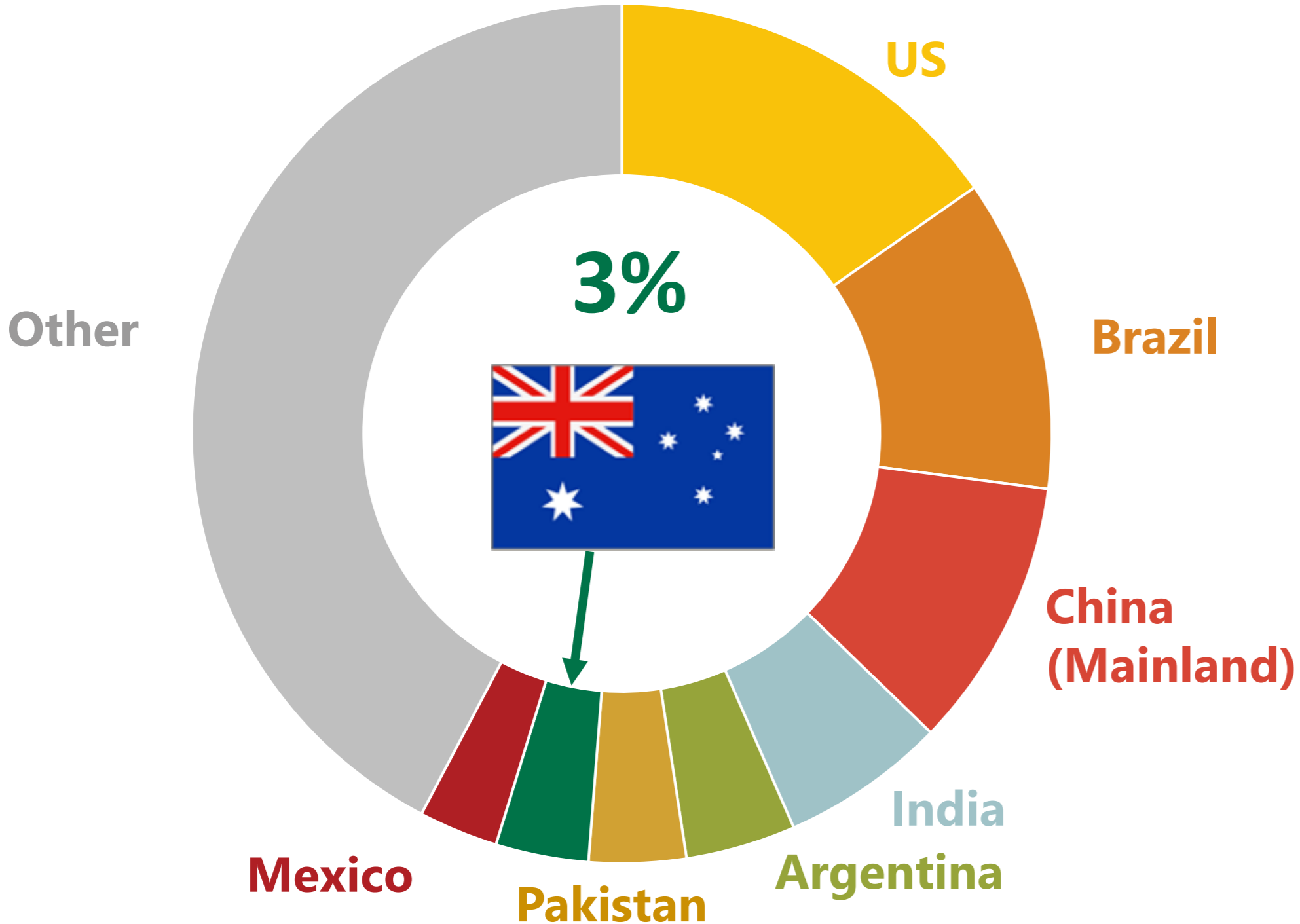
Source: MLA, ALFA



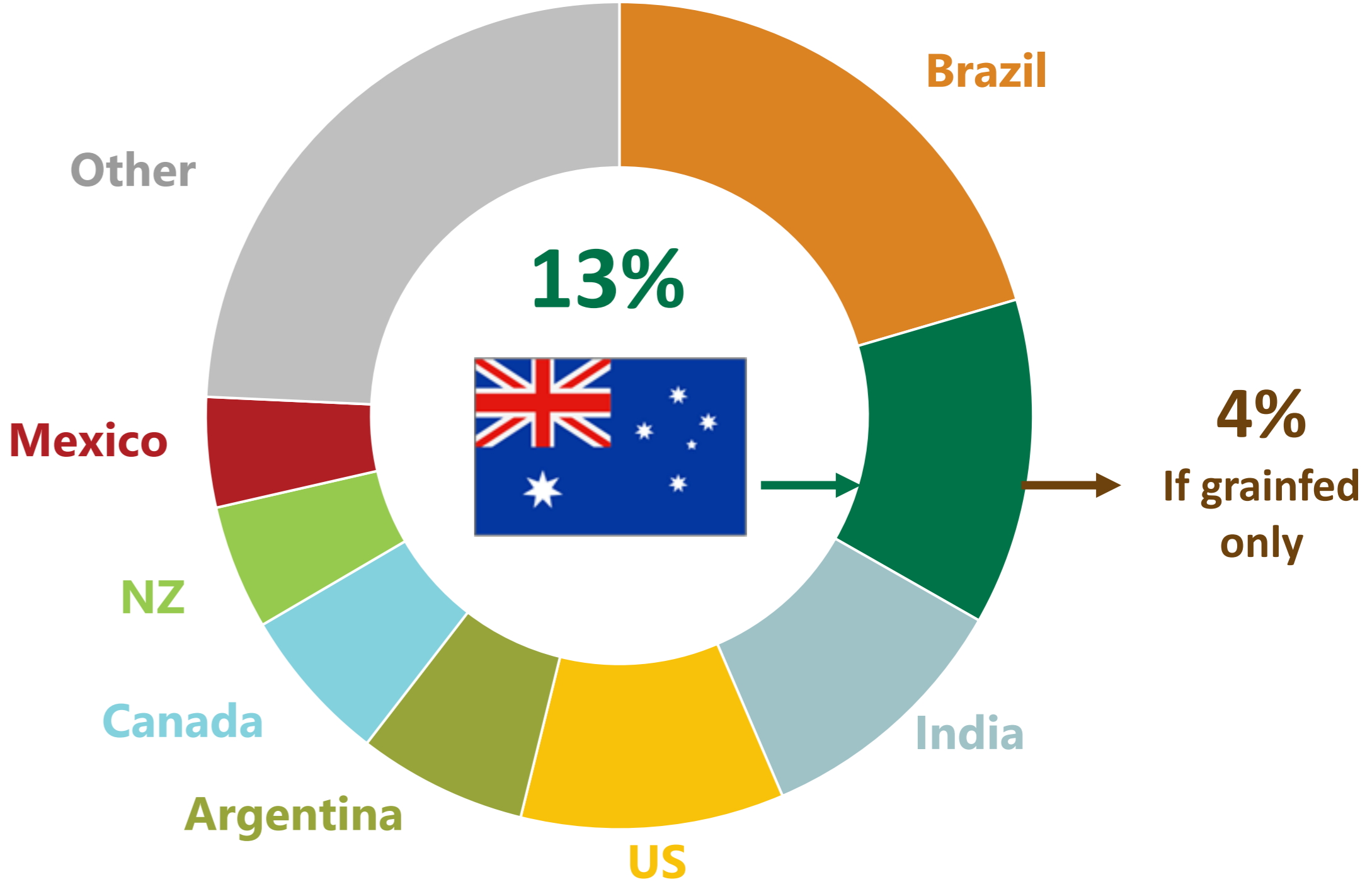
Global grainfed beef trade

Grainfed beef is produced globally, but the US, Canada, and Australia are the leading exporters in international trade

Global beef production 2025



Beef exports 2025



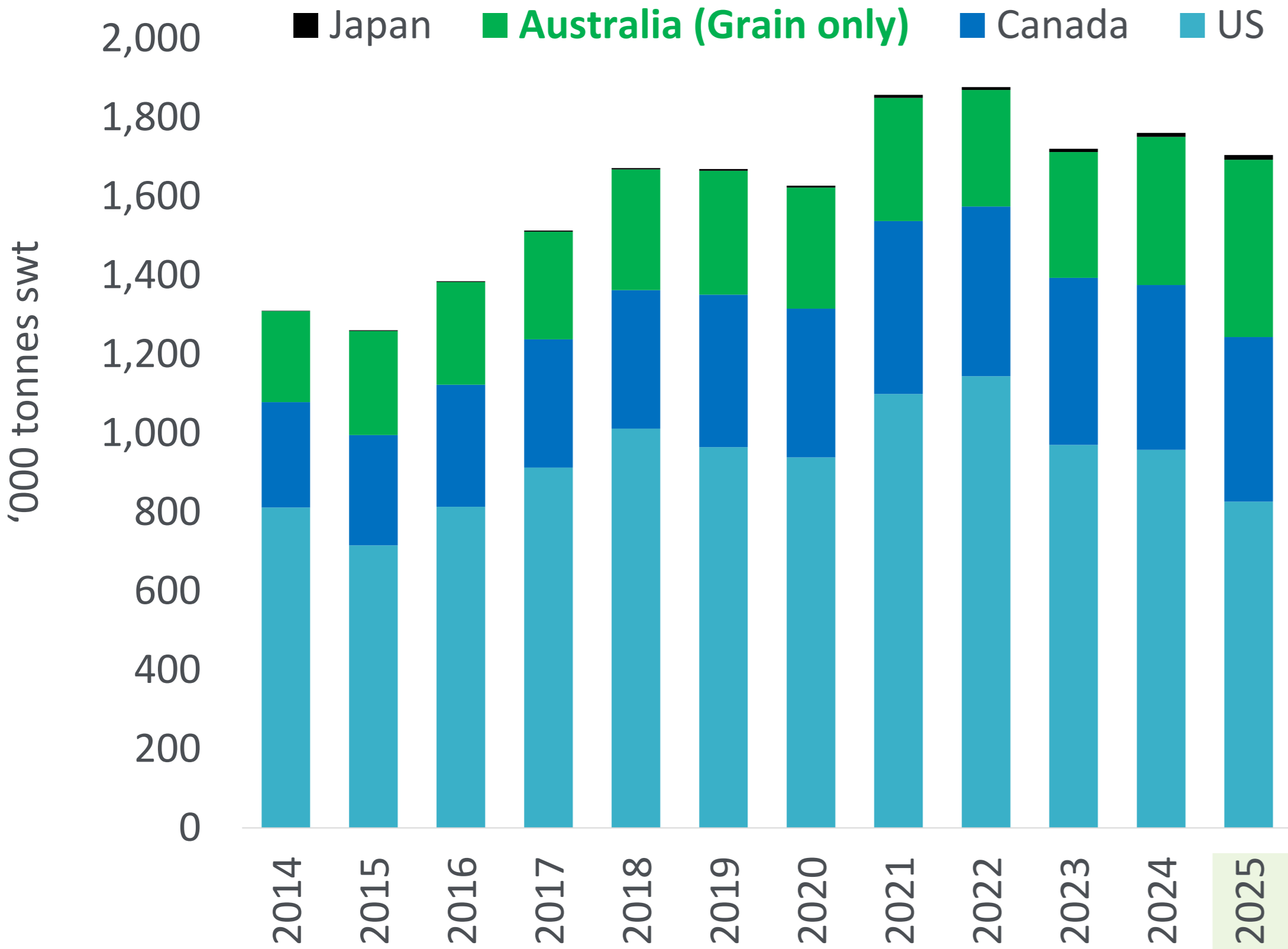
- Canada produces mostly grainfed beef
- Mexico also has minor but established grainfed sector
- Japan and Korea are small volume, high value grainfed beef producers
- Emerging grainfed beef producers include Brazil, China and Russia

- Almost 100% of US beef exported is assumed as grainfed (cornfed) beef
- Approximately 29% of Australian beef exported was grainfed beef in 2025

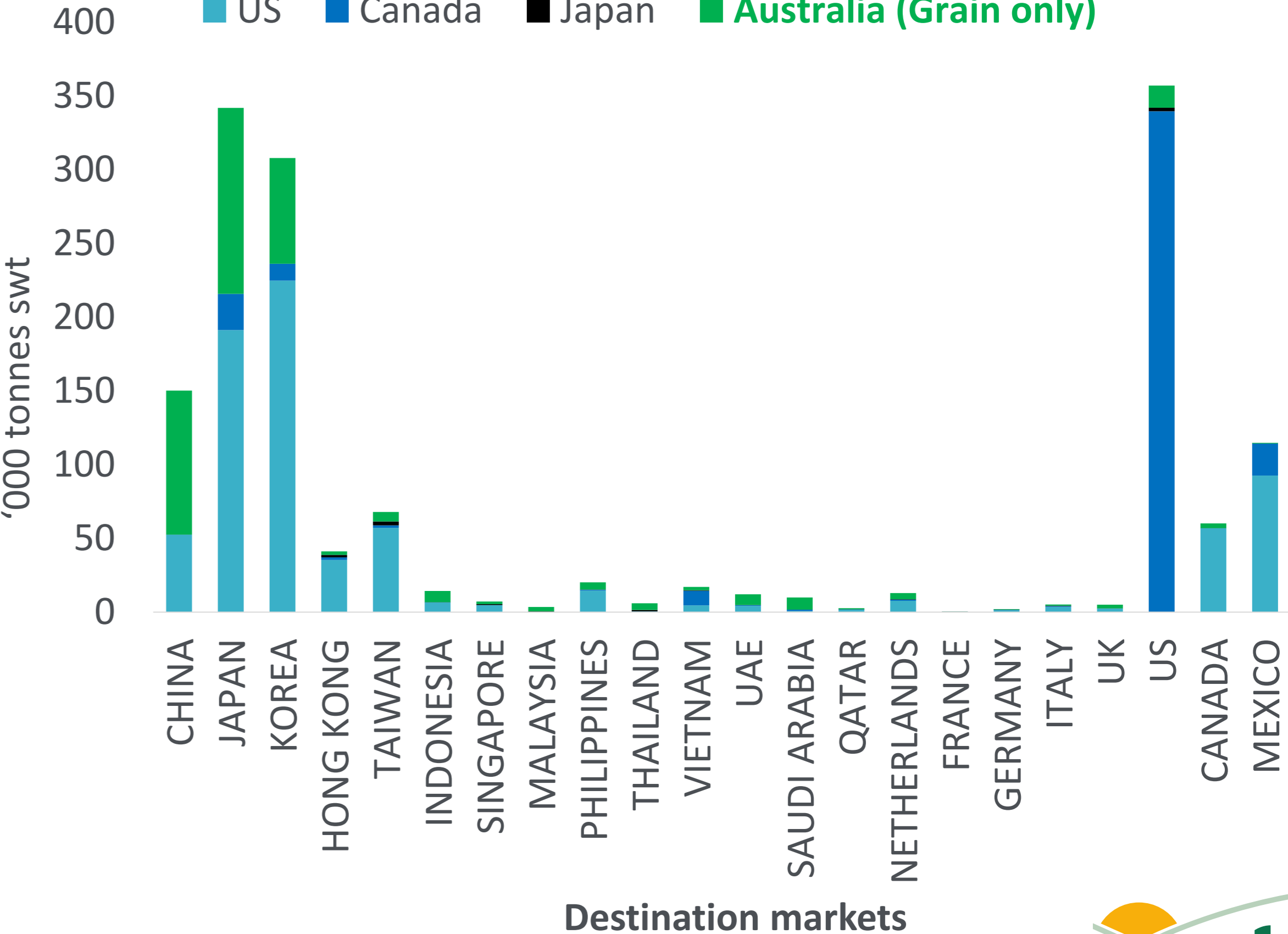
Source: OECD-FAO Agricultural Outlook 2025-2034, India's statistics include buffalo meat

Australia ranks third in grainfed beef export volume, competing with the US in major markets such as Korea, Japan, and China (Mainland)

Beef exports by major grainfed beef supplier, all destinations - volume



Beef exports to key markets by major grainfed beef supplier

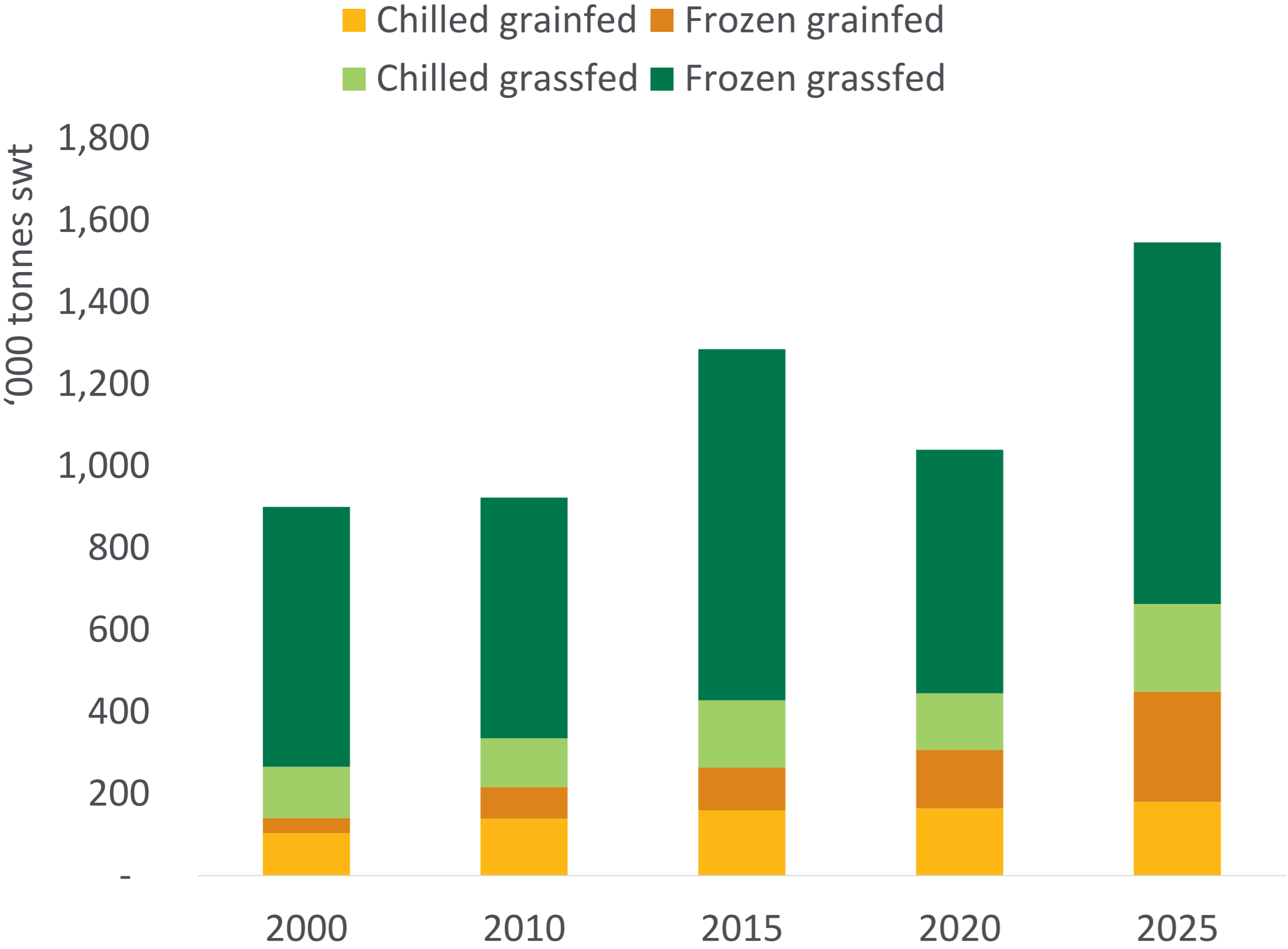


Source: Trade Data Monitor, LLC (TDM), Department of Agriculture, Fisheries and Forestry (DAFF), Australia – grainfed beef exports only, 2025

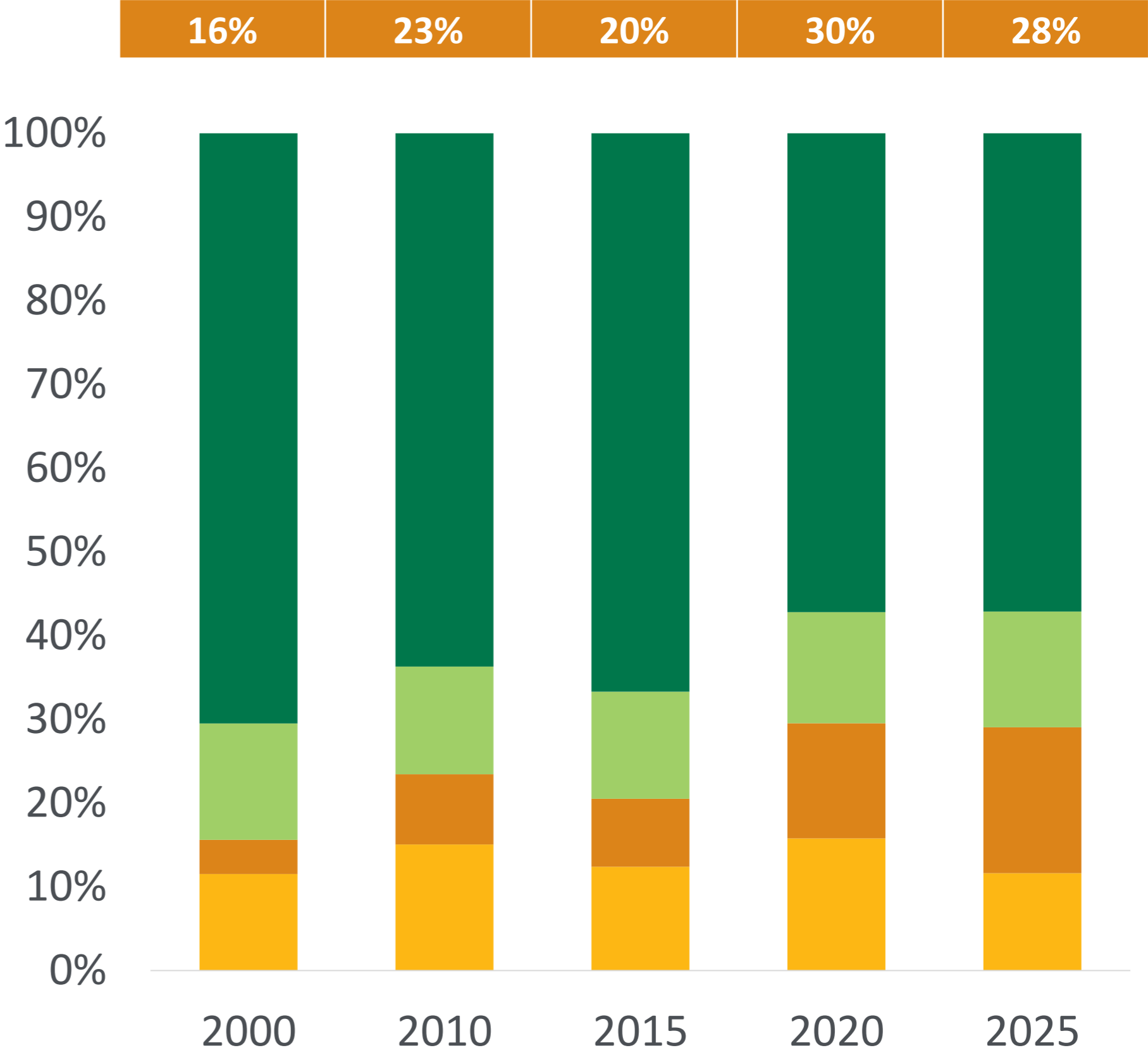


Australian grainfed beef export volumes have grown steadily, while total shipments fluctuate in response to changing supply conditions

Australian beef exports by storage and feed type



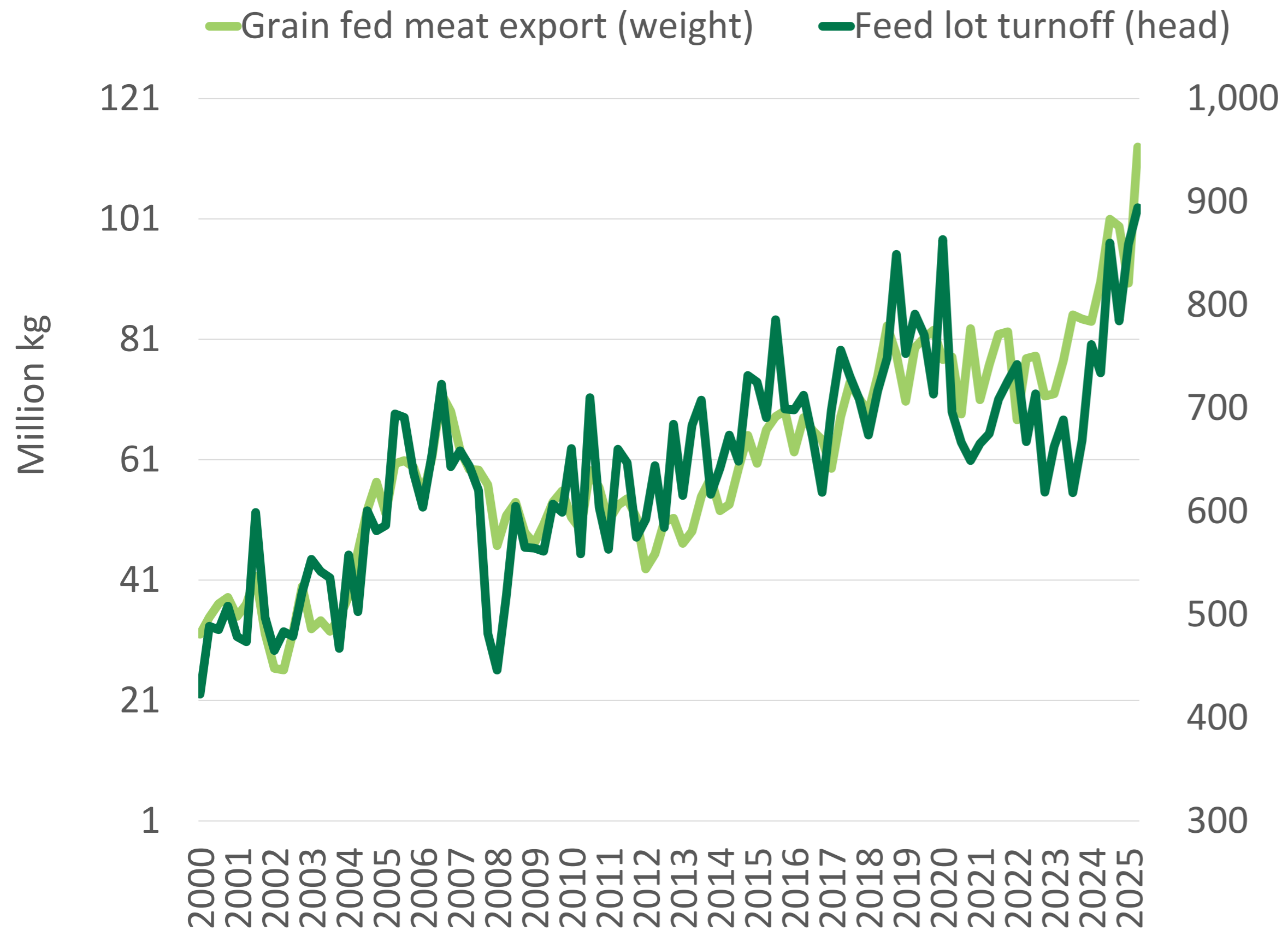
Grainfed beef % out of total exports



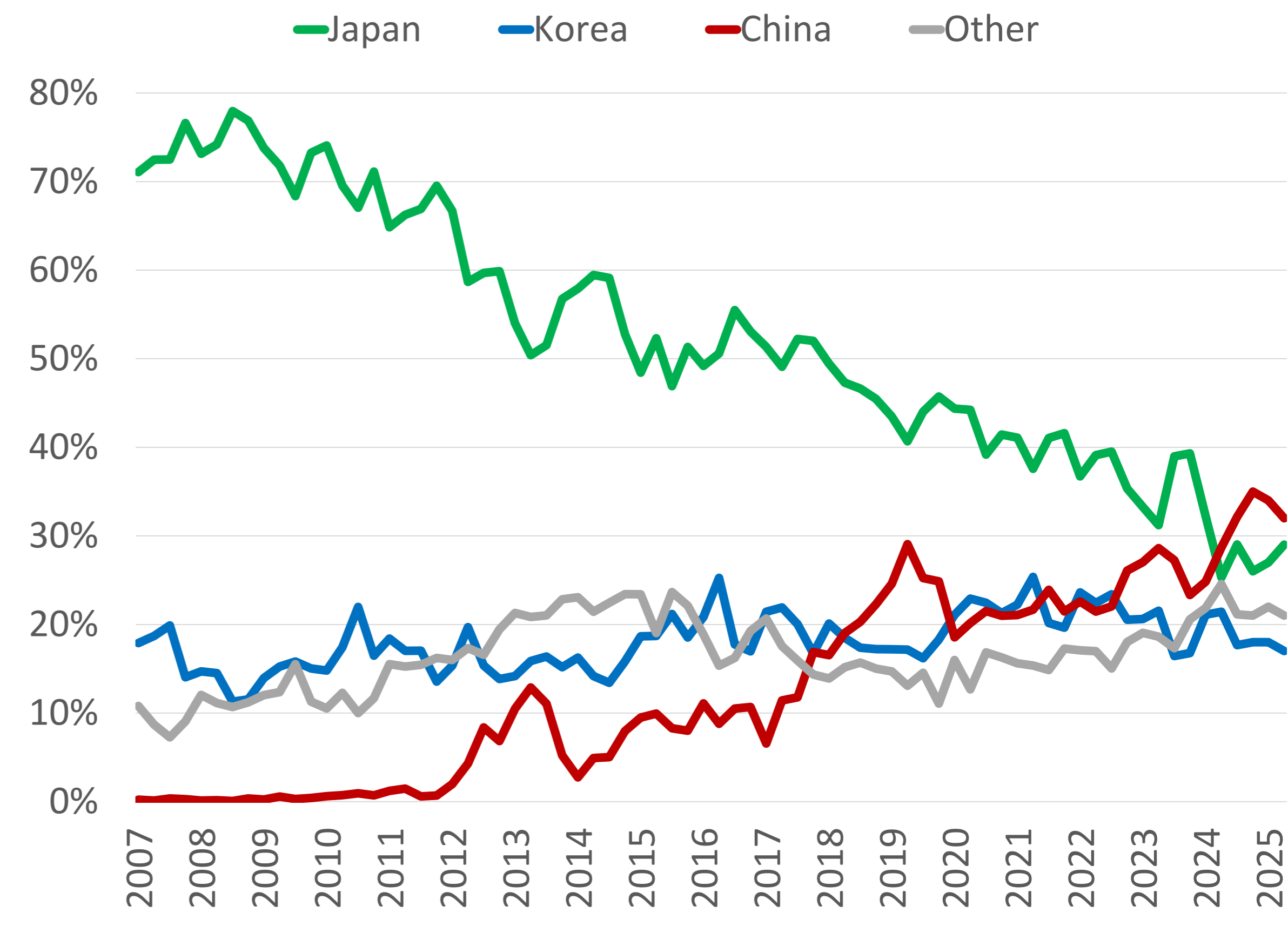
Source: Department of Agriculture, Fisheries and Forestry (DAFF)

Exports drive grainfed beef growth, with China now the largest market due to rising demand and limited US supply

Grainfed exports & feedlot turnoff



Australian grainfed exports by volume share

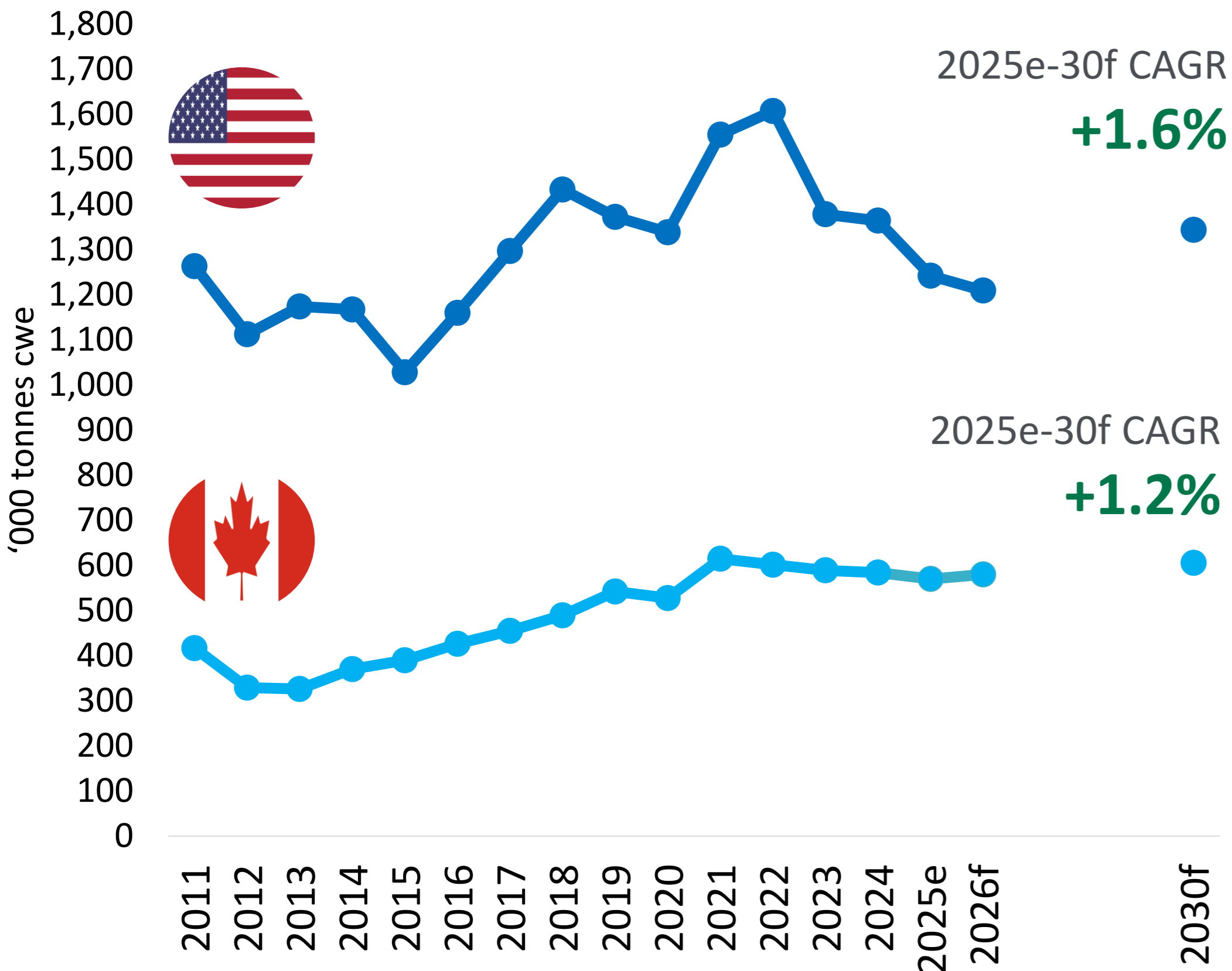


Source: ALFA, MLA, Department of Agriculture, Fisheries and Forestry (DAFF)

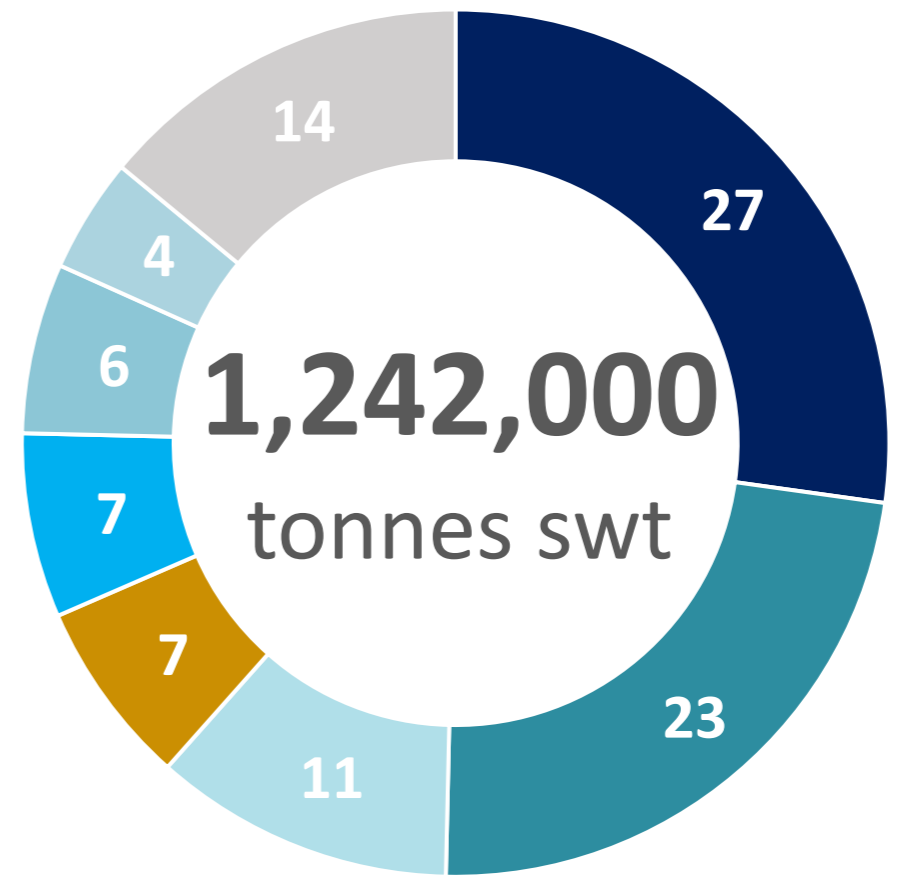


US and Canadian beef export volumes are overall declining since 2023 but are projected to grow, albeit slowly

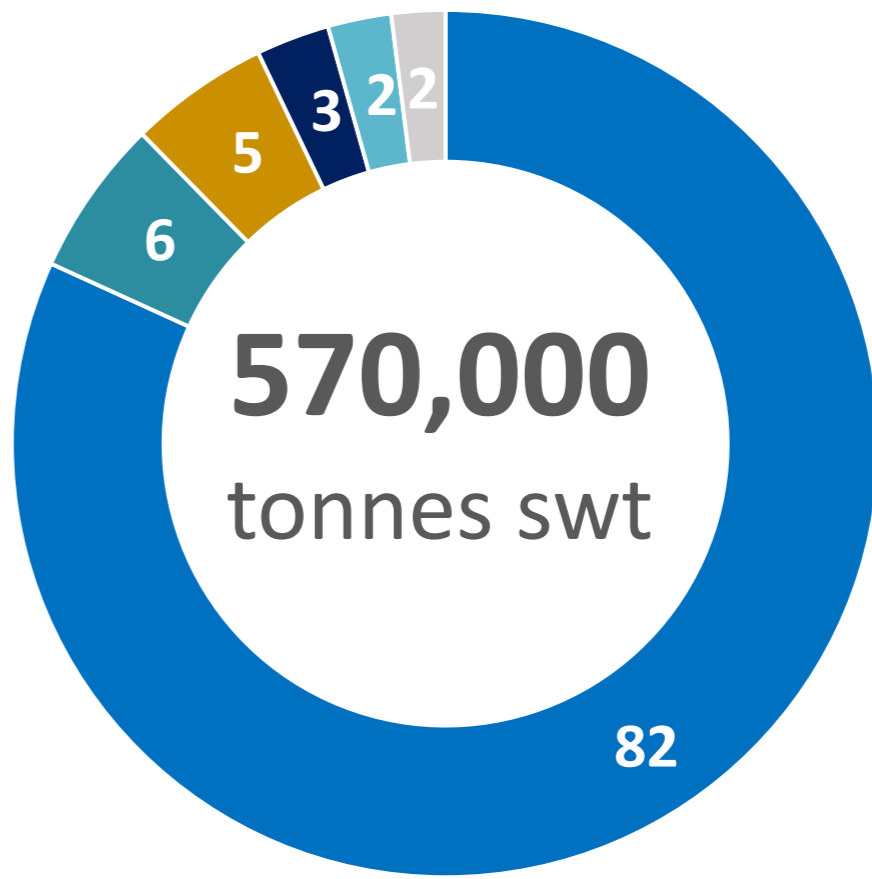
The US and Canada – beef exports to global market



US beef exports – 2025e*
(by volume, %)



Canada beef exports – 2025e
(by volume, %)

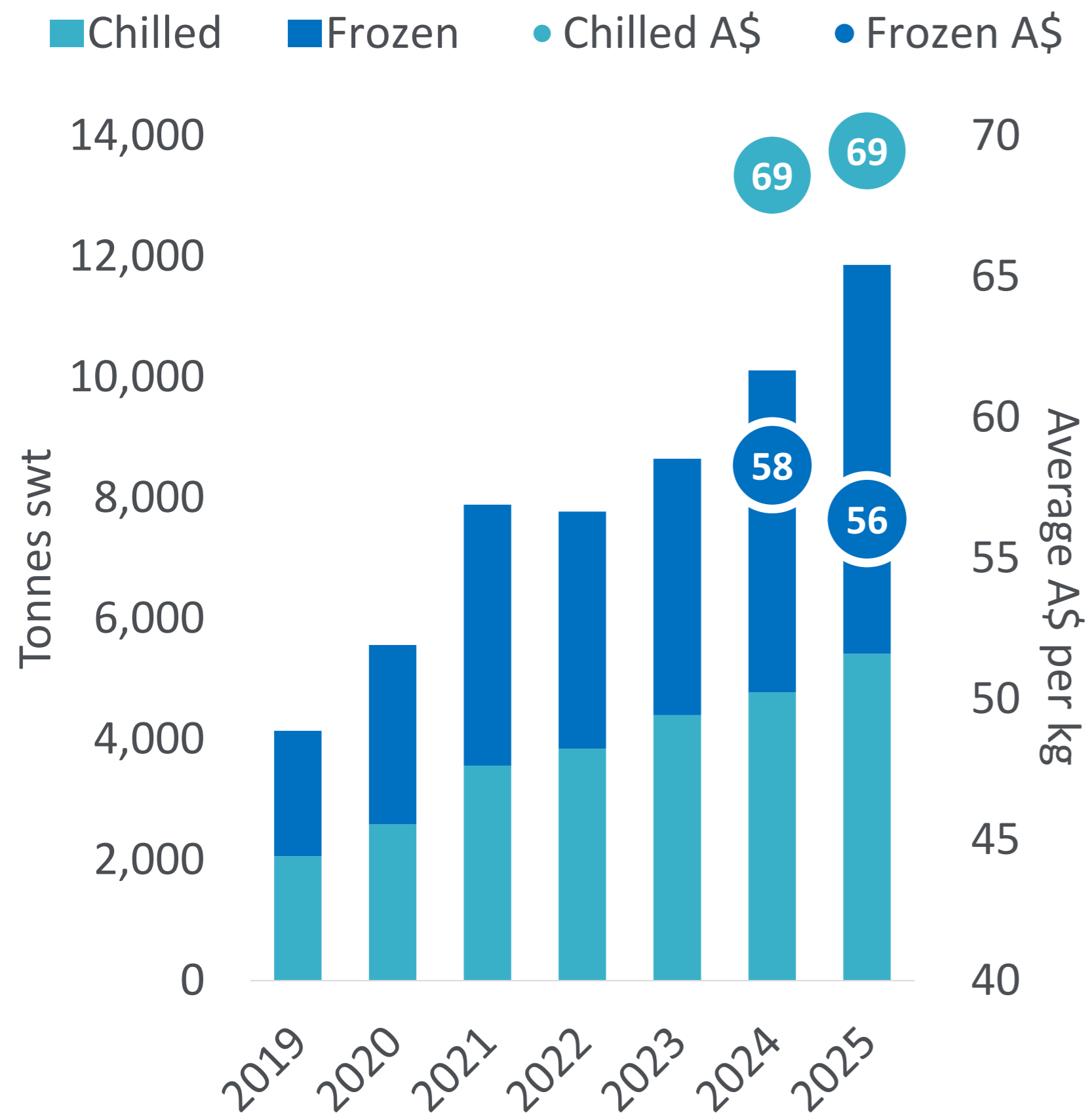


- Korea
 - Japan
 - Mexico
 - Taiwan
 - Canada
 - China
 - Hong Kong
 - Other
-
- US
 - Japan
 - Mexico
 - Korea
 - Vietnam
 - Other

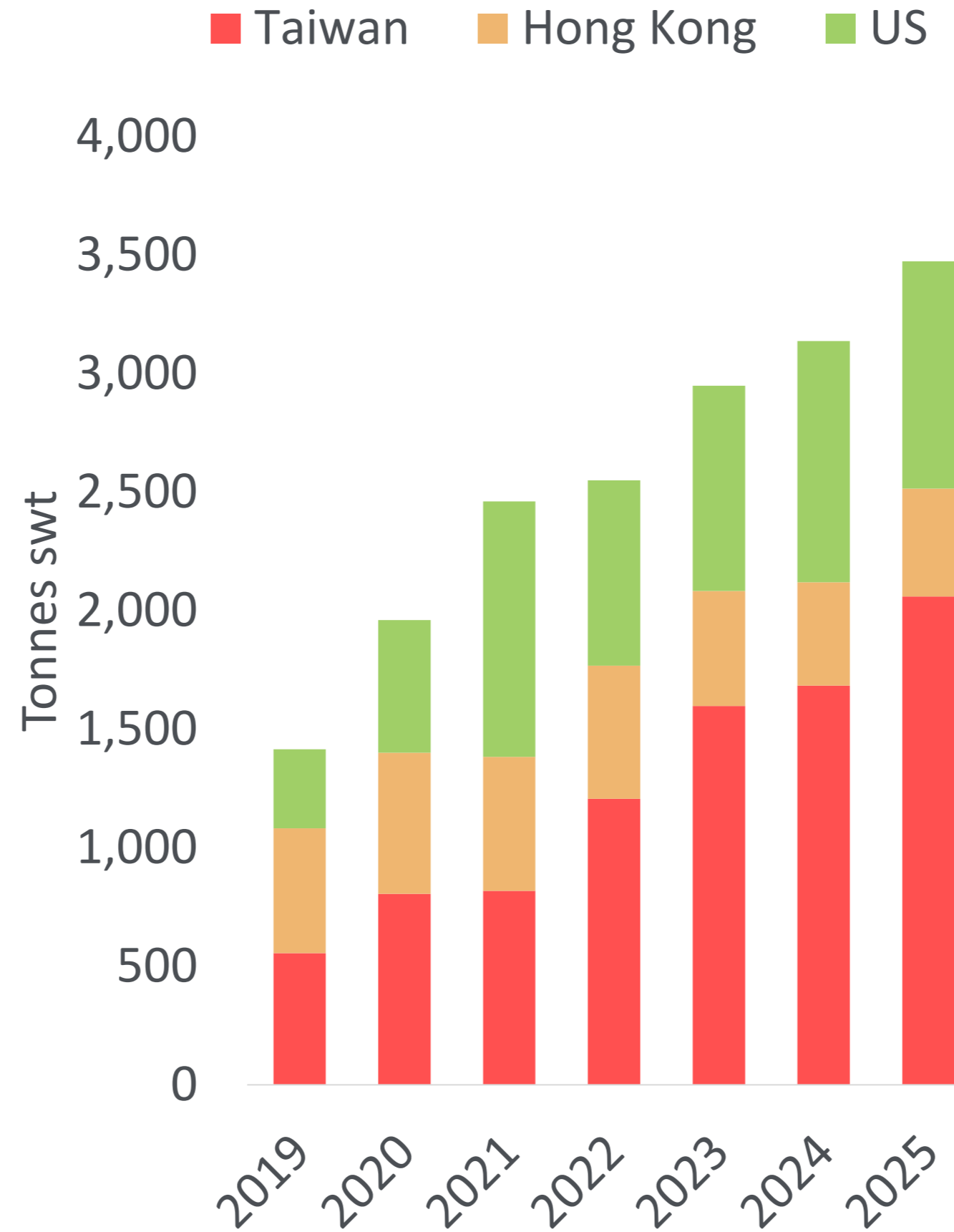
Source: GIRA GMC2025, e = estimate, f = forecast, * % of destination market derived from Trade Data Monitor, LLC (TDM)

Japan has increased high-value beef exports from a small base, supported by Yen depreciation

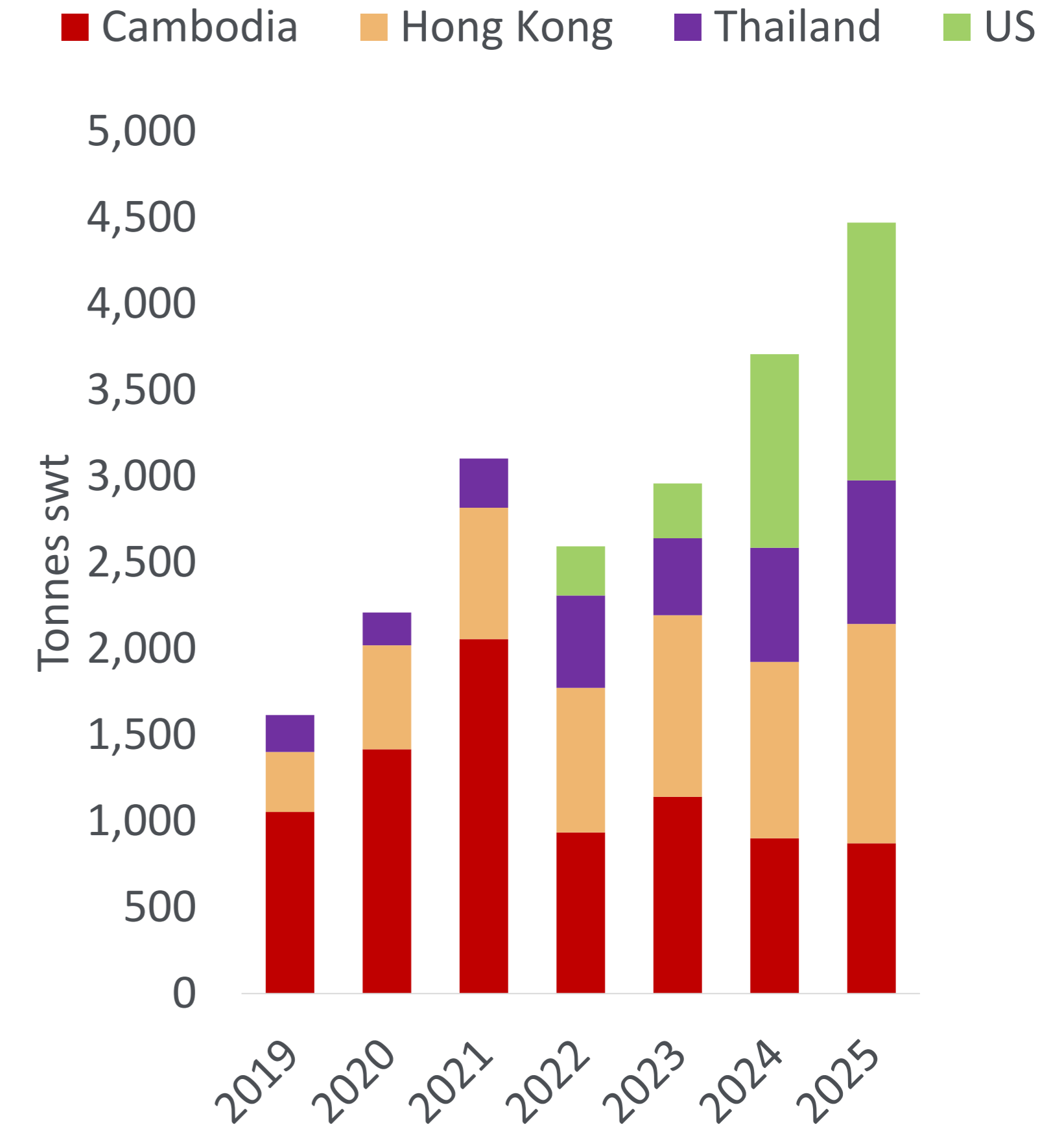
Japan beef exports by storage type



Key markets - Chilled



Key markets - Frozen



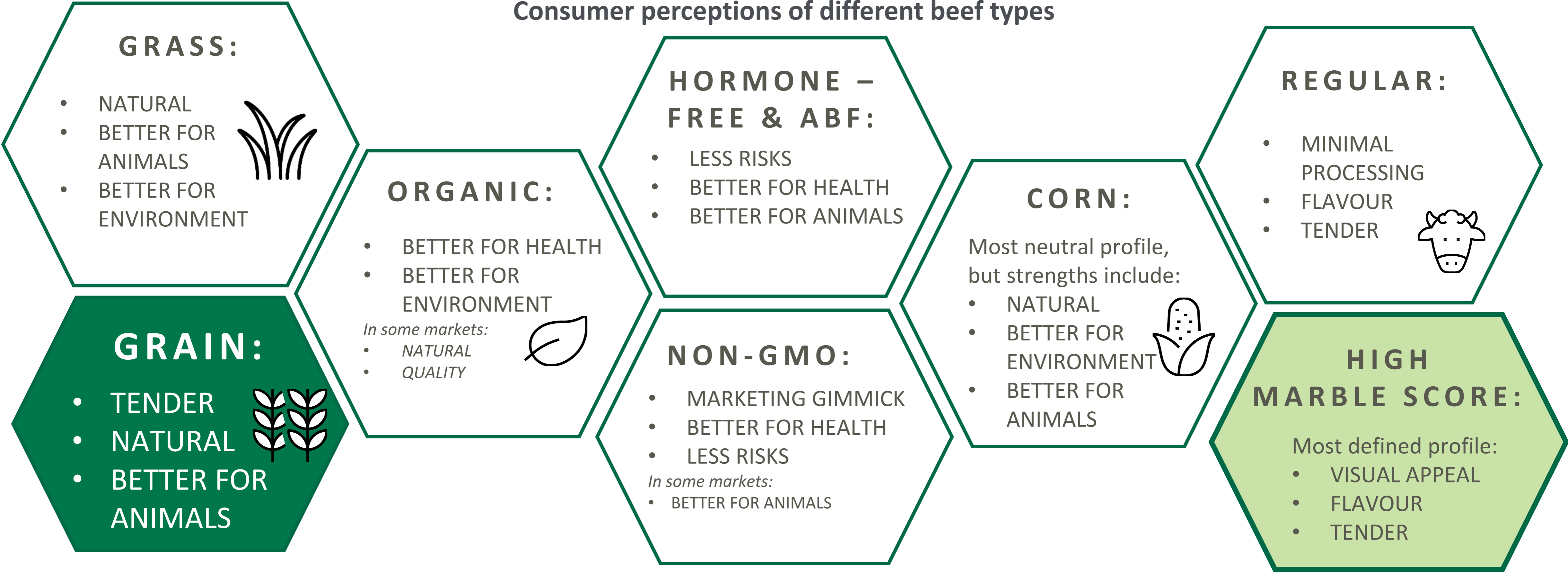
Source: Trade Data Monitor, LLC (TDM), 2025



Global demand for grainfed beef

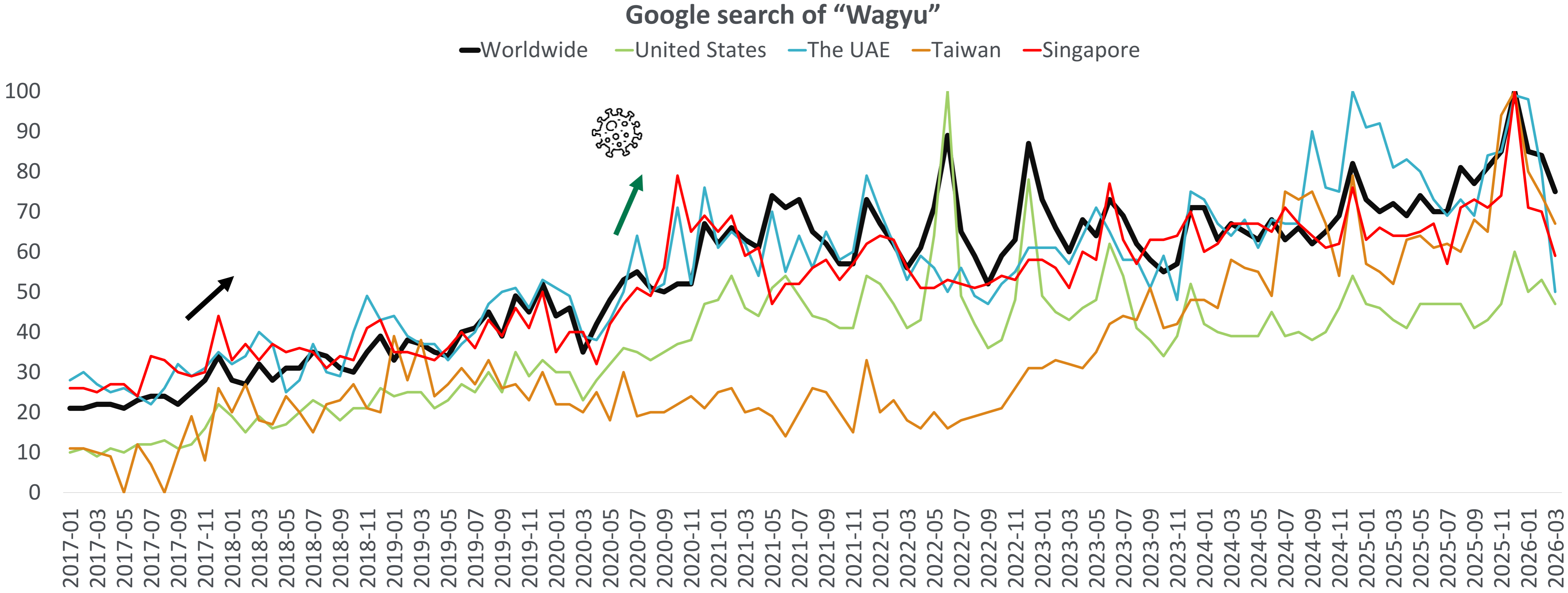
Consumers associate grainfed beef with “natural” qualities, while high marbled beef stands out for visual appeal, flavour, and tenderness

Consumer perceptions of different beef types



Awareness and image profiles are amongst beef buyers only (must have ever bought beef). Global average does not include Australia. The brand image profiles represent strengths (positive figures) and weaknesses (negative) of each type of beef relative to the other types of beef in the category. In total 9 types were compared, but other types have been removed for clarity. The figures do not represent gross endorsement on each attribute as these figures are heavily affected by awareness and consumption of that type of beef. Source: MLA Global Consumer Tracker

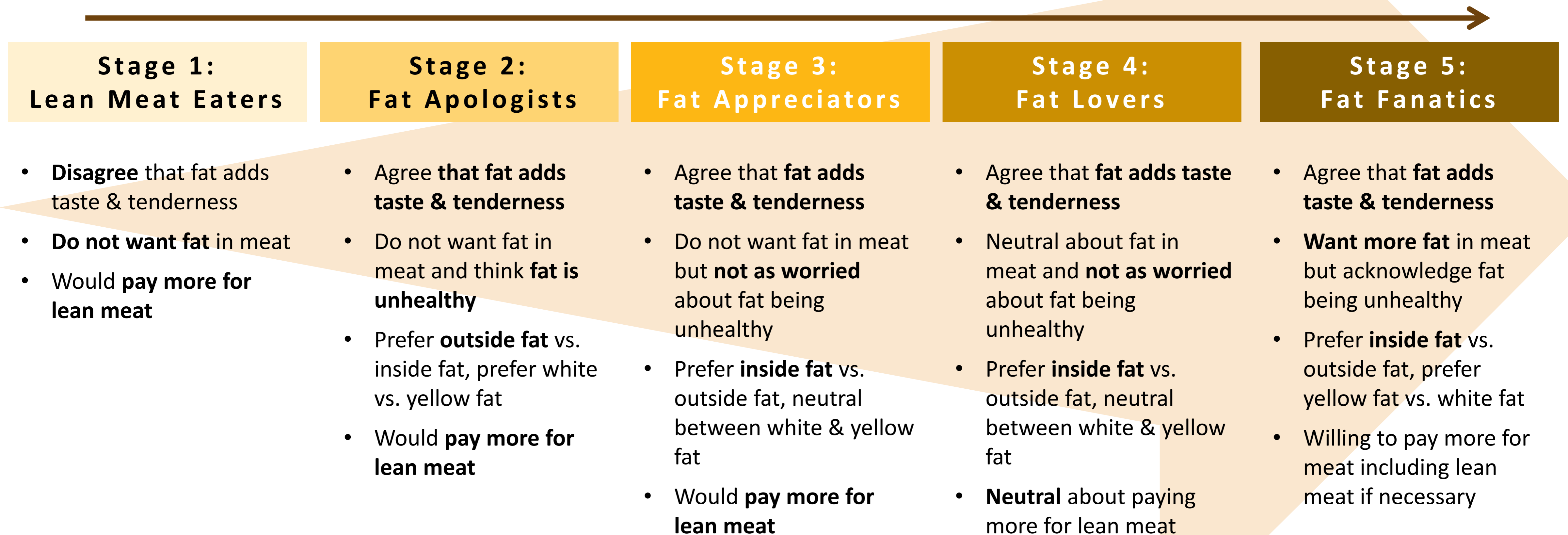
Wagyu became synonymous with premium marbled beef, driving global interest that accelerated from 2017 and surged during the pandemic



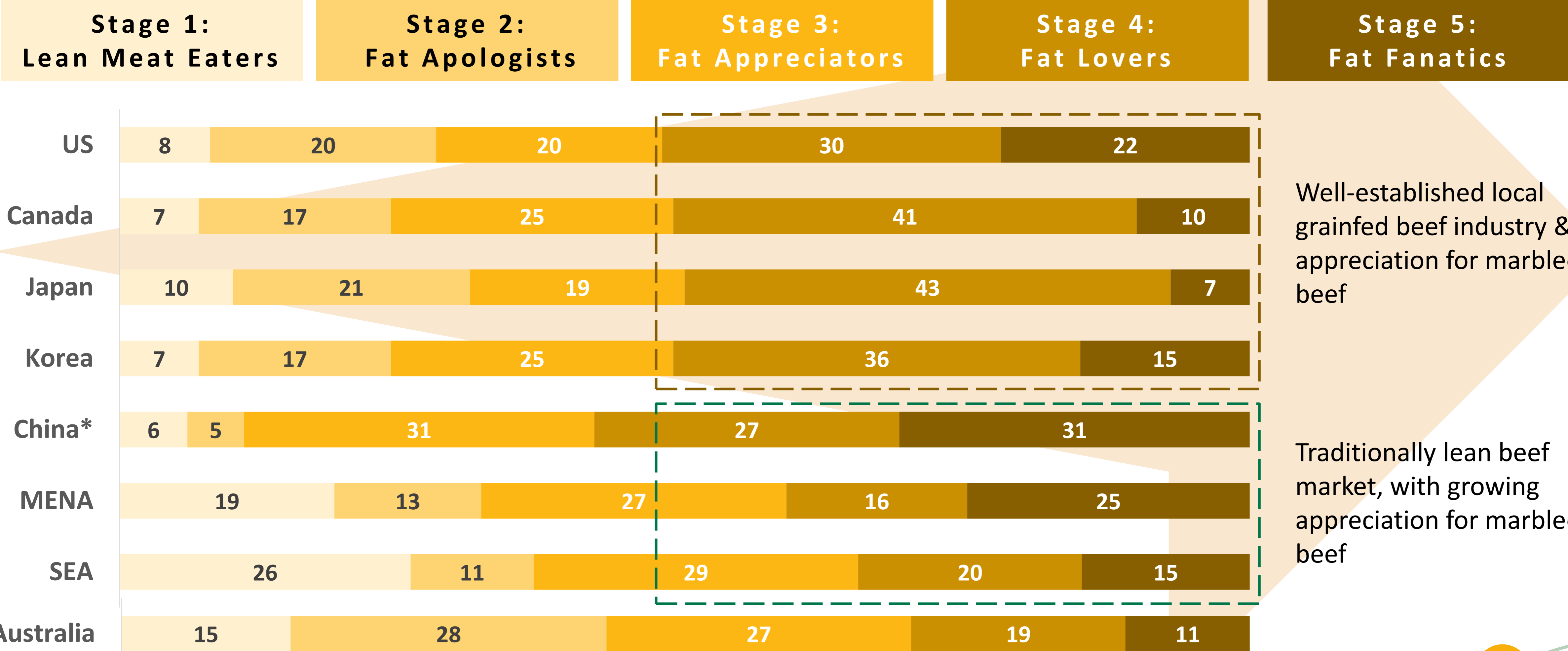
Source: Google Trends, Interest as indicated by the number of Google searches involving the term "Wagyu"

Consumers' attitudes to fat in meat cluster into five distinct groups

Five stages of fat acceptance



Chinese consumers prefer fat in meat even more than consumers in established grainfed beef markets



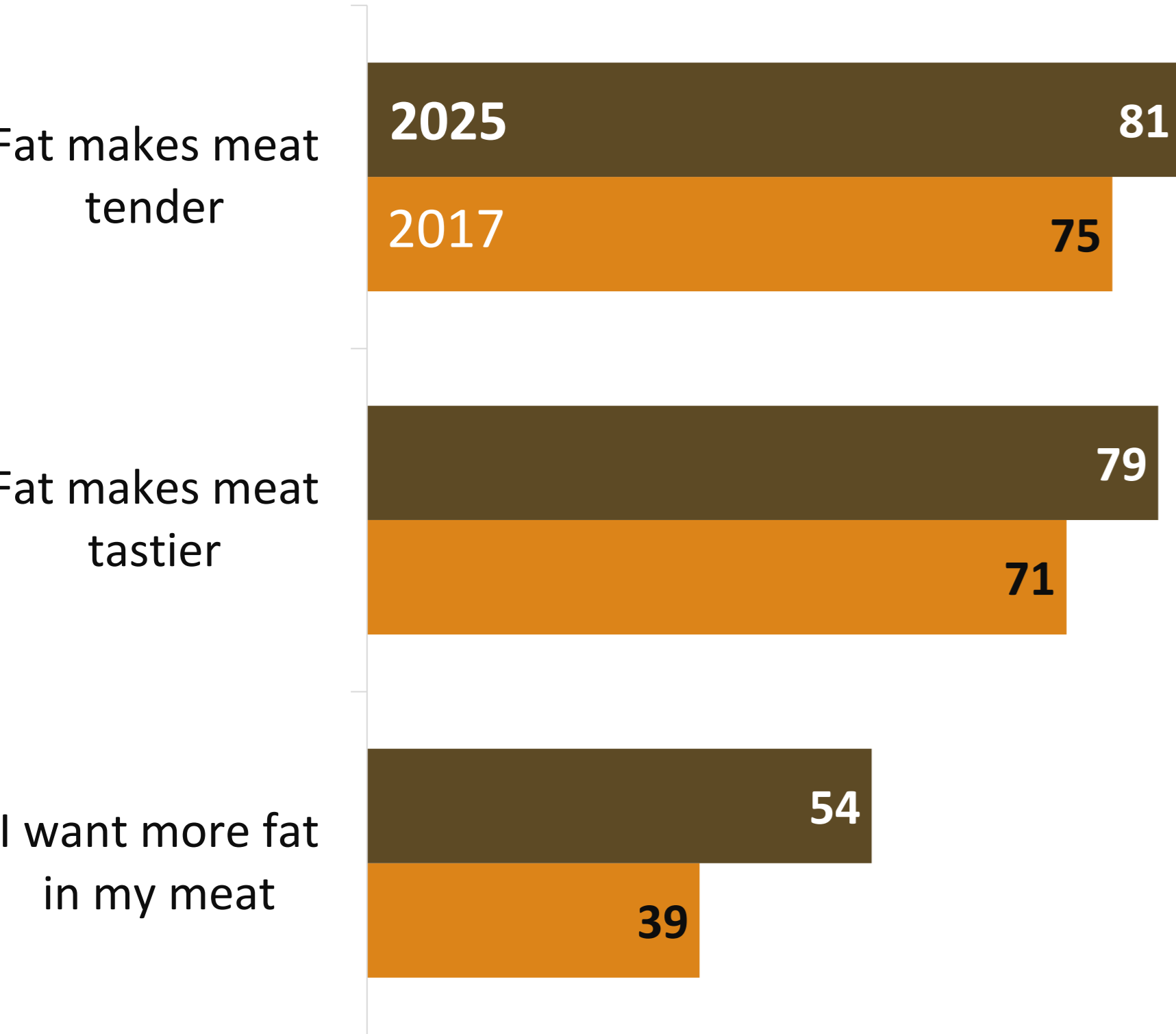
Well-established local grainfed beef industry & appreciation for marbled beef

Traditionally lean beef market, with growing appreciation for marbled beef

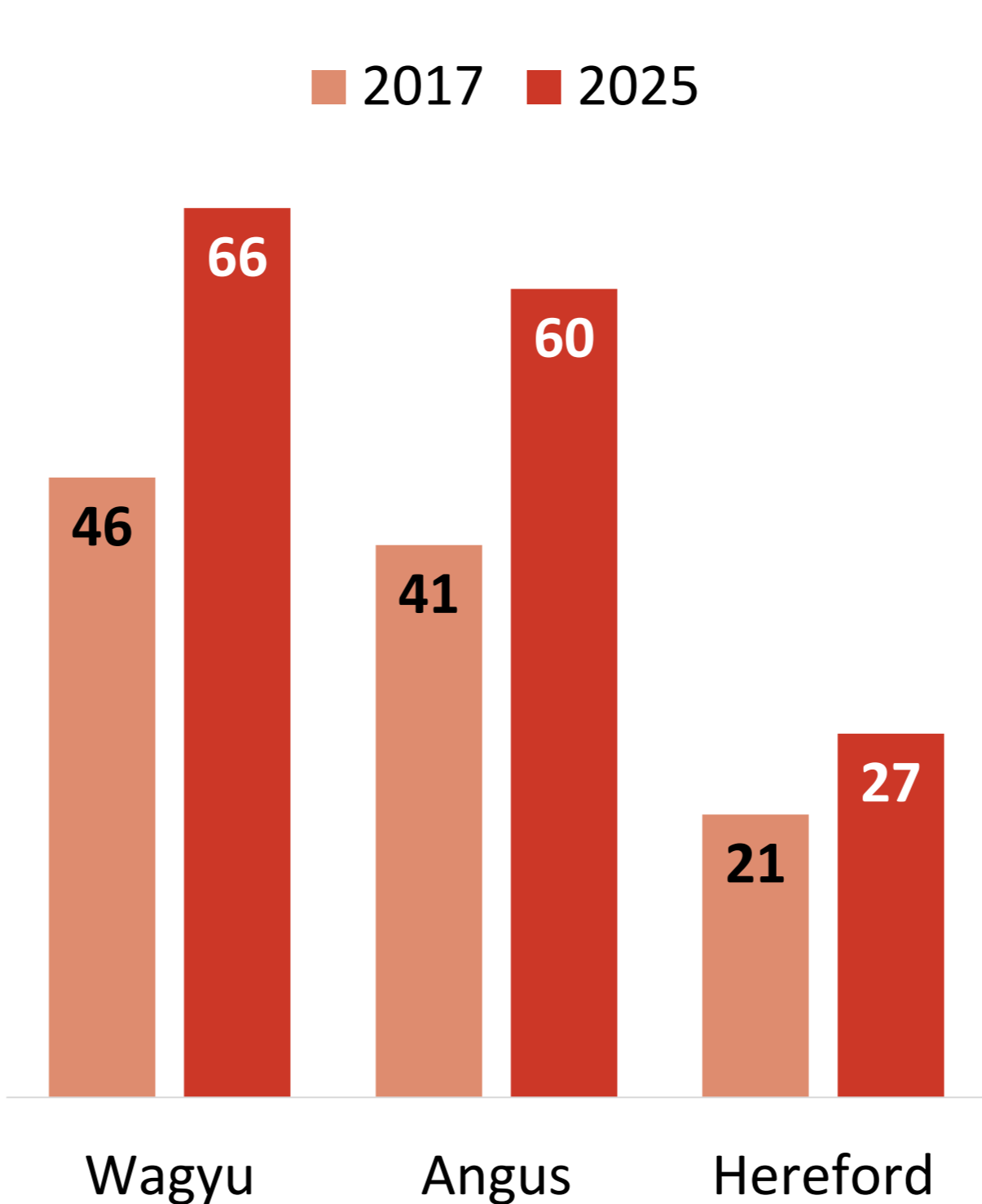
Source: MLA Global Consumer Tracker 2017, *China (Mainland)

Stronger preference for fat and greater breed awareness have since increased Chinese demand for Australian grainfed beef

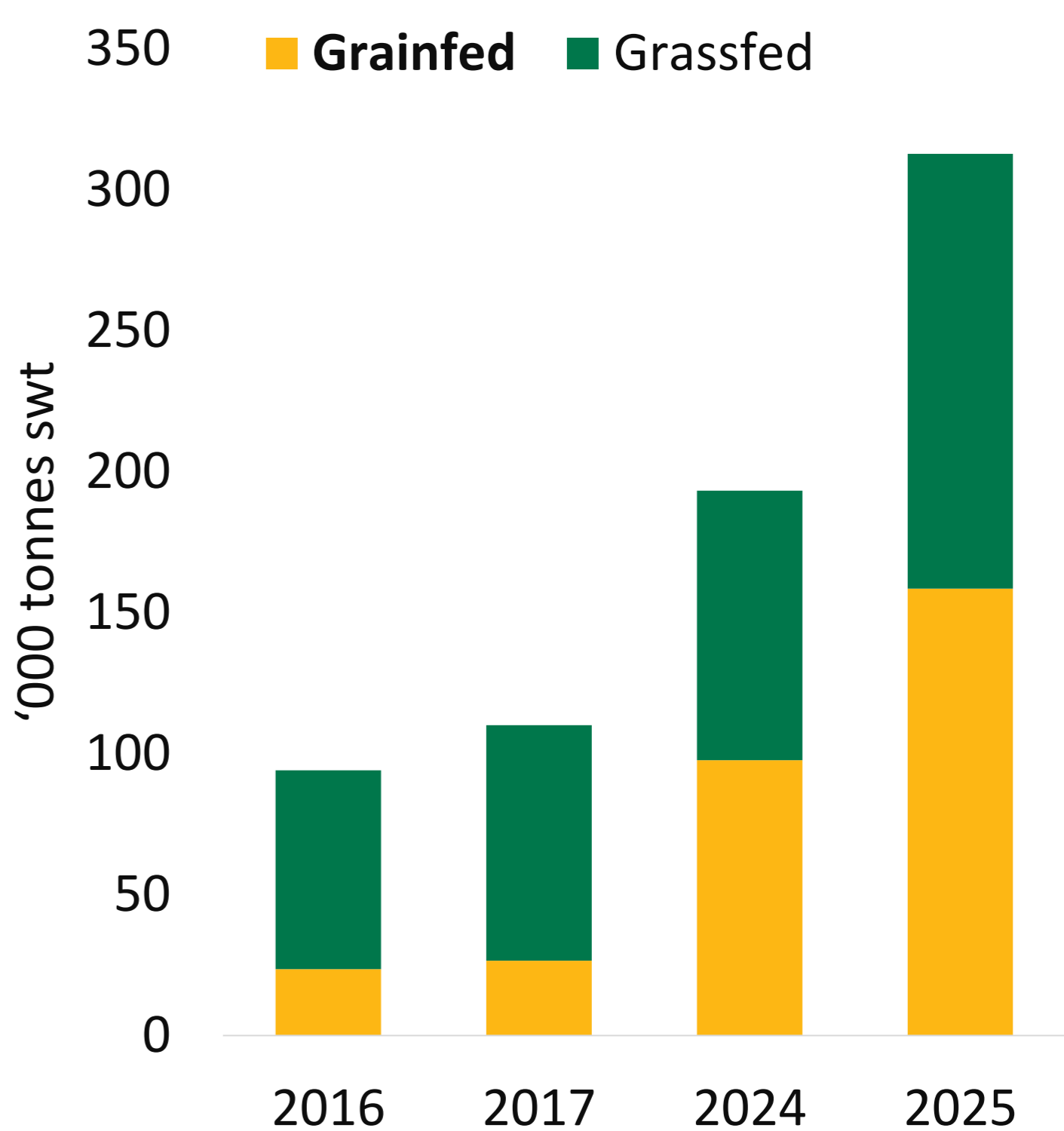
Do you agree that these phrases apply to fat in meat? (Agree %)



Which of the following breeds have you heard of? (Yes %)



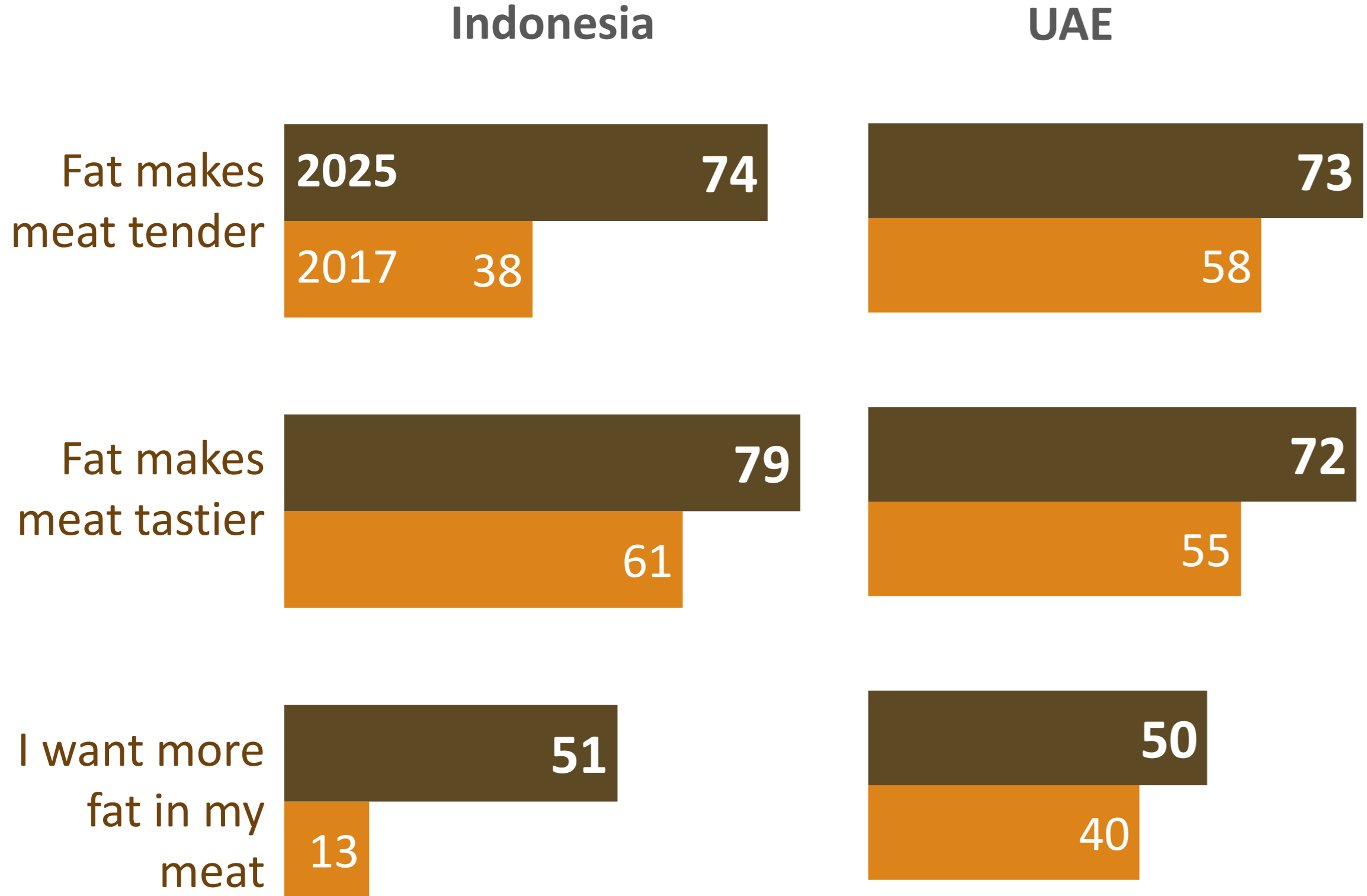
Australian beef exports to China by feed type



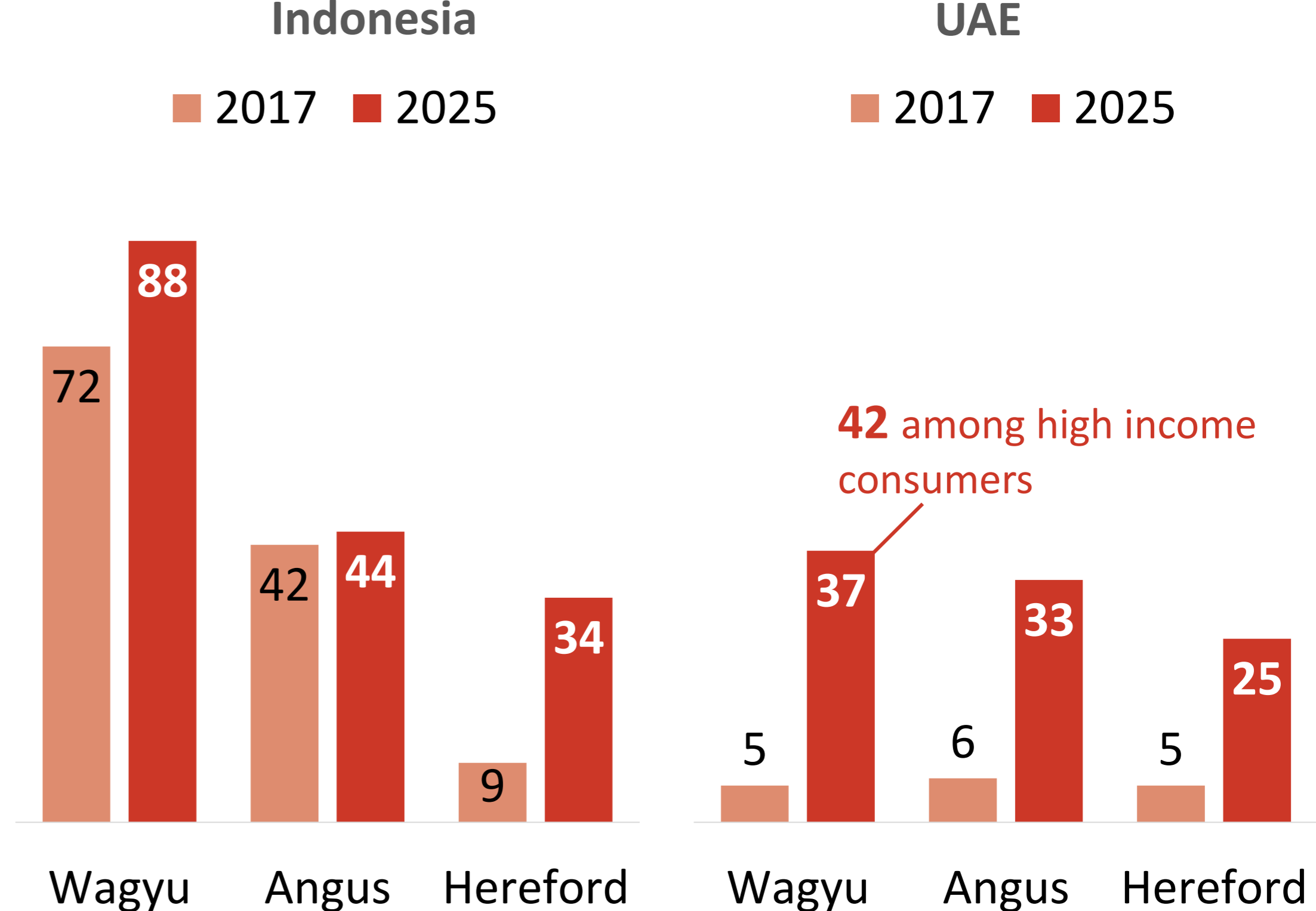
Source: MLA Global Consumer Tracker 2017, 2018, 2025, Department of Agriculture, Fisheries and Forestry (DAFF)

Similar trends have emerged across markets like Indonesia and UAE, reinforcing growing demand for grainfed beef

Do you agree that these phrases apply to fat in meat?
(Agree %)



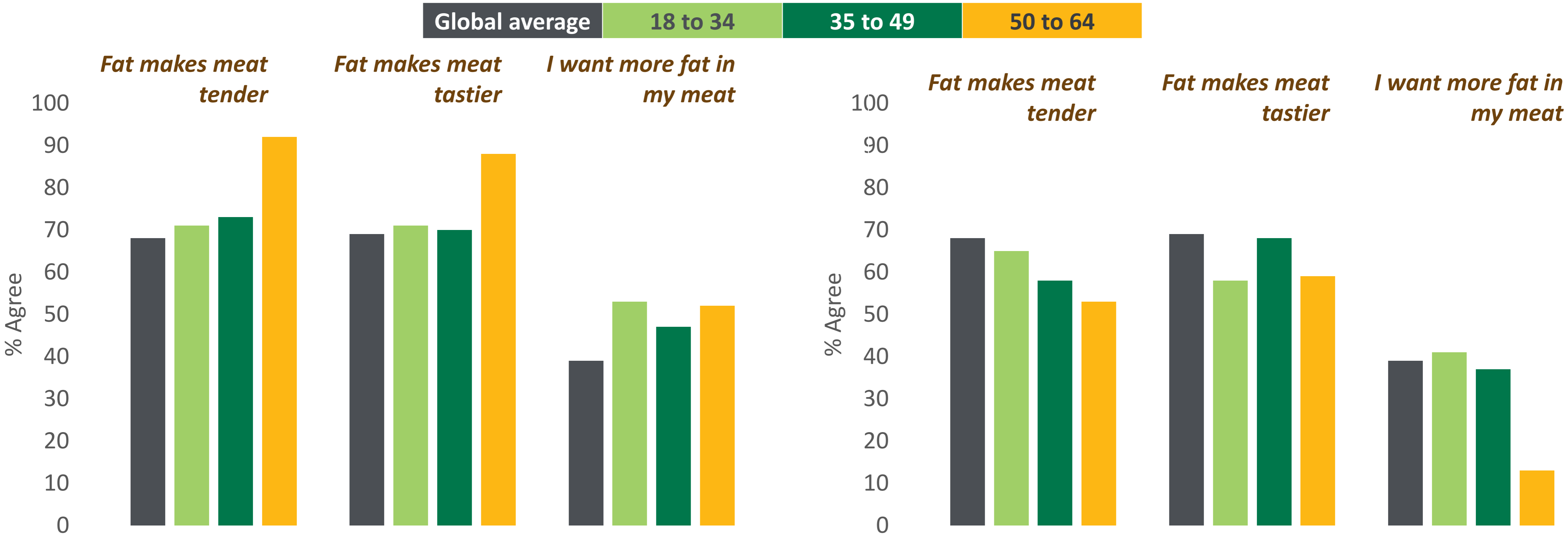
Which of the following breeds have you heard of?
(Yes %)



Source: MLA Global Consumer Track 2017, 2018, 2025

'Fat in meat' is gaining traction in traditionally lean beef markets like the UAE and UK

Do you agree that these phrases apply to fat in meat? (Agree %, by age group)



UAE: Awareness & positive associations are strong across generations, highest among older consumers

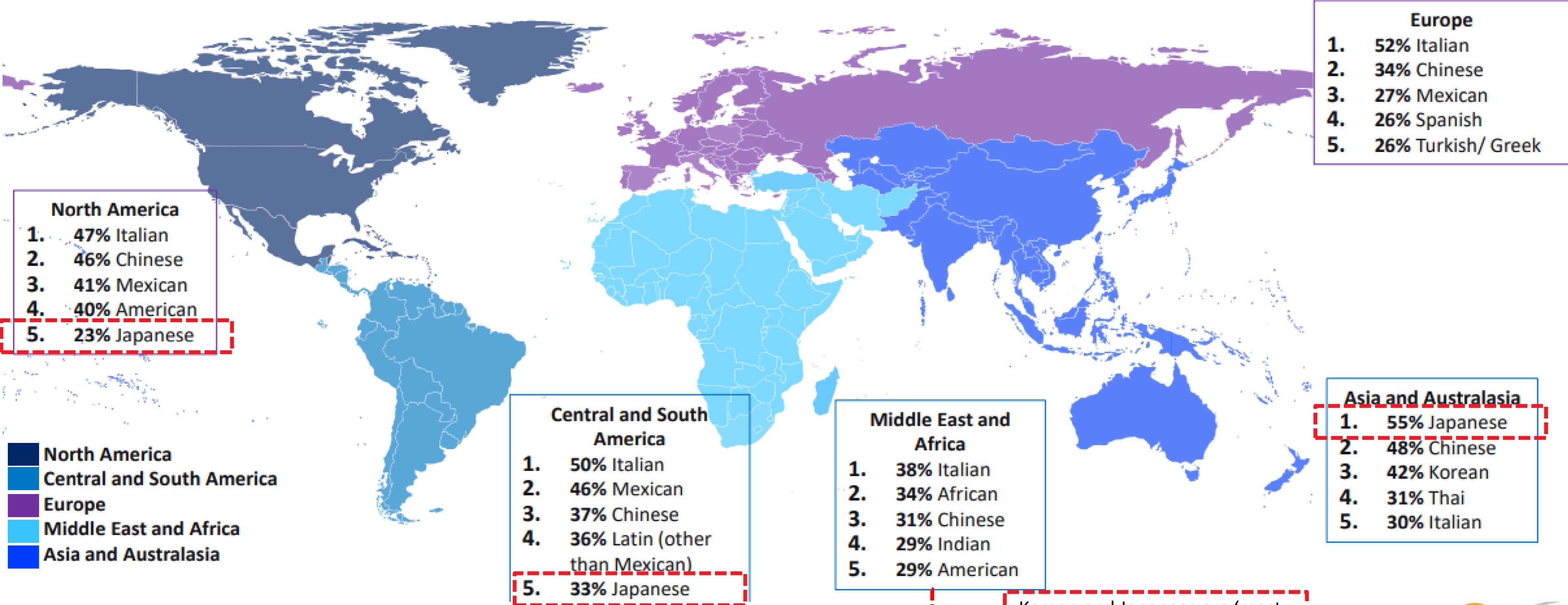
UK: Awareness and interest are rising, led by younger generations

Source: MLA Global Consumer Tracker 2025



Global appeal of Japanese cuisine and marbled beef creates opportunities for Australian grainfed beef

Global: Top 5 cuisines find most appealing



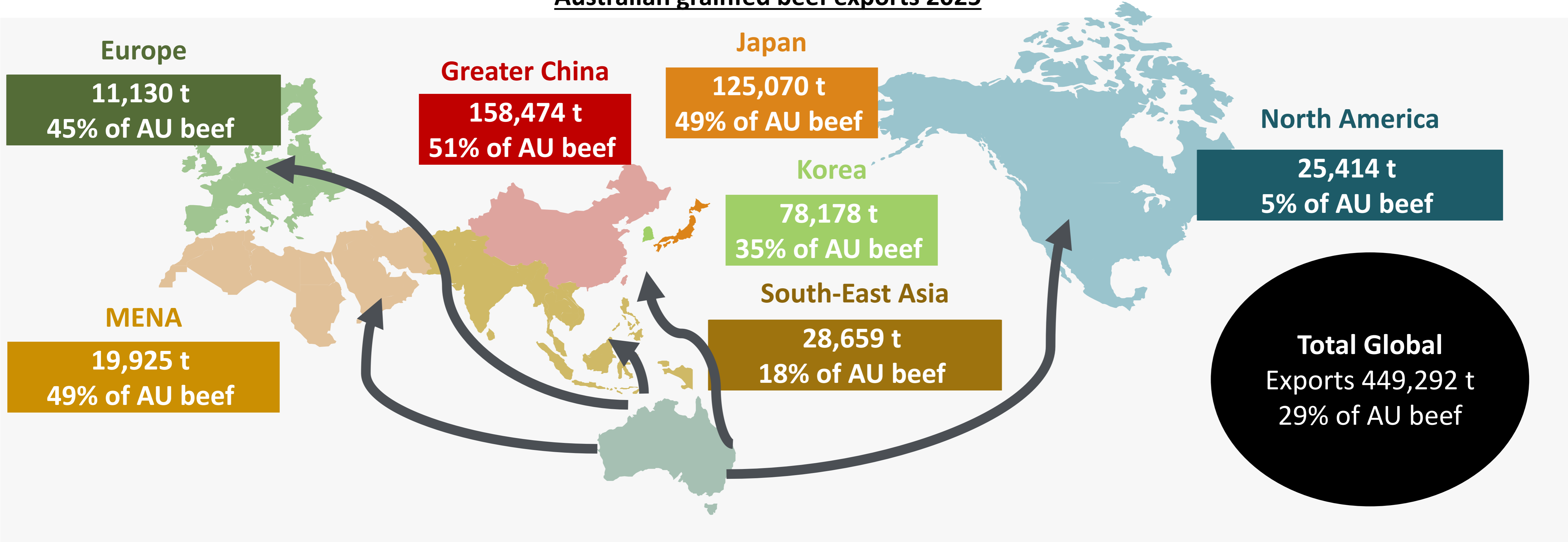
However... →

Korean and Japanese are 'most appealing cuisine' among UAE + KSA 18-24 yr olds

Source: GlobalData 2024 Q1 global consumer survey, map template from Pixabay

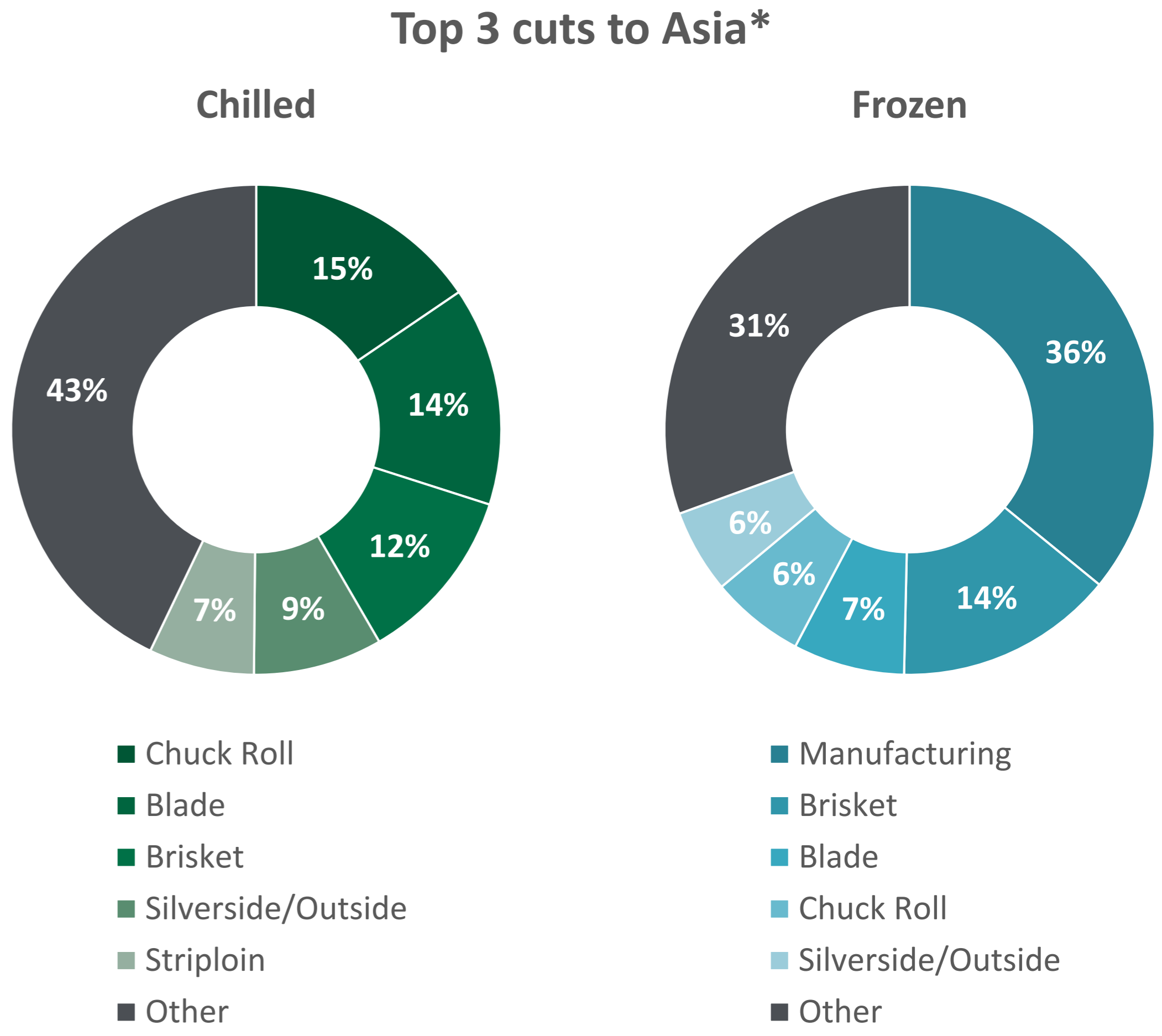
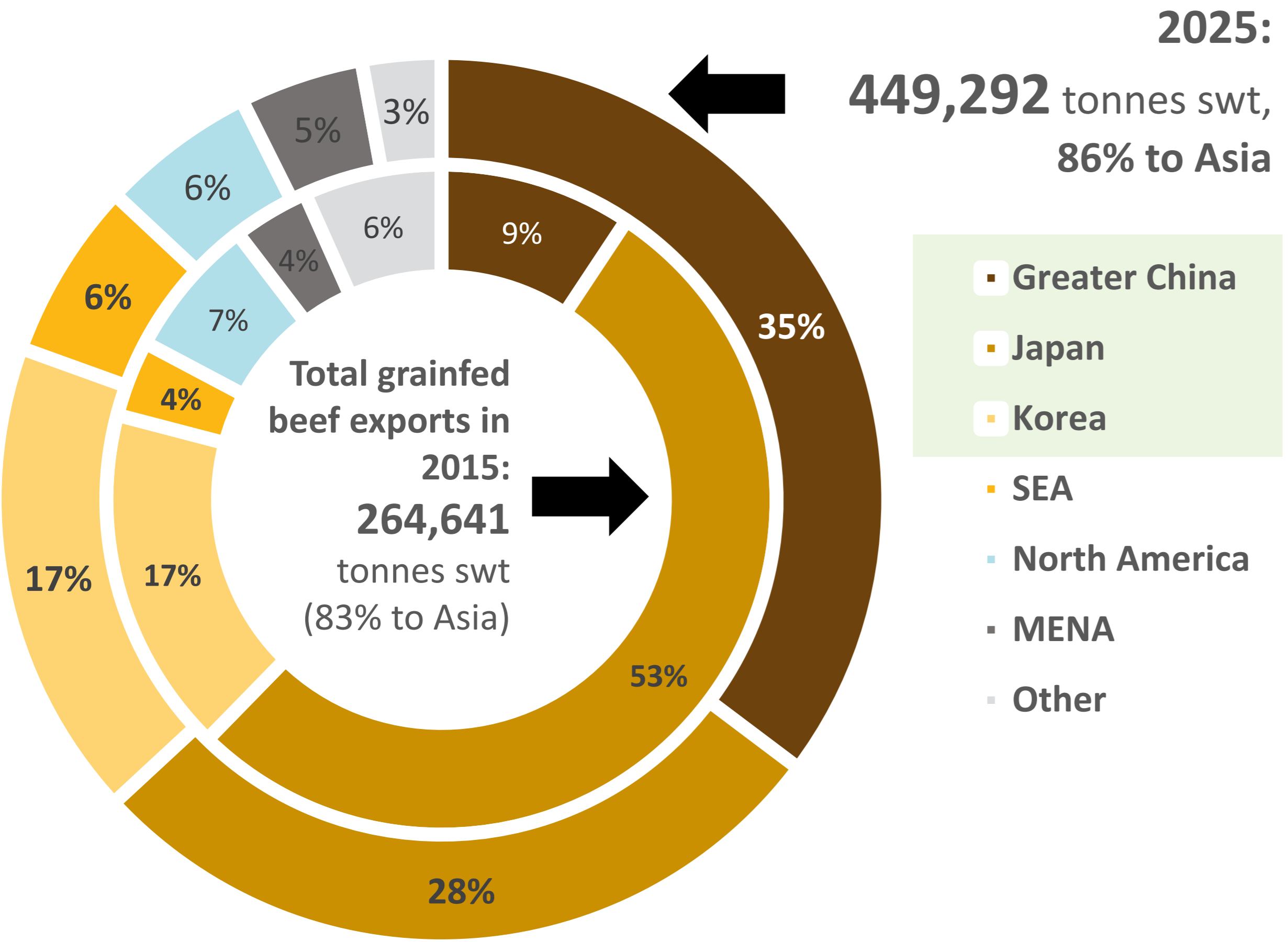
Australian grainfed beef exports reaches over 90 markets, growing by CAGR +10% between 2021–2025

Australian grainfed beef exports 2025



Source: Department of Agriculture, Fisheries and Forestry, Trade Data Monitor, LLC (TDM), 2025, Europe – (EU-27 and the UK), MENA-12 – (UAE, Bahrain, Egypt, Israel, Jordan, Kuwait, Mauritius, Oman, Qatar, Saudi Arabia, Iran, Iraq), South-East Asia – (Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam), Greater China – (China, Taiwan, Hong Kong)

Australian grainfed beef export volume increased significantly over a decade, with Asia continuing to take more than 80% of products



Source: Department of Agriculture, Fisheries and Forestry, 2025, *Asia includes Japan, Korea, Greater China (Mainland China, Taiwan, Hong Kong, Macau) and South-East Asia (Indonesia, Malaysia, Singapore, Thailand, the Philippines and Vietnam)



Key markets for grainfed beef

Japan

Korea

China

South-east Asia

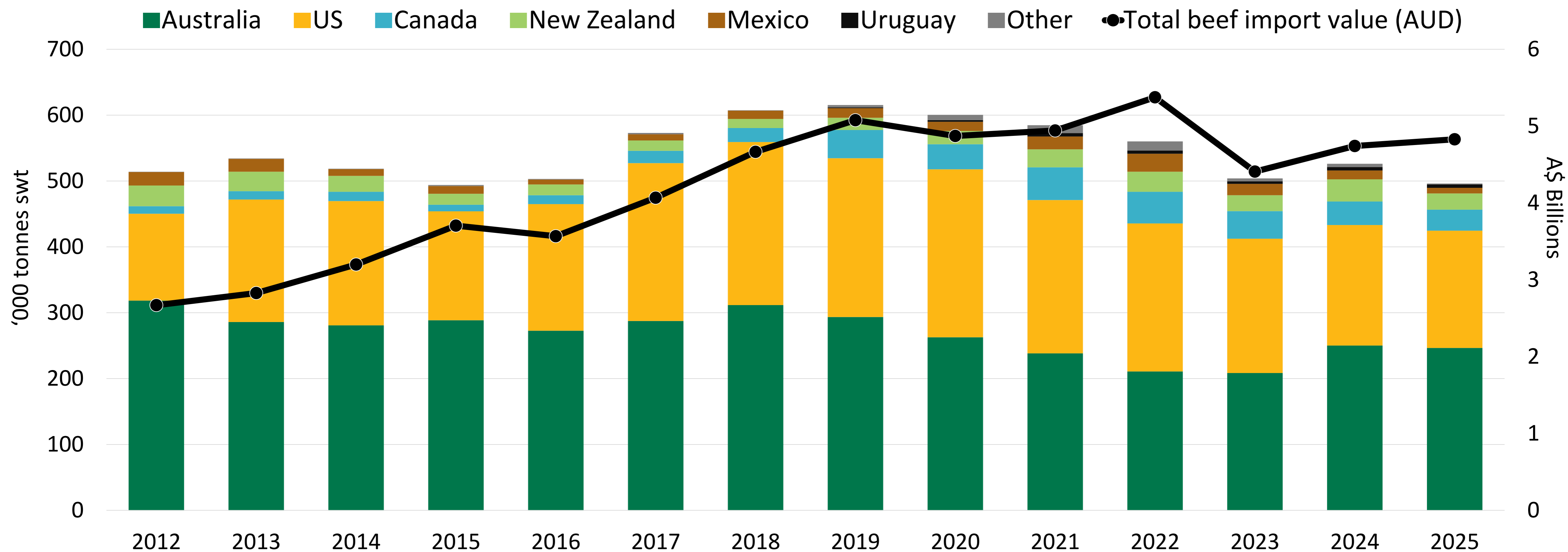
The MENA

The US

The UK

Approximately 60% of beef requirement in Japan is filled by imports, with Australia regaining greater share in the face of US' tight supply

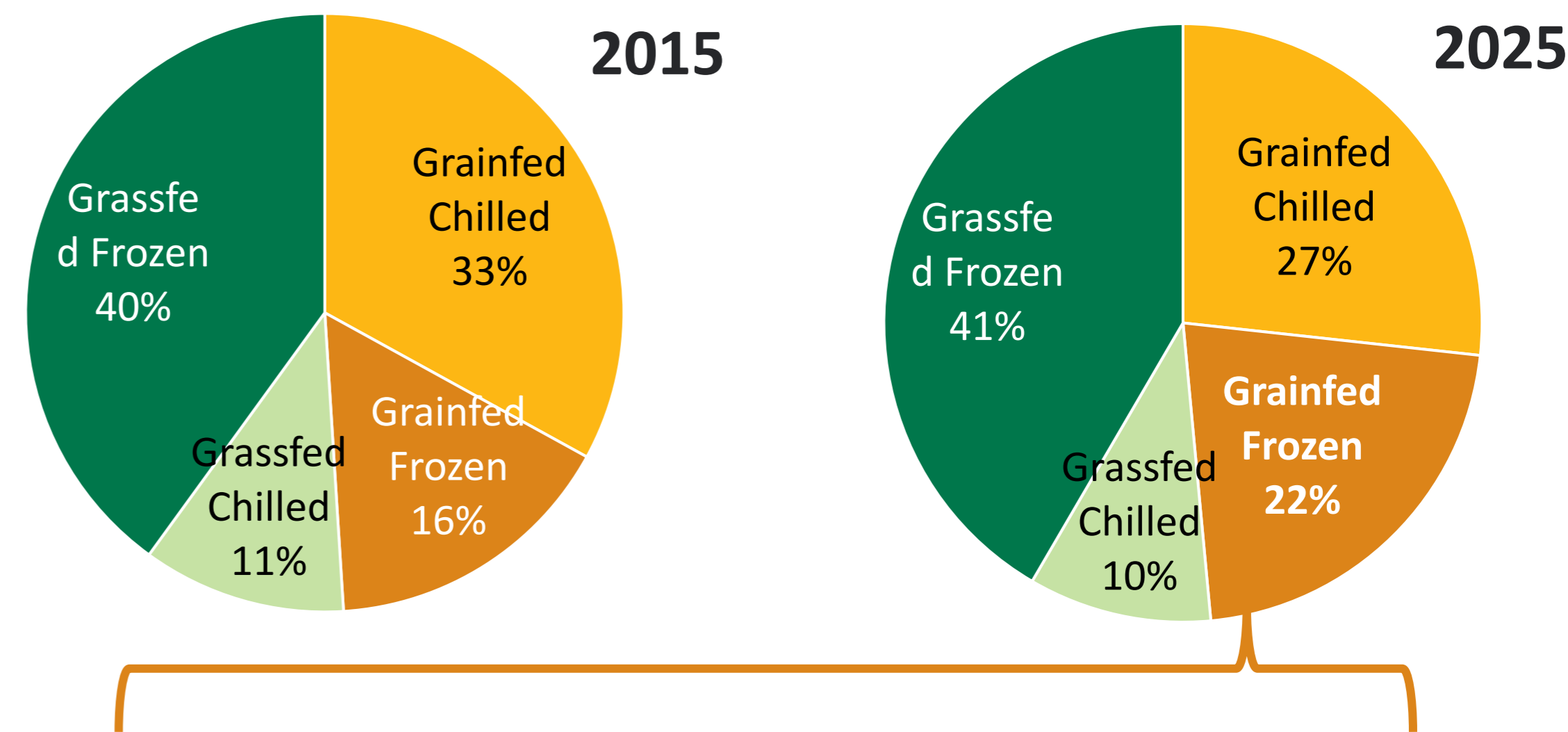
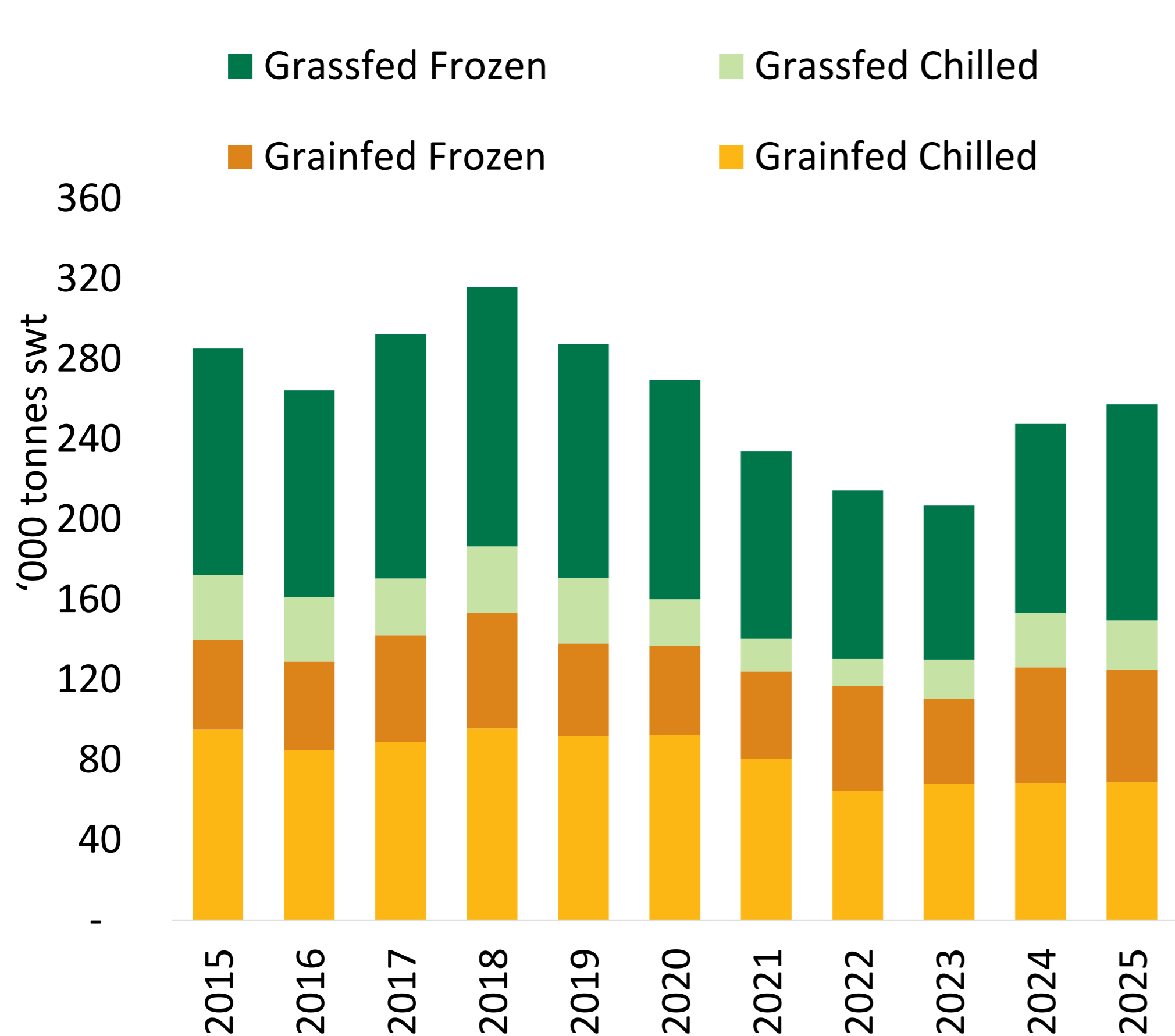
Japan total beef imports by key suppliers



Source: Trade Data Monitor, LLC

Japan remains critically important grainfed beef market for Australia, but its focus has been shifting to frozen products

Australian beef exports to Japan by storage and meat type



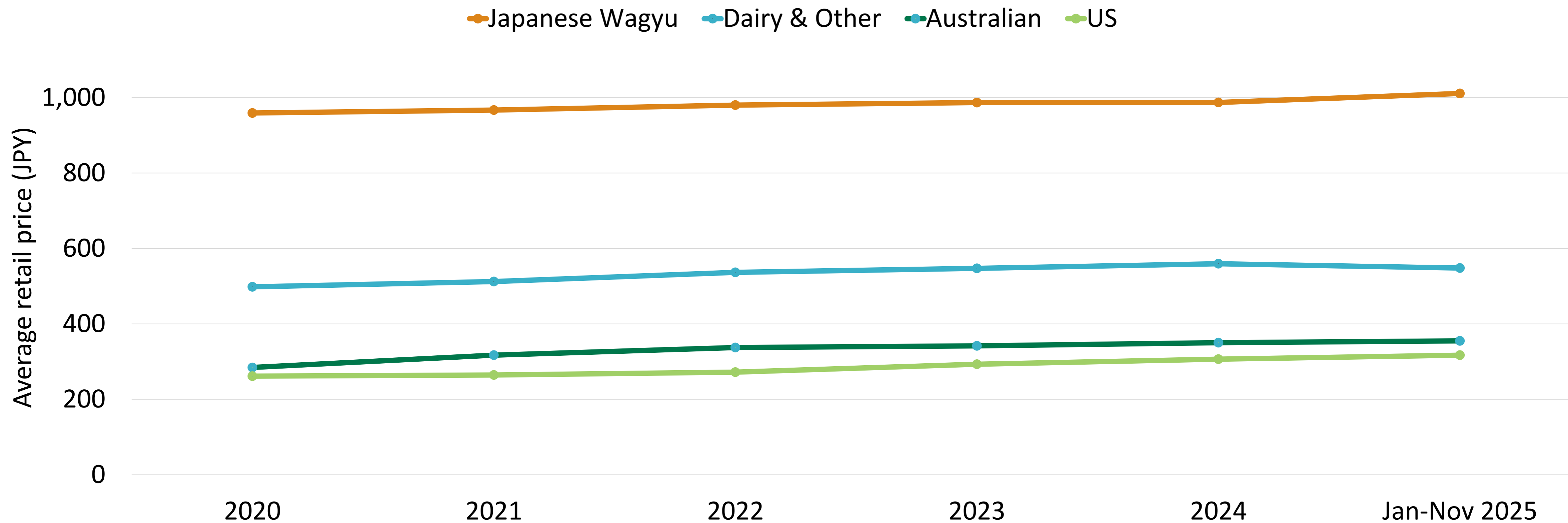
Grainfed Frozen Top cuts	Volume in tonnes swt (2025)	Volume change % 2015 vs 2025
Manufacturing	40,836	+31%
Silverside/Outside	6,699	+90%
Thin Flank	2,135	+157%

Based on volume share.

Source: Department of Agriculture, Fisheries and Forestry (DAFF), Excludes offal, Combines beef and veal

Most Australian beef sold at retail is grainfed, but Japanese consumers shop between Wagyu, dairy beef and imported beef based on occasion and budget

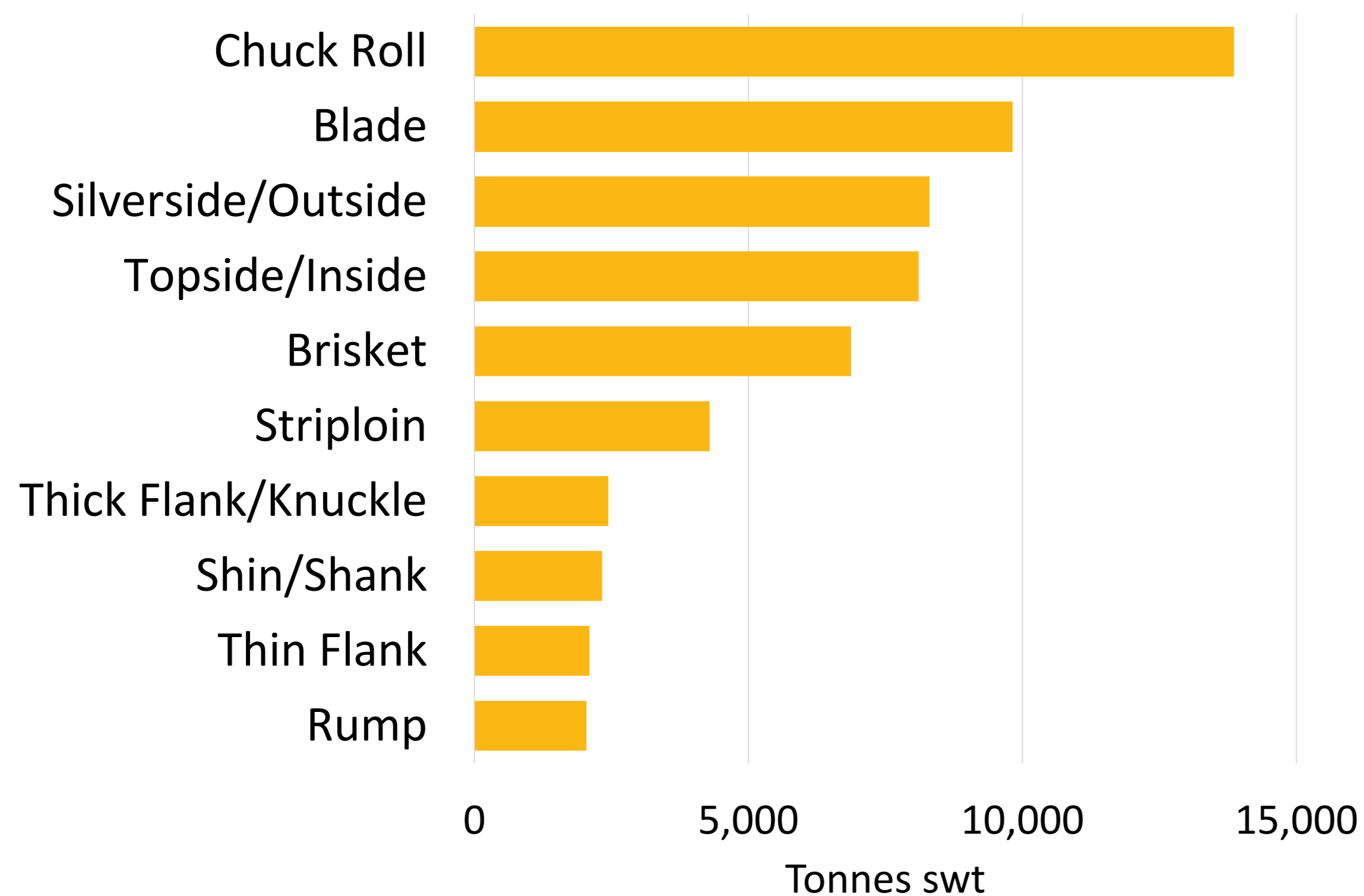
Retail prices of domestic and imported meats in Japan – average price from 2020 to 2025



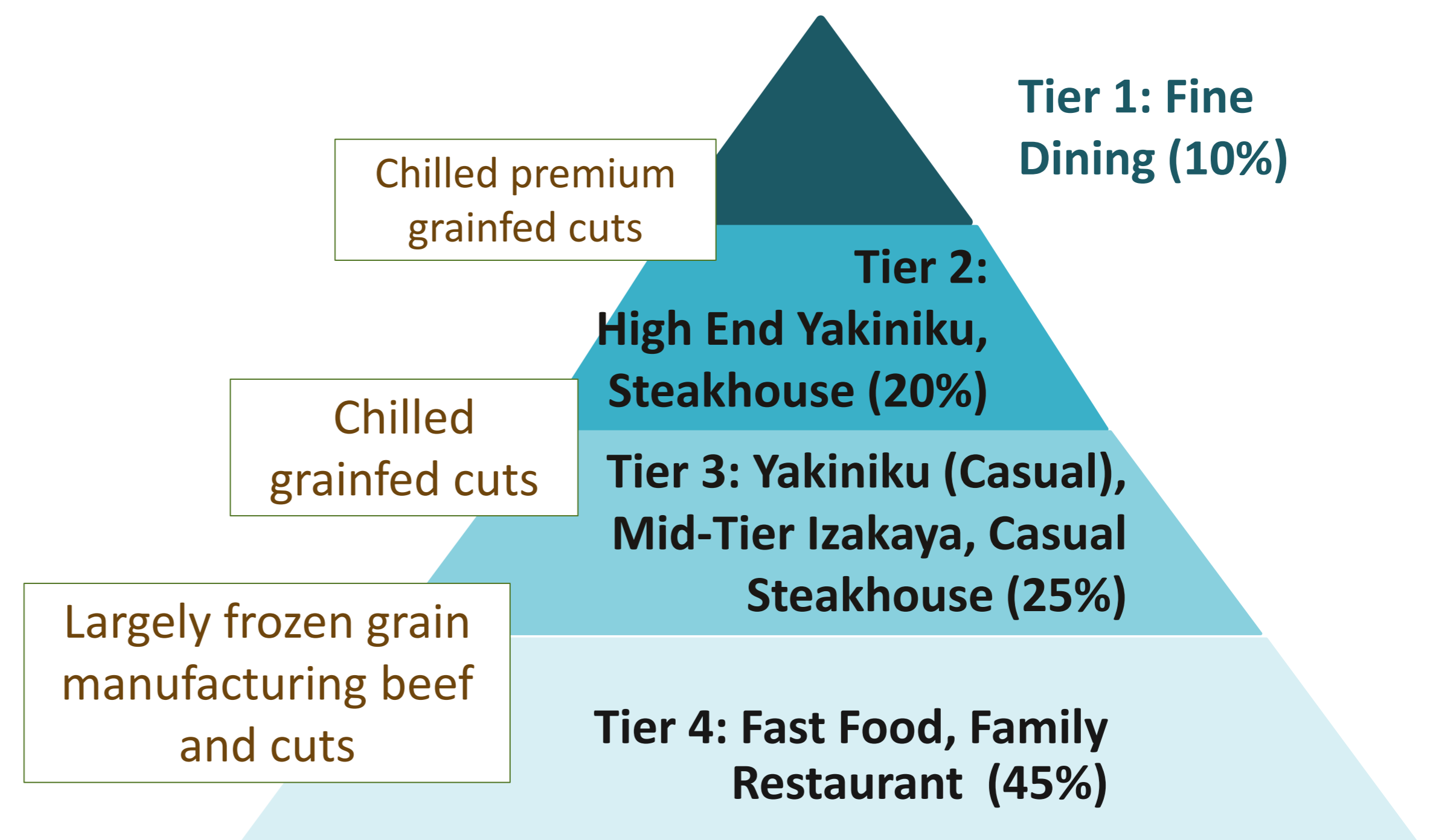
Source: Agriculture & Livestock Industries Corporation (ALIC), Average retail price

Chilled grainfed cuts are largely sold fresh at retail, or served at mid-end restaurants, while manufacturing plays an important role in foodservice

Australian chilled beef exports to Japan – top 10 cuts - 2025



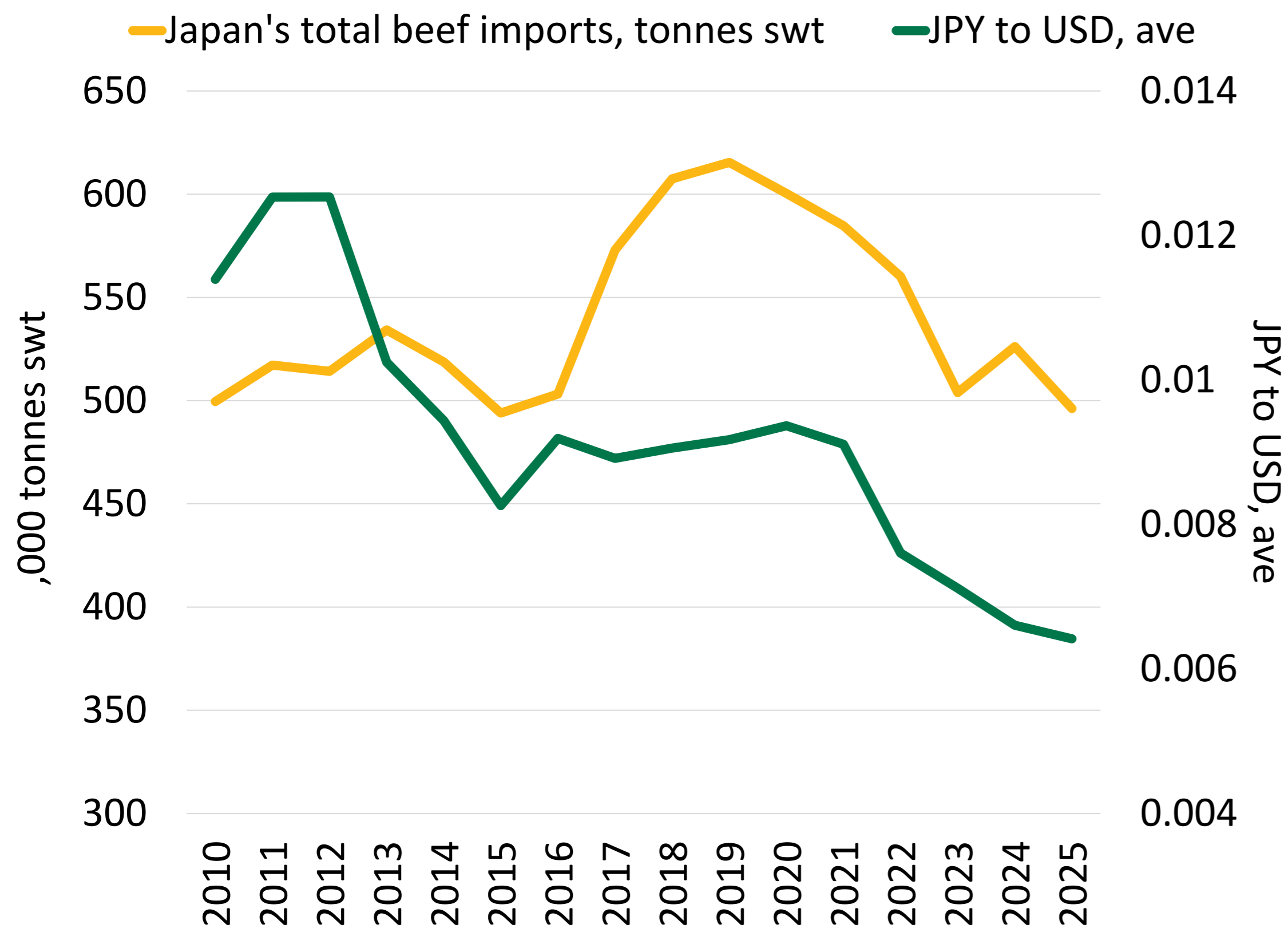
Japan foodservice hierarchy and estimated beef usage % out of total foodservice sector



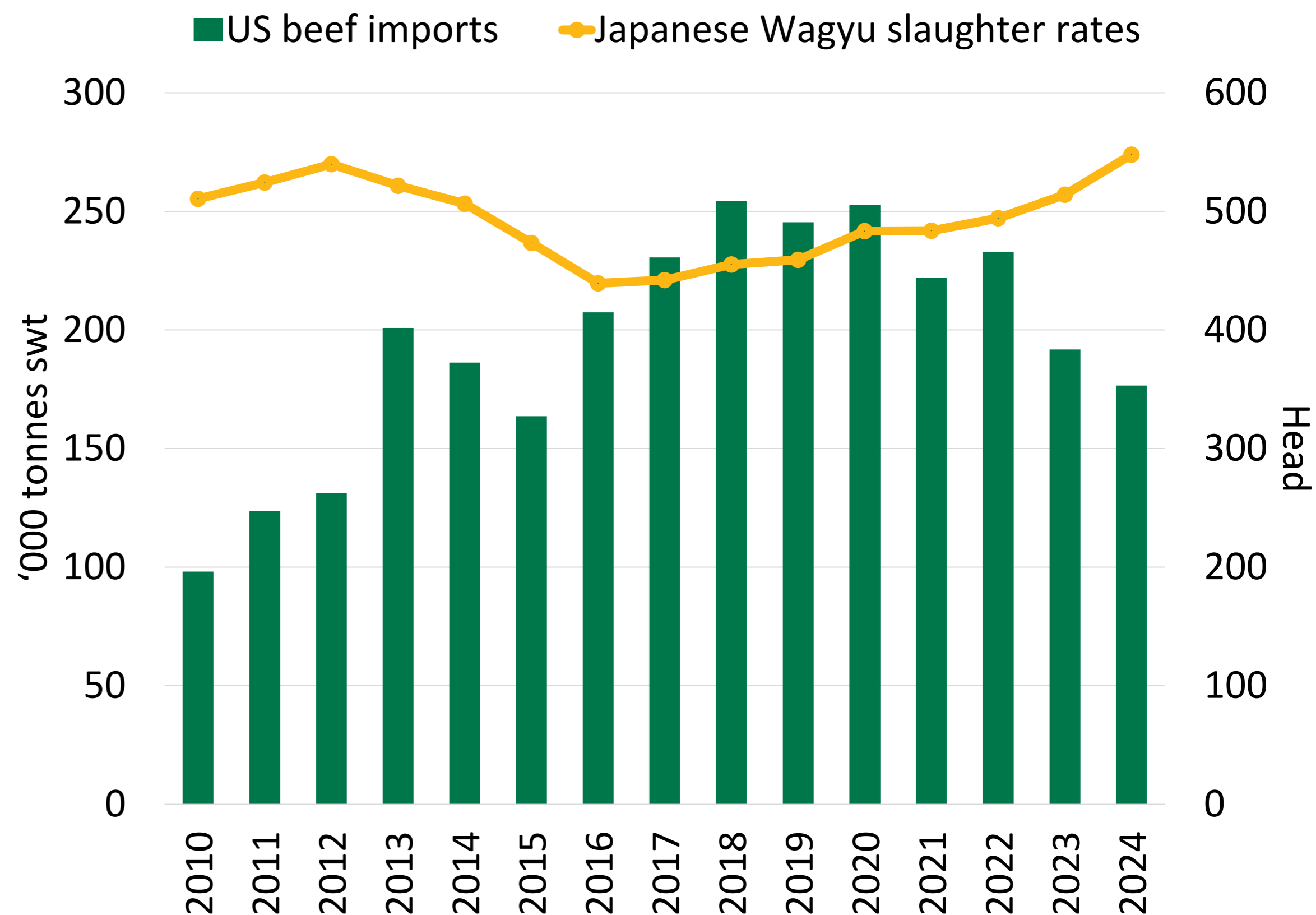
Source: Department of Agriculture, Fisheries and Forestry (DAFF), MLA market intelligence

Japan's stagnant economy has slowed imports and hindered domestic supply. However tight US supply will continue to drive demand for Australian grainfed

Japan's total beef imports

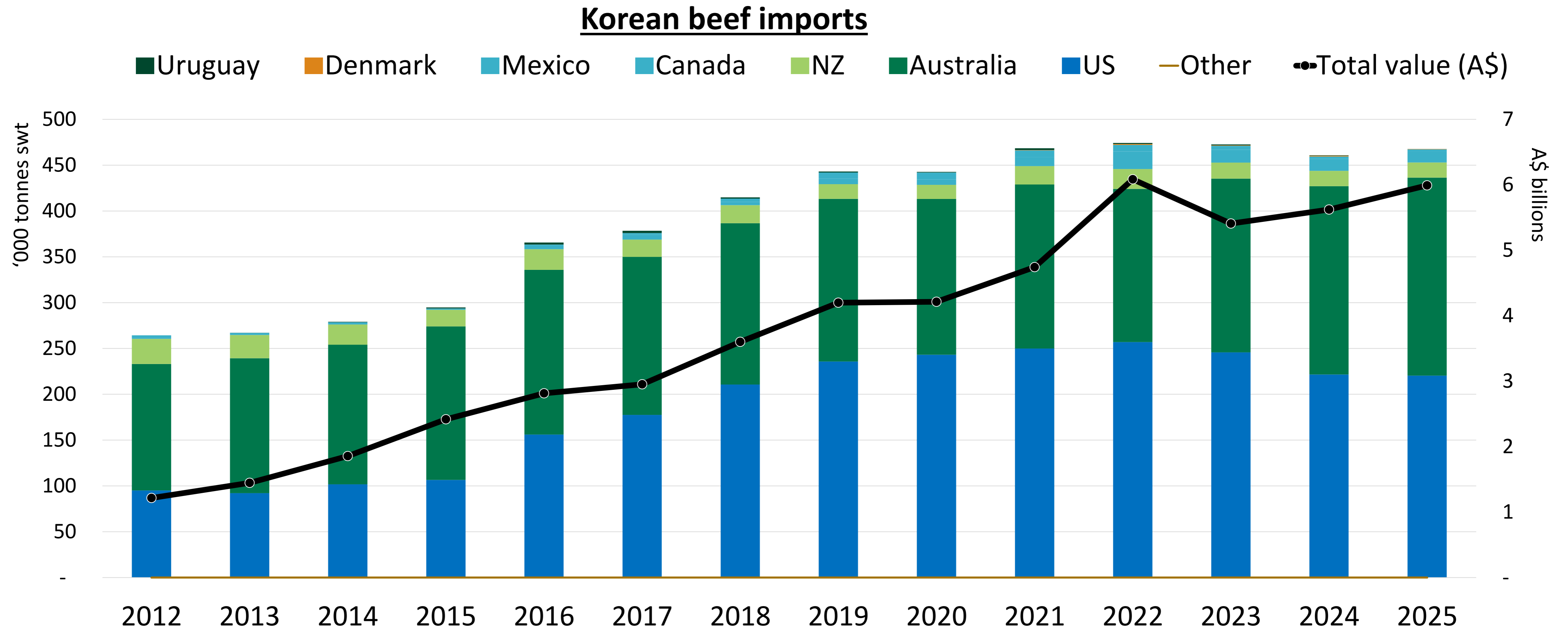


Supply of US beef and domestic beef in Japan



Source: Fitch solutions, Trade Data Monitor, LLC (TDM), Agriculture & Livestock Industries Corporation (ALIC)

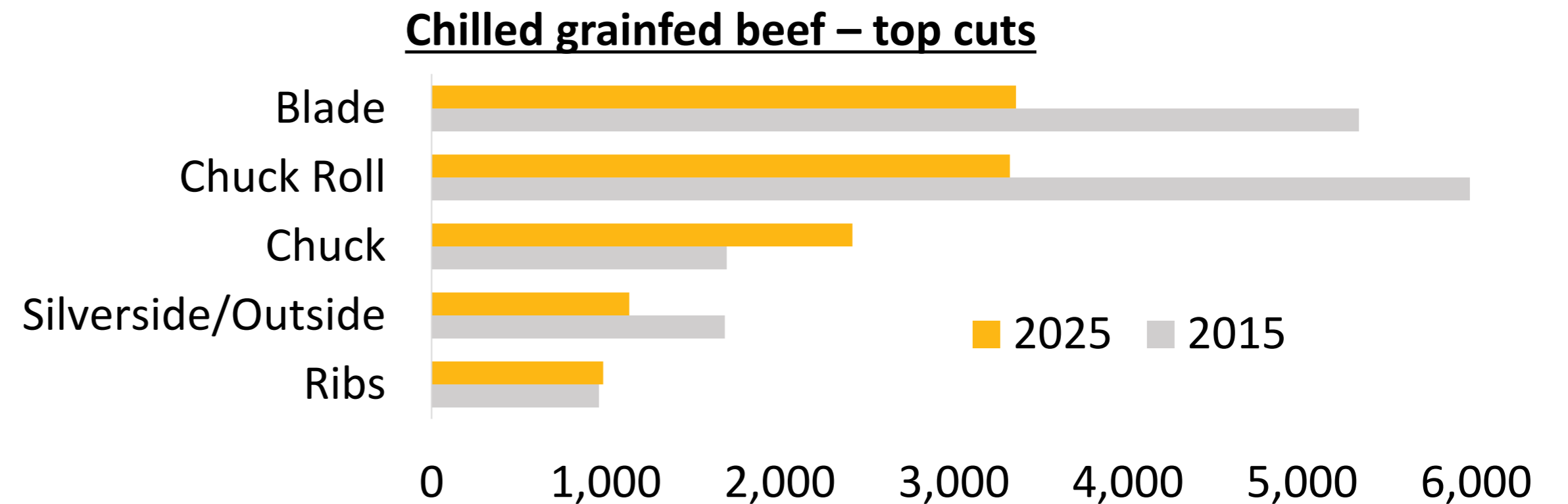
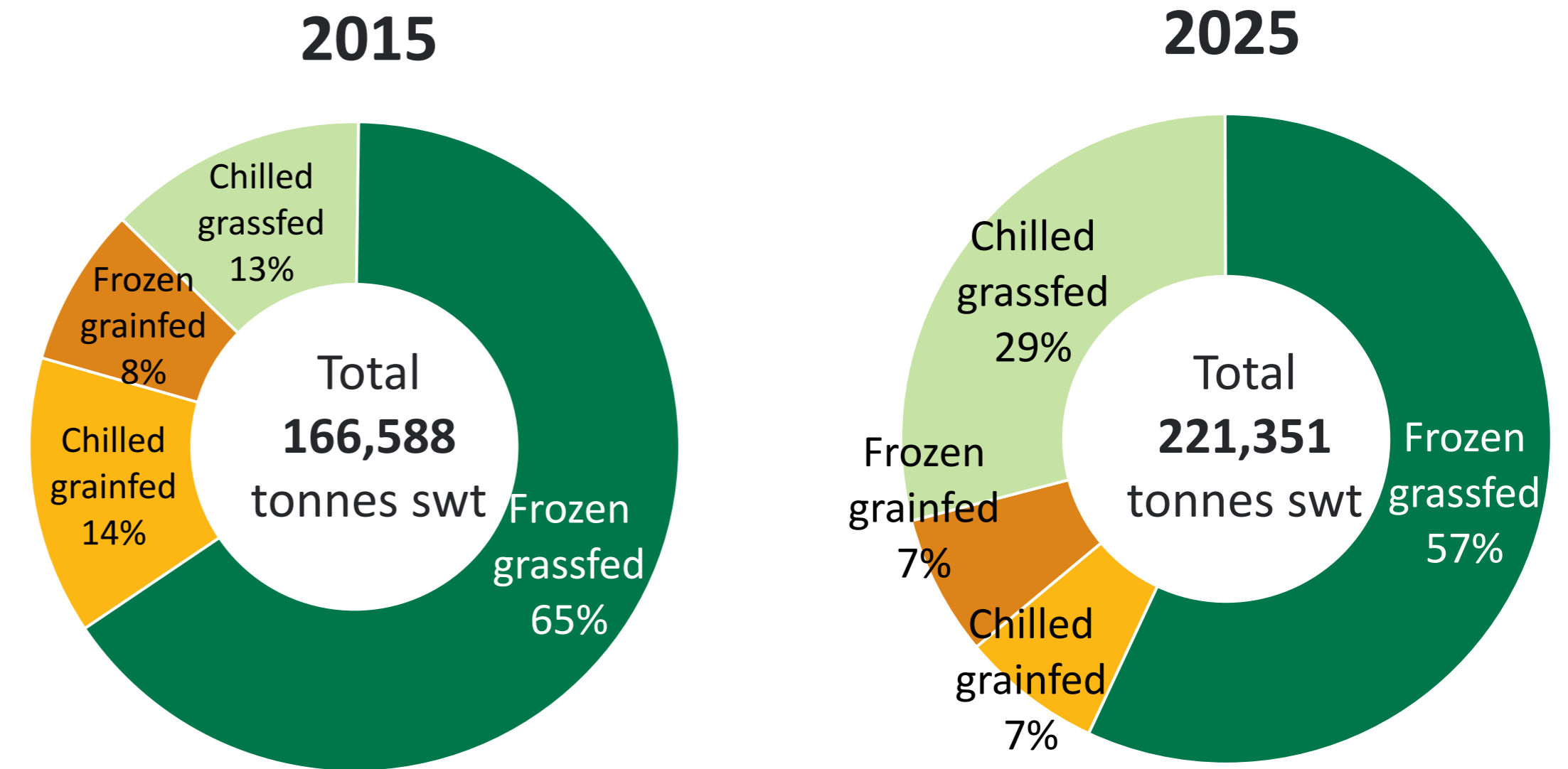
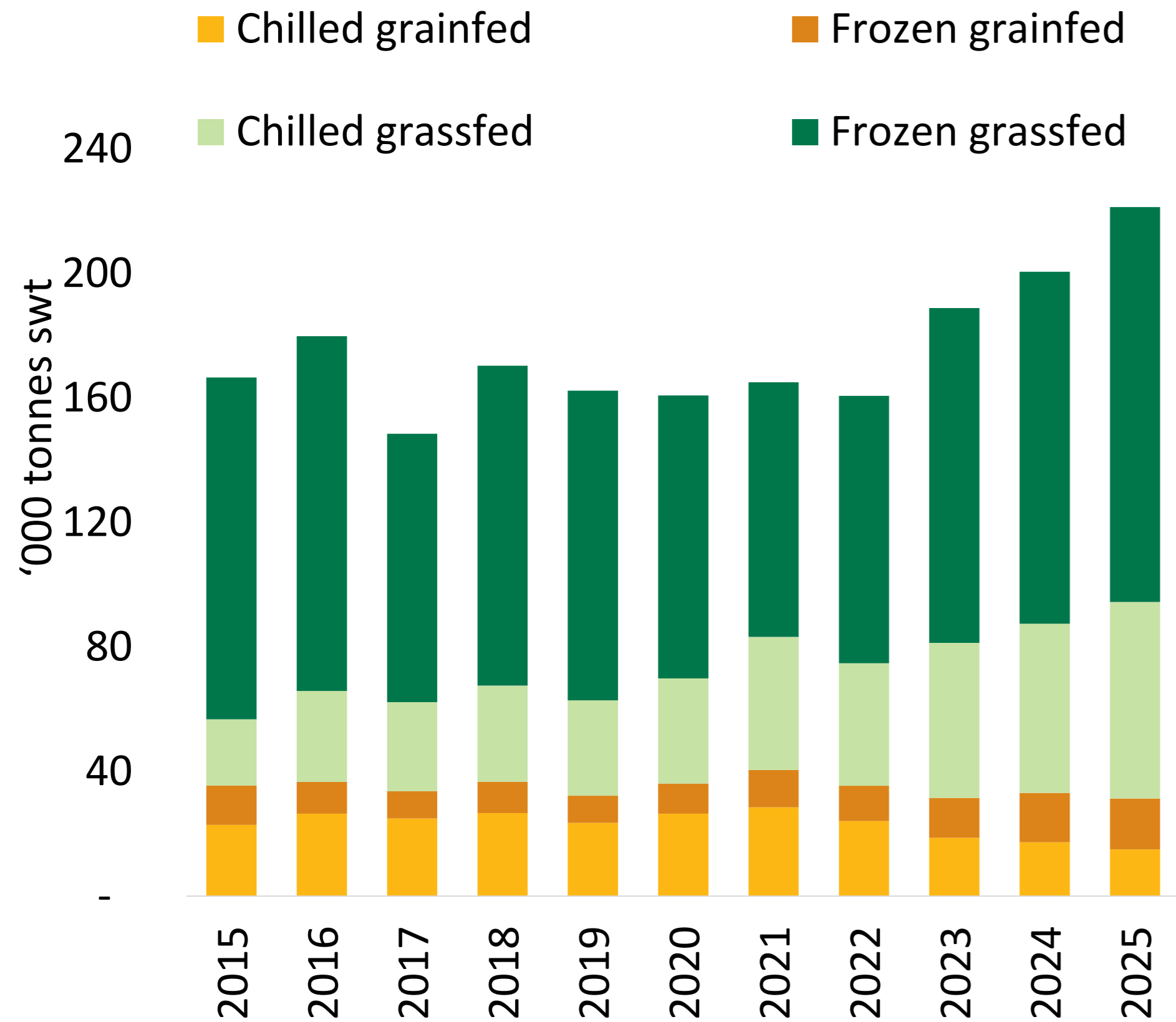
Australia and the US are major suppliers into Korea. Australia's share of beef imports into Korea has increased on the back of tightened US supply



Source: Trade Data Monitor, LLC (TDM)

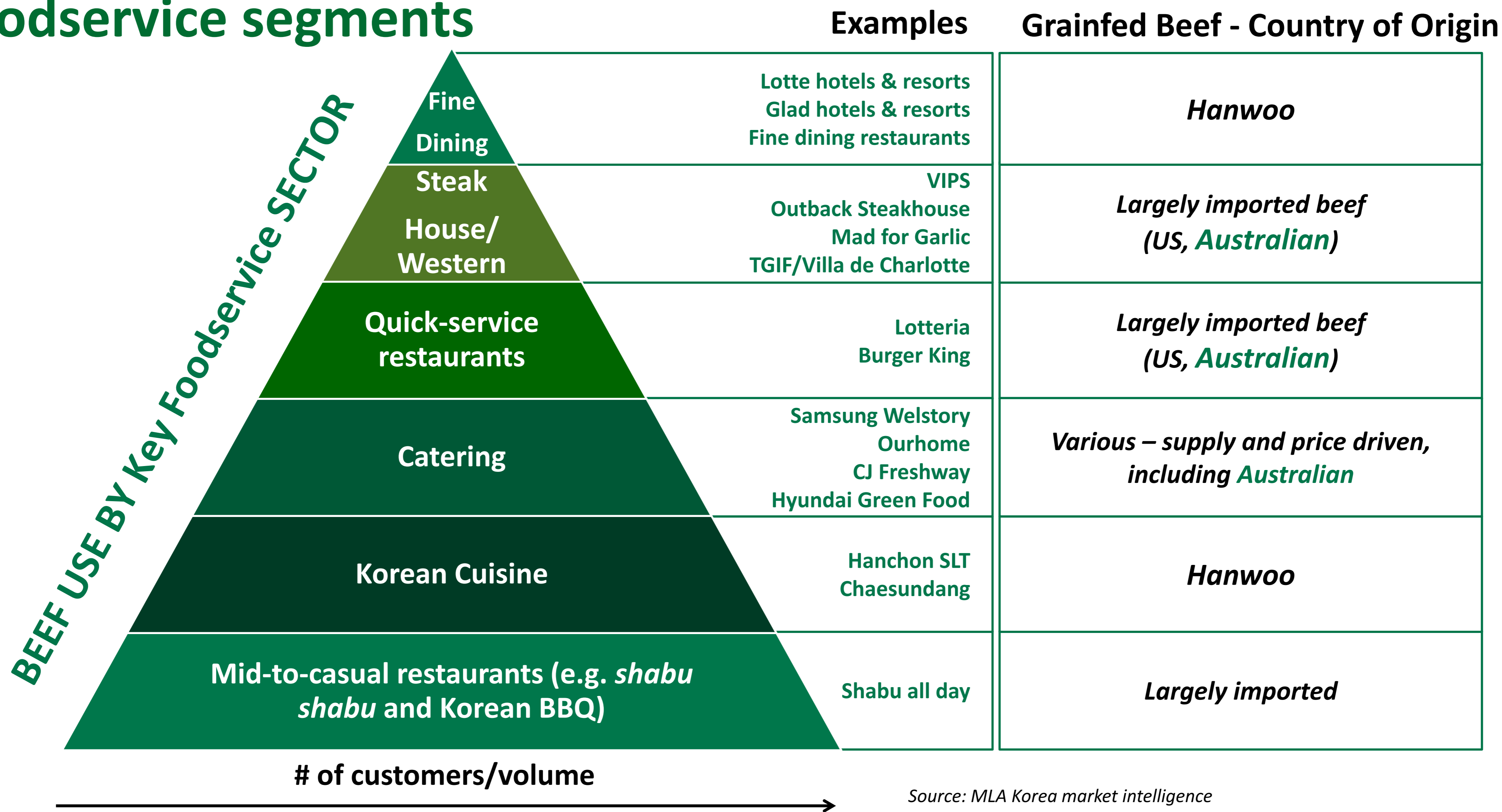
Australian grainfed beef exports to Korea have somewhat softened in recent years

Australian beef exports to Korea by storage and meat type

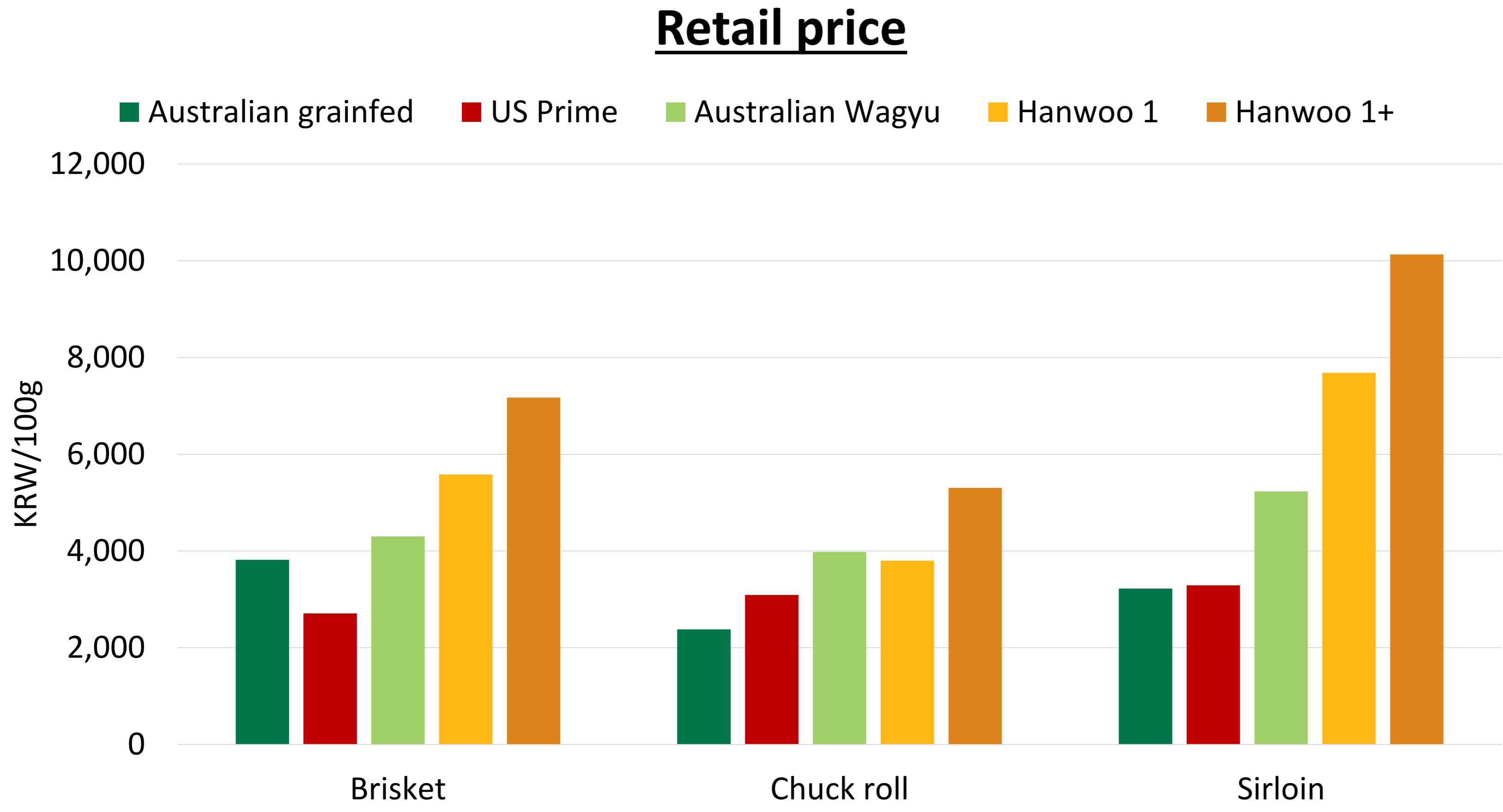


Source: Department of Agriculture, Fisheries and Forestry (DAFF), Excludes offal, Combines beef and veal

Majority of Australian grainfed beef imported into Korea goes to hypermarket and supermarket. The remainder is utilised across a variety of foodservice segments



Hanwoo commands the highest price, while Australian Wagyu sits between Hanwoo and US Prime. Australian grainfed is in a similar price range as US Prime depending on cut



Hanwoo 1+

BMS 6. Equivalent to Japanese Wagyu A4 grade

Hanwoo 1

AUS WAGYU

BMS 4-5. Equivalent to US Prime grade. Hanwoo grade 1 is largely regarded as the equivalent (in terms of product spec) to Australian Wagyu.

US PRIME

AUS GF100

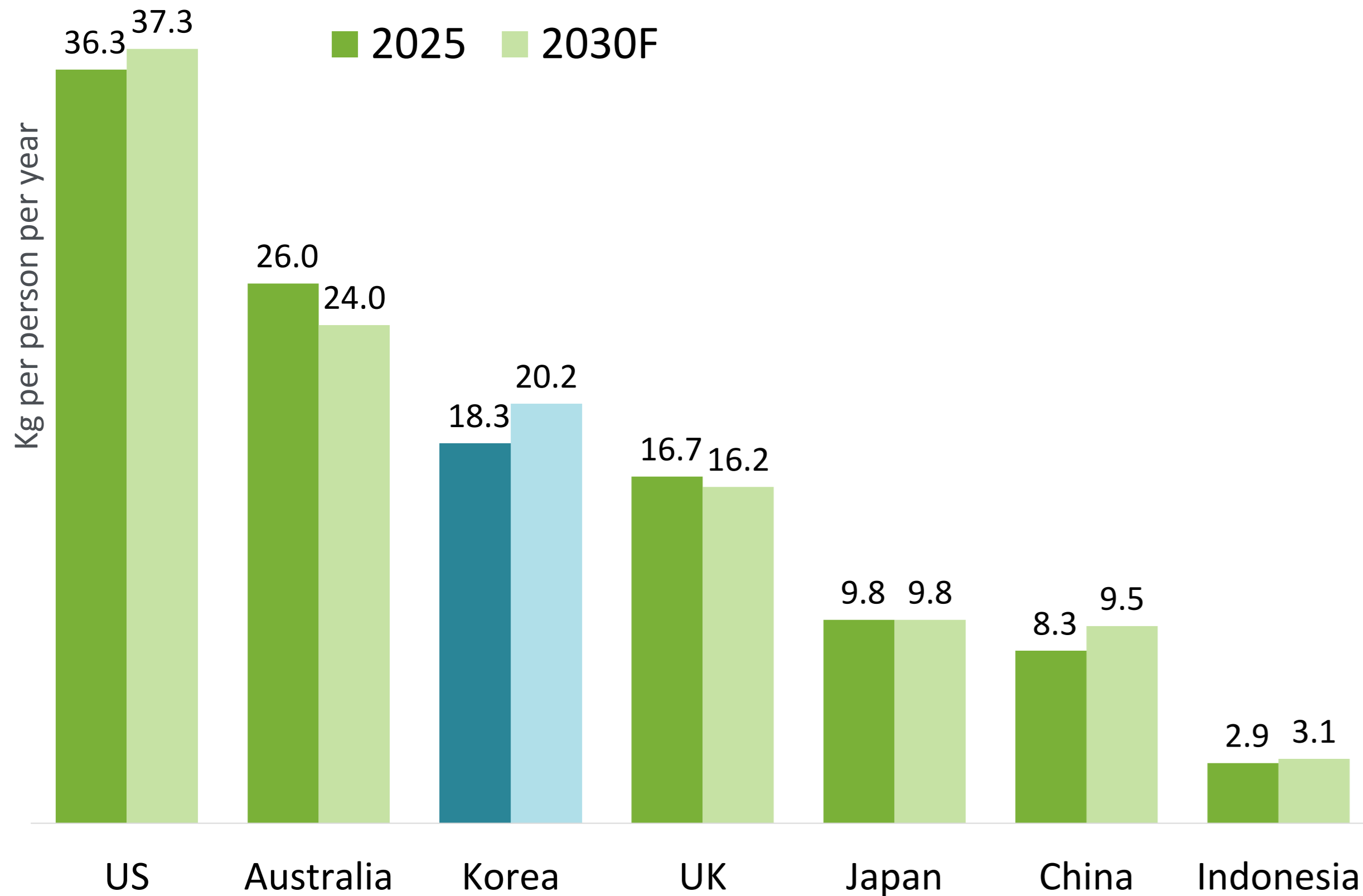
Historically, Hanwoo and imported beef serve different occasions and purposes for consumers.

However recently decreasing price gap between Hanwoo and imported beef has consumers switching.

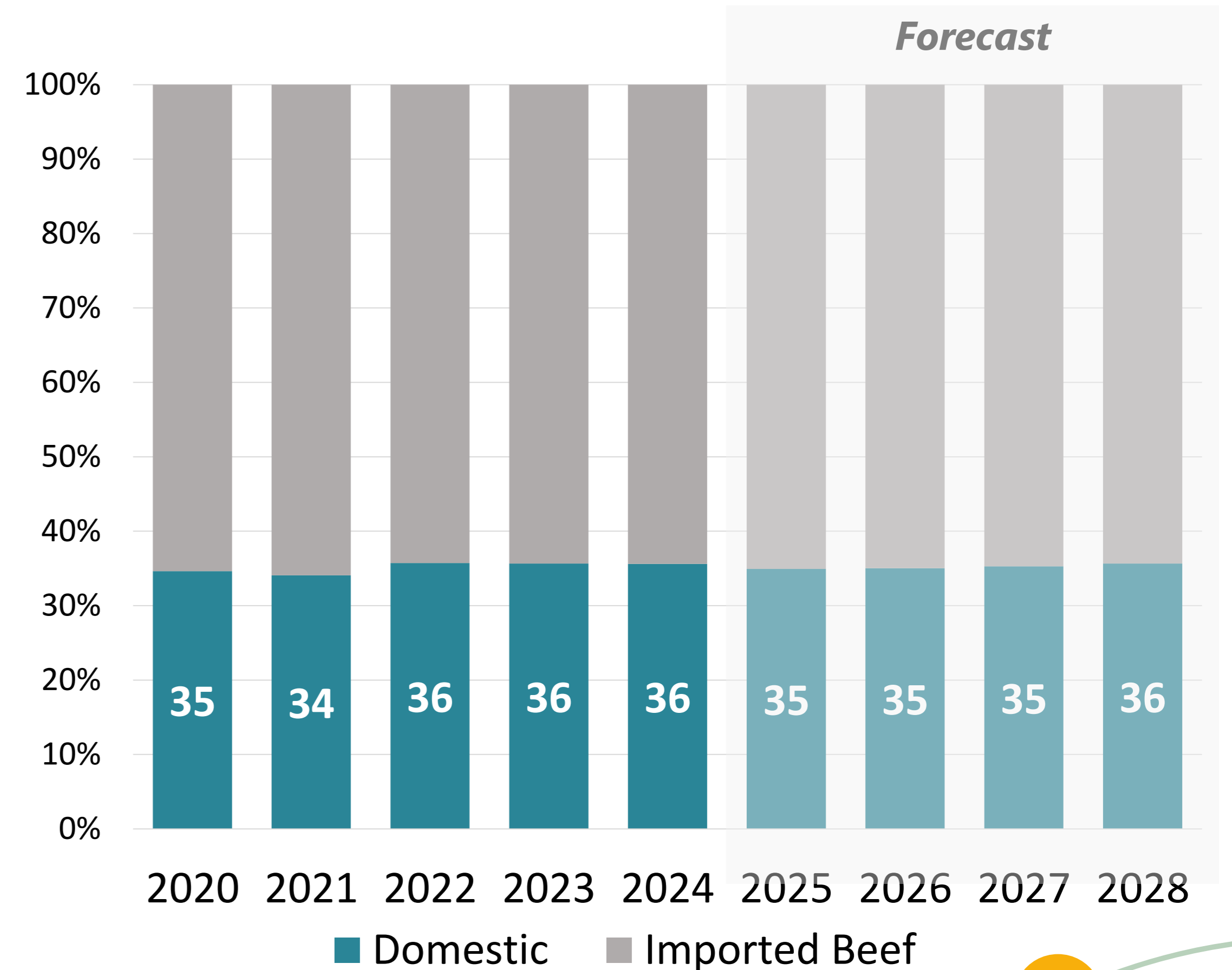
Source: Coupang, Chilled only, Australian grainfed advertised with words "grain" or "wheat" only, Prices are indicative only, Data last reviewed 31/03/2026

High beef consumption and low self-sufficiency keep Korea import-dependent, creating sustained demand for Australian beef

Beef and veal consumption per capita



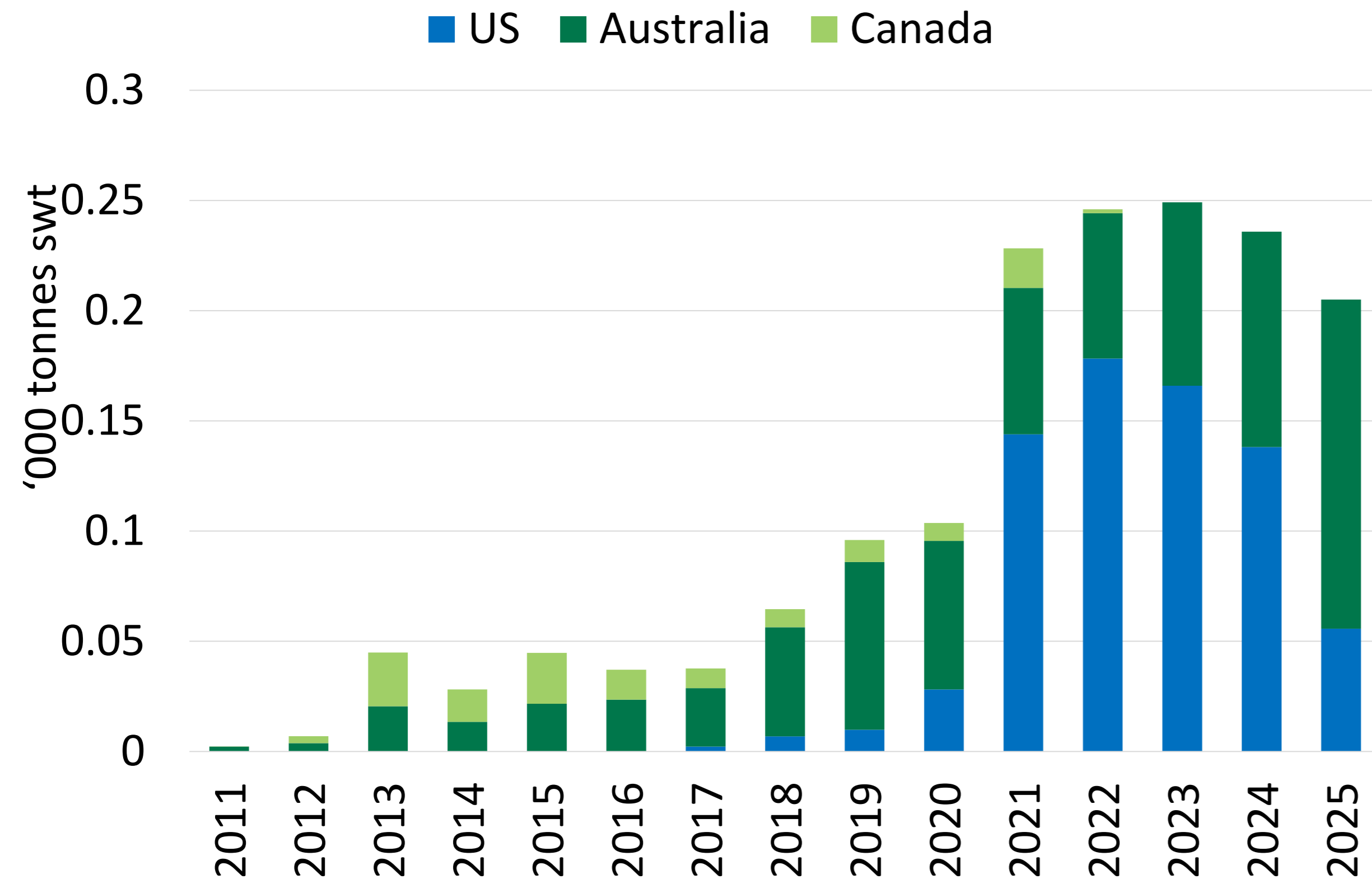
Beef self-sufficiency % 2020-2028f



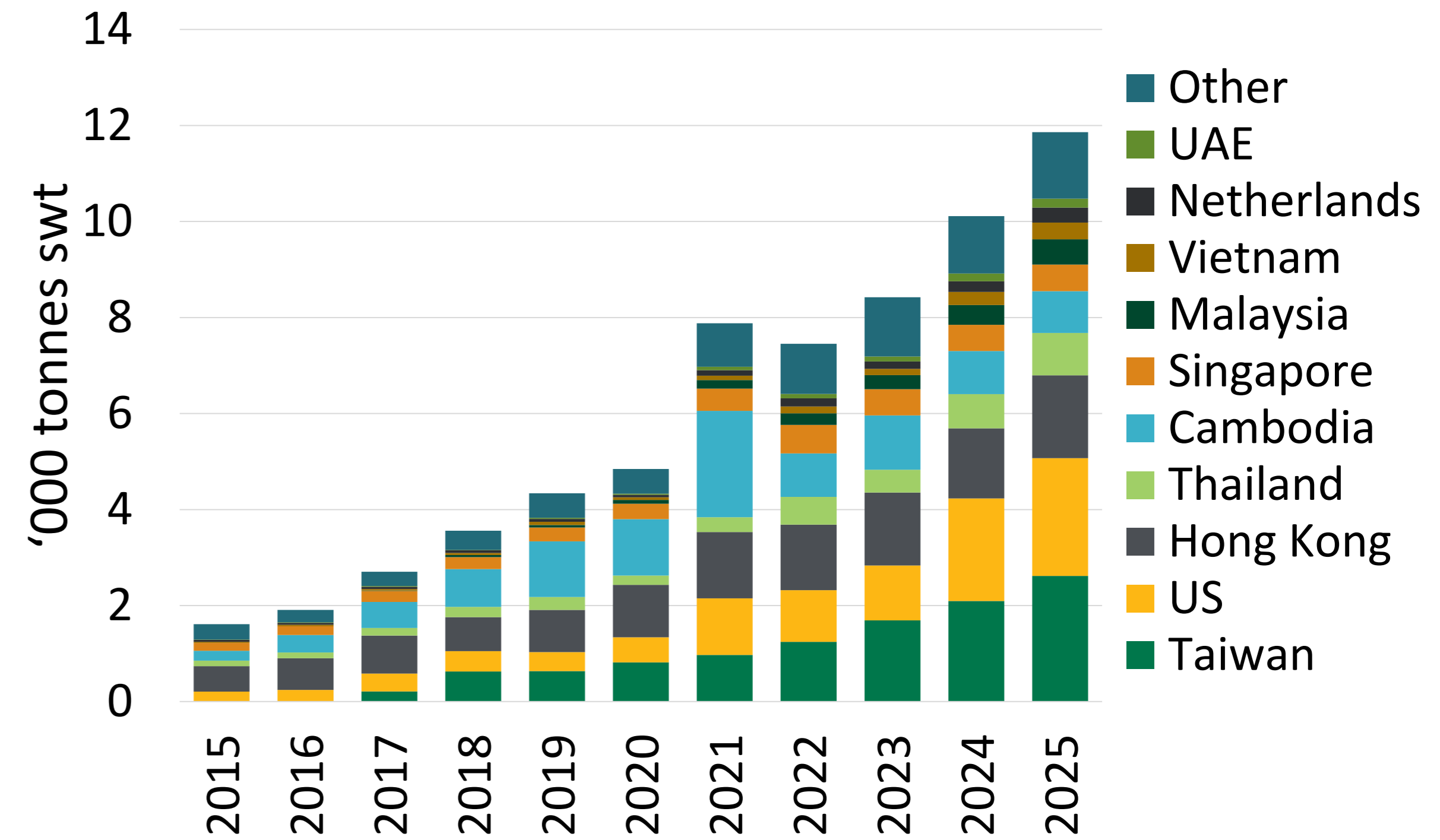
Source: Fitch Solutions

Increased grainfed beef imports in 2025 reflected China's shift toward premium beef, with Australia a key supplier. Japan lacks direct access to China, though some product enters via neighbouring markets

China grainfed beef imports by supplier



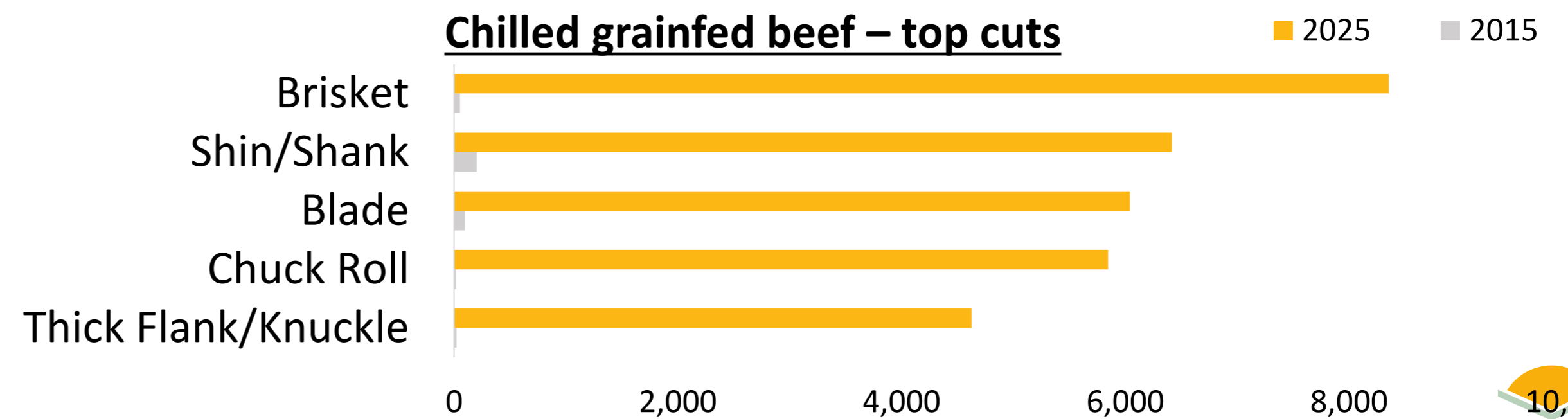
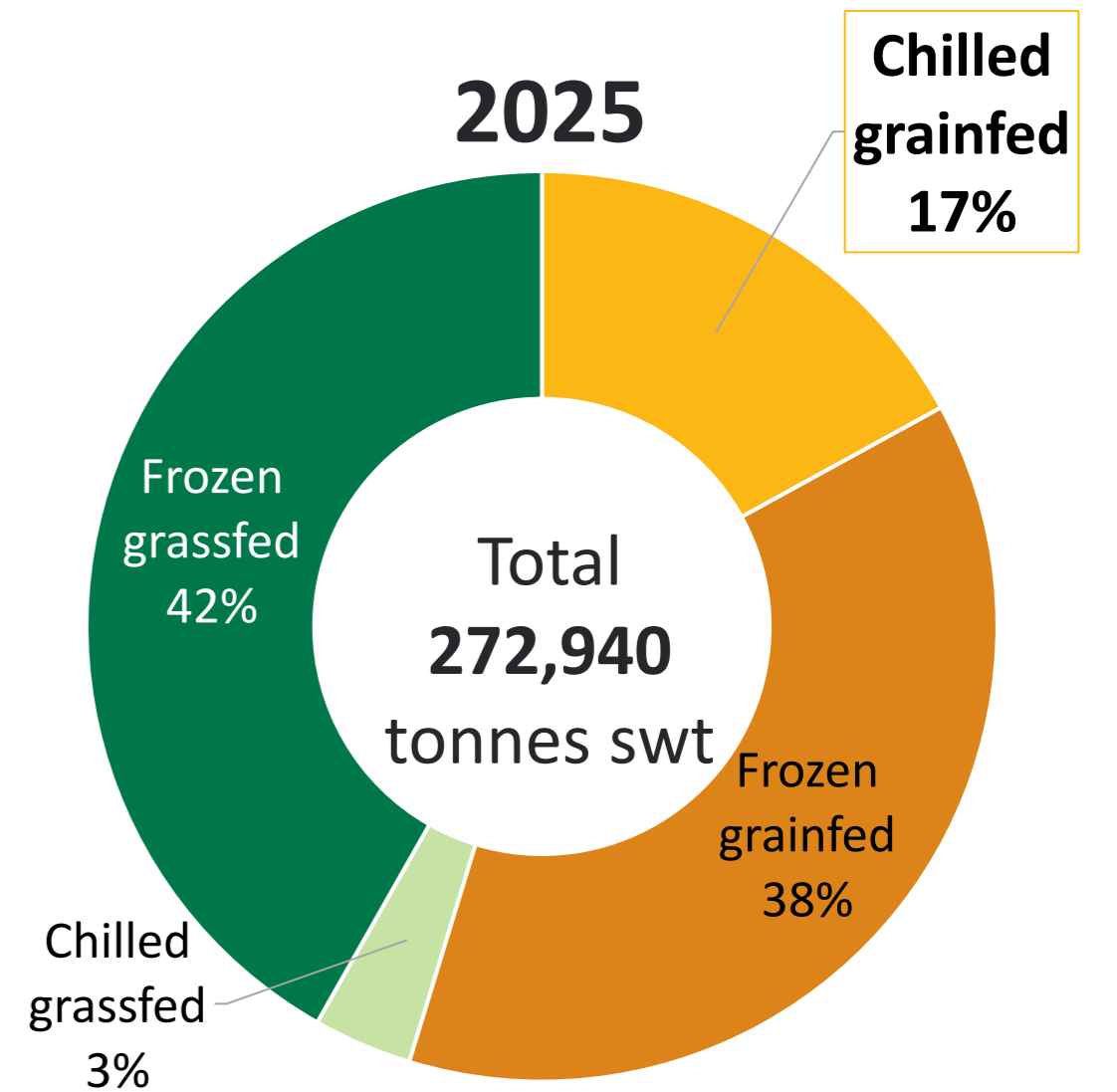
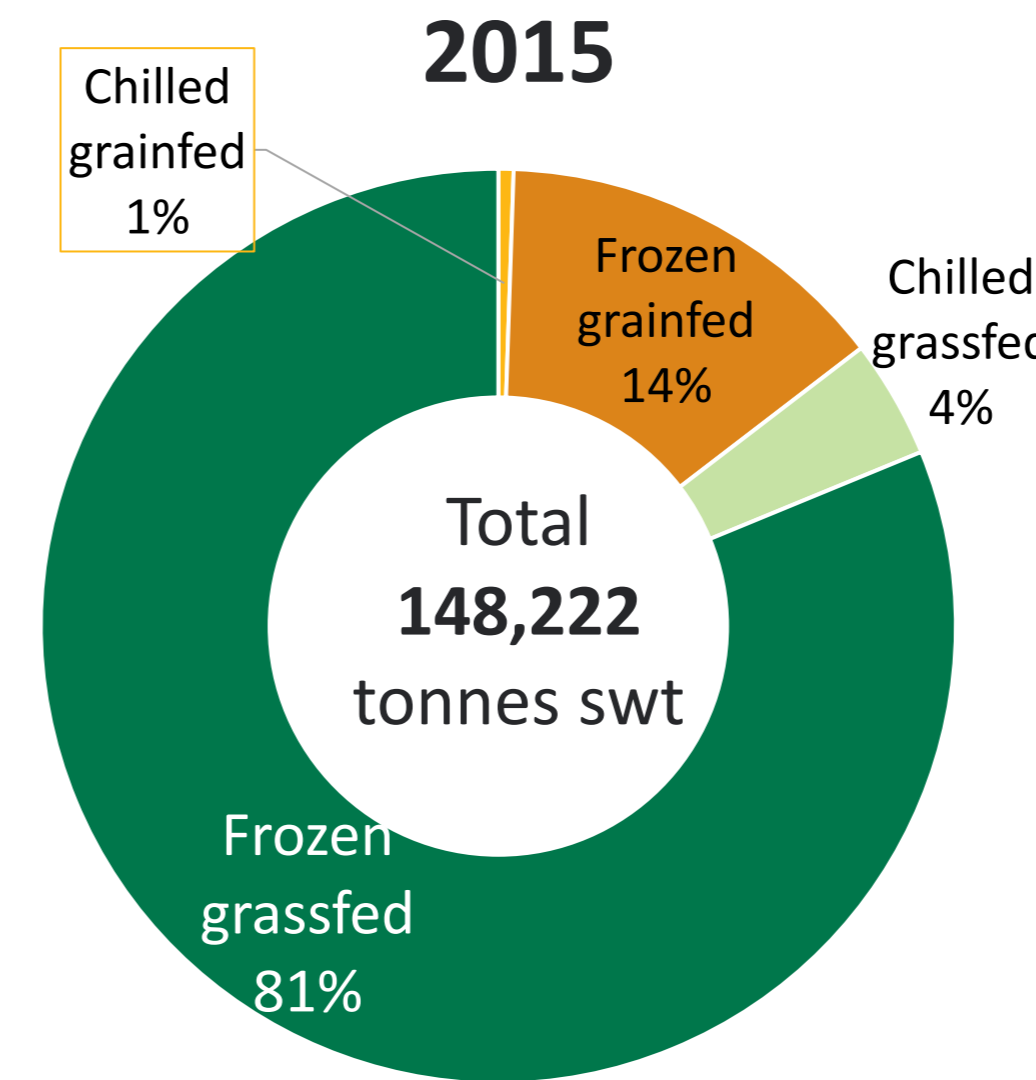
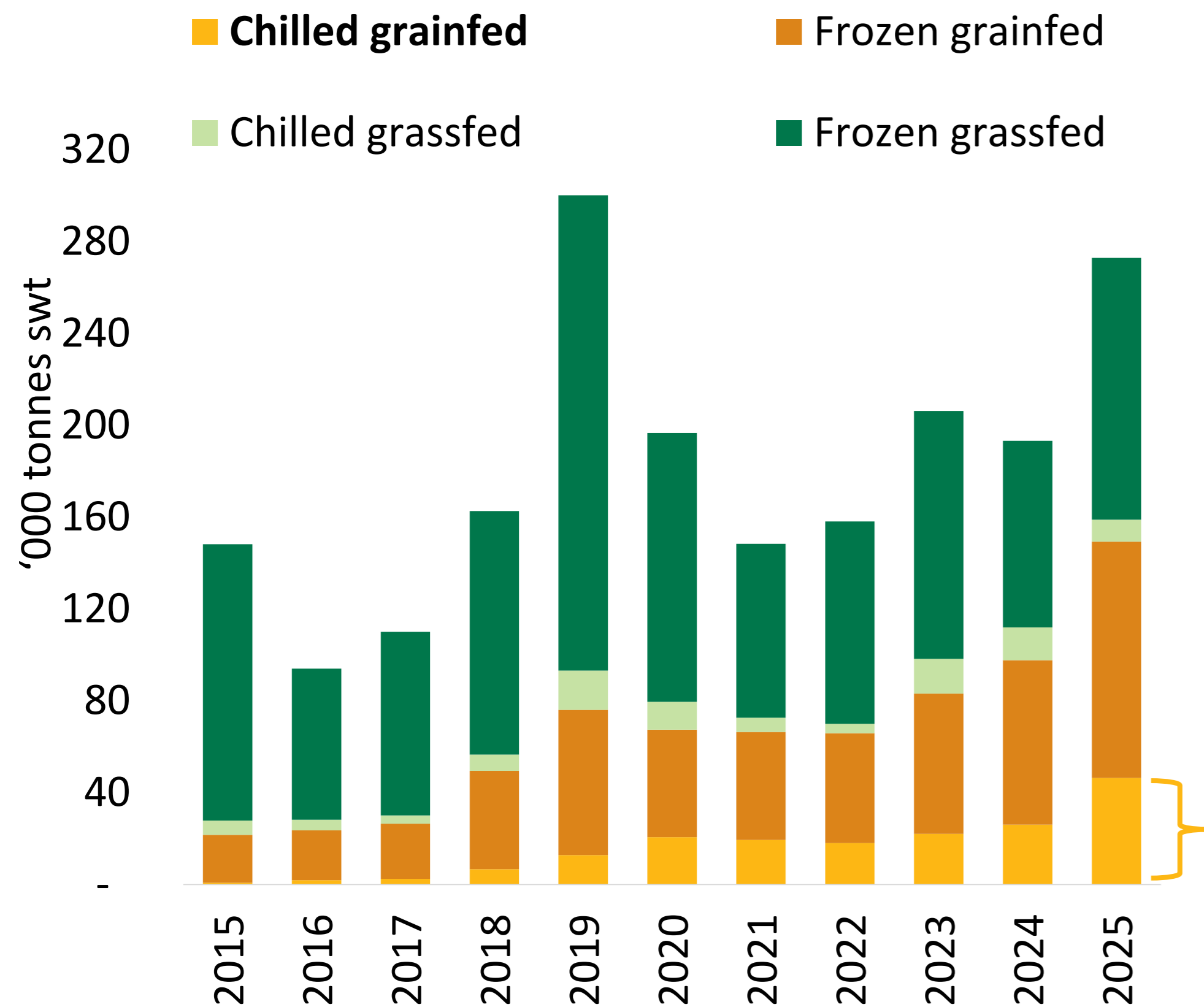
Japan beef exports



Sources: DAFF, Trade Data Monitor (TDM), Australian product here is grainfed beef exports to China

Growth in Australian chilled grainfed beef exports to China reflects rising demand for premium quality

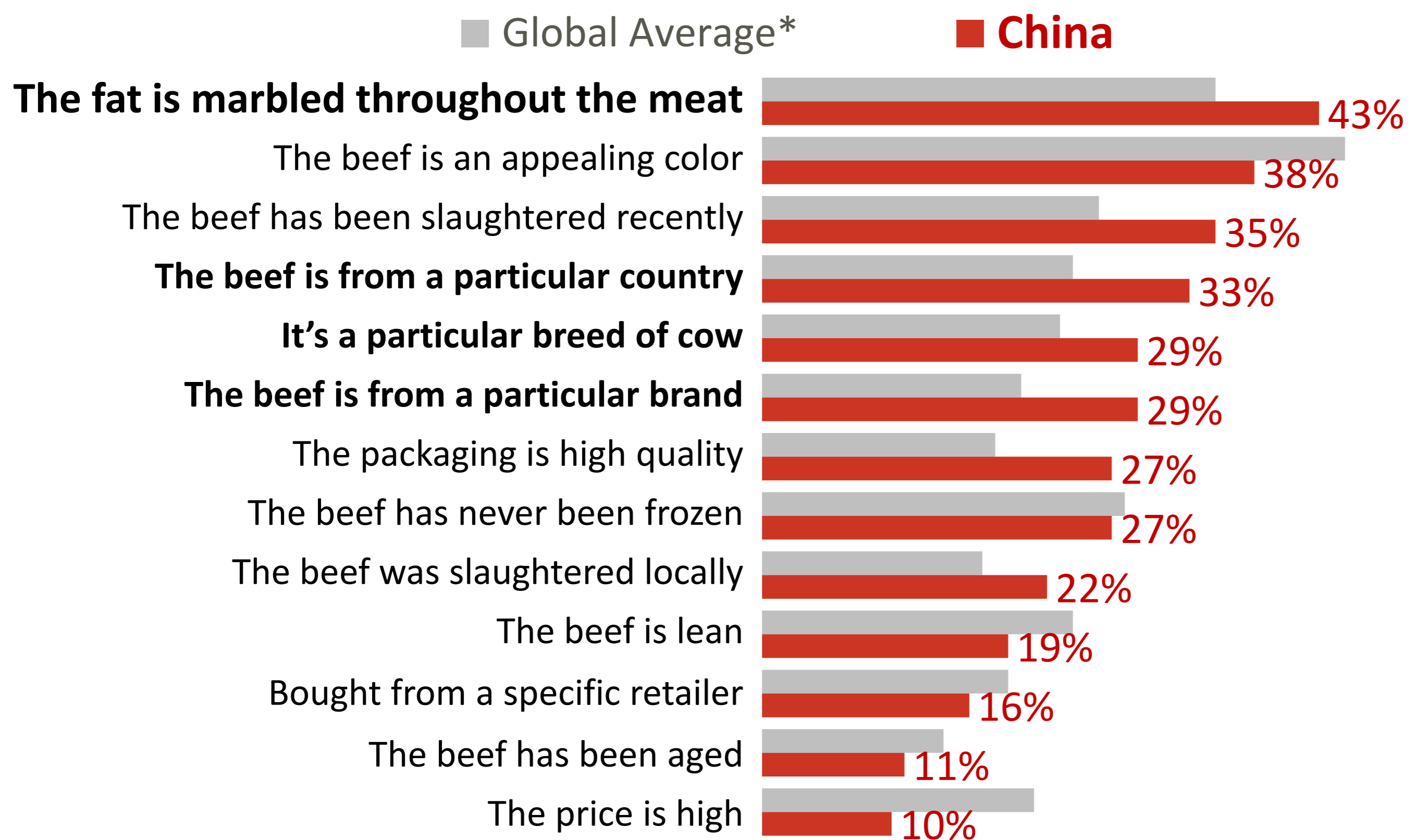
Australian beef exports to China by storage and meat type



Source: Department of Agriculture, Fisheries and Forestry (DAFF), Excludes offal, Combines beef and veal

Chinese consumers associate premium quality beef with marbling, country of origin, in addition to breed and brand

PREMIUM BEEF – HOW CAN YOU TELL?



Source: MLA Global Consumer Tracker, 2018. Images from MLA Australian Advantage Study, 2020, QPREM2. We'd now like you to think about occasions when you are buying the best quality kind of beef.

How can you tell that the beef is high quality when you are purchasing it? Base (n=410)

A WTO beef safeguard tariff introduced from January 2026 reshapes China's import landscape

New 3-year China beef safeguard tariffs announced on 31 Dec 2025



中华人民共和国商务部
MINISTRY OF COMMERCE OF THE PEOPLE'S REPUBLIC OF CHINA

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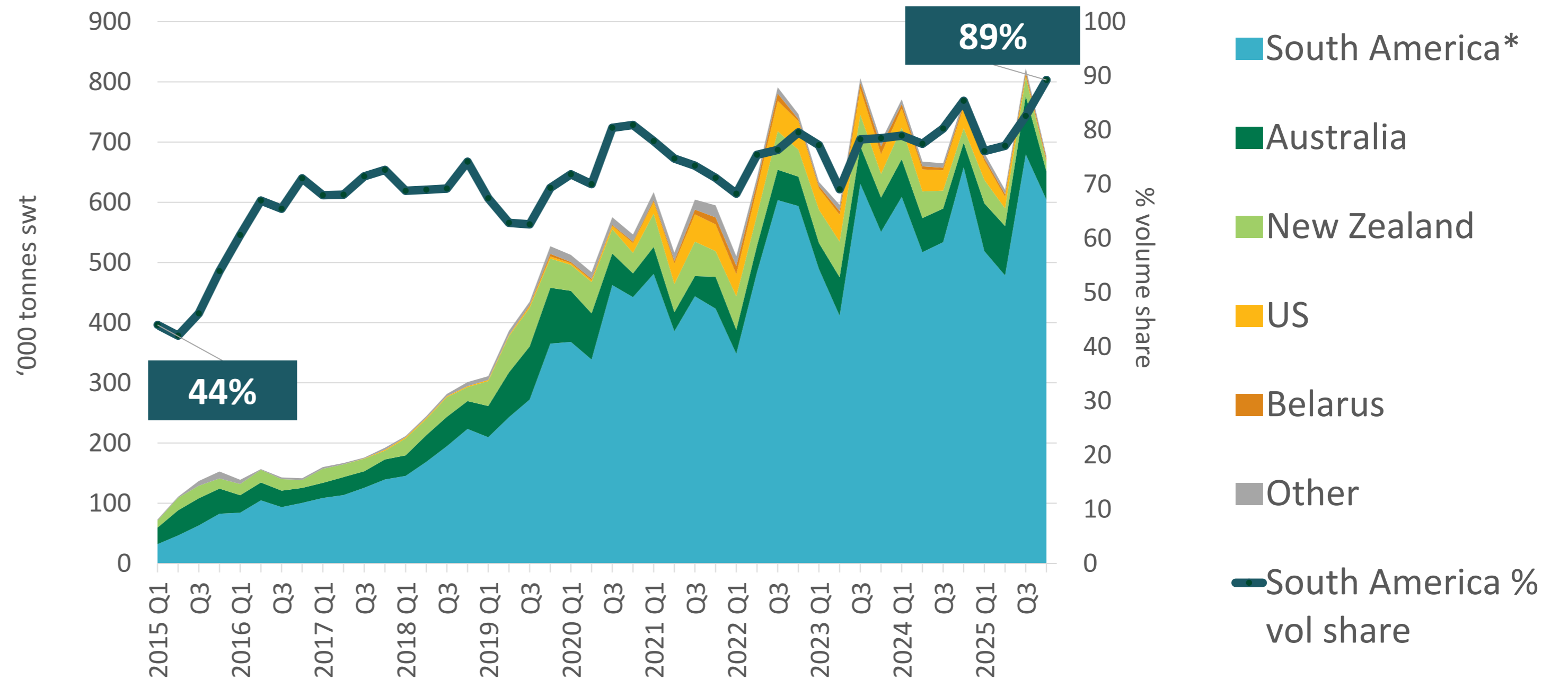
商务部公告2025年第87号 公布对进口牛肉实施保障措施的裁定

Appendix 2: Quota Quantity and Additional Tariff Rate Table

	Country	First Year (January 1, 2026 - December 31, 2026)	Second Year (January 1, 2027 - December 31, 2027)	Third Year (January 1, 2028 - December 31, 2028)
Quota Quantity	Brazil	1.106 million tons	1.128 million tons	1.151 million tons
	Argentina	511,000 tons	521,000 tons	532,000 tons
	Uruguay	324,000 tons	331,000 tons	337,000 tons
	New Zealand	206,000 tons	210,000 tons	214,000 tons
	Australia	205,000 tons	209,000 tons	213,000 tons
	United States	164,000 tons	168,000 tons	171,000 tons
	Other Countries and Regions ¹	172,000 tons	175,000 tons	179,000 tons
	Total	2.688 million tons	2.742 million tons	2.797 million tons
Additional Tariff Rate		55%	55%	55%

Source: MOFCOM, China

China global beef imports by suppliers



Safeguard tariff applies to all suppliers, including Australia, despite South America accounting for almost 90% of imports

Source: TDM, *Includes Brazil, Argentina, Uruguay, Bolivia, Columbia, Chile, Costa Rica, Panama, Nicaragua, *12 months ending November. % score is proportion of beef imports from South America combined.



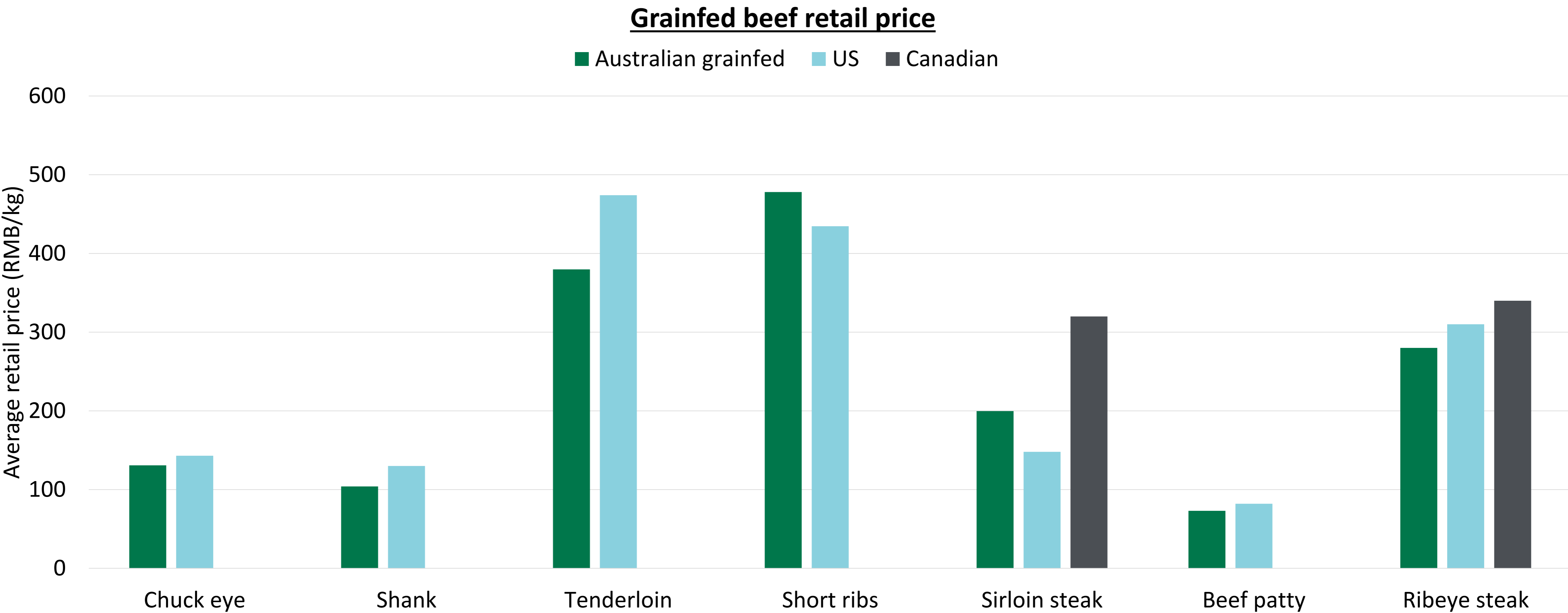
China's new global beef safeguard quotas disproportionately disadvantage Australia

- **Australia** and **Brazil** are the most severely impacted by the Chinese Safeguard Quota until 2028.
- **The US** quota is 164,000 tonne quota, however, the Chinese government has refused to renew import licenses for US abattoirs, meaning virtually no US beef can be shipped currently**.

Beef supplier	2025 export volume to China*	2026 tariff-free quota volume	% difference
Brazil	1,648,326 T	1,106,000 T	-49%
Argentina	497,717 T	511,000 T	+3%
Uruguay	150,622 T	324,000 T	+115%
Australia	272,904 T	205,000 T	-33%
New Zealand	112,831 T	206,000 T	+45%
US	52,497 T	164,000 T	+212%
Bolivia	38,693 T	98,096 T	+153%
Colombia	18,769 T	20,976 T	+12%

(T = all volumes in tonnes swt)

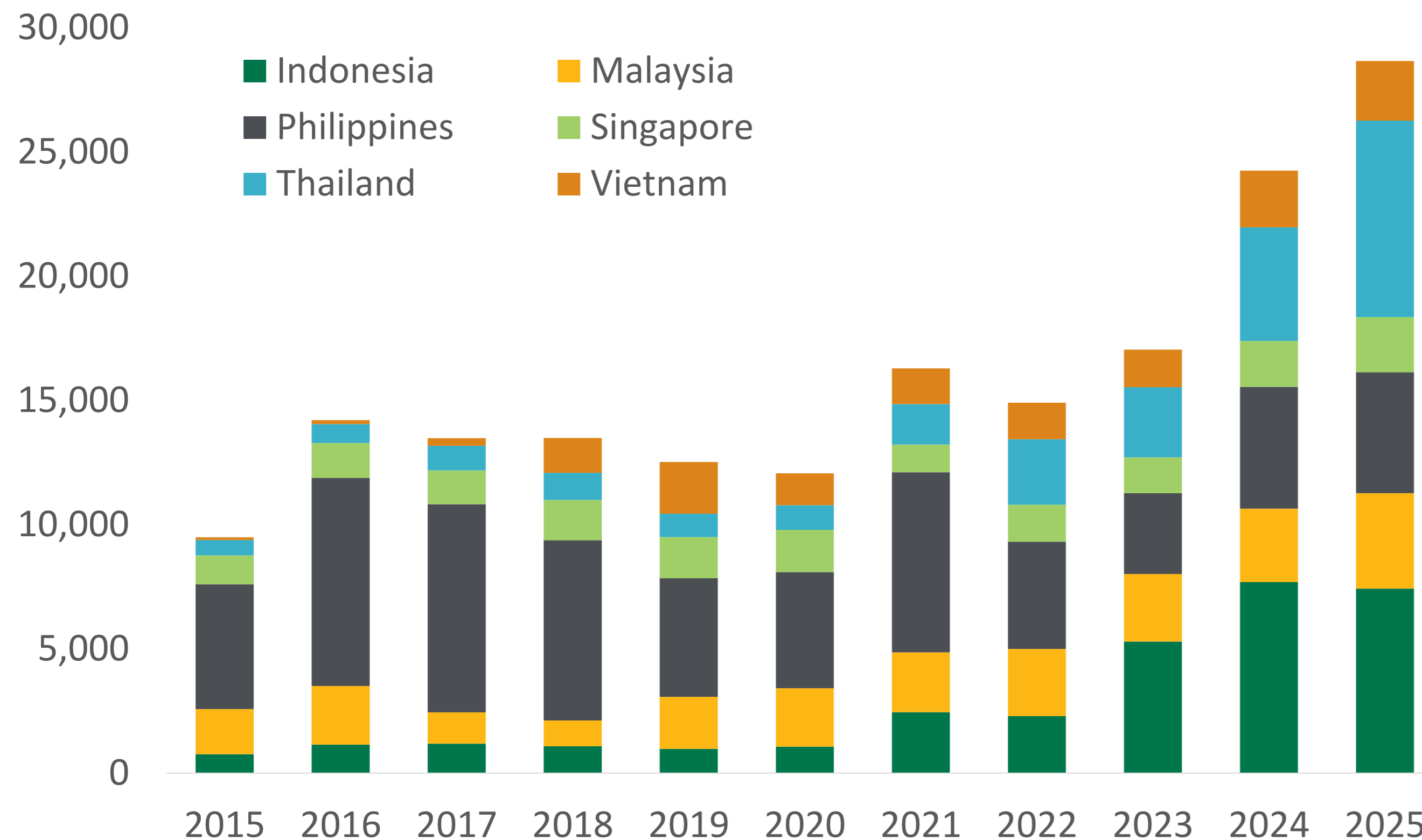
Most Australian grainfed cuts are priced below their US counterparts, but this may change when the safeguard triggers



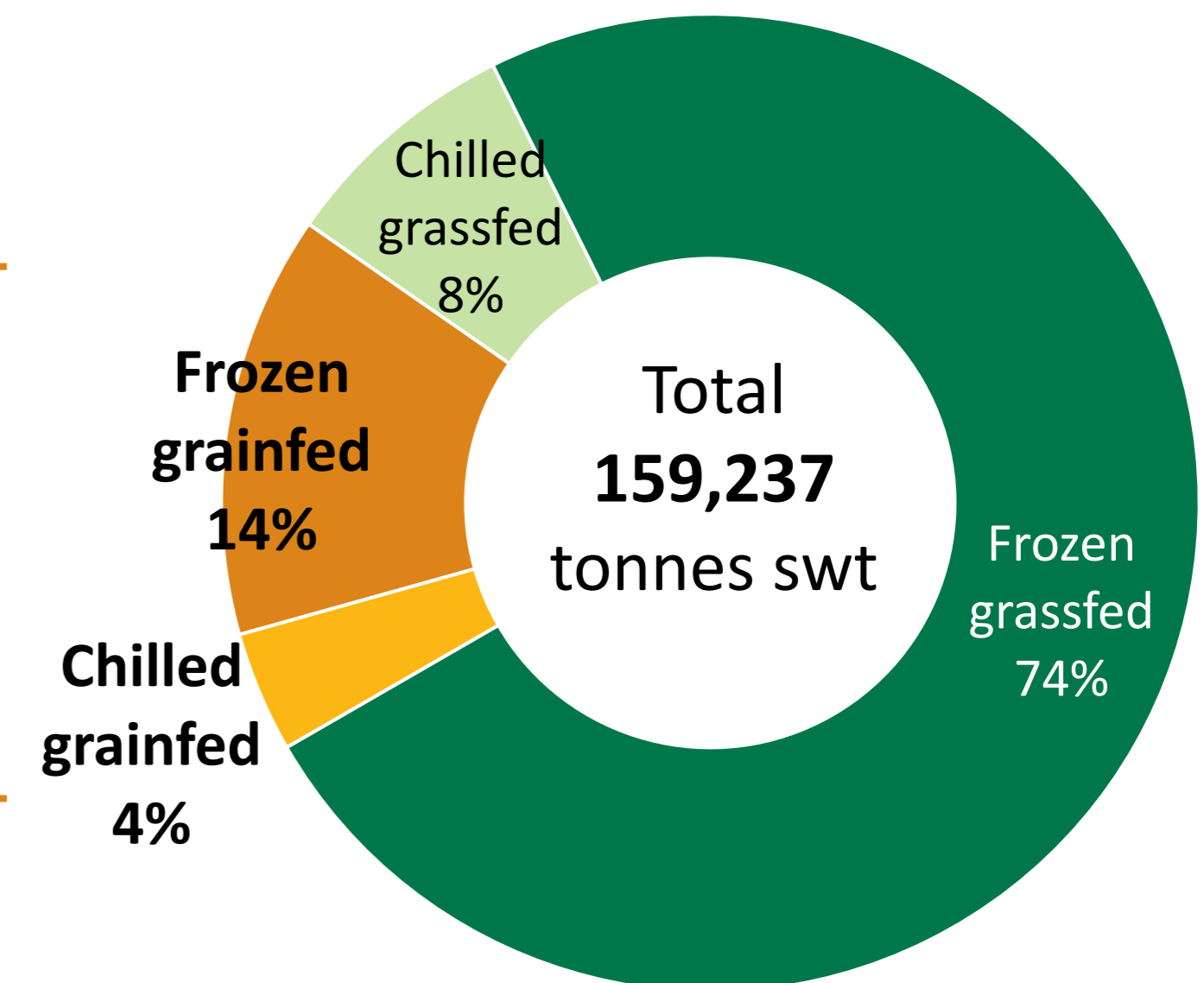
Source: Sam's Club, MLA market intelligence, Prices are indicative of trend, Date last reviewed 31/3/2026, RMB = Chinese Renminbi

While traditionally a grassfed beef market, Australian grainfed beef exports to the South-east Asia region grew significantly over the last 10 years

Australian GRAINFED beef exports to Southeast Asia



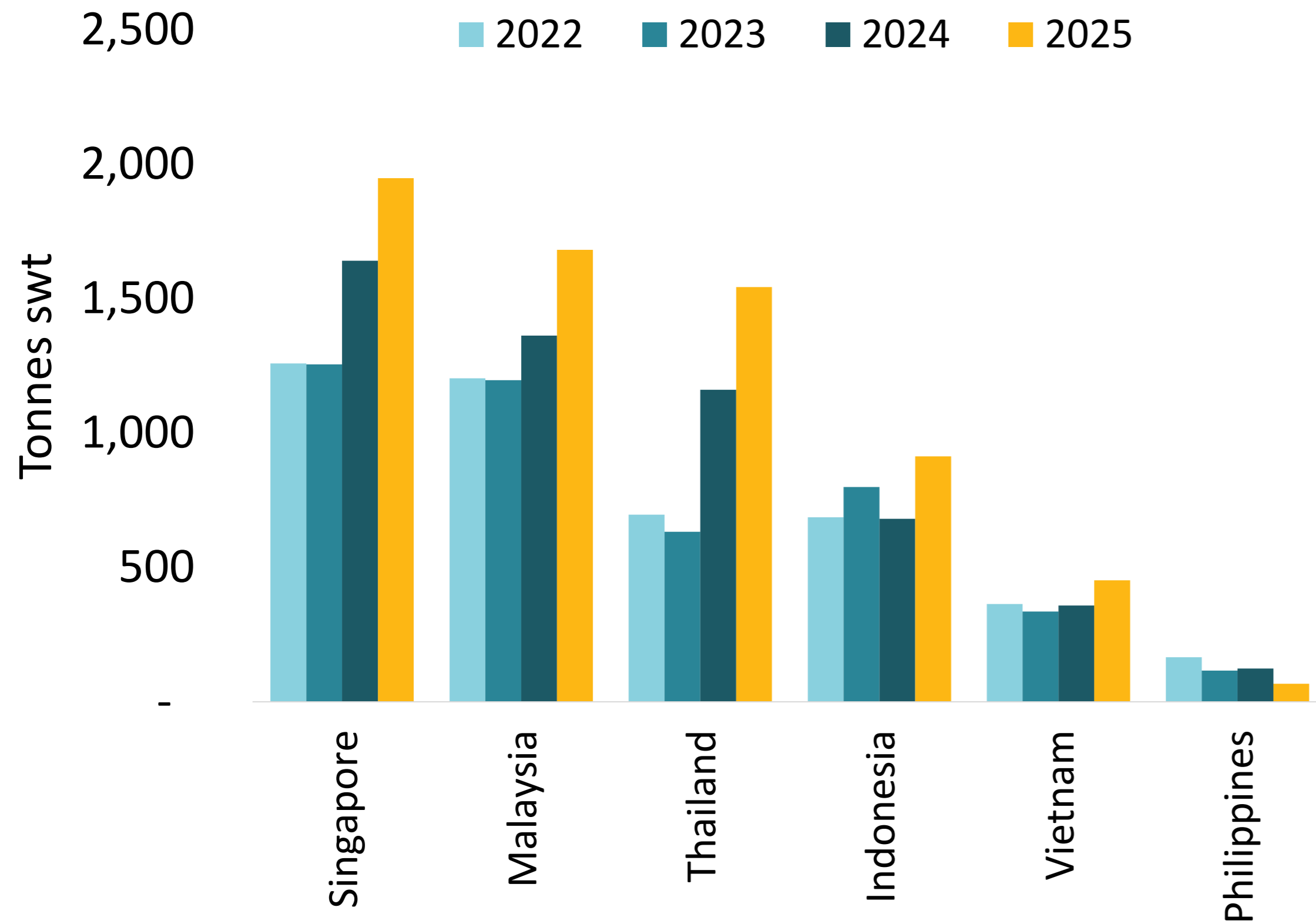
Australian beef exports to Southeast Asia (2025)



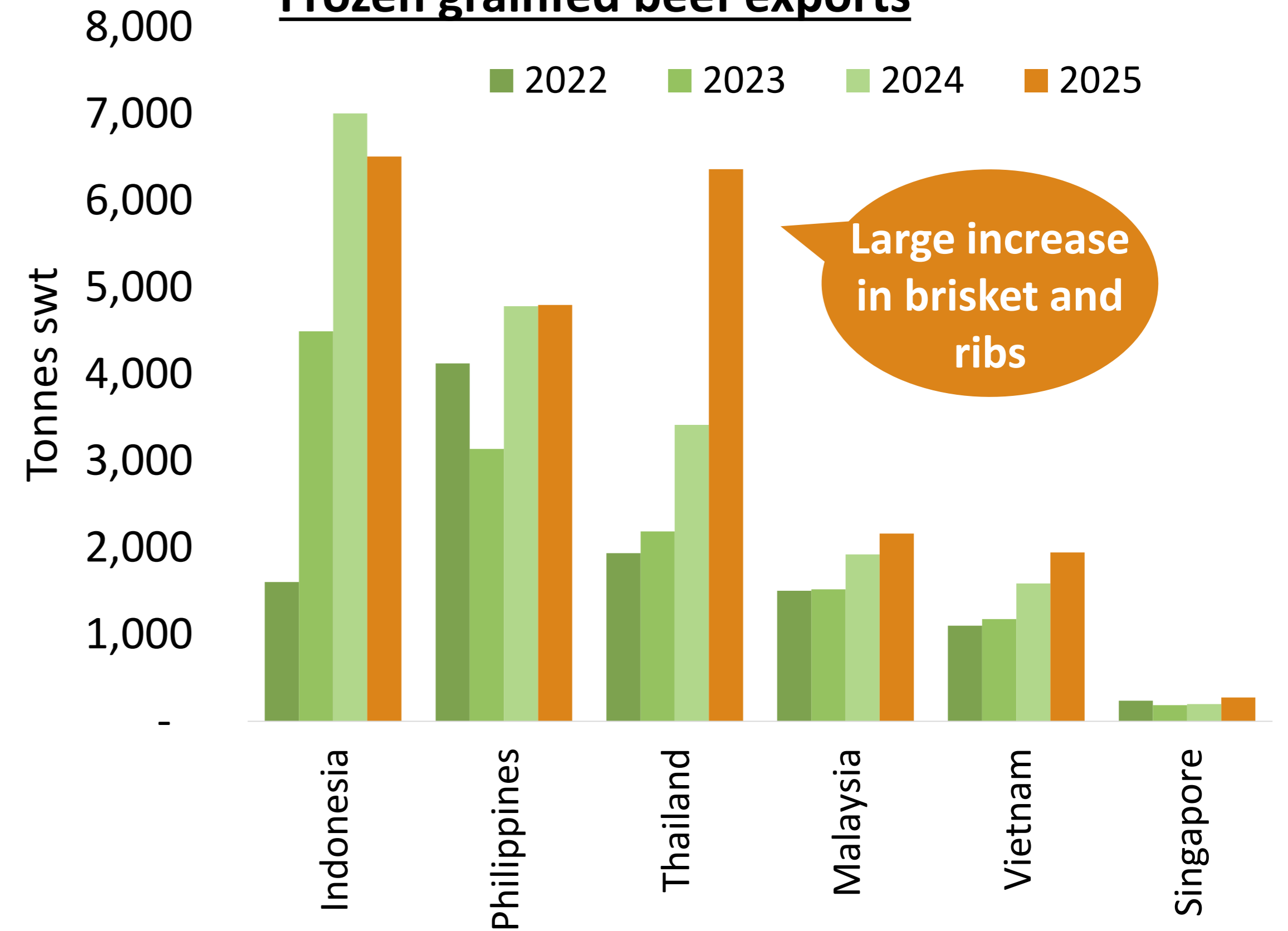
Source: DAFF

Demand for Australian grainfed beef has been growing in the region, with frozen grain underpinning the volume

Chilled grainfed beef exports



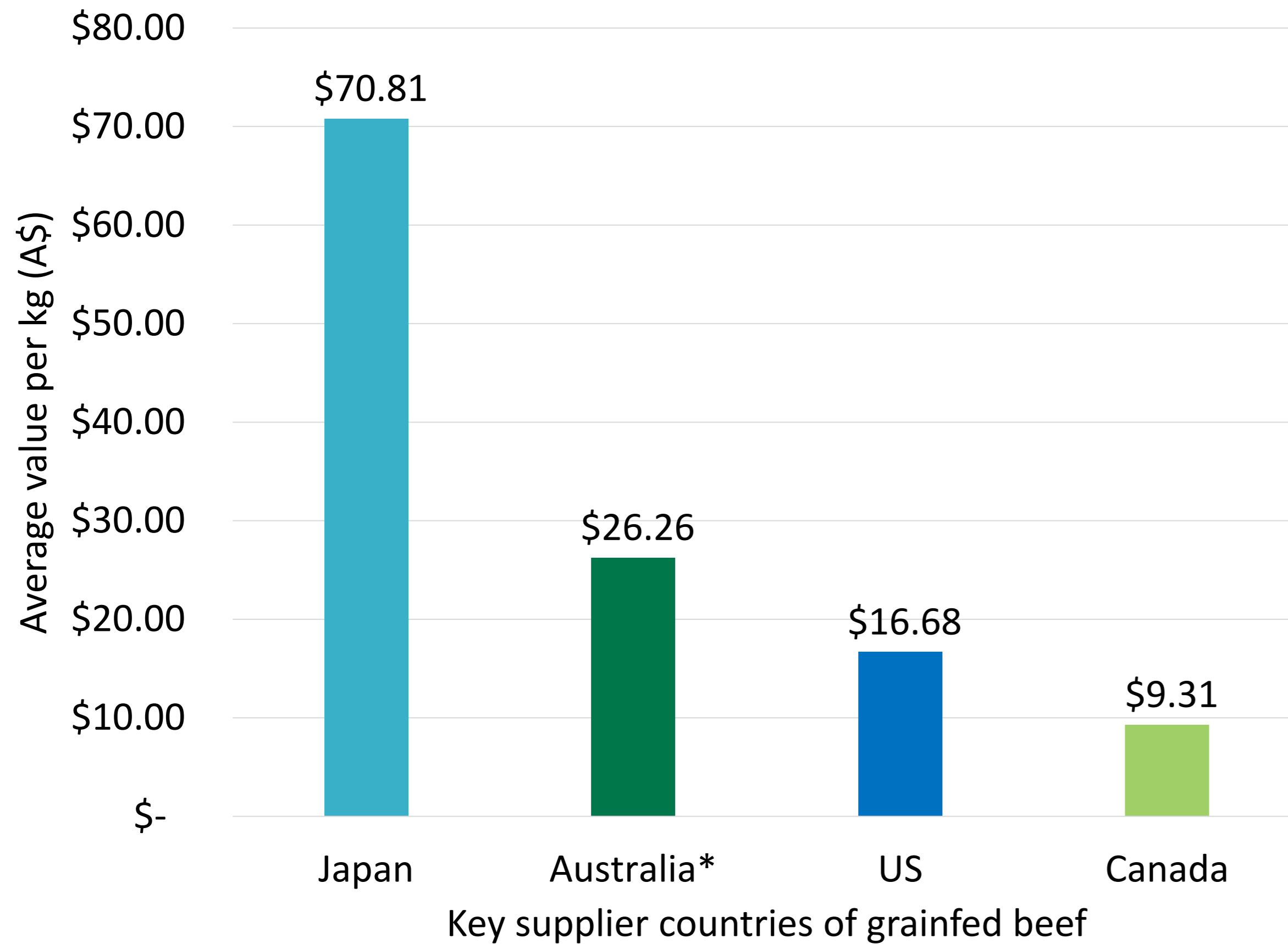
Frozen grainfed beef exports



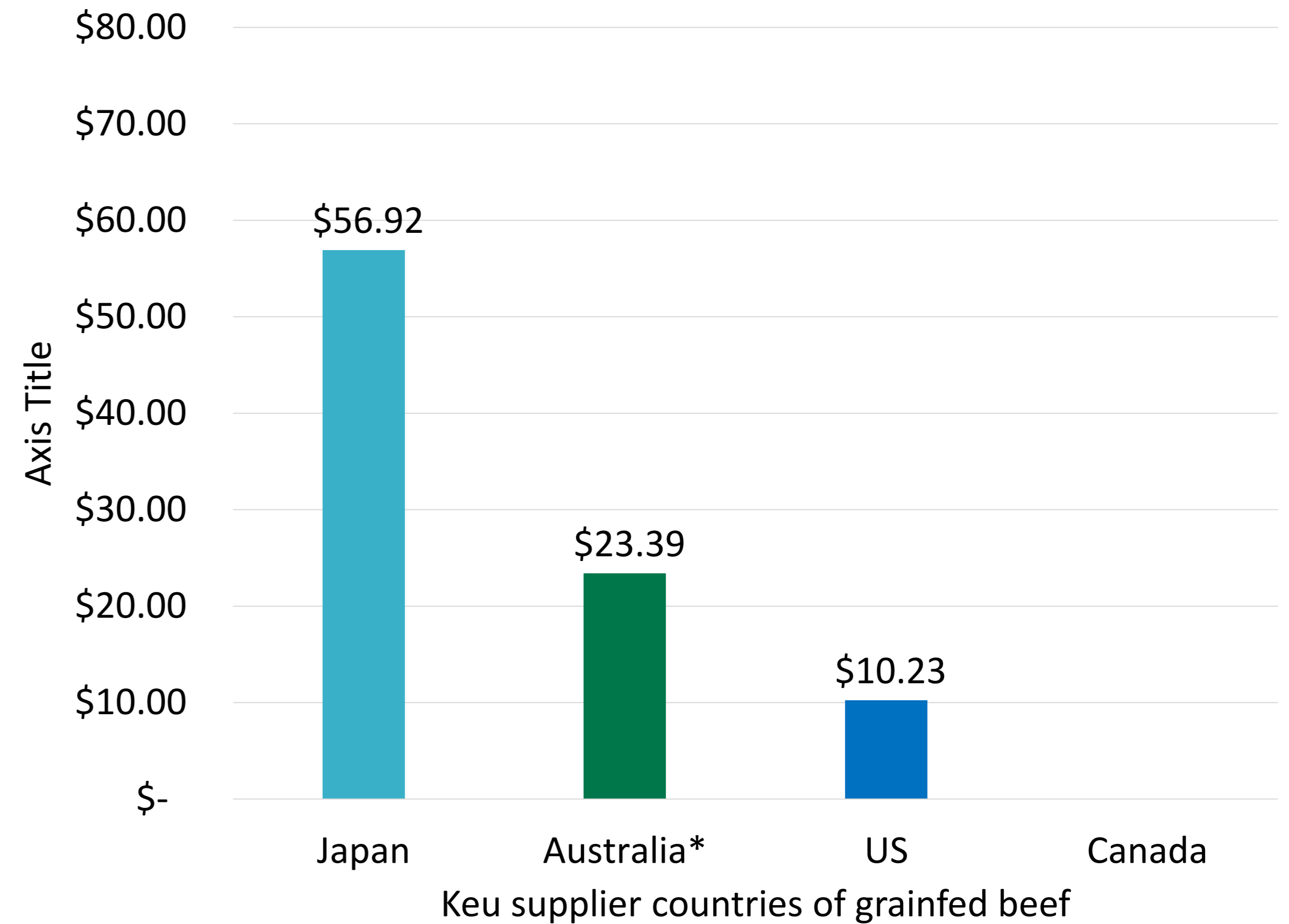
Source: DAFF

Australian grainfed beef is positioned higher in value than other imported grainfed products apart from Japanese Wagyu

Grainfed import value to Singapore (2025)

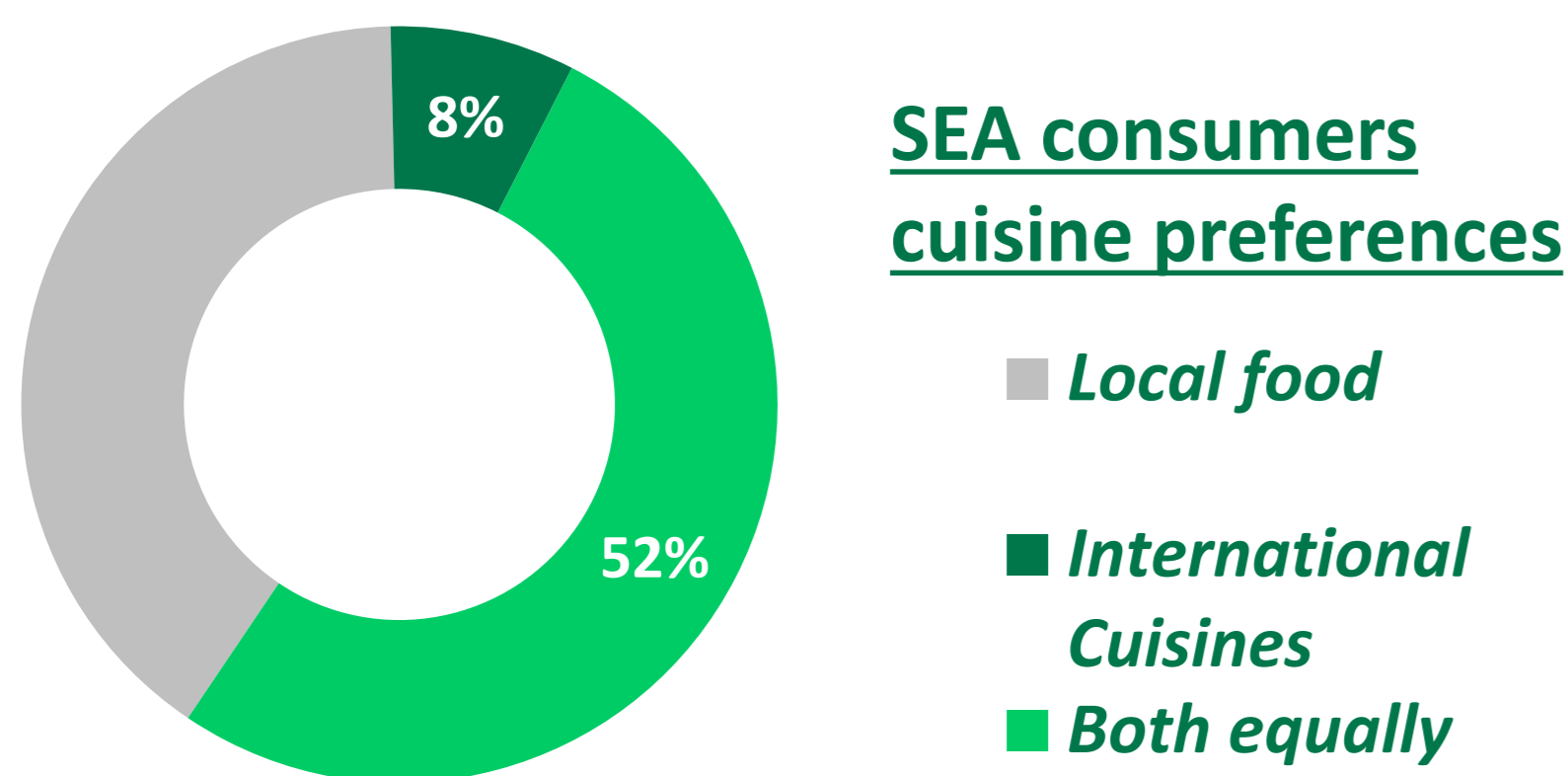
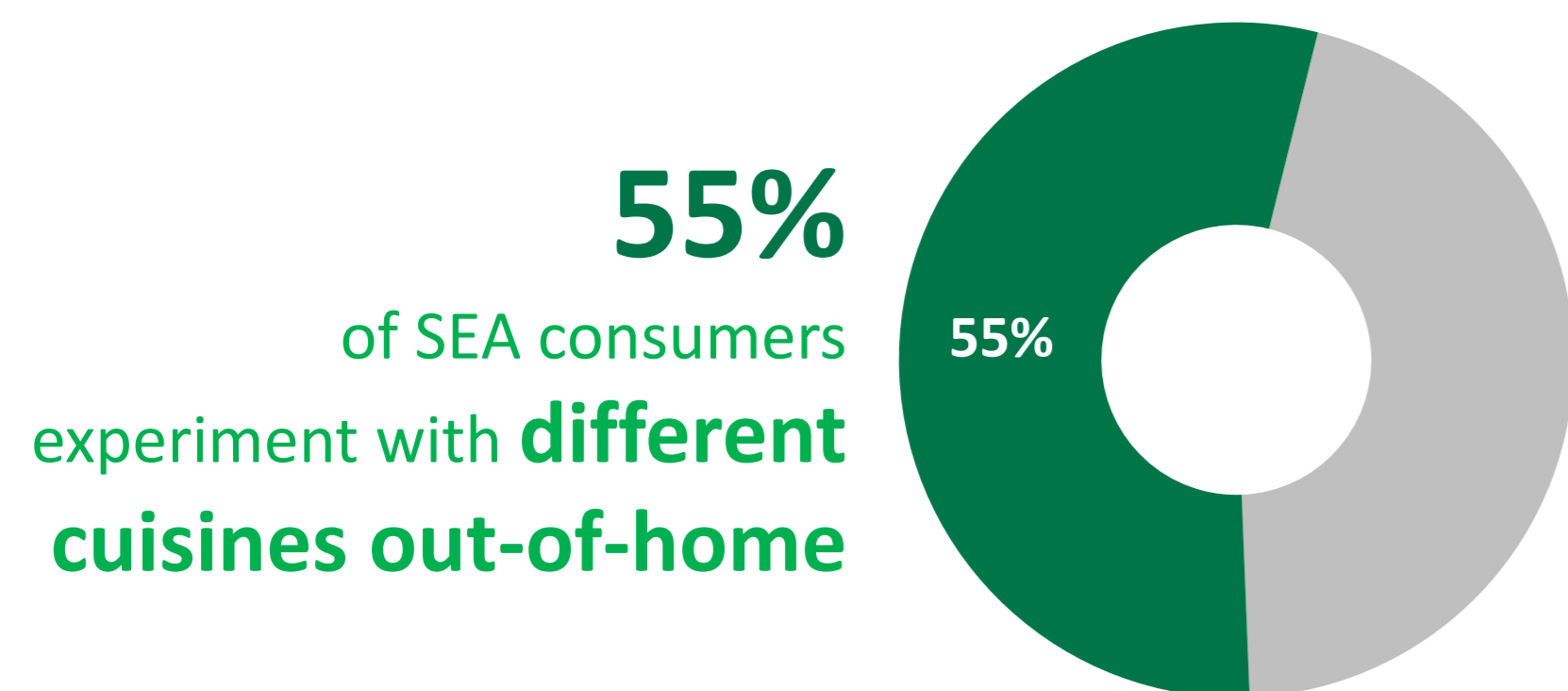


Grainfed import value to Thailand (2025)



Source: TDM, Australia value/kg is chilled as indicative of Australian grainfed

SEA consumers, younger generation in particular, are curious towards international cuisines with Japanese and Korean leading the way



Food delivery in SEA is highly developed, with platforms like Grab and Gojek widely used for meals and groceries. Local dishes are still the most popular, but Japanese and Korean cuisines are seeing rising demand particularly from younger consumers.

Most Ordered Supermarket Items Online (Singapore)

1. Sweet Potato
2. Banana
3. Japanese Ready-to-Eat Meals



Most searched Food Delivery Items (Thailand)

1. Fast Food
2. Thai
3. Chinese
4. Japanese
5. Korean



Favourite cuisines among Gen Z (Indonesia)

1. Korean
2. Japanese
3. Chinese

Thailand's average value for Australian beef exports is second highest regionally, supported by tourism and growing taste for marbled beef

How Thai consumers identify a high-quality beef

- 1 *The **fat is marbled** throughout the meat*
- 2 *The packaging is high quality*
- 3 *It's a particular breed of cow*
- 4 *The beef is from a **particular country***
- 5 *The beef is an **appealing color***
- 6 *The beef has been slaughtered recently*

Thai consumer perception of Australian beef

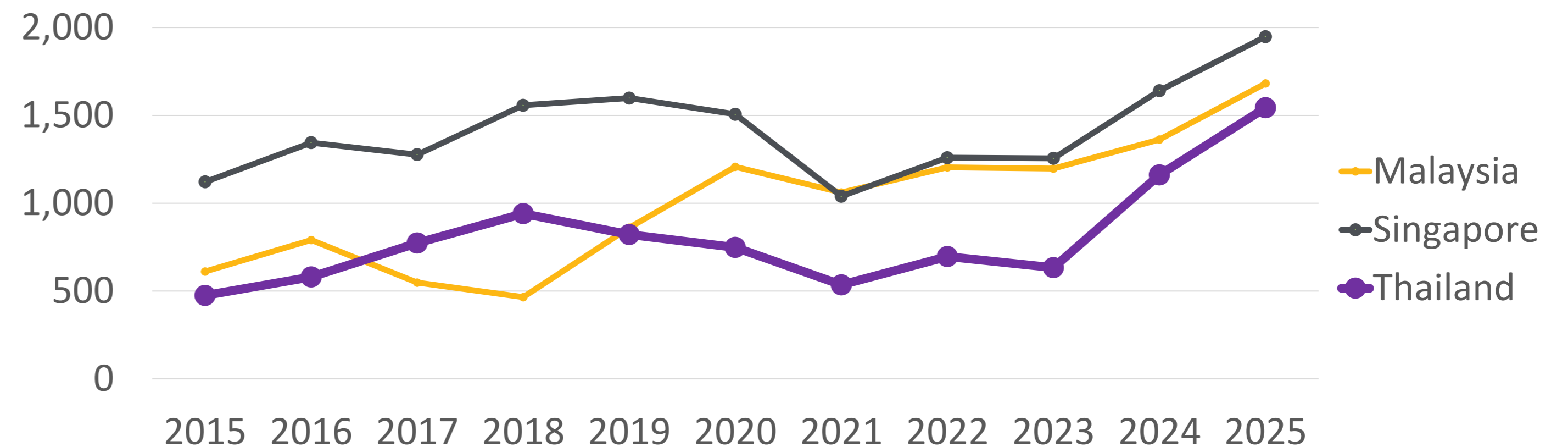


Nicely marbled
Consistent quality standards

Australian beef exports: Average value per kilo



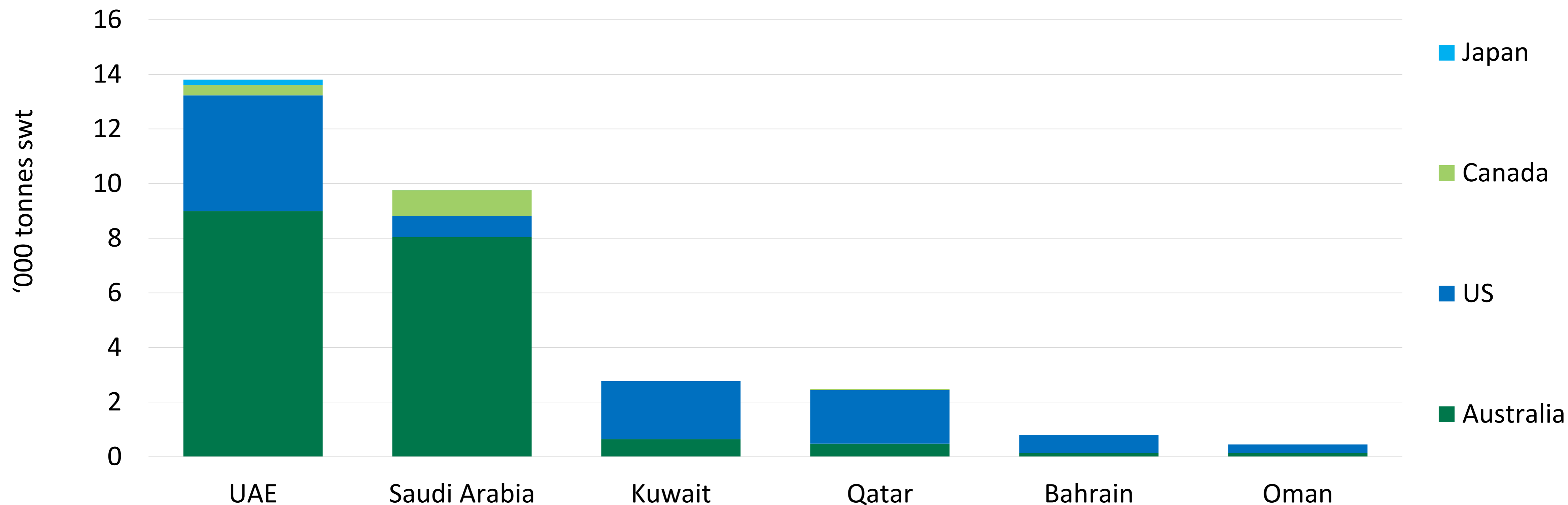
Australian beef exports: Chilled grainfed beef



Source: MLA Global Consumer Tracker Thailand, 2023, Trade Data Monitor (TDM), average value of Nov 23 to Oct24 in A\$

The UAE and Saudi Arabia are key regional grainfed beef markets, with the US as Australia's main competitor and Canada gaining a foothold in Saudi Arabia

2025 Grainfed beef exports to GCC by supplier

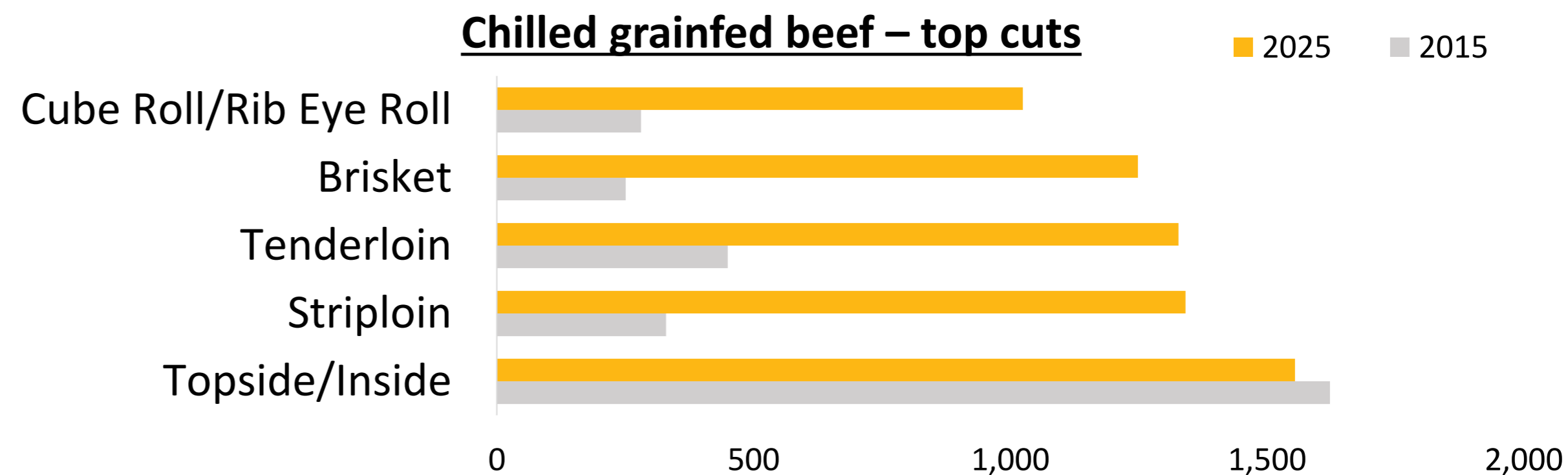
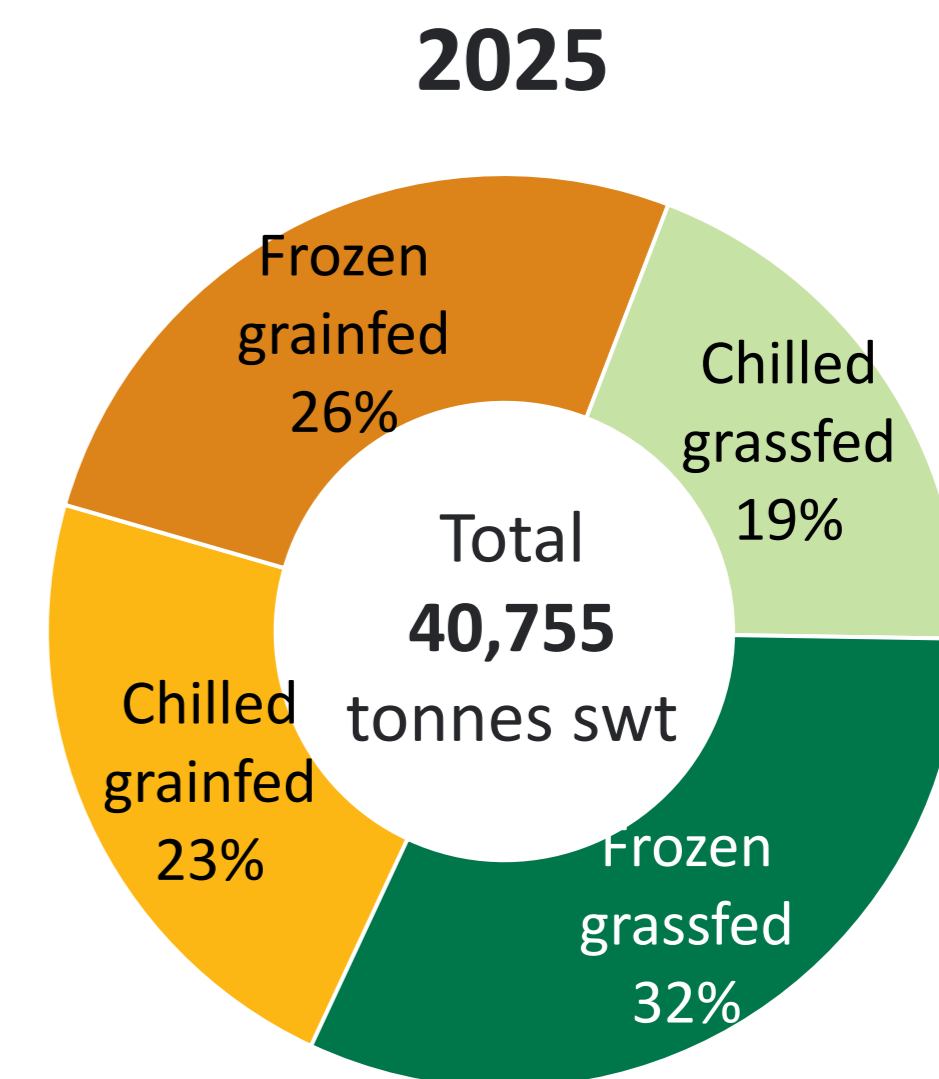
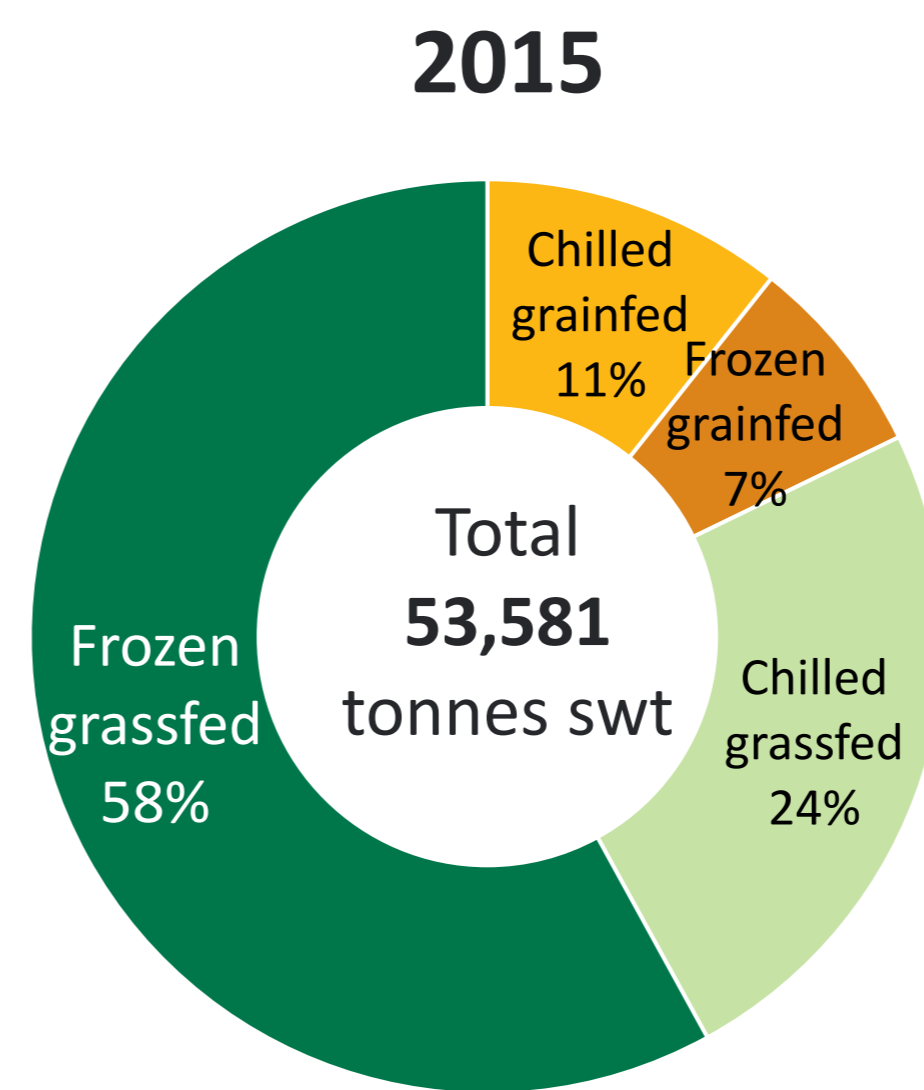
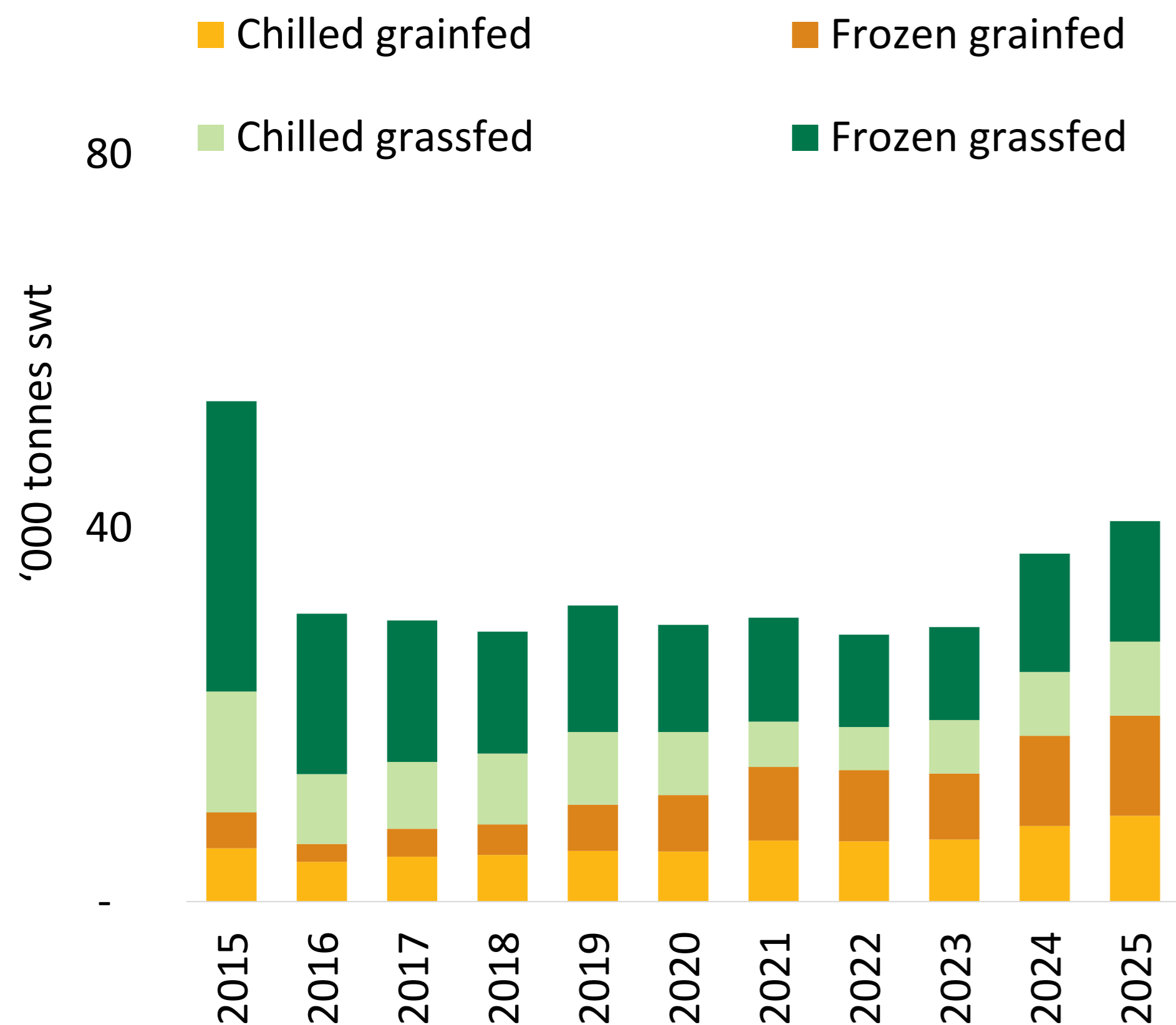


Figures are for suppliers' exports, chilled and frozen combined. Australian product here is grainfed beef only.

Sources: DAFF, Trade Data Monitor (TDM). GCC = Gulf Cooperation Council

Australian grainfed beef exports to Korea have somewhat softened in recent years

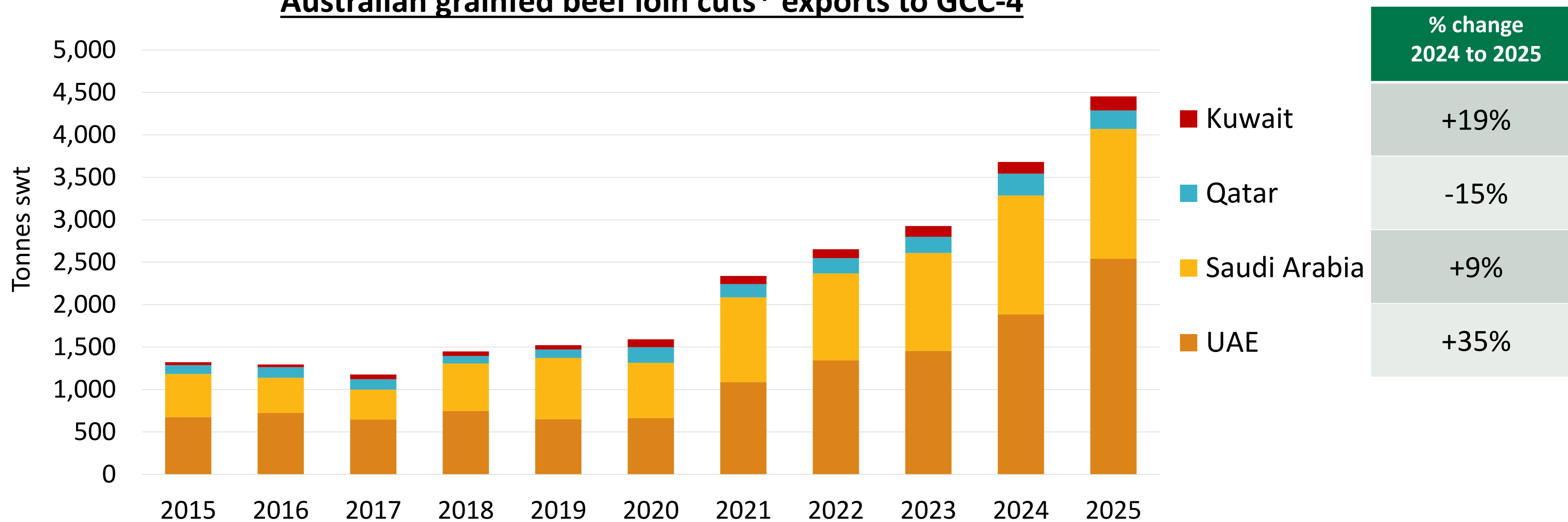
Australian beef exports to MENA by storage and meat type



Source: Department of Agriculture, Fisheries and Forestry (DAFF), Excludes offal, Combines beef and veal, MENA-12 includes Bahrain, Egypt, Iran, Iraq, Israel/Palestine, Jordan, Kuwait, Mauritius, Oman, Qatar, Saudi Arabia, and United Arab Emirates (UAE)

The Gulf is now one of Australia's fastest-growing grainfed export regions, particularly for premium cuts

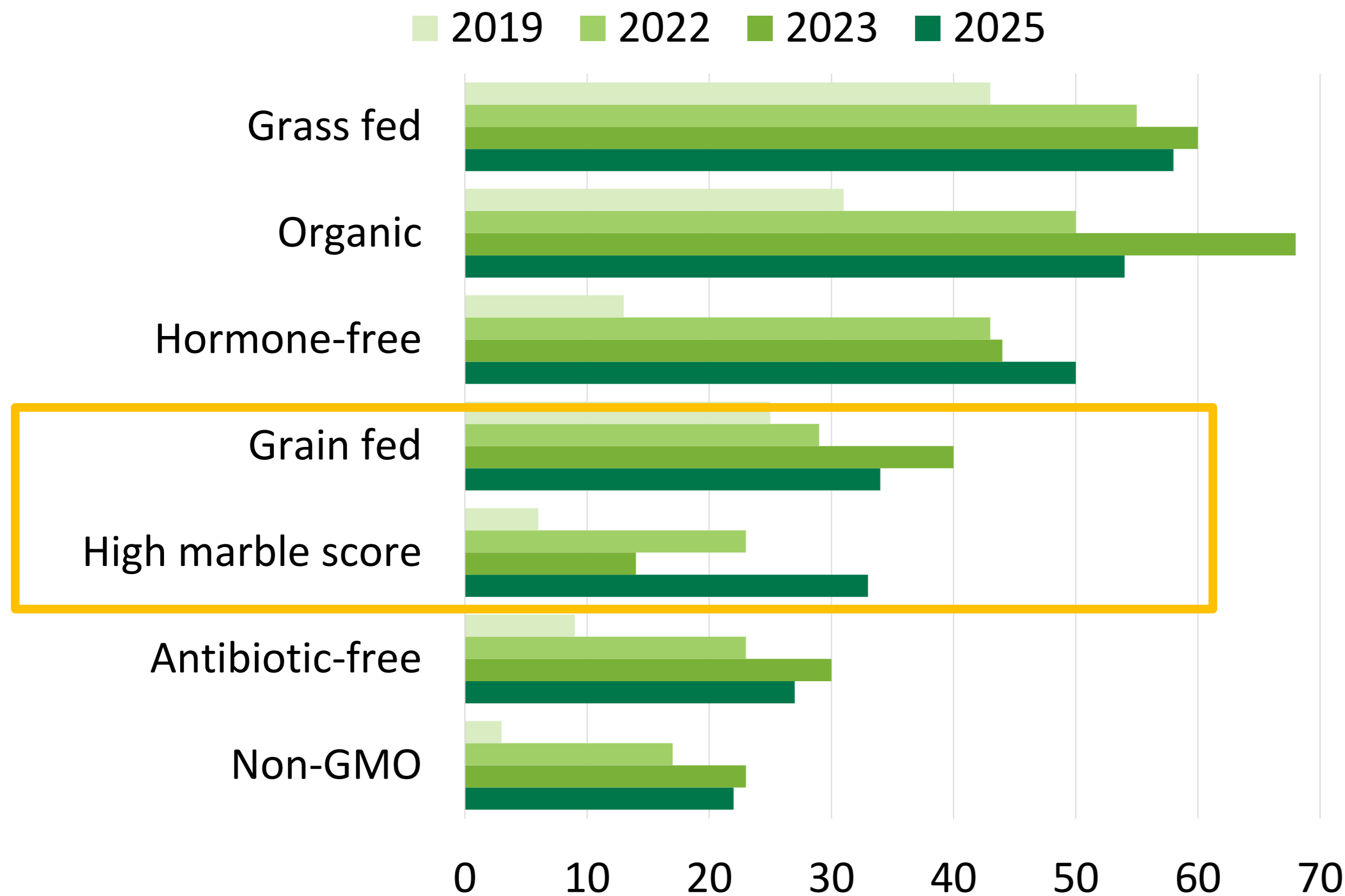
Australian grainfed beef loin cuts* exports to GCC-4



Source: DAFF, Chilled and frozen combined, * loin cuts include: loin, tenderloin, striploin, shortloin, rack, cube roll/rib eye roll

Awareness of premium beef types is rising rapidly in the Gulf, with growing appreciation for a wider range of eating quality attributes

UAE consumer awareness of beef types



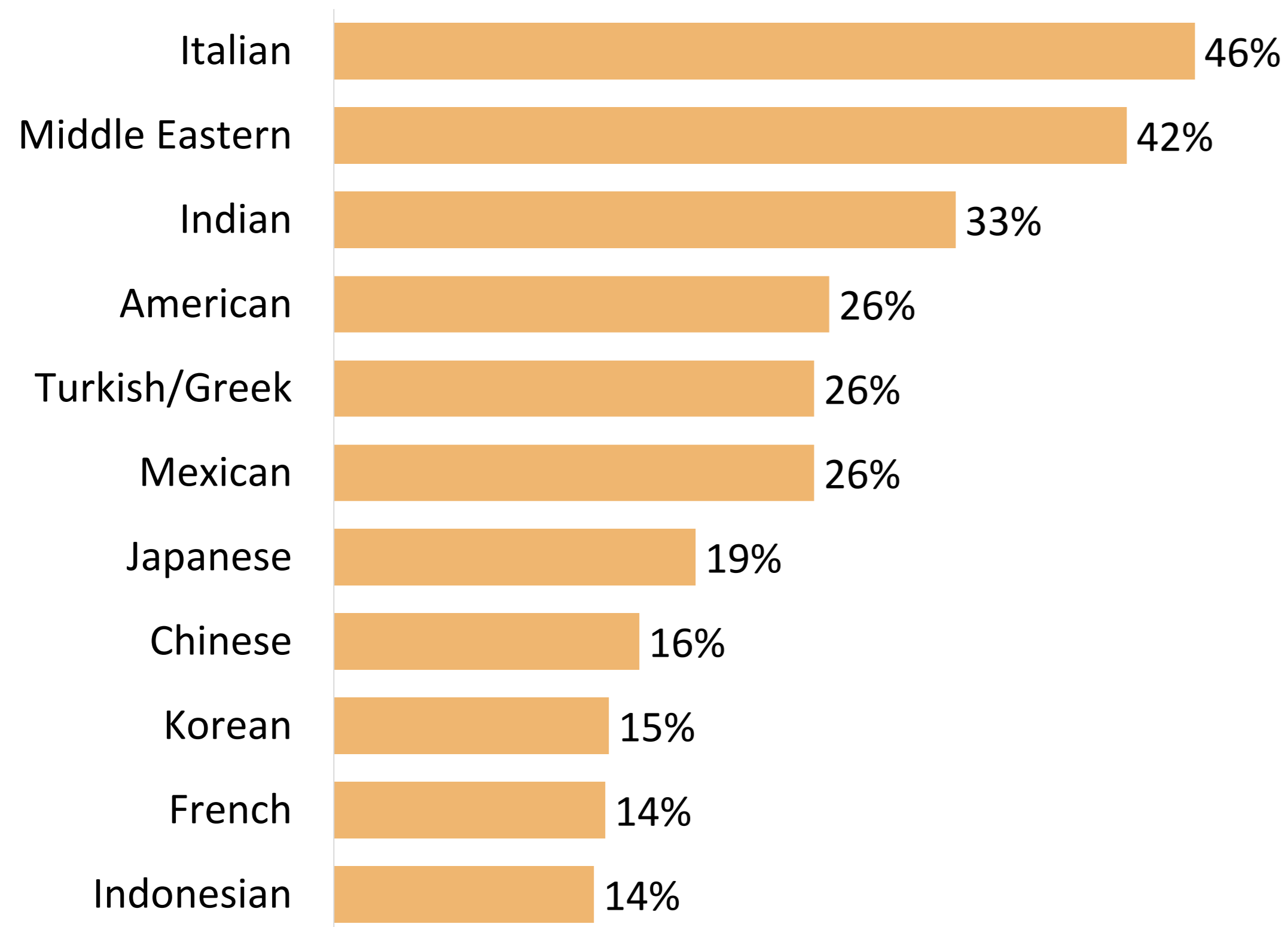
% Aware.

Source: MLA Global Tracker UAE

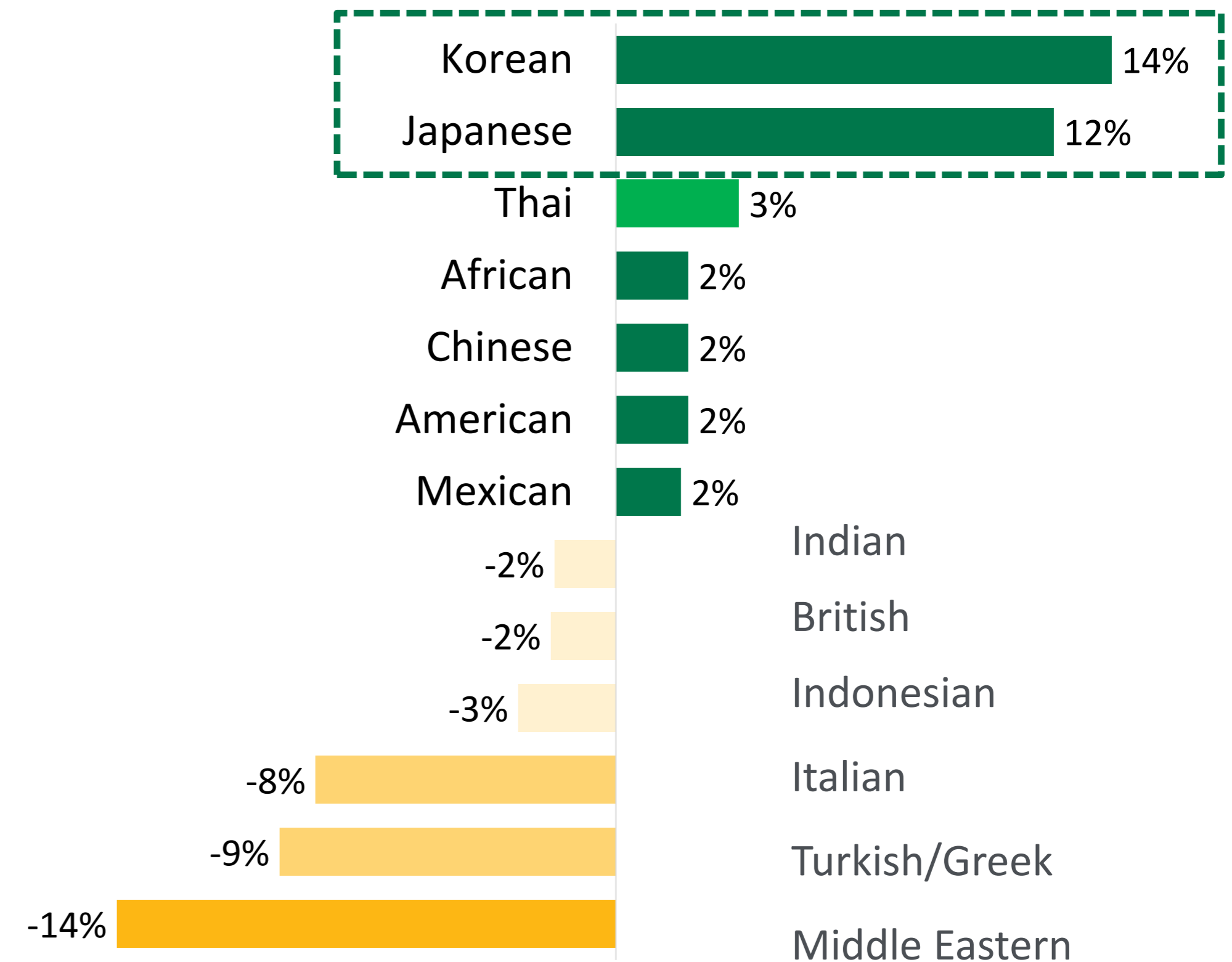


Saudi cuisine is less diverse but shares a love of red meat; younger Saudis are embracing Korean and Japanese dishes with premium beef

Saudi Arabia: Top 5 most appealing cuisines (all age groups)



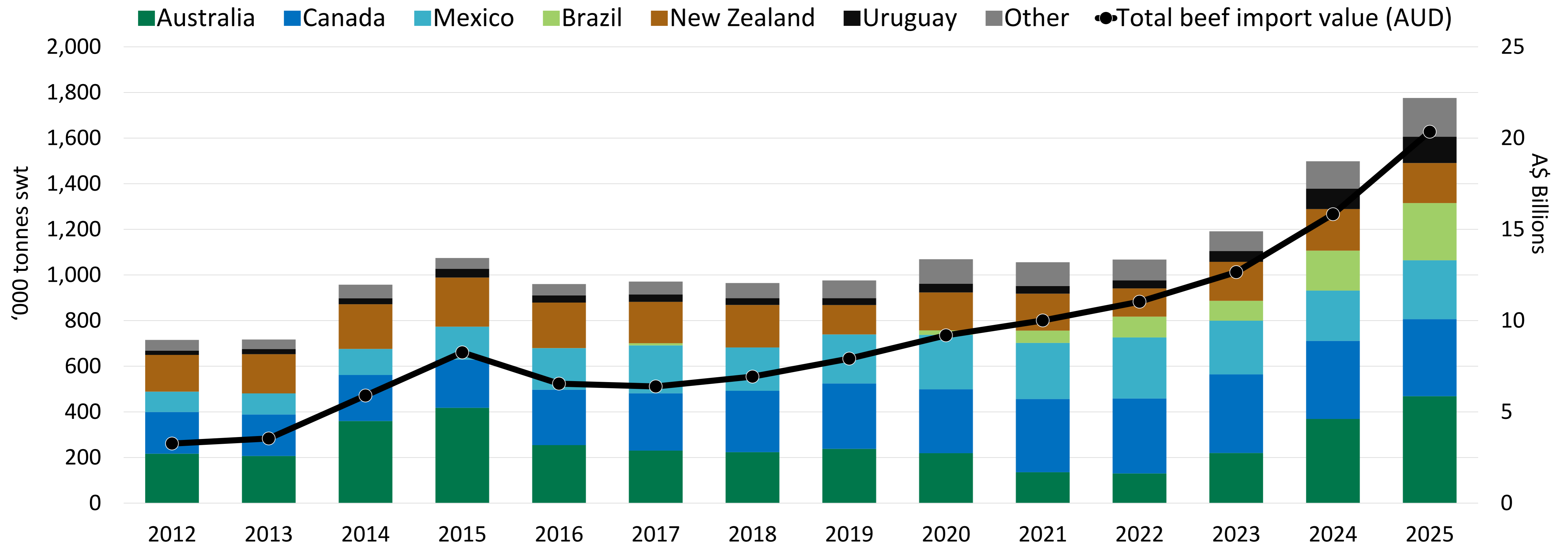
Most appealing cuisines for 18-24 yr olds - % difference versus total KSA population



Source: GlobalData Consumer Survey Q4 2024

US beef imports market was worth over A\$20 billion in 2025, with Australia making up just over a quarter of the volume

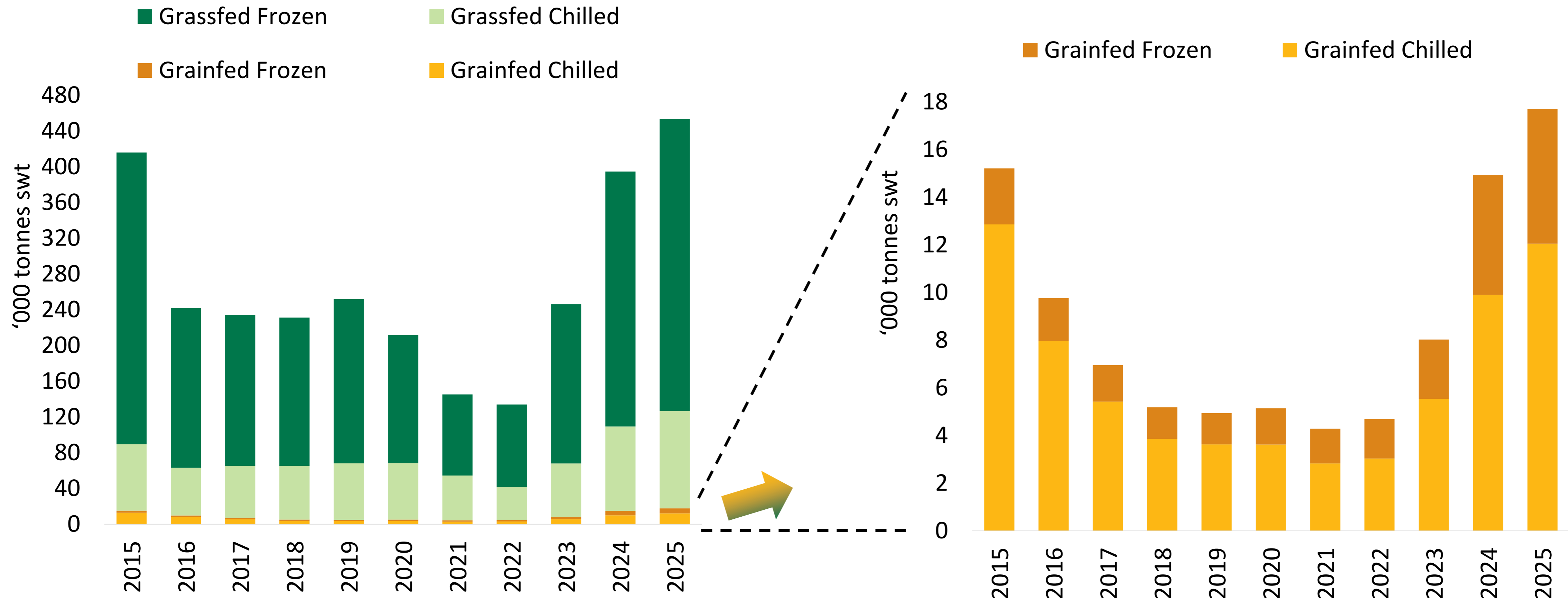
US total beef imports by key suppliers



Source: TDM

Recent tighter US supply has seen increased AU beef exports to the US particularly for chilled grainfed and grassfed items

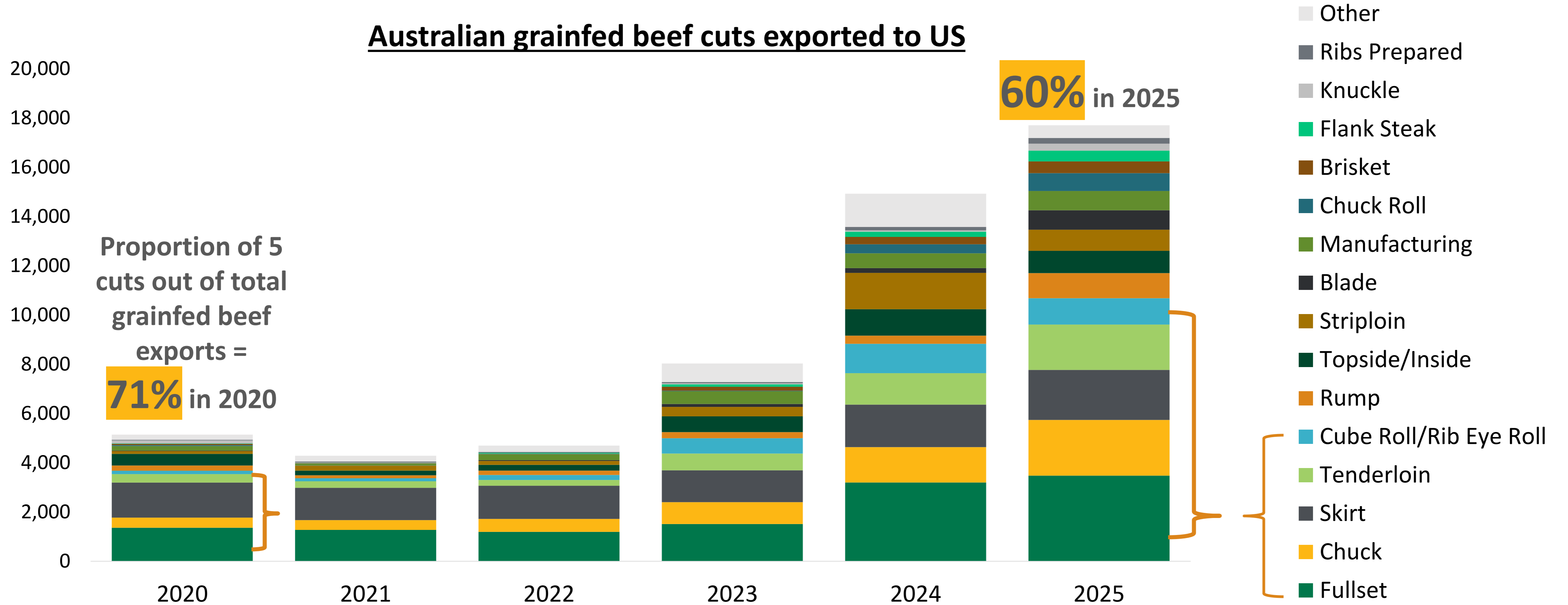
Australian beef exports to the US by storage and meat type



Source: DAFF. Excludes offal. Combines beef and veal.

The US market continues to demand core five cuts, but portfolio has diversified since US domestic supply got tighter

Australian grainfed beef cuts exported to US



A diversifying US population means diverse cuisine influences and interest in a variety of foods, with distinct preferences on where they'd prefer to eat it

Thin Sliced Wagyu for High End Chinese Hot Pot

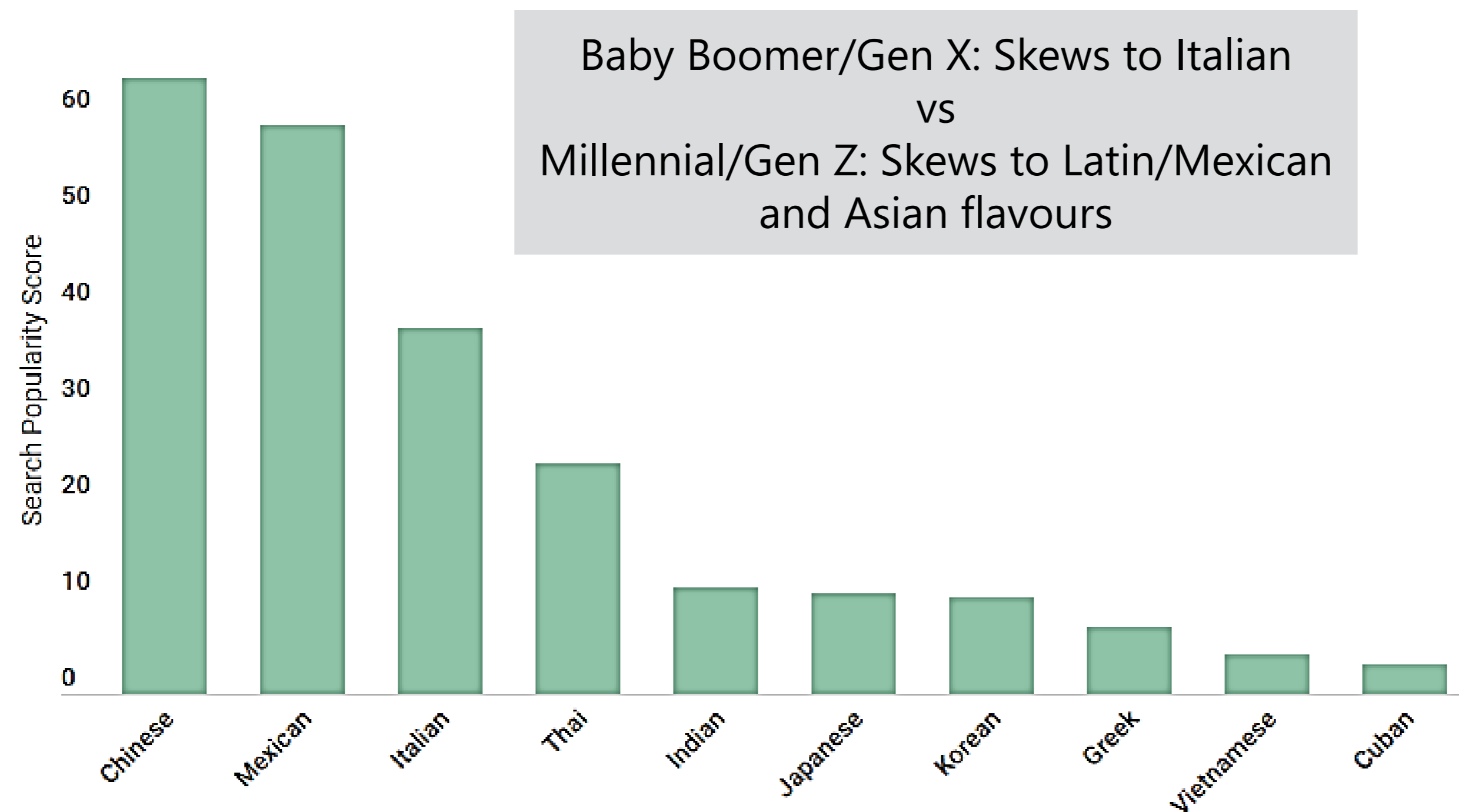


Korean BBQ



Most Popular Ethnic Cuisines in America

An analysis of Google Trends data by Chef's Pencil.



Prefer to eat it...	Away from Home	At Home
Japanese Food	77%	14%
Korean Food	76%	17%
French Food	72%	19%
Jamaican Food	72%	17%
Middle Eastern Food	72%	18%
Hawaiian Food	72%	19%
Indian Food	71%	16%
Chinese Food	70%	15%
Greek Food	70%	19%
Brazilian Food	70%	20%

Source: Chef's Pencil – Google Data 2019, Datassential Foodbytes 2022, Datassential's The Simply Smarter Webinar: 2023 Foodservice Forecast, 3rd of September 2022

Longer fed grainfed beef tends to predominately be in foodservice while shorter fed grainfed is in retail as supplement supply for conventional local beef

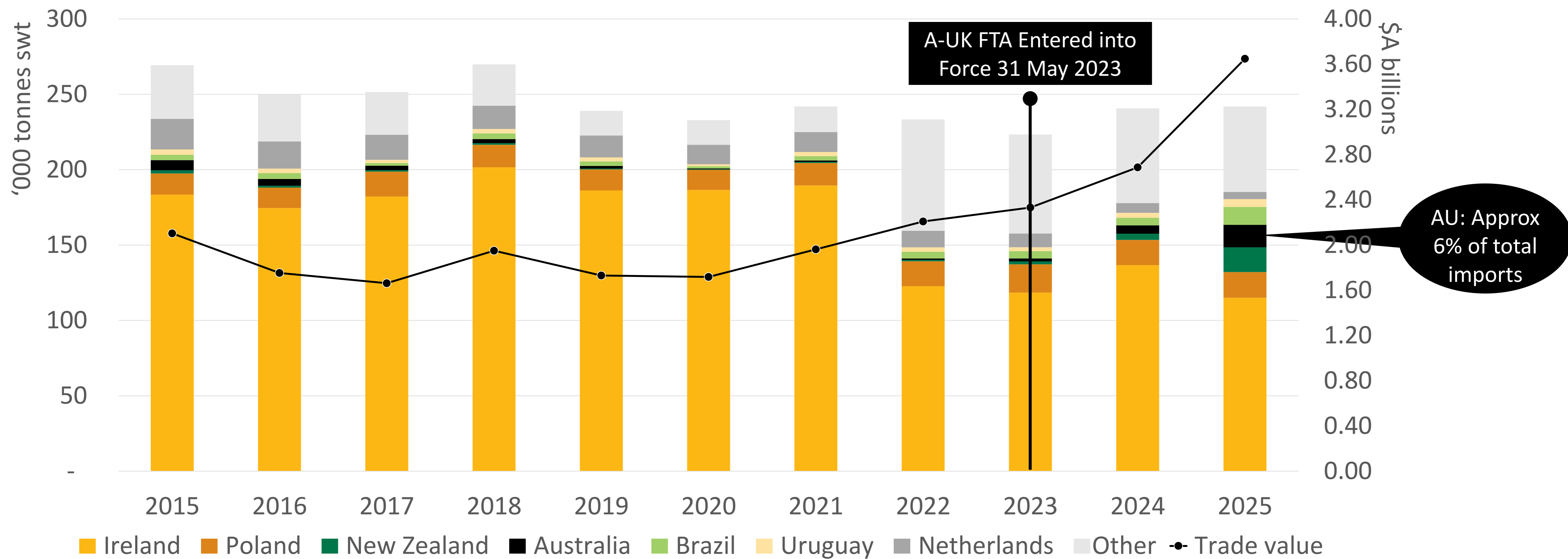


- Mid tier to premium supermarkets as replacement for local beef
- Fast food to fast casual foodservice e.g. in burgers

- Specialty supermarkets
- Butchers
- Online channels

- Predominantly foodservice
- Modern steakhouses which feature wider range of beef from different origins
- Higher end butchers
- Online channel

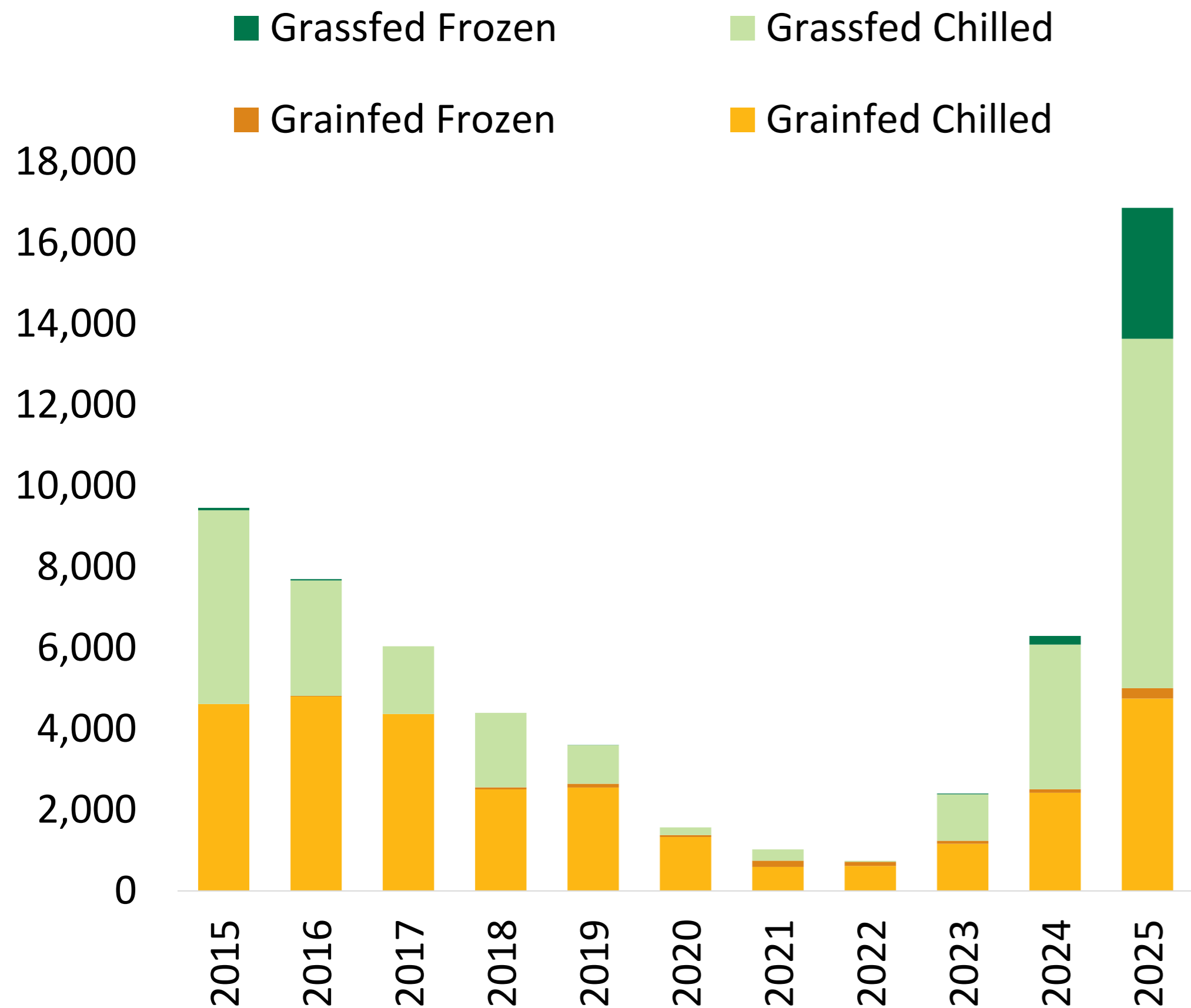
The UK is a predominantly grassfed beef market, with approximately 20% of beef requirement being met by imports



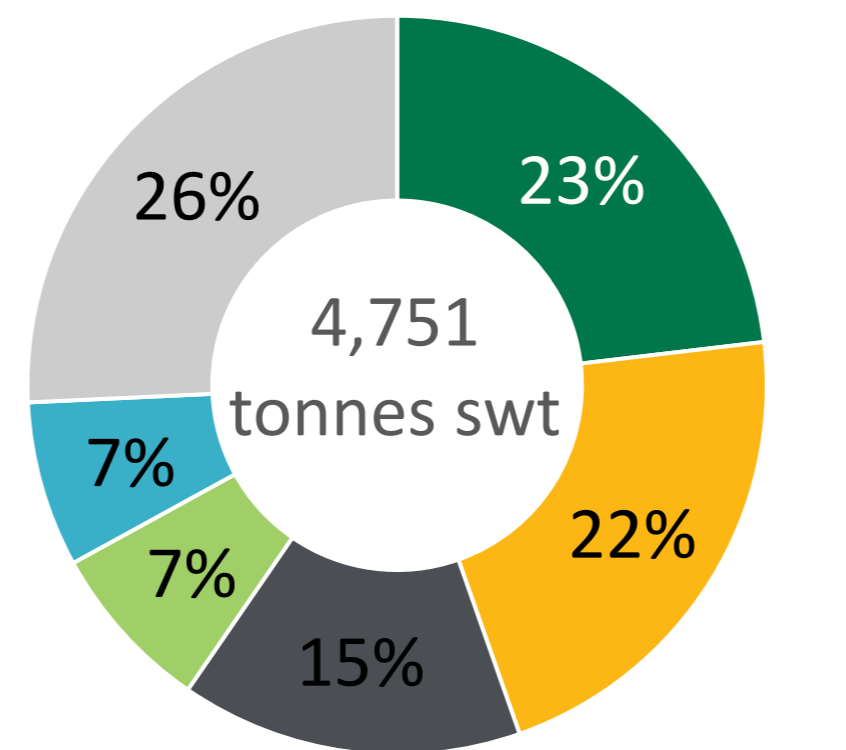
Source: Trade Data Monitor, LLC (TDM), calendar year, Note: Previously country of origin was not collected for UK imports from the EU and country of dispatch was used instead, From 2022 onwards, country of origin has been used instead with exception of Northern Ireland which still uses country of dispatch and is thus grouped into 'other' as origin is not clear

Majority of Australian grainfed beef exports to the UK are chilled products, including highly marbled products such as Wagyu

Australian beef exports to the UK by storage and meat type

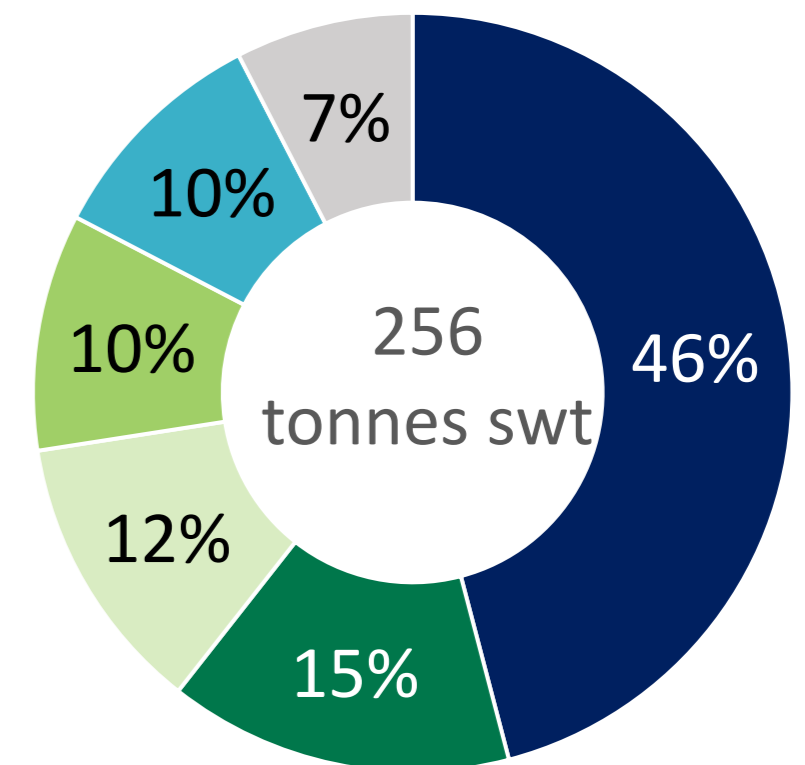


Chilled grainfed (2025)



- Topside/Inside
- Silverside/Outside
- Brisket
- Striploin
- Cube Roll/Rib Eye Roll
- Other

Frozen grainfed (2025)



- Manufacturing
- Topside/Inside
- Thick Flank/Knuckle
- Striploin
- Cube Roll/Rib Eye Roll
- Other

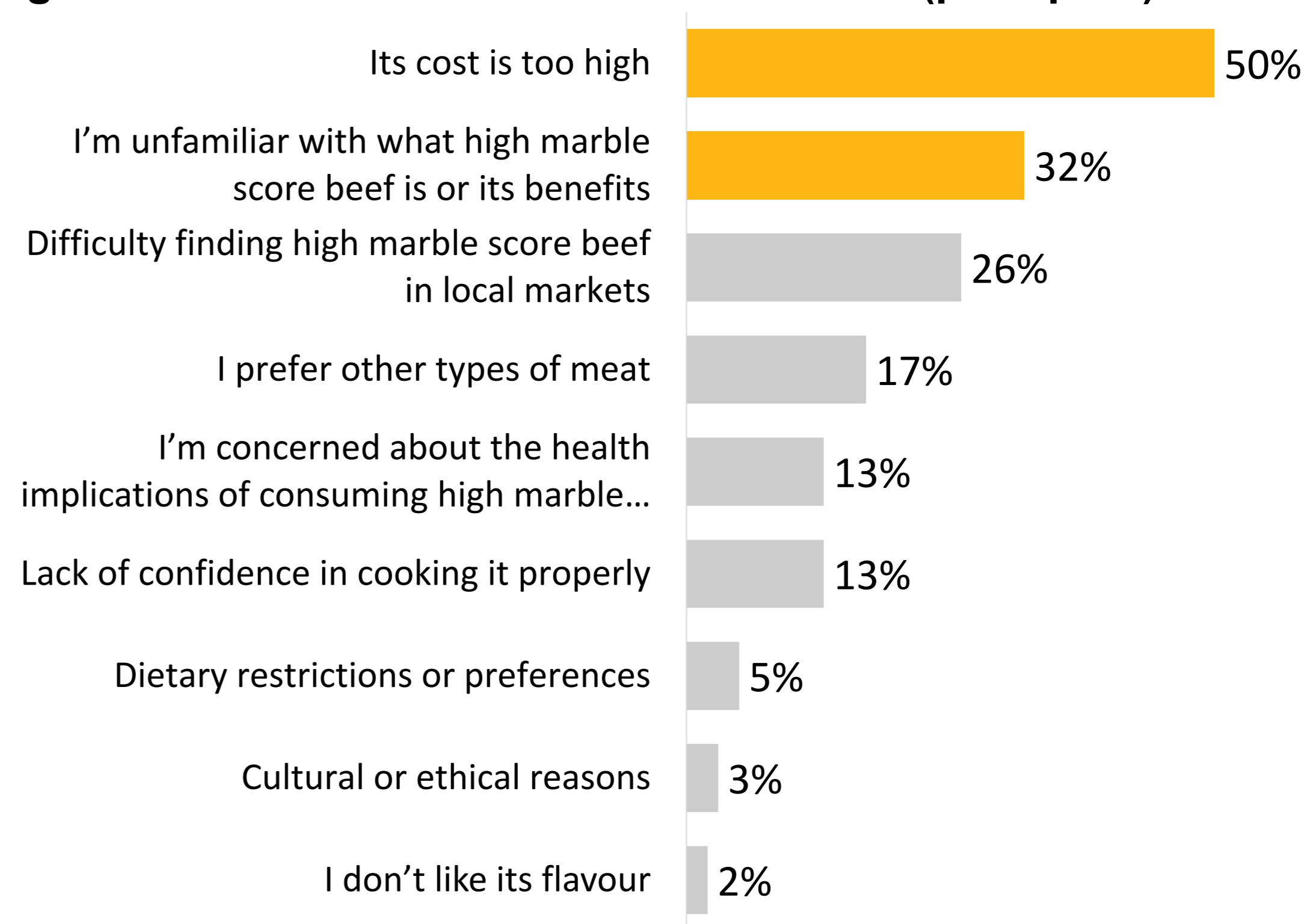
Source: Department of Agriculture, Fisheries and Forestry

Among those who have purchased high marble score beef, there's an appreciation of flavour and tenderness. The key barriers remain cost, lack of familiarity and understanding of its benefits

High Marble Score Beef - Purchase drivers (prompted)



High Marble Score Beef - Purchase barriers (prompted)



Source: Global Consumer Tracker 2025

BOUGHTHIGHMARBLE_CEFUP. Which of the following factors motivated you to purchase high marble score beef in the past? Base (n=88)

HAVENTBOUGHTHIGHMARBLE_CEFUP. What are the main reasons you haven't purchased high marble score beef? Base (n=895)

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