



Opportunities for Australian red meat in Mainland China foodservice

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Global Market Insights



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Opportunities for Australian red meat in Mainland China foodservice

This report summarises foodservice insights from a research study commissioned by MLA and conducted by research agency *China Skinny*, supplemented with additional market and consumer insights from other sources for context



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Opportunities for Australian red meat in Mainland China foodservice

1. Key take-aways

Macro-economic and market context:

Positive outlook for foodservice spending despite subdued consumer sentiment



- **Urbanisation continues in China along with growing numbers of affluent households** that can regularly afford imported premium red meat. Spending on restaurants and foodservices is forecast to average **4% year-on-year growth** out until at least 2029.



- Chinese consumer sentiment has been subdued. More than ever, **diners are looking for strong value propositions**, and Australian red meat is often part of delivering these.



- **Higher-end restaurants** have been under pressure; operators have been looking for ways to bolster margins by **optimising lower value products and cuts**.



- **The mid-tier, casual and chained restaurant segments** have seen expansion and some **premiumisation**, with quality red meat an increasingly important selling point. These operators will continue to look for **provenance stories and related unique selling points** to leverage as a competitive point-of-difference.



- **Reduced presence of US beef** in the China market also presents opportunities for Australian red meat.
- Very high proportion of Australian red meat is utilised in the foodservice sector (~70% of AU beef, ~90% of AU lamb)

China foodservice trends:

Opportunities for Australian red meat to leverage foodservice sector trends



- Growing enjoyment of red meat has driven **growth in red-meat heavy cuisine restaurants** such as Korean, American and Japanese and **increased red meat dishes on-menu** for cuisines that have not traditionally featured many red meat dishes such as French, Thai and Chinese regional cuisines.



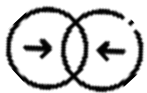
- With intensified competition and sluggish demand, operators are **using premium red meat items to differentiate** on “value for quality” and “affordable premium”. Australia’s wide product and cut portfolio makes it uniquely well-placed to offer premium quality items at all price points.



- With operators across all price points focused on protecting margins, there has been a **trend to shift from grainfed to grassfed products, from lamb to mutton, and from higher value to lower value cuts**. Australia’s wide product portfolio provides the range of product types and cuts across the gamut of operations.



- The **growth in single person households** is driving **premiumisation in the “Solo Dining” segment**, with operators looking for smaller portion sizes of quality red meat products.



- Operators are innovating to compete with **cuisine fusions and new dishes**. Perceived as the category trend leader, Australian red meat is ideally suited to facilitate this, delivering quality performance across global cuisines and cook methods in 100+ global markets.

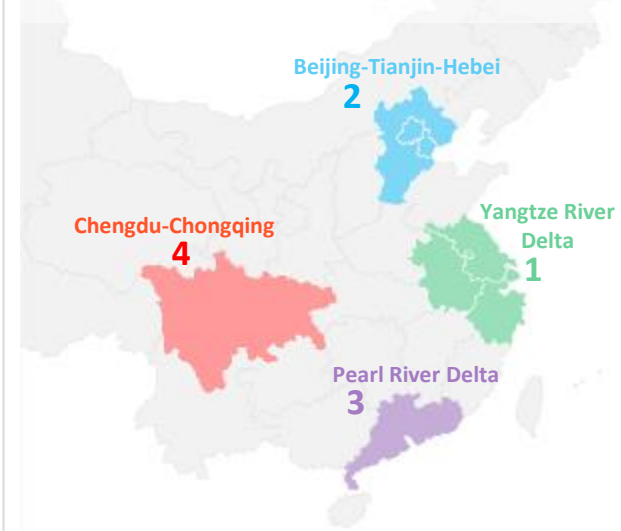


- **Global expansion of Chinese foodservice operators**, especially **hot pot chains** is driving demand for beef and sheepmeat, with Australia ideally-placed as the preferred red meat supplier globally.

Priority locations:

Mega-city clusters optimise opportunities for Australian red meat

China's fastest-growing mega-city clusters around cities with the highest spending diners and most establishments serving Aussie red meat



1. Yangtze River Delta: central east coast cities Shanghai, Hangzhou, Nanjing, Suzhou, Wenzhou
2. Beijing-Tianjin-Hebei area in the North, plus Qingdao
3. Pearl River Delta*: Southern cities of Guangzhou, Shenzhen, Foshan, Dongguan
4. Chengdu-Chongqing: the “twin city circle” in the West, plus Xi’an

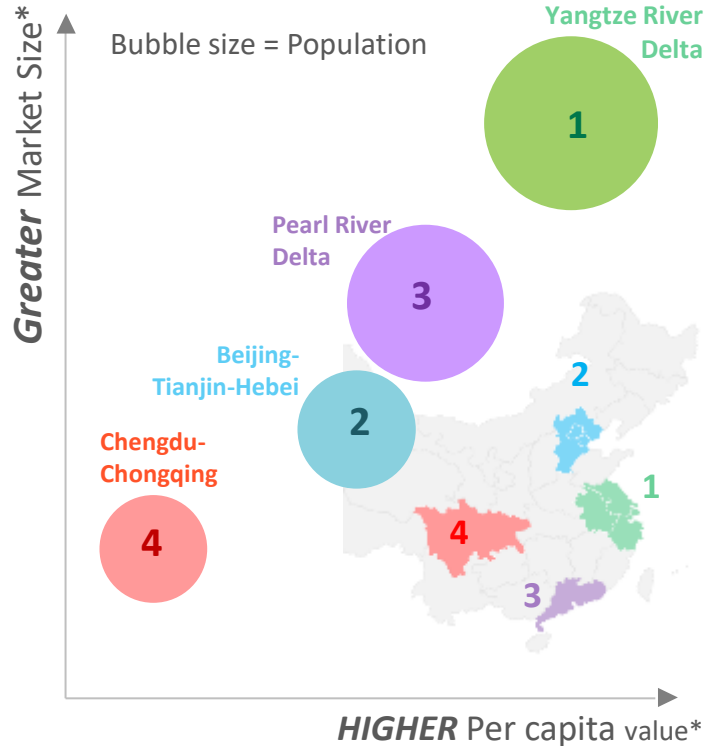


- While **15 top attractive cities**** represent the best opportunities, businesses should leverage **intra-cluster growth**.
- **Intra-cluster growth** occurs when development in a major city stimulates growth in nearby smaller cities or towns within the same urban agglomeration or economic zone***.
- **Advantages:** businesses can expand operations without leaving the economic ecosystem of a Tier 1 city. This minimises expansion costs and maximises operational efficiencies by means of centralised logistics hubs, supporting market diversification.

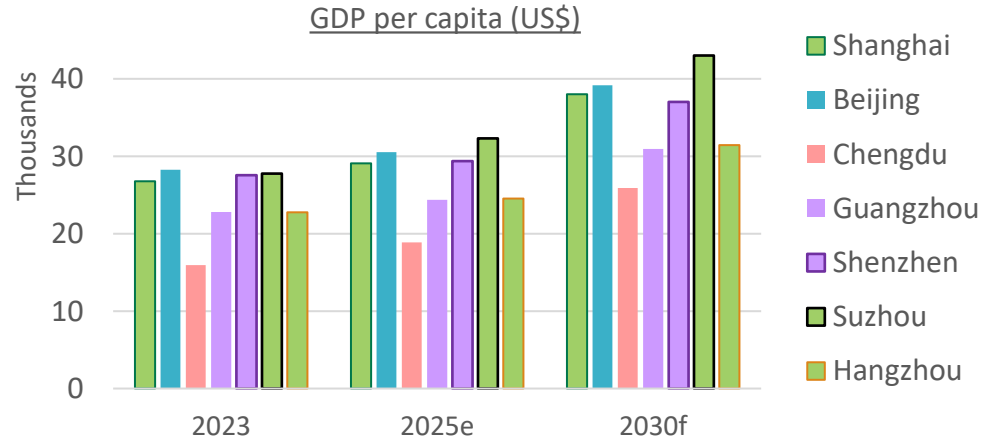
*This region expands significantly when combined with the Hong Kong and Macau Special Administrative Regions into the Pearl River Delta Greater Bay Area. Hong Kong and Macau were not included in this study. **The most attractive cities in descending order of priority: 1. Shanghai and Beijing. 2. Shenzhen, Hangzhou and Nanjing. 3. Guangzhou, Suzhou, Chengdu and Xiamen. 4. Foshan, Dongguan, Wenzhou, Wuhan, Changsha and Qingdao. *** Particularly strong in China as government promotes regional integration through infrastructure, policy coordination and industrial planning

Priority locations:

Mega-city cluster market sizing and growth outlook forecast



- All clusters are identified as high opportunity areas for premium food products such as Australian red meat.
- Among them, **the Yangtze River Delta** presents significant and growing opportunities, with Suzhou forecast to achieve the highest GDP per capita by 2030.
- **The Pearl River Delta** is another high-value growth region with geographical advantages.



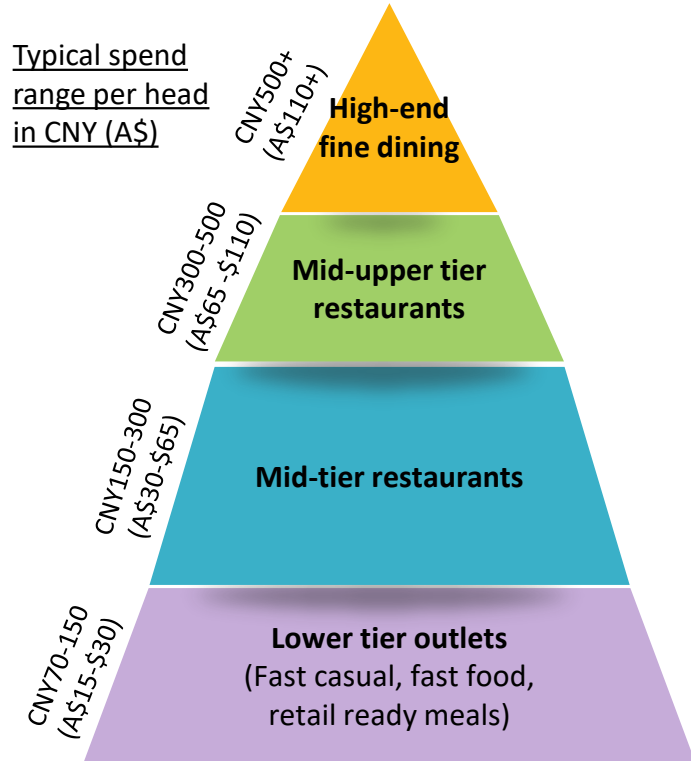
Source: China Skinny, MLA. Based on; *Annual GDP & Total retail sales value, ** Disposable income, spending, spend for culture, education & entertainment. Major city data only, 2023 data

Source: GlobalData



Opportunities for Australian BEEF products in China foodservice

China combined key city areas



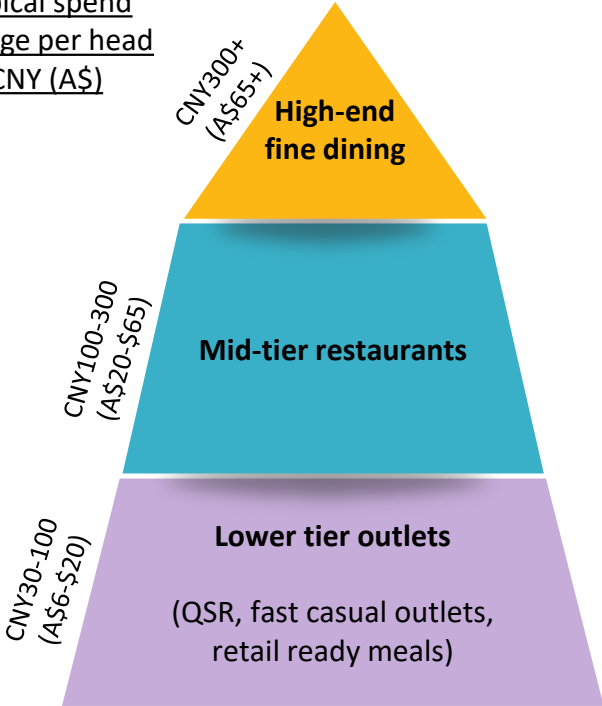
Typical BEEF products used		Points to note
High marble score grainfed & Wagyu	Top premium loin cuts (striploin, tenderloin, short rib, bone-in loin cuts); dry aged beef	High demand e.g. premium steak, roast, beef wellington, Omakase Japanese cuisine growing presence of red meat on menus; Demand for provenance/breed info
Frozen mid-marble score grainfed & Wagyu	Premium cuts (cube roll, striploin, tenderloin, chuck roll, chuck rib, blade, ribs)	Steak; thin-slice for Yakiniku, Teppanyaki; Brazilian BBQ; Thin slice pan-fry & stir-fry; Premium hot pot
Frozen grainfed & grassfed; Chilled grainfed; Lower marble score Wagyu; Angus	Mid-level cuts (chuck tender, blade, thin flank, brisket, shin, knuckle, silverside/outside); Grainfed manufacturing	Frozen bone-in cuts for slow-cook braising; Grainfed thin-slice for Korean BBQ, Japanese Shabu, hot pot, traditional Chinese stir-fry; Grainfed manufacturing for premium burgers, meatballs, kebabs
Frozen grassfed; Ready-to-cook pre-prepared items	Grassfed manufacturing, silverside/outside, brisket, shin/shank, carcase	Frozen manufactured rolls for hot pot; Bone-in cuts for use in soup/stock (Hot pot, Phở)

Opportunities for Australian SHEEPMEAT products in China foodservice



China combined key city areas

Typical spend range per head in CNY (A\$)



Typical SHEEPMEAT products used		Points to note
Frozen lamb	Premium loin cuts (rack, cutlets, shortloin, loin)	Roasting, grill/BBQ, pan frying in French/Western cuisine
Frozen lamb/Frozen mutton	Rack, flap, shoulder, leg,	Frozen bone-in cuts for slow-cook braising; BBQ, Cuts into Hot Pot rolls, pan-fry & stir-fry
Frozen mutton	Breast & flap, leg, neck, carcase, manufacturing, shank	Mix of meat/fat needed for kebabs, Chinese BBQ, Frozen manufactured rolls for hot; Bone-in cuts for use in soup/stock

Source: MLA China, China Skinny Research, Australian Beef and Lamb Analysis China, November 2024.

Social media learnings:

Communication on 'quality' and 'value' is most popular and engaging, reflecting today's challenging economic environment

BEEF

Value-for-money generated highest engagement of beef-related posts, reflecting demand for strong value propositions

Prime cuts, Marbling, Wagyu and Angus are topics of interest, with consumers keen to learn about different types of **quality** beef to make better-informed decisions about **'value'**

Other popular engaging topics relate to tips & inspiration on how to cook beef (e.g. roast, BBQ) to achieve the **best value and eating quality attributes** to judge and appreciate quality, well-cooked beef

LAMB

Similar to beef, **value-for-money** is a key engaging topic, though posts on the **deliciousness** and **quality** of lamb are more engaging than **price**

As a relatively less familiar protein, numerous engaging posts relate to how to use various **cooking methods** (e.g. stew, roast, BBQ, Hot Pot) to **bring out the best of lamb**

Eating quality attributes are engaging as consumers seek knowledge on how to judge and appreciate **quality, well-cooked lamb**

The **"smell" of lamb** is an engaging topic as it continues to be a perceptual barrier for some



**Opportunities for Australian red meat in
Mainland China foodservice**

2. Foodservice trends presenting opportunities for Australia

Driving forces in China Mainland's foodservice sector creating opportunities for Australian red meat

More special

Operators eyeing premium segments

Value *vs* & Innovation

Pressure for value leading to creative solutions

Foodservice *vs* to Retail

*Chefs & restaurants launching retail
ranges*

Quality, variety & authenticity

Expectation is high when dining out

Meal for One

Changing demography, shifting habits

Going Global

International expansion of Chinese operators

More
special

Premiumisation is a key strategy that restaurants across all price points are using in an increasingly competitive sector. Australian red meat offers a full range of products that elevates menu at any price point.



CouCou Hotpot (湊湊火锅)

Upscale hotpot offer owned by XiabuXiabu brand budget hot pot chain with 1,224+ outlets

Premiumisation strategy:

Offers premium meats including F1 Wagyu, salmon, Iberico pork to differentiate from budget XiabuXiabu brand chain

Typical spend:

> ¥150 RMB per head



Moka Bros (摩卡站)

Western-style health food chain, 8+ outlets across Beijing, Shanghai, Chengdu

Premiumisation strategy:

Uses lean Australian beef & lamb in bowls and wraps. Promotes sourcing transparency and nutritional value, targeting young professionals and fitness-focused consumers.

Typical spend:

¥80-120 per head



Haidilao (海底捞)

Budget outlets: Hailao (海捞)

6 pilot outlets, basic beef and lamb cuts, often domestic or lower-cost imports. Offers half-portions and set meals to keep prices low. Aussie sliced lamb shoulder is offered as an “affordable premium” item.

Typical spend: ¥60-80 per head

Mid-/high-end outlets: Haidilao

1,300+ outlets, premium cuts such as Australian Wagyu beef, grass-fed lamb, and Iberico pork, marketed for quality, marbling, and international sourcing.

Typical spend: ¥150–200 per head



Mid-range outlets: Kanpai Yakiniku

Izakaya (乾杯烧肉居酒屋)

Offers Australian long-fed grainfed and Wagyu beef (e.g. ribeye, chuck roll, skirt steak). Focus on “value-for-quality”, premium meats at “accessible prices”

Typical spend: ¥150-250 per head

High-end outlet: Kanpai Classic (乾杯經典)

Taiwan-owned Michelin-starred Japanese Yakiniku in Shanghai
Specialises in Australian Wagyu, offering a wide range of cuts in Wagyu tasting platters, table-top charcoal grilling, thick-sliced skirt steak

Typical spend: ¥500–800 per head

More
special

Australian red meat is uniquely placed to meet Chinese foodservice customer and diner needs, as it is considered a superior choice with many advantages

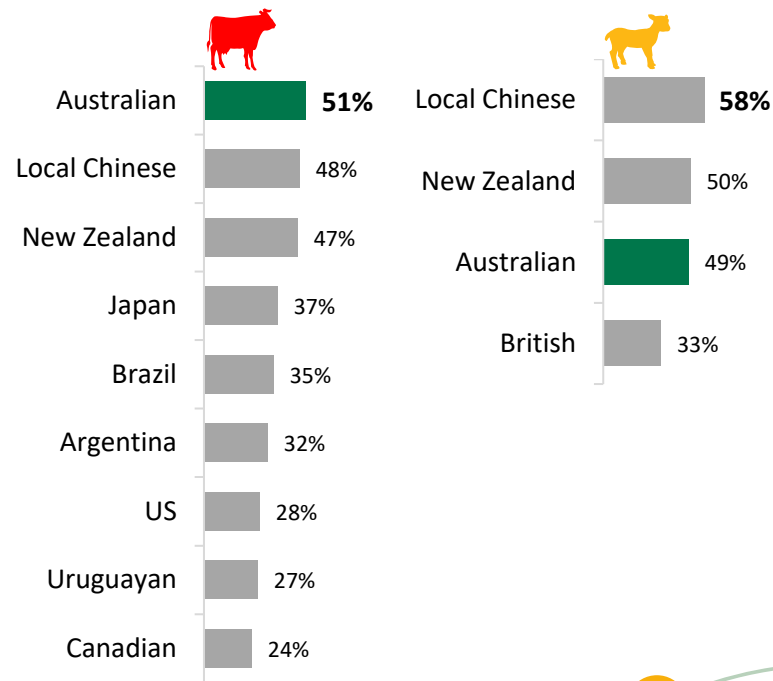


Australian red meat is considered to be superior quality from paddock to plate

Chinese consumer perceptions of beef & lamb by key import suppliers

	Australia	US	New Zealand	Uruguay	Argentina
From the perfect place to produce beef/lamb	67	50	49	47	40
My, my family's favourite	65	41	43	38	47
I trust the red meat from here	64	50	43	46	45
The most delicious red meat	63	46	53	44	40
Environmentally sustainable	62	56	48	51	49
Processed to the highest animal welfare standards	62	58	46	40	43
Consistent quality standards	62	60	48	37	46

Australian beef and lamb "lead the trends"



Source: MLA Global Consumer Tracker China 2025, % agree score

Intense competition and consumer demand for ‘value’ is driving innovation in new dishes and fresh flavours across cuisine types



Western fast food

Enhanced innovation: in March 2025, 45 Western fast-food brands introduced a total of 58 new products, up 13.7% y-o-y.

The innovation is centered around “burgers and wraps,” “small eats,” and “pizza.”

Ingredient upgrades are key, with a focus on flavor and fillings.

EG. Pizza Hut’s Beef Rendang Pan Pizza. Taco Bell’s spicy lamb burrito and char siu pork tacos. McDonald’s Peking duck McWrap.



Hot Pot

New ingredients: 22 hot pot brands launched 88 new products, mostly new ingredients including premium and unique ones, in March 2025.

EG. Left Court Right Yard Fresh Beef Hot Pot introduced goji berries; Pei Jie Chongqing Hotpot introduced Wagyu beef tongue; Hong Jie Old Hotpot offers pre-marinated lamb rolls in Xinjiang-style cumin spice; Hotpot Republic introduced new gourmet black garlic beef paste dipping sauce



Noodles

New regional flavor fusions: 61 noodle brands launched 43 new products in March 2025, including local regional flavors and ingredients.

EG. Meet Noodles fused braised pork with chili-pepper-ginger sauce to create a Sichuan-style “Soul-Snatching Braised Pork Noodles”; Tan Tsai Rice Noodles fused Cantonese flavors to launch “Radish and Beef Brisket Mixed Noodles”; Ajisen Ramen created a “Japanese Black Truffle & Mushroom Thick Soup Ramen”.

Value vs & Innovation

Innovative fusion concepts in China restaurants offer potential opportunities for Australian red meat to leverage its category leadership perception

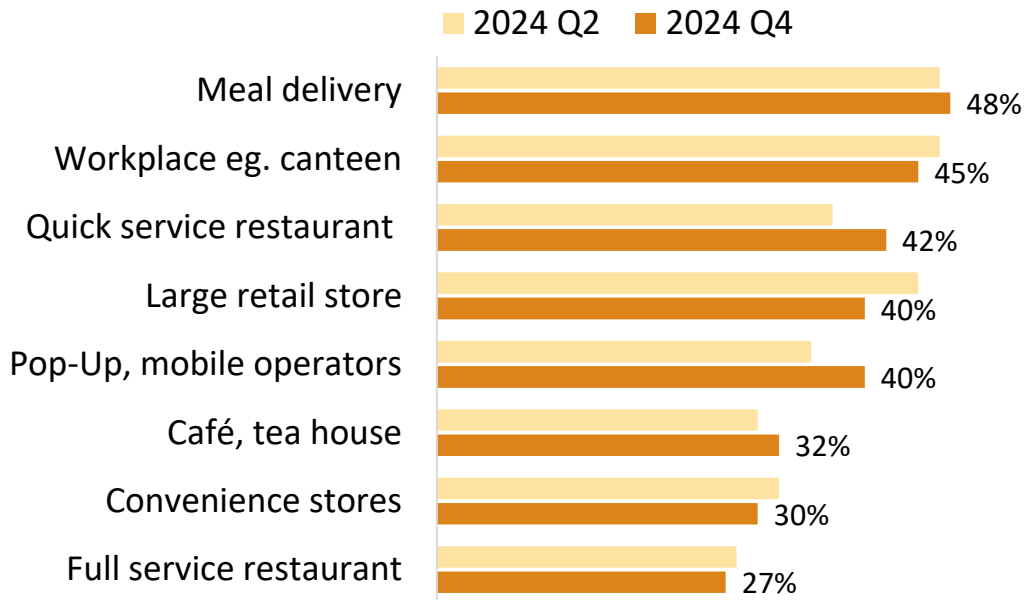
As a favoured product around the world - exported to over 100 destinations - and a uniquely diverse product portfolio, Australian red meat has products suited to a broad range of global cuisines and cooking methods

Fusion cuisine/dish concept	Description	Restaurant Name
Sichuan Tapas Bars	Spanish tapas-style dining with Sichuan flavors (spicy lamb skewers, mala octopus, chili pork bites)	The Sichuan Project
Italian Hotpot	Hotpot with Italian broths like tomato basil and truffle cream, featuring meats like prosciutto, meatballs, and beef ravioli	Hotpot Republic
Xinjiang-Brazilian BBQ	Combines cumin-spiced lamb skewers from Xinjiang with Brazilian churrasco-style sides	Skewer & Samba
Peking Duck Pizza	Crispy duck skin, hoisin sauce, scallions, and cucumber served on thin-crust pizza	Duck & Dough
Korean-Chinese BBQ Fusion	Korean-style grilled meats paired with Chinese sauces and sides	Seoul Grill House
Yunnan-Indian Curry Bowls	Yunnan-style meats (wild boar, cured pork) served in Indian masala gravies with naan or rice	Spice Trail Yunnan
Char Siu Tacos	Cantonese-style BBQ pork served in soft taco shells with Asian slaw and chili mayo	Bao & Taco
Sichuan-Mexican Burritos	Spicy beef or lamb wrapped in burritos with Sichuan peppercorn sauce	Chili Wrap Republic
Yakitori Dim Sum	Yakitori-style grilled meats served in dim sum baskets with Chinese style dipping sauces	Steam & Skewer
Middle Eastern-Chinese Lamb Wraps	Lamb shawarma-style meat wrapped in Chinese flatbread, with cumin	Silk Road Eats

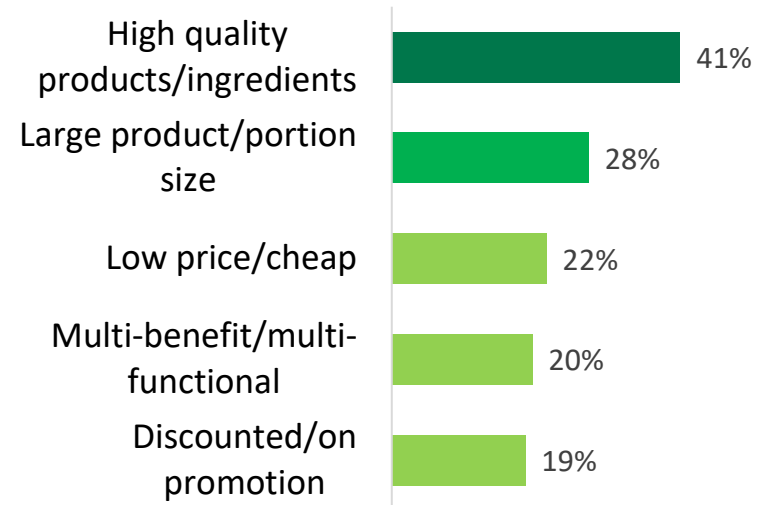
Value vs & Innovation

In recent years, high-end restaurants have been challenged by reduced discretionary spending, while lower to mid-tier casual establishments have expanded. Red meat still features on-menu and diners prioritise strong value propositions.

China: order food/drinks at least once a week via...



For Chinese consumer spend on meat, "good value for money" means high quality product above all else



Shifts in Australian beef cuts to China indicate some trading down due to higher price sensitivity, as operators try to preserve margins - shifting to grassfed over grainfed and to lower value cuts -



Australian grassfed beef exports to China – Jan-Jun YTD

2025 Jan-Jun year-to-date **grassfed** export volume is up 33% year-on-year

Higher demand for:

Manufacturing, Topside/inside, Cube roll/Rib eye roll, Rump, Neck, Tenderloin

	YTD 2024	YTD 2025	Qty YTD YOY % chg Grassfed exports
Ribs Prepared	252	34	-87%
Tenderloin	94	148	57%
Rump	215	364	70%
Intercostals	342	371	9%
Cube Roll/Rib Eye Roll	228	405	77%
Striploin	430	585	36%
Carcase	711	645	-9%
Chuck	1,021	1,222	20%
Neck	808	1,265	57%
Thick Flank/Knuckle	1,587	1,306	-18%
Short Ribs	1,325	1,574	19%
Topside/Inside	881	1,805	105%
Thin Flank	1,793	1,903	6%
Chuck Roll	1,907	2,966	56%
Silverside/Outside	3,869	3,356	-13%
Blade	3,383	3,580	6%
Ribs	4,049	4,722	17%
Shin/Shank	8,059	7,596	-6%
Manufacturing	5,365	12,561	134%
Brisket	9,378	14,262	52%
Grand Total	45,697	60,671	33%

Australian grainfed beef exports to China – Jan-Jun YTD

2025 Jan-Jun year-to-date **grainfed** export volume is up 55% year-on-year

Higher demand for:

Thin flank, Neck, Manufacturing, Skirt, Silverside/outside

	YTD 2024	YTD 2025	Qty YTD YOY % chg Grainfed exports
Ribs Prepared	489	269	-45%
Tenderloin	317	367	15%
Flank Steak	368	512	39%
Neck	220	535	143%
Skirt	462	812	76%
Thin Flank	186	881	375%
Intercostals	683	897	31%
Rump	946	1,085	15%
Topside/Inside	991	1,398	41%
Ribs	1,691	2,050	21%
Chuck	1,541	2,164	40%
Striploin	1,988	2,513	26%
Cube Roll/Rib Eye Roll	2,041	2,793	37%
Thick Flank/Knuckle	2,322	3,249	40%
Shin/Shank	2,885	4,304	49%
Silverside/Outside	3,387	5,812	72%
Chuck Roll	4,200	6,013	43%
Blade	4,769	7,150	50%
Brisket	7,143	10,238	43%
Manufacturing	7,245	14,976	107%
Grand Total	43,876	68,020	55%

While demand for premium lamb cuts remains firm, there has been higher demand for mutton carcase and forequarter



Australian lamb exports to China – Jan-Jun YTD

2025 Jan-Jun year-to-date lamb export volume is up 19% year-on-year

	YTD 2024	YTD 2025	Qty YTD YOY % chg Lamb exports
Chump	60	95	57%
Rack	99	245	148%
Shortloin	211	461	119%
Leg	275	1,094	298%
Carcase	609	703	15%
Shank	799	336	-58%
Shoulder	1,275	2,090	64%
Neck	1,995	1,928	-3%
Manufacturing	5,821	7,547	30%
Breast & flap	17,035	19,109	12%
Grand Total	28,178	33,608	19%

Higher demand for:
Leg, Rack, Shortloin and Shoulder

Australian mutton exports to China – Jan-Jun YTD

2025 Jan-Jun year-to-date mutton export volume is up 11% year-on-year

	YTD 2024	YTD 2025	Qty YTD YOY % chg Mutton exports
Forequarter	198	360	82%
Neck	248	284	15%
Rack	291	116	-60%
Bone-in Loin	411	391	-5%
Shank	1,163	399	-66%
Shoulder	1,177	1,294	10%
Leg	1,979	2,449	24%
Manufacturing	3,445	2,771	-20%
Breast & flap	11,114	11,833	6%
Carcase	11,897	15,405	29%
Grand Total	31,922	35,304	11%

Higher demand for:
Forequarter, Carcase

Opportunities for foodservice brand extensions into modern retail



- Numerous **popular chefs** and well-regarded **restaurant brands** have collaborated with food companies to launch modern retail product ranges
- This has supported not only the restaurant brand but also **increased home consumption of premium red meat** by offering **quality convenience**



Chef Name	Brand/Product Line	Product Type	Availability
Chef Dong Zhenxiang (Da Dong)	Da Dong Gourmet Series	Packaged sauces, ready meals	High-end supermarkets, online
Chef Lan Guijun	Green Tea Restaurant Products	Tea-infused snacks, condiments	Boutique food stores
Chef Zhang Yong (Haidilao founder)	Haidilao Retail Line	Hot pot bases, dipping sauces	Nationwide retail & e-commerce
Chef Liu Yiqian	Liu's Kitchen	Traditional Shanghainese dishes	Premium grocery chains
Chef Dianxi Xiaoge	Dianxi Xiaoge Yunnan Series	Regional Yunnan spice kits, snacks	Online platforms, specialty stores
Chef Vivian Aronson	Cooking Bomb Sauce	Sichuan-style chili sauces	International and domestic retail

Growing opportunities with the rise of restaurant brands' product ranges created for modern retail



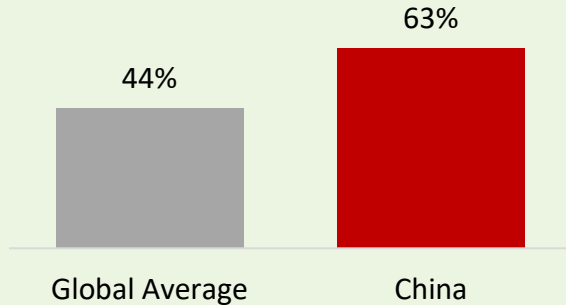
Numerous **restaurant brands' retail product ranges** have driven increased home consumption of red meat, helping consumers to overcome barriers to red meat preparation and cooking success

Restaurant Brand	Retail Product Type	Notes
Haidilao	Hot pot soup bases, dipping sauces	Yihai brand hot pot products sold in supermarkets and online
Xiabuxiabu	Instant hot pot kits, condiments	Known for convenience and affordability
Zhen Kung Fu (Real Kung Fu)	Ready-to-eat meals, frozen dim sum	Focus on traditional Cantonese flavors
Meizhou Dongpo	Packaged Sichuan dishes, sauces	Premium positioning with authentic Sichuan taste
Lao Gan Ma	Chili sauces, condiments	Originally a retail brand, now partnered with restaurants
Little Sheep (Xiao Fei Yang)	Hot pot bases, spice packs	Owned by Yum China, widely distributed
Wufangzhai	Packaged zongzi (sticky rice dumplings)	Traditional brand with modern packaging
Quanjude	Vacuum-packed Peking duck products	Iconic Beijing brand entering retail

Quality, variety & authenticity

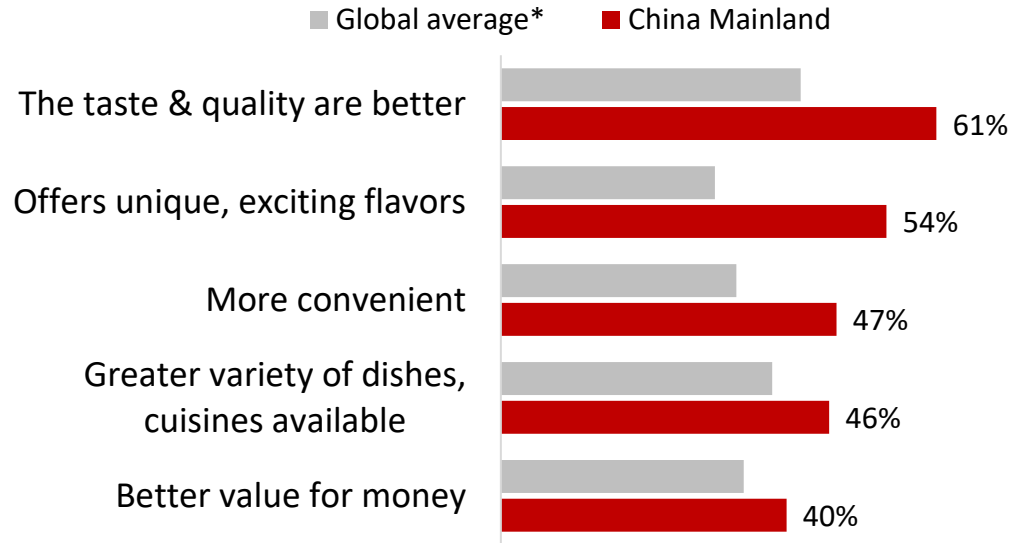
Key drivers of Chinese dining out are desire for quality, authentic taste plus excitement and variety

"I experiment with different cuisines out-of-home"



63% of Chinese diners agree "how **authentic and true it is to its traditions**" is a key driver of choice between restaurants (VS 34% global average)

Top 5 factors influencing China Mainland consumers when deciding to go out for a meal



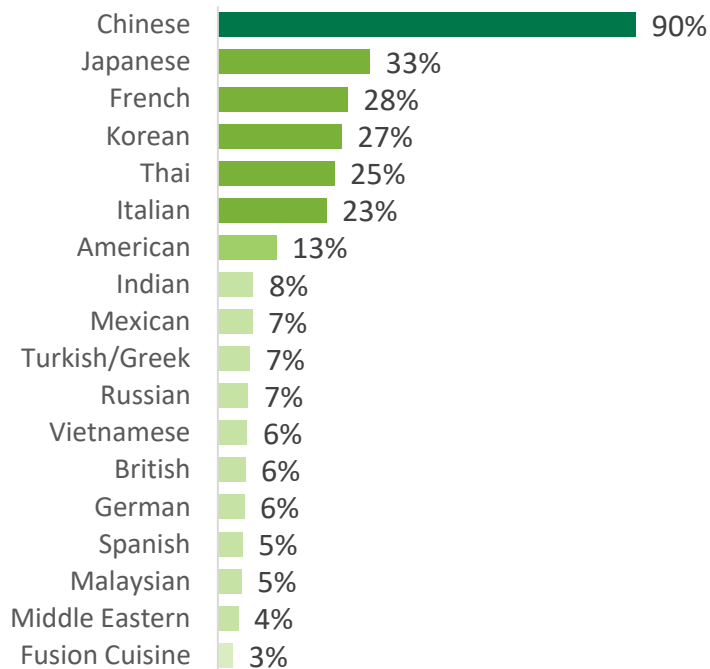
Source: GlobalData Q4 2024. Global average of 42 countries.

Source: GlobalData Q4 2022. Global average of 42 countries.

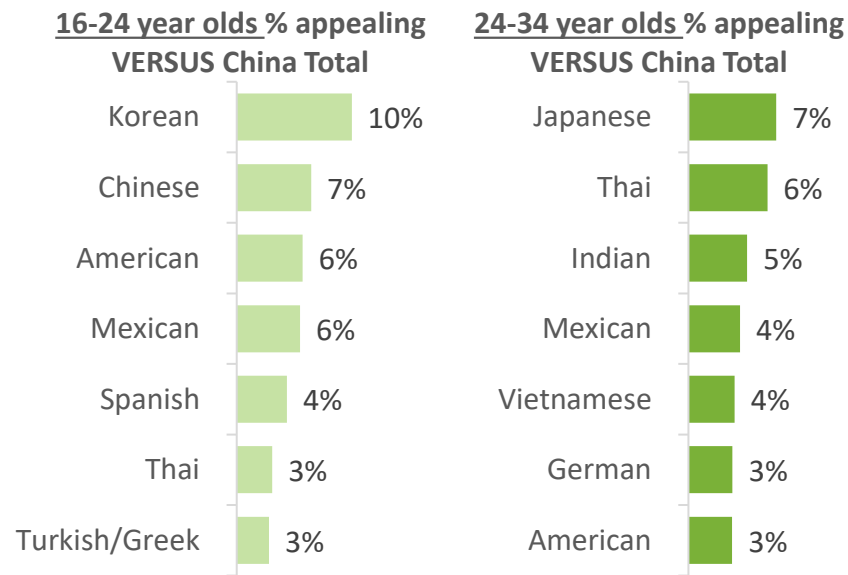
Quality,
variety &
authenticity

Chinese consumers particularly enjoy Japanese, Korean, Italian and American cuisines - all heavy users of red meat. Chinese, Thai and French are popular cuisines where Chinese love of red meat has increased red meat items on menus.

China Mainland: most appealing cuisines



Younger Chinese consumers are driving growth in cuisines that utilise more red meat



Quality,
variety &
authenticity

Over the past 10 years, cuisines that feature red meat dishes have grown in popularity in China. Diners consider red meat to add a unique flavour and eating qualities to particular cuisine dishes, spanning fine dining to street food.

Cuisine types gaining popularity in China	Key popular red meat dishes
Xinjiang Cuisine	Lamb skewers, lamb pilaf, roasted mutton
Inner Mongolian	Mutton hotpot, boiled lamb, sheep bone soup
Shaanxi Cuisine	Biang Biang noodles with beef, lamb soups
Lanzhou Cuisine	Lanzhou beef noodle soup
Middle Eastern	Lamb kebabs, beef kofta, shawarma
Western Steakhouse	Wagyu steaks, lamb chops, beef burgers
Korean BBQ	Bulgogi (beef), grilled lamb ribs
Japanese cuisine	Premium beef thin slice for Shabu Shabu, Wagyu ramen, Wagyu sushi & nigiri, beef katsu (gyukatsu)
Thai Cuisine	Beef Massaman curry, Thai beef salad (Yam Nua), Grilled beef moo ping
Spanish cuisine	Beef paella, Wagyu tapas (Wagyu albondigas), grilled lamb pintxos
Mexican cuisine	Wagyu tacos, Wagyu carne asada, beef quesadillas



Quality,
variety &
authenticity

Chinese consumers' growing appreciation for red meat is increasing the presence of red meat dishes on menus across a range of cuisines

- Chinese consumers have been gradually **consuming more red meat** and reducing consumption of pork as urbanisation and incomes have increased
- Red meat is considered a comparatively **better-tasting** and **more nutrient-dense** protein
- As consumers are less familiar with cooking red meat at home, it is often **a choice when dining out**
- This has grown **the presence of beef and sheepmeat dishes on menus**, even for cuisines that have not traditionally featured many beef dishes, such as French, Cantonese and some Asian cuisines

Cuisine	Traditional protein focus	Red meat dishes often added to menus in restaurants China
French	Poultry, seafood, pork	Wagyu steak frites, beef bourguignon, lamb racks, beef Wellington
Cantonese	Seafood, pork, chicken	Braised beef brisket noodles, stir-fried lamb with leeks, lamb claypot, spicy cumin beef
Japanese	Fish, chicken	Wagyu sushi, beef tataki, gyudon (beef rice bowl), lamb yakitori, beef in omakase
Thai	Pork, chicken, seafood	Beef massaman curry, grilled lamb satay, beef pad see ew, spicy beef salad

Quality,
variety &
authenticity

Among Chinese cuisines, consumers tend to favour their own local regional cuisine, but the major regional cuisines have become popular across major cities



Chinese diners' enjoyment of red meat has increased the presence of red meat dishes on-menu in Chinese regional cuisine restaurants

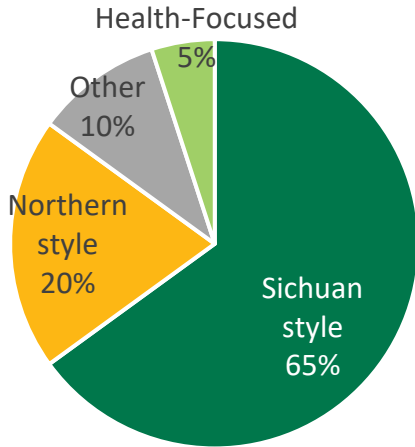
Chinese cuisine region	Examples of newer red meat dishes gaining popularity	Notes
Cantonese (Guangdong)	Black Pepper Beef Stir-Fry (黑椒牛肉)	Western-influenced dish now common in Cantonese restaurants
	Tangerine Peel Beef (陈皮牛肉)	Combines traditional citrus flavors with beef for a modern twist
Sichuan	Poached Sliced Beef in Chili Oil (水煮牛肉)	Intensely spicy and numbing; now a staple in Sichuan menus
Hunan	Dry-Fried Cumin Beef (孜然牛肉)	Bold, spicy, and aromatic; reflects northern Chinese influences
Shandong	Braised Beef with Potatoes (土豆烧牛肉)	Hearty and warming; added to menus especially in colder regions
Inner Mongolia	Roast Leg of Lamb (烤羊腿), Hand-Grabbed Mutton (手抓羊肉)	Traditional Mongolian dishes gaining mainstream appeal in urban restaurants
Xinjiang (Northwest)	Lamb Skewers (羊肉串)	Widely adopted across China as street food and restaurant fare
Yunnan	Yak Hot Pot (牦牛火锅)	Regional specialty now featured in tourist and fusion restaurants

Quality,
variety &
authenticity

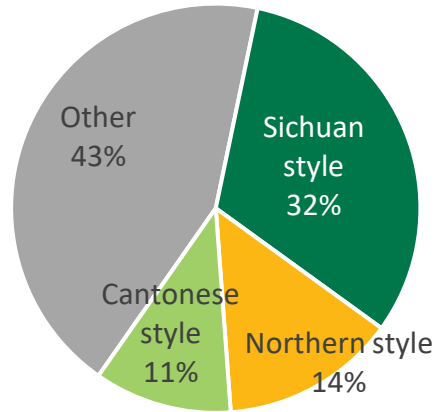
China's hot pot sector has been segmenting, diversifying and premiumising, driving new growth opportunities

China Mainland hot pot restaurant numbers by cuisine type

2015



2025



- More **premium ingredients** (e.g. wild mushrooms, Yunnan sauerkraut, Hainan vinegar hotpot)
- **Lesser known cuisines** with a focus on **authenticity** (e.g. Yunnan-Guizhou style, Qiao Jiao beef pot)
- **Immersive dining experiences** like cultural storytelling and live performance (e.g. “Tang Dynasty Banquet” hotpot, “Martial Arts” hotpot, camping hotpot, “Time travel” hotpot, “Zen” hotpot)

Solo dining trend: rise in smaller households driving new foodservice growth opportunities across price points



Meal for one
(一人食 yī rén shí)

- A combination of China's ageing population and growing number of singles not marrying are driving a rise in **single-person households** – their number has increased 73% from 2005 to number 74 million in 2025. Their percentage of total households doubled over this period from around 8% to 16%.
- Solo dining is a growing phenomenon in foodservice, with more brands promoting their **solo dining offers** to attract diners in a highly competitive market.
- As a high proportion of solo diners in large cities are in the “Single Incomes No Children” demographic, they tend to **enjoy higher discretionary spending, driving growth in demand for meals for one with premium quality protein offerings like red meat**

Pizza Hut Wow (Shenzhen and other cities)

- A new format by Yum China **designed for solo diners**
- Offers **smaller-sized pizzas and dishes** like baked escargot
- **Smaller portions** tailored for one person, priced for one
- 100+ locations converted to this format, with plans to double in next few years

Yi Wei Hot Pot (Nationwide)

- Hot pot chain with **counter-seating and single-serve pots**
- Diners select ingredients from a conveyor belt, minimizing waste
- Designed for **solo enjoyment** of a traditionally communal dish
- Already 50+ locations, plans to expand to 200 by 2026

Da Dong (Beijing, Shanghai, Chengdu)

- Contemporary Chinese fine dining
- 10+ outlets, one earned a Michelin star
- Some branches offer **individual hot pot courses** using luxury ingredients like Wagyu beef, abalone, truffle broth
- Offer “super lean duck” for health-conscious diners in **half portions** for solo diners

Chinese restaurant brands are going global, presenting potential growth opportunities for Australian red meat

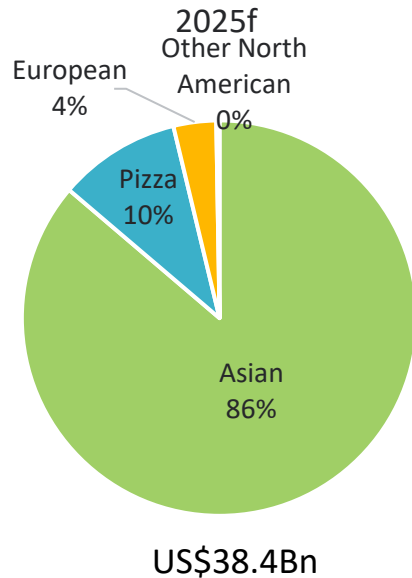


- There has been a notable acceleration of Chinese foodservice brands seeking growth **outside of China**
- Chinese brands have evolved from being associated with poor or average quality to recognition for their **category leadership**
- **Hot Pot** has particularly lent itself to global expansion as the soup base and other ingredients can be “localised”
- As hot pot is a **heavy user of beef and sheepmeat**, global consumer preference for Aussie red meat makes it a natural choice for Chinese operators looking to expand globally

	Foodservice operator	China regional origin	International Presence Highlights
	Haidilao	Sichuan	Super Hi International operates 119 stores, 60% located in Southeast Asia.
	Little Sheep (Xiao Fei Yang)	Inner Mongolia	Operates over 300 outlets globally, including in North America, North and Southeast Asia; part of Yum China
	Shoo Loong Kan (Shu Long Kan)	Chongqing, Sichuan	Known for spicy hot pot; expanded to 25 countries and regions outside of China, with over 800 stores worldwide, including in Southeast Asia and North America
	Zhangliang Spicy Soup	Heilongjiang	“Mala tang” customisable food items in a Sichuan style spicy beef bone soup. Hundreds of outlets across 15 countries in 2023 and ongoing expansion.
	Luoma Hot Pot	Chongqing, Sichuan	Gaining international traction with outlets in Southeast Asia (2 in Malaysia) and plans for North America

In China's chained full-service restaurant sector, Asian cuisine (mostly Chinese and hot pot) dominates. Other notable players using red meat include western style brands of Yum!, Saizeriya, Papa John's and AmRest Holding.

China Mainland:
Chained full-service restaurants by cuisine type



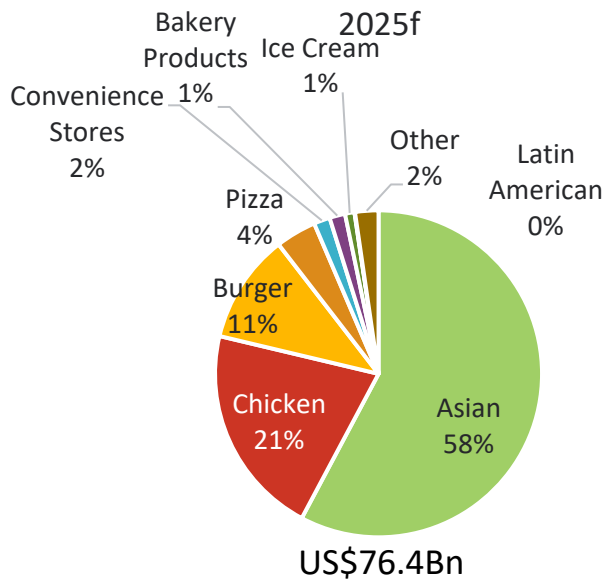
Key chained FSR players by market share, 2024



Source: Euromonitor International, includes forecast. Sales value is based on RSP = Retail Selling Price.

China's chained quick service restaurant sector is double the size by sales value. The QSR segment has more western influence than FSR. While chicken features more prominently than in FSR, red meat is popular, with diner demand increasing its presence on menus.

**China Mainland:
Chained QSR restaurants by cuisine type**



Key chained QSR players by market share, 2024

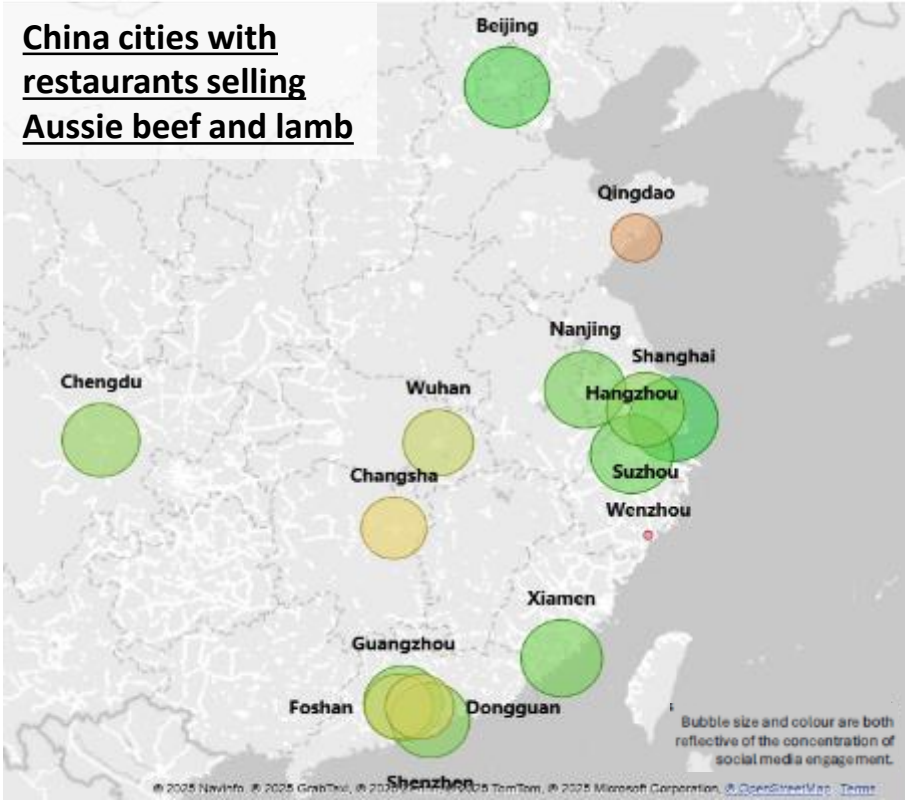


Source: Euromonitor International, includes forecast. Sales value is based on RSP = Retail Selling Price.

**3. Australian red meat in
China foodservice
– opportunities by geography**

Concentrations of restaurants selling Aussie red meat are in 15 cities, aligning with more affluent consumers with higher disposable incomes and per capita dining out spending

China cities with restaurants selling Aussie beef and lamb



- The top 15 cities with concentrations of restaurants selling Aussie red meat tend to cluster in key areas of economic growth.
- **In the mid-East coast area:** Shanghai, Hangzhou, Suzhou, Nanjing cities all have high concentrations of restaurants promoting Aussie red meat, with **Shanghai and Hangzhou** the stand-outs. Well connected by high speed train, close to Shanghai port and Free Trade Zone.
- **In the Southern area:** Guangzhou, Shenzhen, Dongguan, Foshan have comparatively somewhat less restaurant exposure for Aussie red meat but **Guangzhou and Shenzhen** are the most attractive of these.
- **In the North, Beijing** is a natural go-to, similar in size to Shanghai.
- While concentrations of restaurants are generally along the **east coast**, in line with the overall level of economic development, some **inland cities** are growing rapidly from a lower base.
- In the inland West, **Chengdu** city is a stand-out, while Chongqing and Xi'an are other cities in this broad area with potential.
- Inland cities of **Wuhan and Changsha** are considered “**emerging**” markets, with relatively rapid growth from a lower base.

Source: MLA/China Skinny Research, Australian Beef and Lamb Analysis China, November 2024

Businesses are increasingly taking a ‘regional’ approach with their China strategy. On-going urbanisation is seeing areas surrounding large cities merging into “mega city clusters” with particularly rapid development and consumer spending growth.

China’s fastest-growing mega-city clusters around cities with the largest numbers of restaurants selling Aussie beef and lamb



THE YANGTZE RIVER DELTA

- At 3.7% of the country’s size, 16.8% of the population and 24.0% of China’s total GDP, the Yangtze River Delta has been the driving force behind the country’s economic transformation.
- Four of our key cities (**Shanghai, Hangzhou, Nanjing, Suzhou**) are found within this mega cluster and are home to 37% of restaurants promoting Aussie red meat analysed in this report.

THE PEARL RIVER DELTA

- This cluster is home to Guangzhou and Shenzhen which are the manufacturing and technology powerhouses of China. Home to a large and wealthy consumer base, the region also boasts a highly educated workforce.
- Four of our key cities (**Guangzhou, Shenzhen, Foshan and Dongguan**) can be found here, as well as 25% of restaurants analysed.

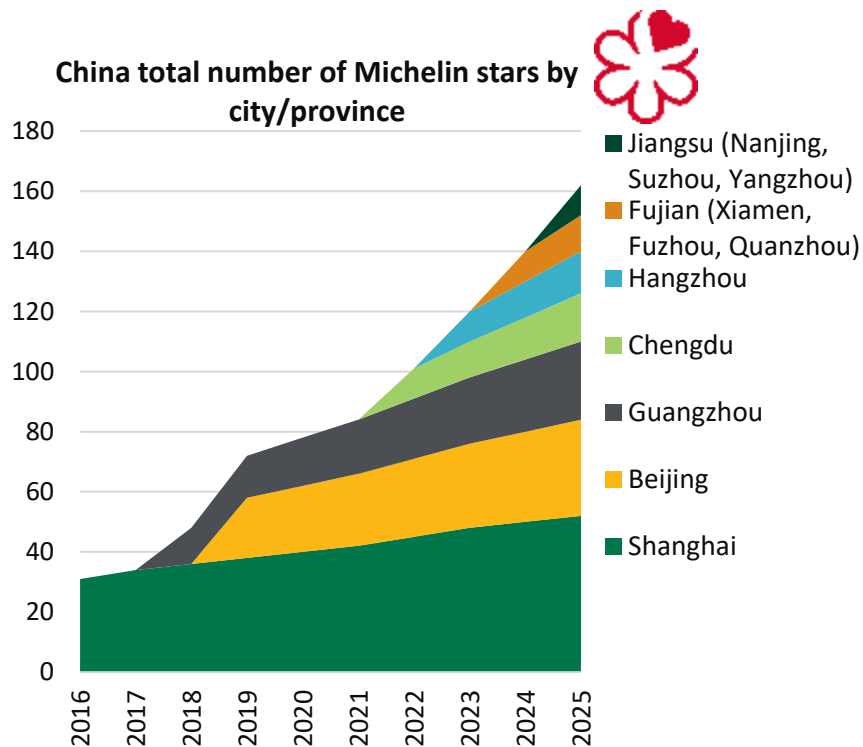
BEIJING-TIANJIN-HEBEI

- Home to around 109 million people, this cluster is the center of economic activity in the north. The region is undergoing a heavy reshuffle as “non-capital functions” are being moved out of Beijing to surrounding cities.
- Only one of our key cities (**Beijing**) falls within this cluster, although Tianjin ranked 18th under our criteria.

CHENGDU-CHONGQING

- Known as the “Twin City Circle”, this cluster plays a pivotal role in the development of western and southwestern China. This cluster was promoted to equal importance with the other three in 2019.
- Only Chengdu made it to our top 15, however Chongqing was close at 17th.

More provinces and lower tier cities are joining both the Michelin Guide and China's Black Pearl Guide, reflecting the rapid expansion of the affluent consumer base around Tier 1 cities seeking quality dining experiences

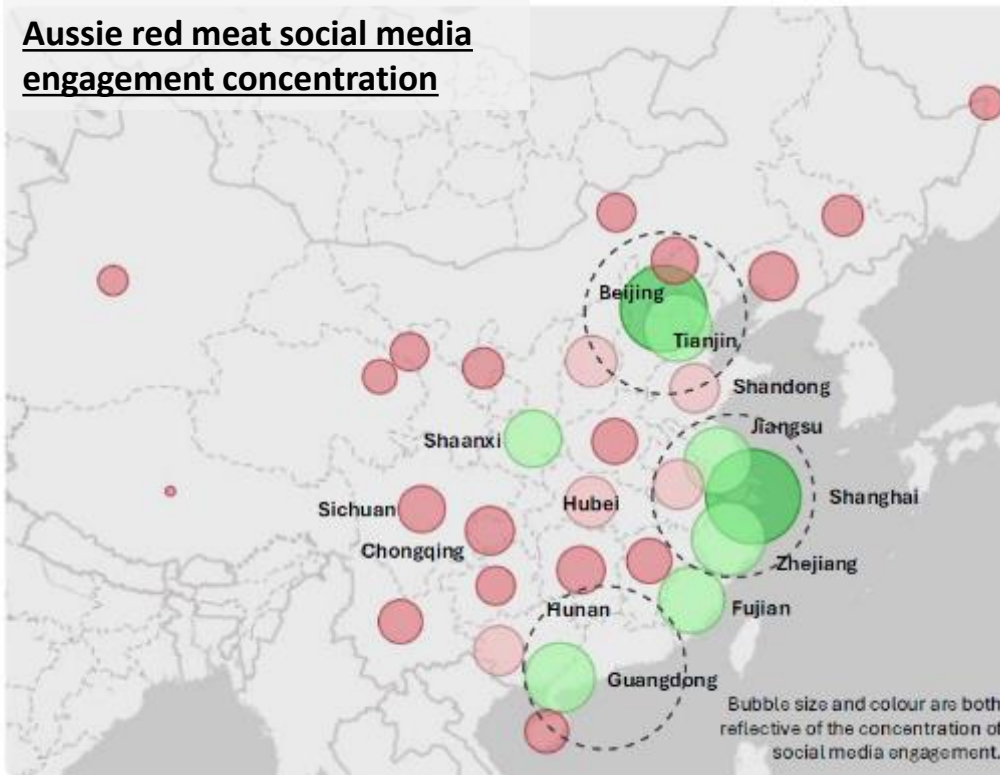


Source: Michelin Guide, Black Pearl Guide

**4. Australian red meat in
China foodservice
– social media learnings**

Geographic concentrations with higher social media engagement with Aussie red meat generally reflects areas with higher sales volumes

Aussie red meat social media engagement concentration

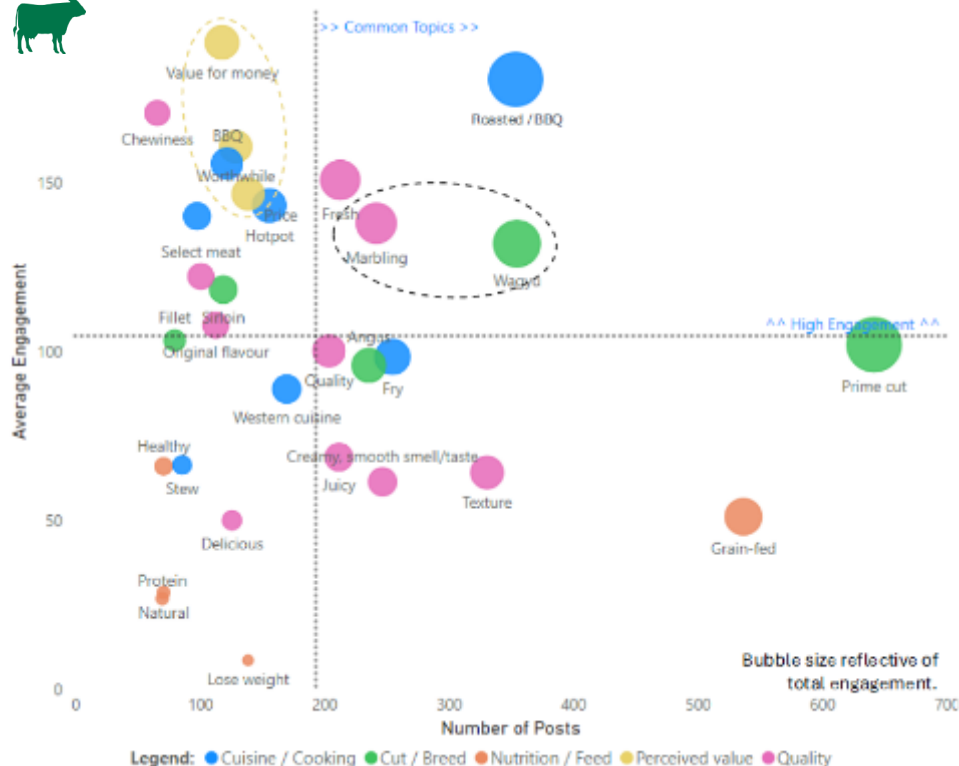


- **Coastal provinces and cities from Beijing down to Guangdong** stand out as key priority areas for leveraging social media messaging on red meat, with concentrations of consumers much more likely to engage with red meat-related content
- **Shaanxi Province**, capital Xi'an city, is an exception, with particularly engaged REDNOTE fans in this city famous for traditional beef and lamb dishes. The province and city are a major tourist destination, home of the UNESCO World Heritage Site of the Terracotta Army.

Social media key words relating to Beef that engage Chinese consumers reflect their focus on 'value' and particular interest in aspects of premium beef

Social media content on Beef:

Top 30 key words by number of posts and average engagement



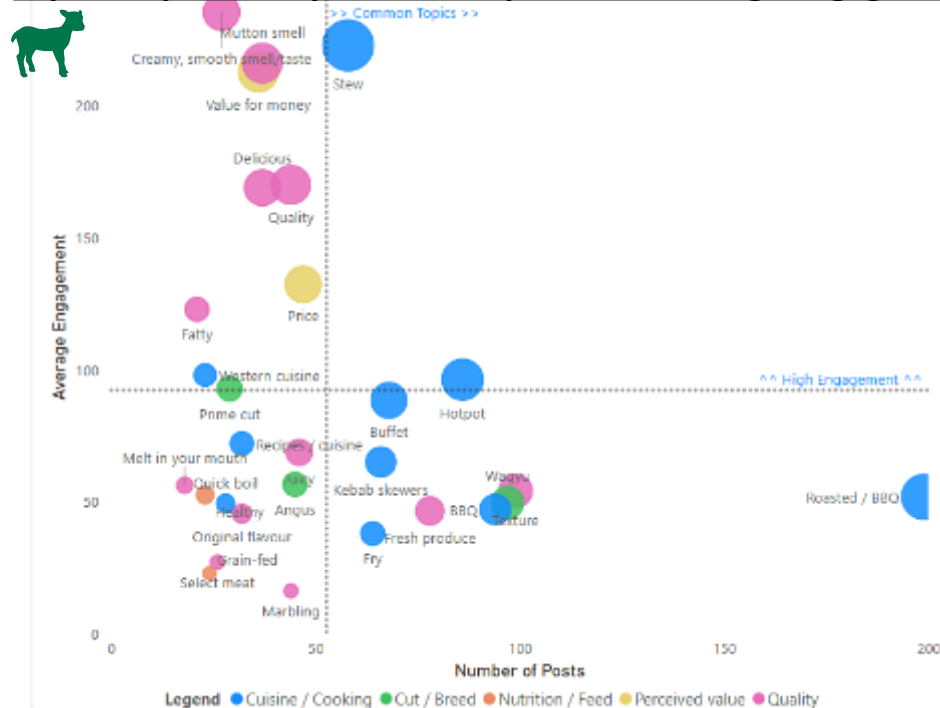
- Social media posts on 'value for money' received the highest engagement of beef-related posts, reflecting heightened desire for strong value propositions
- **Prime cuts, Marbling and Wagyu** beef are other key topics of interest, with consumers keen to learn and exchange information about different types of **quality** beef products and make informed decisions about 'value'
- Other engaging popular topics relate to '**Roast**' and **BBQ** recipes
- Fair engagement is seen in a large number of posts on **eating quality attributes**, as consumers want to learn more about **how to judge and appreciate quality, well-cooked beef**
- 'Grainfed' is a less engaging topic than more specific ones such as Wagyu, Angus

Source: MLA/China Skinny Research, Australian Beef and Lamb Analysis China, November 2024, based on social media posts relating to Aussie red meat on Douyin, RED, and Weibo. Total social media posts = 1,624.. Social media content topics are driven by keyword searches.

Engaging social media posts relating to Lamb reflect strong interest in learning about the variety of cooking methods to get the best out of lamb, alongside a focus on ‘value’

Social media content on Lamb:

Top 30 key words by number of posts and average engagement



- Numerous engaging posts on Lamb relate to how to use **various cooking methods** to get the best out of lamb, with Stew, Roast/BBQ and Hot pot the most popular, particularly during the cooler months of the year
- As a relatively less familiar protein, **eating quality attributes** are engaging as consumers seek knowledge on how to judge and appreciate **quality, well-cooked lamb**
- The **“smell” of lamb** is an engaging topic as it remains a perceptual barrier for some consumers to overcome
- Similar to beef, **value-for-money** is a key topic of interest, given lamb’s premium pricing and the current market environment where consumers are more cautious about discretionary spending.

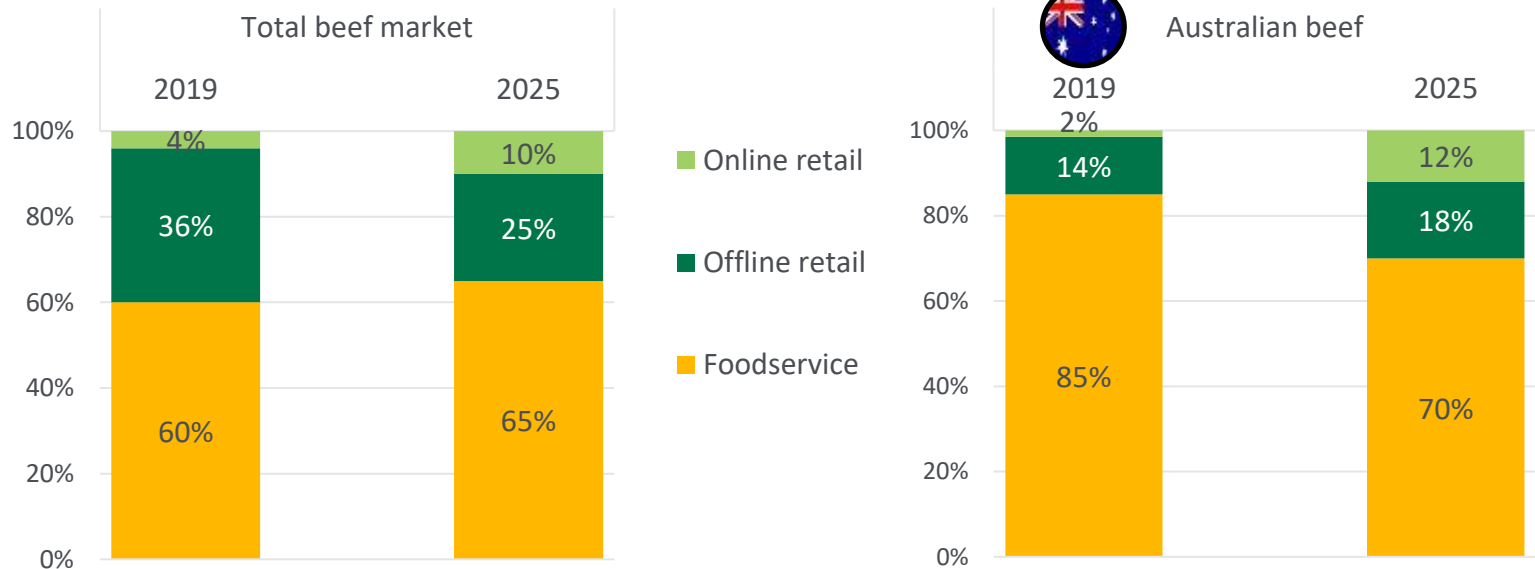
**Opportunities for Australian red meat in
Mainland China foodservice**

Appendix: Macro-economic trends shaping China foodservice

What happens in the China foodservice sector matters to Australian red meat – around 70% of Australian beef in China is consumed via foodservice channels



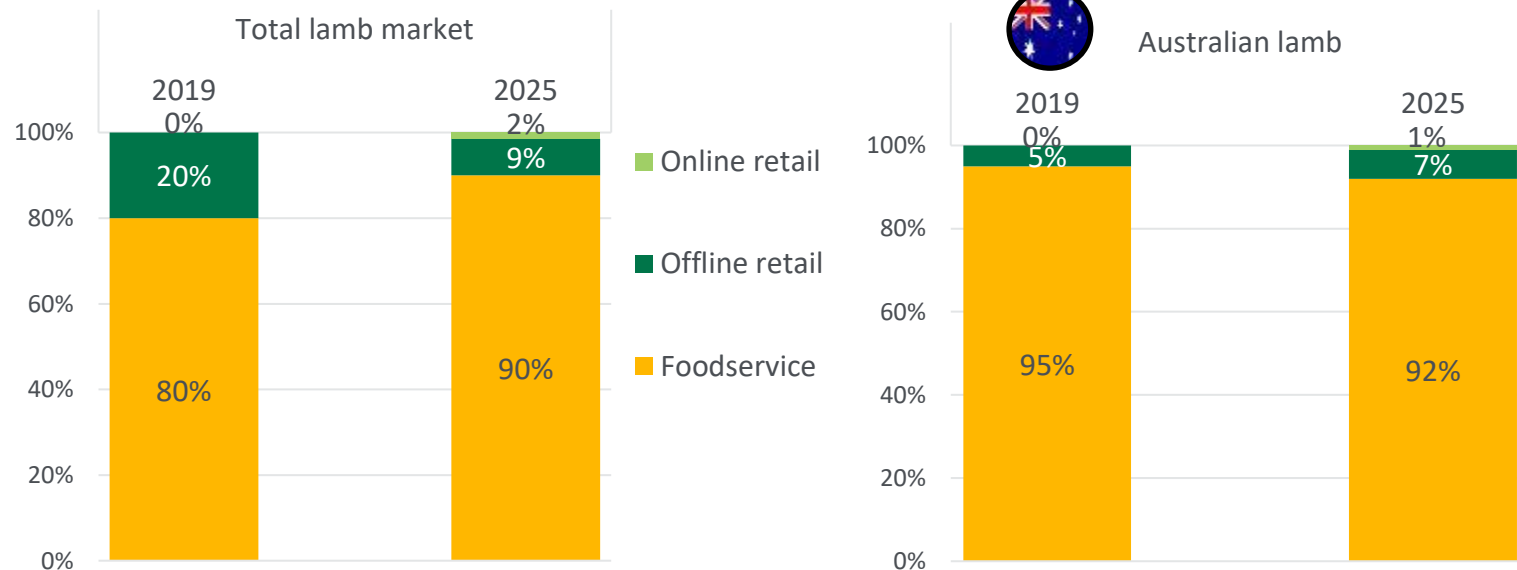
China beef utilisation



Around 90% of lamb in China is consumed through foodservice, including Australian lamb

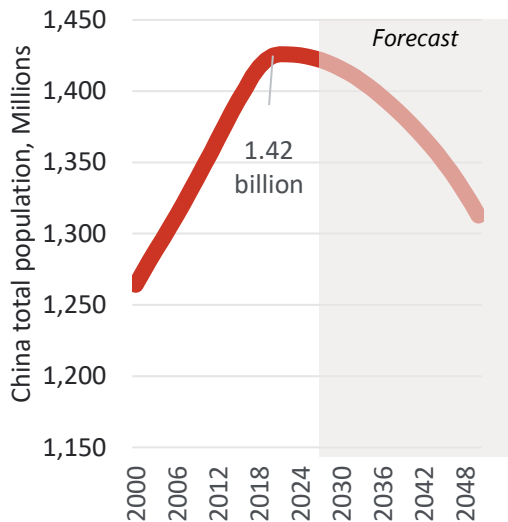


China lamb utilisation

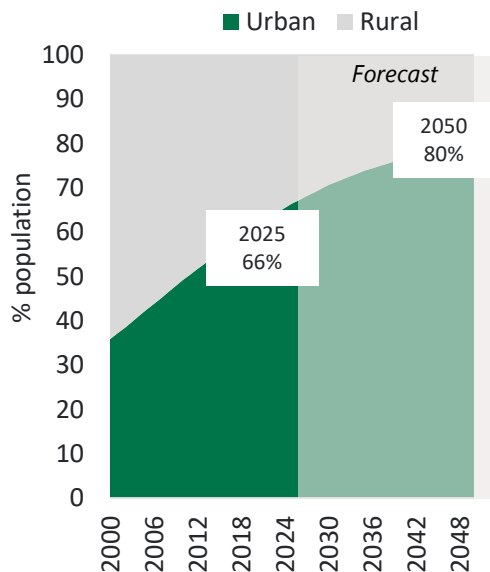


Although China's population is now beginning to decline from its large base, urbanisation continues, with an increasing number of affluent households that can afford premium imported red meat regularly

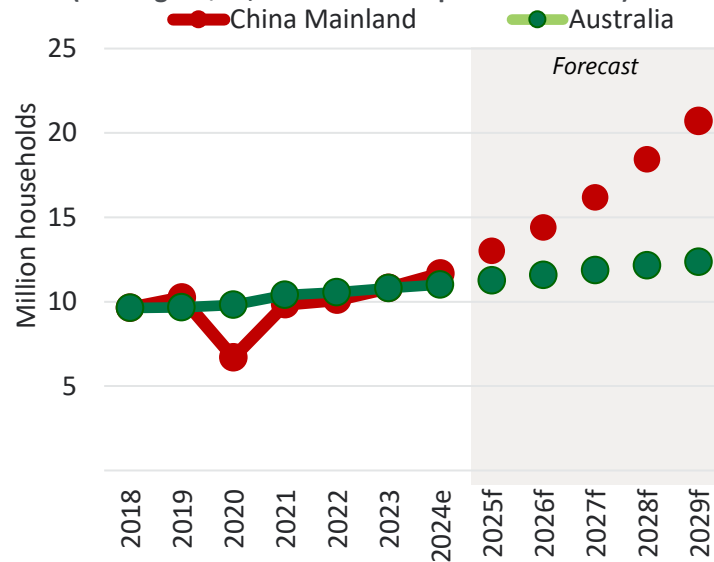
China's population peaked in 2021



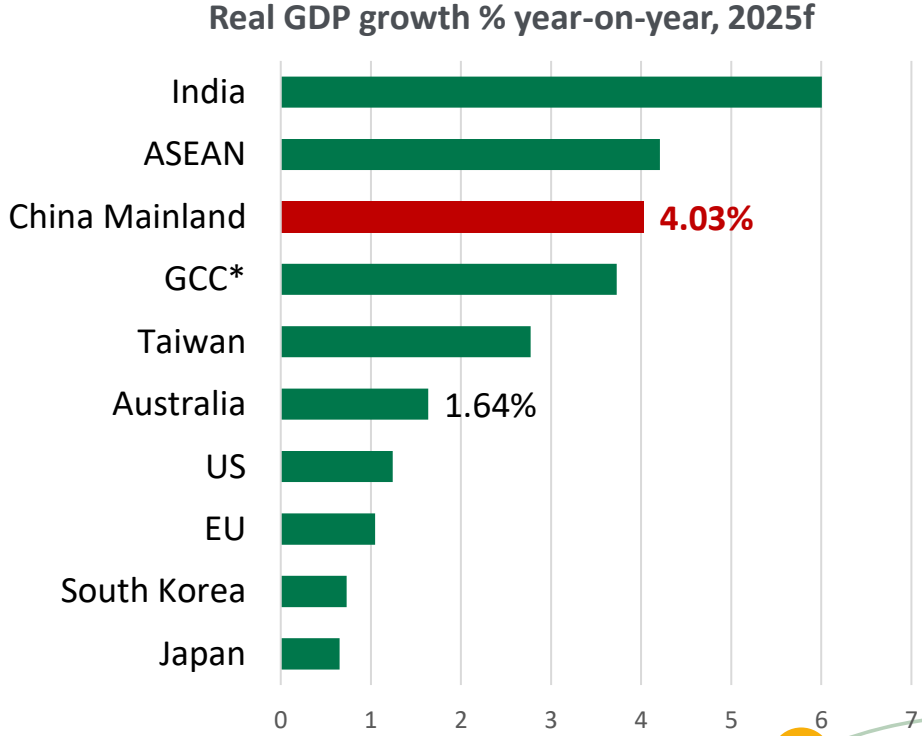
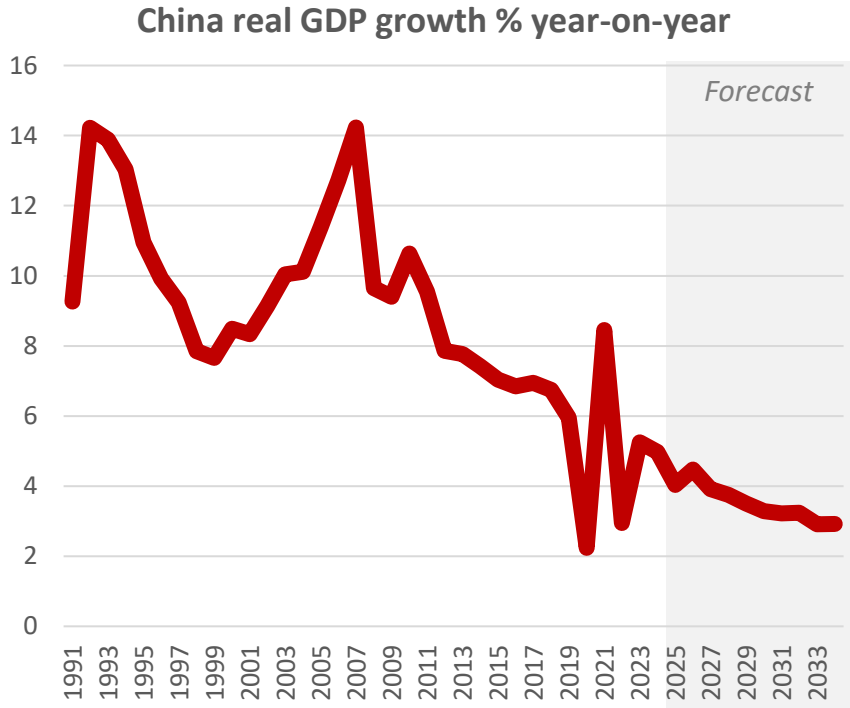
China urbanisation continues



Affluent households growing rapidly (earning US\$35,000+ annual disposable income)



China's GDP growth is forecast to continue to slow to more sustainable levels but remains strong by global standards

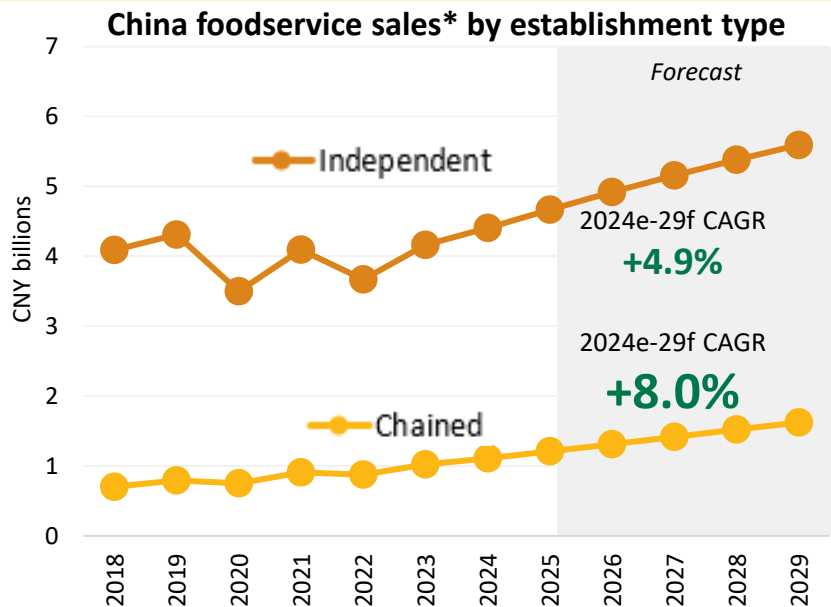


Source: Fitch Solutions, Data accessed 08/05/2025, *GCC = Gulf Cooperation Council (6 countries: Saudi Arabia, UAE, Qatar, Kuwait, Oman, Bahrain)



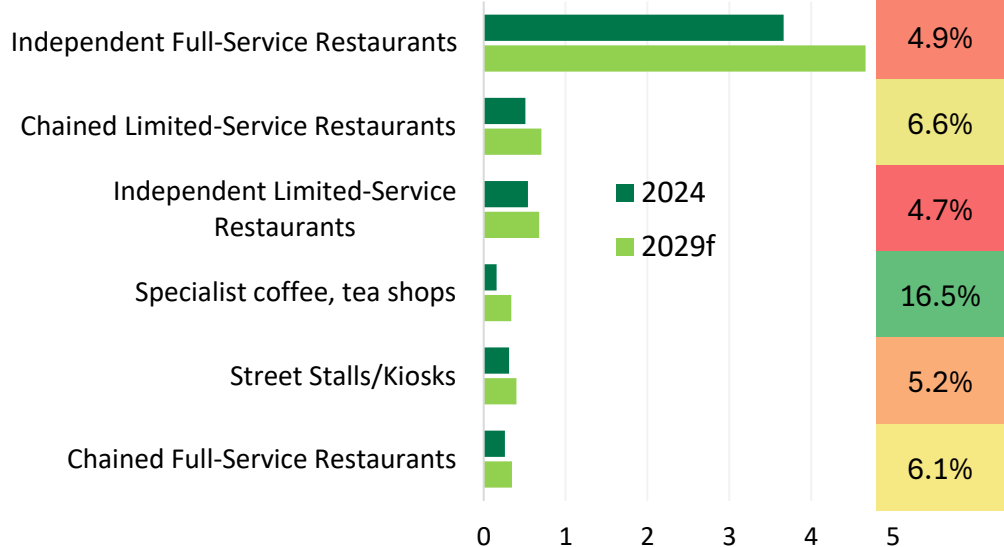
Despite challenges, the sector is forecast to grow. Independent Full-service restaurants dominate but chained restaurants are increasing their presence.

Chained establishments have grown faster than independent due to better infrastructure support and economies of scale, and more quality consistency for diners



Specialist coffee/tea shops are growing fast, increasing their food offerings with items such as sandwiches, salads, snacks & pastries which could potentially include more red meat

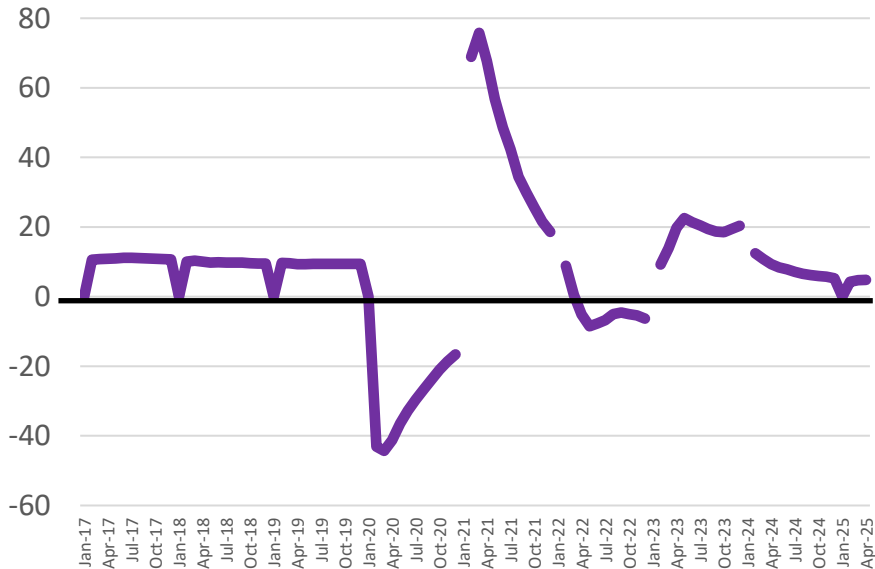
China total foodservice sales* and outlook by channel



Source: Euromonitor International, includes forecast. *RSP = Retail Selling Price. FSR = Full-Service Restaurant. LSR = Limited-Service Restaurant (fast food + 100% home delivery/takeaway outlets). Cafes/Bars, Bars/Pubs and other include both Chained and Independent. *CAGR = compound annual growth rate.

The impact of the pandemic on foodservice was long-lasting, with lockdowns only fully lifted from Dec 2022. The economy faced other challenges, including a fall in property prices, weighing on consumer confidence. Restaurant sales have risen in 2025 to-date but remain below pre-pandemic growth levels.

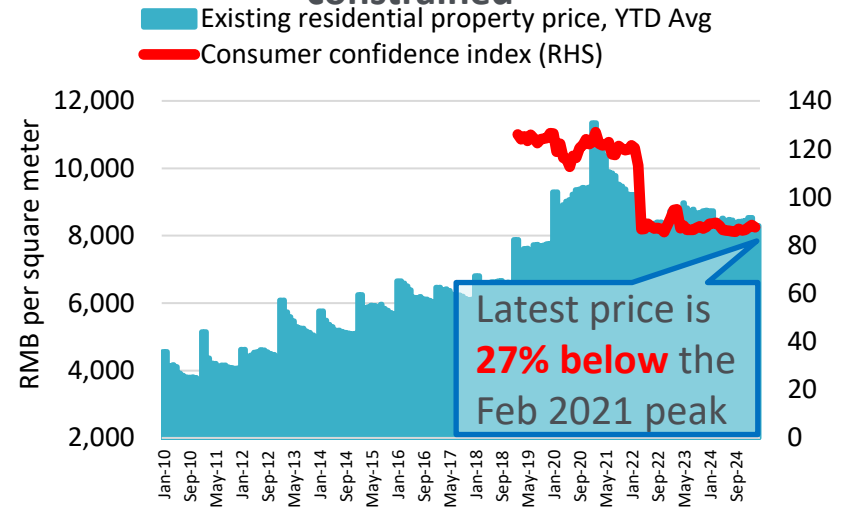
China mainland catering sales % YOY



Source: IMA Asia

After 15+ years of steady rises, declining property prices since 2021 have made consumers feel

constrained

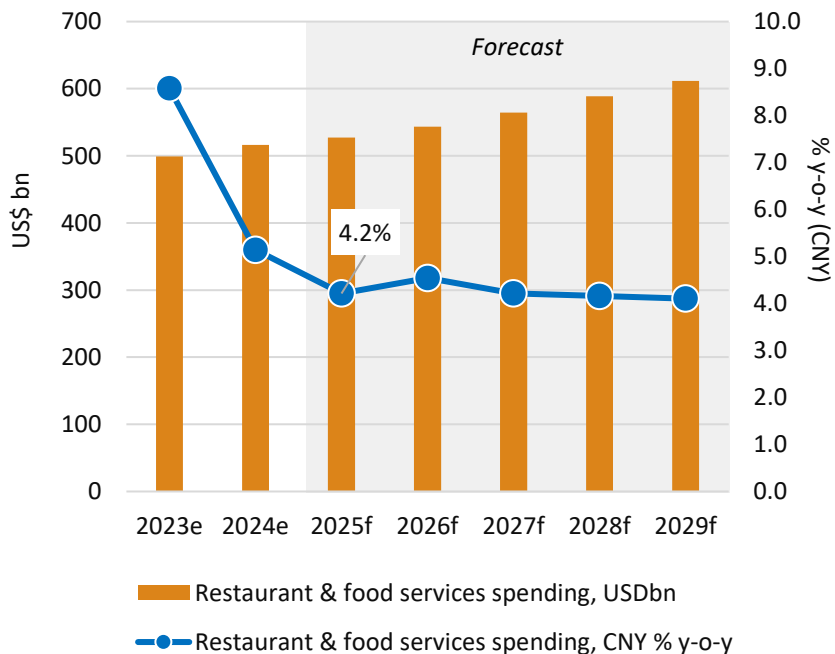


Source: IMA Asia, Consumer Confidence Index by NBS

Forecast growth in restaurant spending and tourism presents growth opportunities for Australian red meat in the foodservices sector

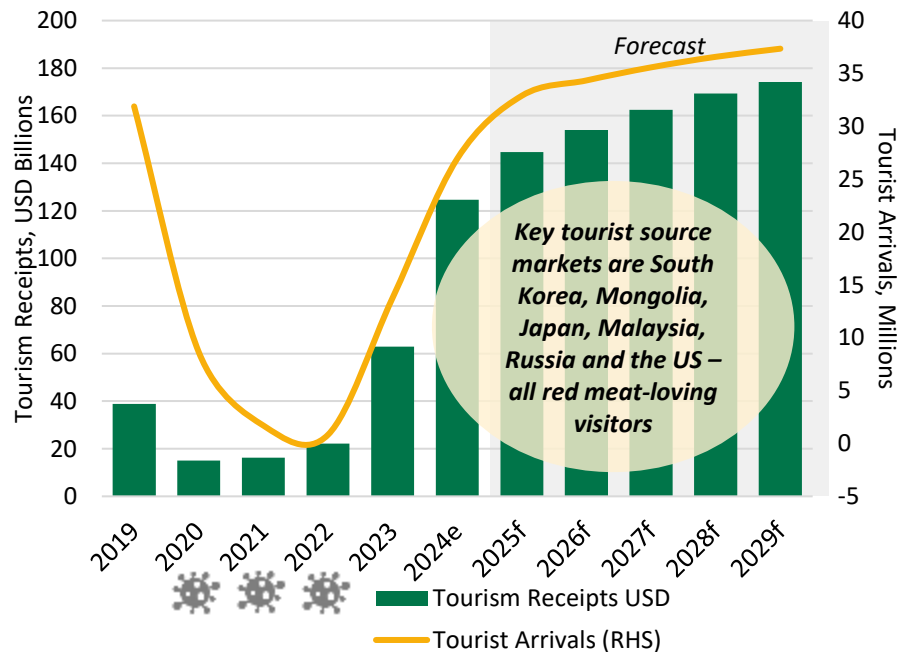


China post-pandemic foodservice spending



Source: Fitch Solutions, Data accessed February 2025

Tourist inbound arrivals to China and spend



Source: Fitch Solutions, Data accessed 09/05/2025

Opportunities for Australian red meat in Mainland China foodservice

Appendix: Research sources

Research Background

Research Objective: With the majority of Australian beef and lamb in China utilised in the foodservice sector, further understanding of the geographic distribution of end-diners was sought, as well as the types of foodservice establishments selling Australian red meat by cuisine type and level of spend per head per meal. These market and diner insights are intended to assist Australian industry to enable business development and marketing activities in China's foodservice sector to be more targeted and successful by leveraging both existing operations and networks and regional synergies.

Research Methodology: Research company China Skinny analysed platform data from Dazhong Dianping, focusing on foodservice establishments selling Australian beef and lamb. A total of 11,930 establishments representing 75 cuisine types selling Australian red meat were included in the study. Establishments include any venues that serve Australian red meat, from premium to casual full-service, quick service restaurants, to cafes and bars. Social media content analysis came from related posts on Douyin, RED and Weibo, identifying popular, engaging topics relating to beef and lamb.*

Geography: Initial analysis based on weighted metrics for 28 top-performing cities was conducted. Metrics included population, disposable income levels, number of restaurants per city, sales of Australian red meat on Douyin, Aussie red meat KOL follower numbers on RED and Aussie Steak and Australia search ranking on Baidu. The top 15 key cities** of interest were identified and serve as the foundation of the research. District-level data was also used to indicate concentrations of restaurants in the 15 cities selling Australian red meat.

Timing: the research fieldwork was conducted leveraging social media posts dating from July to December 2024, report delivered end Jan 2025.

*See Appendix for more information on these sources.

**15 cities: Shanghai, Beijing, Guangzhou, Shenzhen, Hangzhou, Suzhou, Nanjing, Foshan, Dongguan, Wenzhou, Xiamen, Chengdu, Wuhan, Changsha, Qingdao.

Appendix: Research sources



Data source for foodservice establishments selling Australian red meat, spend and geographical location

- **Dazhong Dianping:** (大众点评) is one of China's most popular local lifestyle and review platforms, including user reviews and ratings for foodservice establishment, integrated with location services and allows users to follow influencers. Used as a source for data on restaurants selling Australian red meat across China's major cities. Data collected was for all foodservice establishments selling Australian red meat, including bars and cafes. City districts with only one establishment selling Australian red meat were excluded as outliers due to their skewing of the data.



Data source for social media posts relating to Australian red meat geographical location

- **RED (RedNote):** known in China as "Xiaohongshu" (小红书), a popular Chinese social media and e-commerce platform. A hybrid of Instagram, Pinterest and Amazon, combining user-generated content with e-commerce. Used as a source for research data on number and engagement of social media posts on Beef and Lamb.
- **Douyin:** China's version of Tik Tok (抖音) is a short video and E-Commerce-integrated platform, especially live commerce (selling products during livestreams). Used as a source for research data on number and engagement of social media posts on Beef and Lamb.
- **Weibo:** (微博) one of China's largest and most influential social media platforms, often described as a hybrid of Twitter and Facebook. Users post microblogs, trending and hot topics, celebrities, influencers and brands have verified accounts, the platform supports livestreaming, supports post likes and reposting and brands use it for marketing, and its integrated with e-commerce shopping platforms like Taobao. Used as a source for research data on number and engagement of social media posts on Beef and Lamb.



抖音



Dazhong Dianping restaurant coverage



Dianping includes a **broad spectrum** of foodservice establishments, such as:

- ✓ **High-end restaurants** (e.g., fine dining, Michelin-starred venues)
- ✓ **Mid-range and casual dining** (e.g., hot pot chains, family restaurants)
- ✓ **Street food and snack shops** (e.g., dumpling stalls, street vendors)
- ✓ **International cuisine** (e.g., Japanese, Korean, Italian)
- ✓ **Local specialties and regional Chinese cuisines** (e.g., Sichuan, Cantonese, Jiangsu)
- ✓ **Cafés, dessert shops and bakeries**
- ✓ **Franchise chains** (e.g., Haidilao, McDonald's, Da Niang Dumplings)

While Dianping is extensive, some types of establishments are **under-represented or excluded**:

- ✗ **Very new or unregistered restaurants:** Especially those without a business license or digital presence
- ✗ **Remote rural eateries:** Particularly those far from urban clusters or tourist routes
- ✗ **Private clubs or invitation-only dining:** These often operate outside public review platforms
- ✗ **Pop-up restaurants or temporary food stalls:** Unless they gain viral popularity
- ✗ **Foreign-owned restaurants in smaller cities:** May not be listed unless they attract local attention
- ✗ **Ghost kitchens or delivery-only brands:** These may appear on food delivery apps like Meituan or Ele.me but not on Dianping

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