



# Market access prioritisation

# Contents

3	Introduction
4	China
6	South Korea
8	Taiwan
10	Vietnam
12	Japan
14	USA
16	Mexico
18	The Caribbean
20	MENA
22	References



# Introduction

The UK has market access in over 50 countries for sheep, beef and pig meat. The export of British red meat amounts around to just under 608,000 t a year, worth £1.76bn. Successes include the approval of new pork sites and trotters by China, the lifting of the ban on UK beef export to China, the approval of UK pork export to Taiwan, approval from Japan for beef and lamb export and our previously agreed pork access.

The global population and income growth are driving the demand for meat and meat products. The challenge for UK exporters is identifying markets with the best growth potential.

## The market access prioritisation process

Market access work includes gaining entry to new markets and maintaining or improving access to existing markets. Market access activities add value to the supply chain and maximise returns. However, gaining entry to a new market and/or improving access takes time and involves resources and tenacity. It is, therefore, crucial to ensure that resources are properly allocated. Hence the importance of having an evidence-based market access prioritisation that informs the direction of travel of our market access activities. Having said that, our market access activity plan is a living document that is closely monitored to reflect changes in the different environments in which it applies.

Our market access prioritisation exercise adopts a step-by-step approach. The initial step calls upon the expertise of the Export and Market Access team to identify potential new markets based on their knowledge and intel. The Export team has expertise in Asia, the Americas, Europe, and the Middle East and North Africa (MENA).

This provides the building block of the next stage, where the Market Access team, in partnership with the UK Export Certification Partnership (UKECP), the UK Government, and the industry, refines the list using hard and soft data. The output from this exercise aims to produce a top-priority countries list (up to a dozen countries), where the attractiveness of each potential market is then assessed using a series of criteria such as population, consumption growth, and forecast for market potential in terms of volume and value. The market access prioritisation exercise also considers market access barriers associated with having to meet complex and country-specific health and safety standards. The outcome of this stage feeds on the decision process on which markets are prioritised in light of further discussions with the UK Government, UKECP, and local intelligence.

The report aims to give a brief overview of some of the key markets in which we are currently focusing our market access activities.

Those markets include:

- China: beef and lamb
- South Korea: beef and lamb
- Taiwan: lamb and beef
- Vietnam: pork, beef and lamb
- Japan: beef
- USA: lamb
- Mexico: pork
- The Caribbean: beef, lamb and pork
- MENA: lamb and beef



**Ouafa Doxon**  
Market Access Manager, AHDB



# China

## Market overview

- China holds opportunities to expand UK trade in pork while developing a new market for beef and sheep meat
- Chinese demand for cuts not in high demand in the UK, including offal and fifth quarter, helped carcass balance and helped drive the value of the whole carcass by utilising parts that would have been of little or no value in western markets. As part of our market access priorities, we are actively exploring widening the scope of pork products for exports
- The UK gained access to beef in 2019, creating a great opportunity for UK beef exporters. Despite gaining access to this market, the UK faces challenges in harvesting the benefits, hence our priority to address them
- Gaining access to the sheep meat market will represent a trade opportunity for the UK. The steady rise in sheep meat consumption supported by our access to pork and beef markets creates the perfect momentum and opportunity for opening the sheep meat market
- China has the second-largest economy considering nominal gross domestic product (GDP) and the world's largest economy by purchasing power parity.<sup>1</sup> Economic growth has driven the growth of the middle class and urbanisation. Increasing the consumption volumes for beef and lamb is forecasted to continue. However, China's meat market is dominated by pork. Pig meat is the most popular meat consumed in China; it is expected to increase from just under 24 kg per capita in 2021 to just under 31 kg per capita in 2029<sup>2</sup>
- Nonetheless, driven by several factors, like increased urbanisation and disposable income, consumer demand for premium imported beef is expected to continue to grow<sup>3</sup>
- According to the OECD's medium-term projections (2017–2026), Chinese sheep meat production is expected to increase by 30% during this period, with beef and veal output increasing by 15%. Pork production is expected to increase by 9% only due to stricter environmental policies compared with those for other meats. However, these figures were before the African swine fever (ASF) outbreak, so will be reduced accordingly
- China's increase in meat production will not be enough to meet its increasing domestic meat demand. China needs to maintain its high level of import of meat products to supplement domestic production. Import of beef is forecasted to grow. The limited natural resources and productivity gain test China's ability to meet its growing domestic sheep meat demand. Possible opportunities for British beef and sheep meat include forequarter cuts
- Beef is predominately supplied by South America (Brazil, Uruguay, and Argentina), followed by Australia and New Zealand. Lamb, on the other hand, comes predominately from Australia and New Zealand. The EU and the USA account for over half of all Chinese pork imports



## Strengths

- Large population with high consumption and import levels of meat
- Quality and food safety drivers favour imported products
- Changing eating habits

## Weaknesses

- Dynamic legislative environment
- A collection of different smaller markets

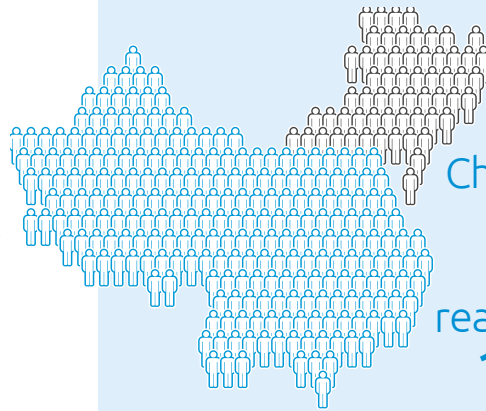
## Opportunities

- Structural meat deficit exacerbated by animal disease outbreaks
- A rising interest in health
- Increasing use of e-commerce gives access to markets beyond large cities
- A rising middle class with more disposable income

## Threats

- Strict import requirements
- Free Trade Agreements (FTAs) with several countries
- Internal drive for a strong domestic production

### GROWING POPULATION

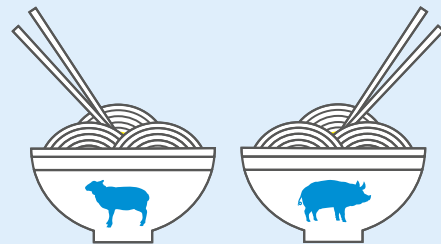


China's population has been **growing at a steady rate**, reaching approximately **1.4 billion** in **2021**.

Source: Statista, 2022

### GROWING MEAT CONSUMPTION

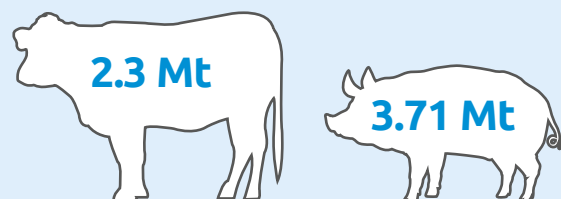
Consumption of beef, pork and sheep meat per capita is expected to **continue to grow**, in particular for lamb and pork.



Source: OECD-FAO Agricultural Outlook (Edition 2021)

### GROWING BEEF IMPORTS

In **2021**, China imported about **2.3 Mt** of beef, about **10% more** than in the previous year.



In comparison, China imported around **3.71 Mt of pork** that year.

Source: Statista, 2022

### GROWING GDP

In 2020, the GDP of China amounted to around **US\$14.87trn**. It is forecasted to reach **US\$24,99**.

Source: Statista, 2022



# South Korea

## Market overview

- Building on the success in accessing the South Korean pork and dairy markets, the UK is prioritising opening a beef market followed by a sheep market. Still great potential for UK beef and sheep exporters
- The Korean economy is the fourth largest in Asia and the fifteenth largest in the world thanks to its strong economic growth.<sup>4</sup> In 2021, South Korea's GDP was around US\$1.8trn, with a projected growth to US\$2.3bn by 2026<sup>5</sup>
- Over the last 10 years, South Korea's consumption of all meats has grown as people's eating habits have been westernised.<sup>6,7</sup> The increased meat consumption, which is forecasted to grow further, is driven by factors such as economic growth and urbanisation. Korean consumers pay high prices for meat. South Korea's pork and beef consumption are among the highest in Asia
- Cheaper imported beef has become more available as its consumption is growing because of changing behaviour.<sup>8,9</sup> Beef consumption is expected to increase to just under 13 kg per capita in 2029. Pork consumption still leads with a projected 32 kg per capita by 2029<sup>2</sup>
- Korea imports most of its meat requirements. The volume of sheep meat and beef imports has continuously been increasing for the past few years. In 2021, sheep meat imports reached just over 17.8 Mt; it is forecasted to reach 18 Mt by 2030. Beef, on the other hand, in 2021, the import was 560 Mt, and it is forecasted to reach just over 607 Mt by 2030<sup>10</sup>
- The beef market in South Korea is expected to reach 728,000 t by 2024, with demand for imported beef in Korea forecasted to continue to grow<sup>8</sup>
- The competition currently comes from the USA and Australia, which have the advantage of proximity, established markets, and price



## Strengths

- Large middle class
- Food safety and quality orientated
- Good demand for imported food
- Established retail outlet

## Weaknesses

- Strict import requirements
- The possible impact of the distant market on the shelf life

## Opportunities

- A structural shortage of meat
- Possible seasonal opportunities from different production times from competitors in the southern hemisphere
- UK-South Korea bilateral trade agreement

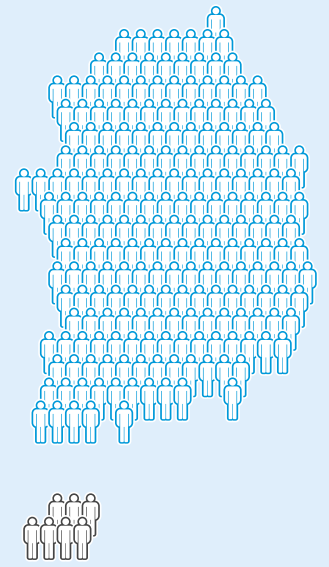
## Threats

- A bilateral agreement with different countries that include preferential tariff rate
- Import duties on US beef will be removed by 2026, by 2027 for Irish/EU beef, and by 2028 for Australian beef

### GROWING POPULATION

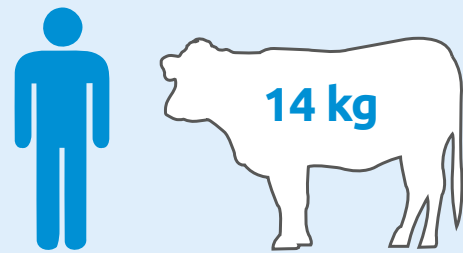
In **2021**, the total population of South Korea was just under **52 million**.

Source: IMF



### GROWING MEAT CONSUMPTION

Overall, the consumption of **beef in South Korea** has been **increasing** for the last few years.

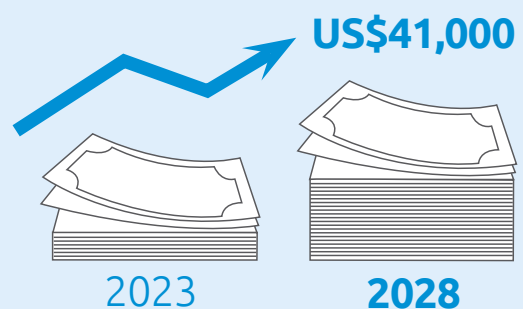


In **2021**, just under **14 kg** of beef was consumed per person in South Korea.

Source: Statista, 2023

### GROWING GDP

The GDP per capita in South Korea is expected to keep increasing between **2023** and **2028**.



Source: IMF



# Taiwan

## Market overview

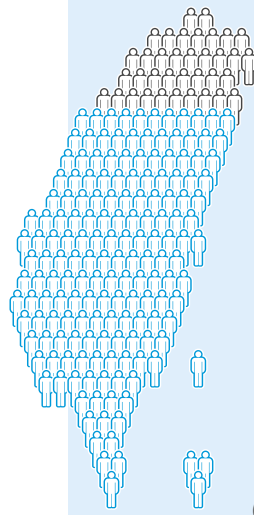
- Taiwan offers high-value market opportunities. The UK's initial priority is to open the lamb market, followed by the beef market. The UK currently has access to the pork meat market, which holds great opportunities
- Taiwan has a healthy GDP, which was worth US\$668.50bn in 2020, according to official data from the World Bank. Taiwan's population of just over 23 million is described as wealthy, with a GDP value representing 0.59% of the world economy<sup>11</sup>
- Taiwan relies on importing a wide range of food because of limited natural resources and space. While small, the import of lamb in Taiwan has steadily been increasing, reaching 16 Kt of fresh and frozen sheep meat.<sup>12</sup> Despite the size, accessing the Taiwan lamb market represents a trade opportunity to broaden the UK export sheep meat market portfolio and build confidence in UK food safety controls. The next step is to build on the success of entering the sheep meat market to gain access to the Taiwan beef market
- The increasing beef consumption positions Taiwan as an appealing export market, especially for premium beef.<sup>13</sup> Socio-economic and historical factors are associated with the growing consumption, with consumers described as young and affluent, willing to taste different cuisines involving beef. The flourishing tourism and hospitality industry also contribute to the growing demand for imported beef<sup>13</sup>
- In 2019, red meat accounted for approximately 7% of the average Taiwanese diet, with beef consumption averaging 6.8 kg per person annually.<sup>13</sup> Just over 95% of beef consumed was imported, and this ratio was projected to remain for the foreseeable future.<sup>13</sup> Taiwan's beef production is negligible and relies on imports to meet demand. In 2021, Taiwan imported 134 Kt of fresh and frozen beef.<sup>12</sup> The top three suppliers of imported beef are the USA, Australia, and New Zealand
- While the consumption of beef and lamb remains small, it has steadily been increasing in the last few years





## Strengths

- Changing eating habits led by urbanisation and economic growth
- Growing middle class as income increases
- Increasing use of technology, and e-commerce



### GROWING POPULATION

In **2022**, Taiwan had a total population of just **over 23 million**. It is forecasted that by **2050**, over **85%** of the total population will live in an urban area.

Source: National Development Council (Taiwan); Dept. of Household Registration (Taiwan) and UN DESA

## Weaknesses

- A changing legislative environment with many small markets

## Opportunities

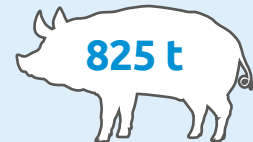
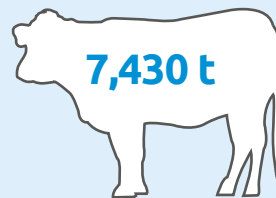
- Rising high-end foodservice
- Structural meat deficit
- A growing interest in health and imported high-quality goods
- Growing per capita income level

## Threats

- Strict import requirements
- FTAs with multiple other countries
- Political drive for stronger domestic production

### MEAT PRODUCTION

In **2021**, pork production was around **825 t**,

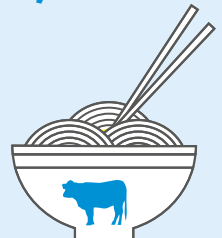


while beef production volume amounted to approximately **7,430 t**.

Source: Statista, 2023

### CONSUMPTION OF BEEF

Taiwan's beef consumption per capita is relatively high within Asia. In **2020**, it was reported to be in the region of **6–7 kg** per person per year.



Source: AHDB



### CONSUMPTION OF SHEEP MEAT

In **2020**, sheep meat consumption was just under **1 kg**. While small, it offers potential for growth.

Source: FAO

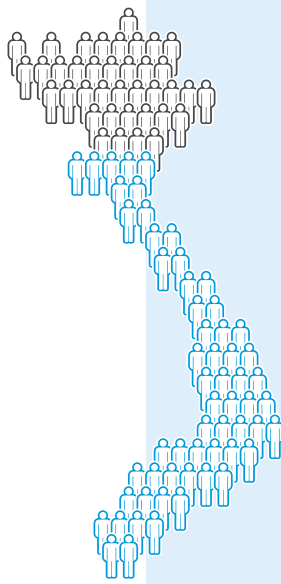


# Vietnam

## Market overview

- Entry into the Vietnam pork market is one of the UK's priorities, followed by the beef market
- Pork, which represents over 70% of meat consumption, is anticipated to stay the main protein with an annual growth of 3%.<sup>14, 15</sup> The consumption of beef is smaller, representing just under 10% of all meat consumed. However, it has a forecasted annual rate growth of 3–5%. The consumption of mutton, on the other hand, is negligible though rapidly growing<sup>15</sup>
- With a population of 98 million, it is the fifteenth most populated country in the world.<sup>16</sup> The level of per capita consumption of meat has increased as consumers become wealthier, and while the population is increasing, so is the overall demand for meat, in line with the role of meat in traditional Vietnamese dishes.<sup>15</sup> In 2021, Vietnam's GDP amounted to just under US\$363bn and is expected to increase to just over US\$690bn by 2027<sup>17</sup>
- New opportunities for meat and niche markets are emerging with the population changing profile and demand for imported products. The main factors for the market changes include western influences, a growing economy resulting in more disposable incomes, and rapid urbanisation. Consumers usually buy fresh meat locally in wet markets. However, driven by food safety concerns, purchasing habits are changing in favour of chilled products
- Pork dominates the domestic production of meat, while the lack of grassland and cost of production limits the production of beef.<sup>16</sup> This result is sufficient domestic production to meet the demand for pork while making it harder to meet the domestic demand for beef<sup>16</sup>. Offal and some of the popular cuts for pork include belly cuts which could help achieve carcass balance considering its low demand in the UK. Beef cuts that are in high demand include beef flank, chuck, and other steak cuts<sup>18</sup>
- Meat production is characterised by manual slaughtering, unintegrated, and small-size businesses. In the past, the meat production sector has met additional challenges that include animal health disease outbreaks leading to culling and trade restrictions. Consequently, the domestic production of meat falls short of meeting its internal demand, hence Vietnam being a strong net importer of meat<sup>16</sup>





## Strengths

- Large population size
- Growing economy and GDP
- Rising meat consumption
- Fragmented domestic production

## Weaknesses

- Fresh meat is highly valued, which can be challenging to the sale of frozen meat
- Lengthy approval process and export requirements

## Opportunities

- High production cost for domestic producers
- Growing demand for beef with a deficit in beef production
- Animal health outbreaks impact the supply of livestock
- A shift towards modern retail outlet

## Threats

- A drive towards an improved integration of domestic production
- A strong presence from the USA concerning beef
- Multi FTAs with several countries

### GROWING POPULATION

In **2021**, the population of Vietnam reached around **98 million**

**70%** of the population is under **35 years old**

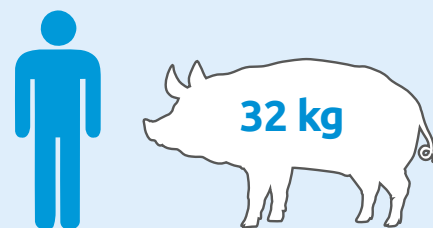
**38%** of the population live in **urban areas**



Source: AHDB – <https://ahdb.org.uk/knowledge-library/country-focus-vietnam>

### CONSUMPTION OF MEAT

The consumption of meat is expected to continue to rise.



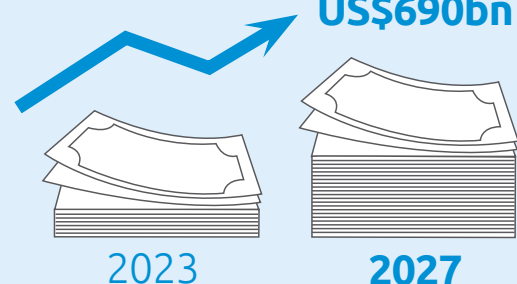
Pig meat is forecasted to reach around **32 kg/capita** in **2029**, and beef around **9.63 kg/capita**.

Source: OECD-FAO Agricultural Outlook (Edition 2021)

### GDP

**GDP** is expected to **increase** to just over

**US\$690bn**



Source: IMF



# Japan

## Market overview

- Japan is a key target market for the UK's red meat sector, with the country being one of the world's largest beef importers – importing 585,000 t of fresh and frozen beef in 2021, worth £2.7bn<sup>19</sup>
- Japan opened its doors to imports of UK beef in January 2019, which means that the UK has access to beef, lamb, and pork
- Building on the successful access and relationship, the UK priority is now to expand the scope to export UK beef to include those over 30 months of age and certain meat products
- Japan's population is the eleventh largest in the world, and it is described as ageing and highly urbanised. The limited availability of agricultural land makes Japan dependent on imports for around 60% of its food<sup>20</sup>
- As the third largest economy in the world, the Japanese are affluent consumers willing to pay a premium for high-quality food products
- Western eating habits are influencing Japan's traditional food consumption pattern in favour of a meat diet.<sup>21</sup> The younger generation's taste shifts towards red meat products such as steak are resulting in a growth of eateries. Nonetheless, the demand for offal remains high<sup>21</sup>
- Japanese consumers are price and food-safety aware. A better understanding of the long-term benefit of diet in health has led to an increasing interest in health and wellbeing. Food safety and related issues have made Japanese consumers more aware of the origin of the product
- The Japanese retail market is described as fragmented, with several powerful regional players. The competition comes from the USA, Europe, and Australia, which have the advantage of proximity to established markets and prices<sup>21</sup>



## Strengths

- Growing meat consumption
- The UK has access to beef, lamb, and pork

## Weaknesses

- Strict controls concerning animal quarantine link to repeated animal disease outbreaks

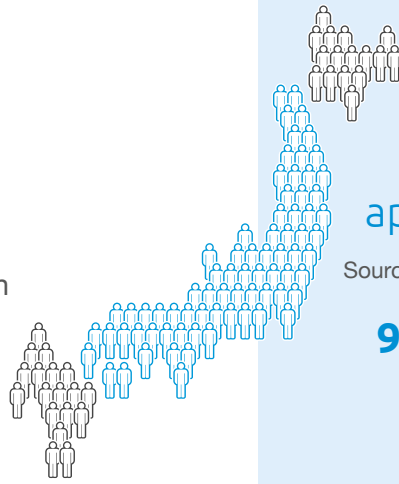
## Opportunities

- Future FTA discussion
- Increasing demand for premium-aged beef
- Changing behaviour such as eating out, involving a wide range of meat-based meals

## Threats

- FTA with several countries
- Challenging tariff system
- Growing domestic beef production

Source: [ec.europa.eu/chafea/agri/sites/default/files/handbook-japan-2019\\_en\\_0.pdf](https://ec.europa.eu/chafea/agri/sites/default/files/handbook-japan-2019_en_0.pdf)



### POPULATION

Japan's population in **2022** amounted to approximately **124.31 million**.

Source: <https://www.ceicdata.com/en/indicator/japan/population>

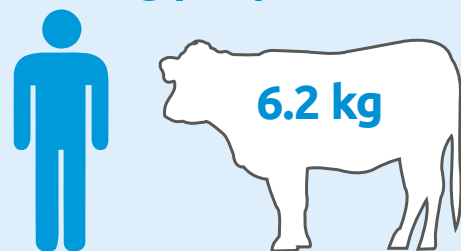
**94%** of the population live in **urban areas**

**27%** of the population is **over 65 years old**

Source: AHDB <https://projectblue.blob.core.windows.net/media/Default/News/AHDB%20/>

### CONSUMPTION OF MEAT

In **2021**, the per capita consumption of meat in Japan reached around **34 kg per person**.

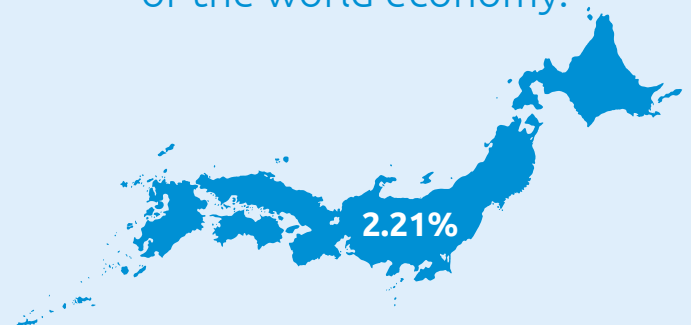


The consumption volume of **beef** and **veal** meat has steadily been increasing to reach approximately **6.2 kg per person in 2021**.

Source: [statista.com/statistics/880061/japan-beef-veal-meat-consumption-volume-per-capita/#:~:text=Beef%20](https://www.statista.com/statistics/880061/japan-beef-veal-meat-consumption-volume-per-capita/#:~:text=Beef%20)

### GDP

In **2021**, Japan's **GDP** was worth **US\$4940.88bn**. The GDP value of Japan represents **2.21%** of the world economy.



Source: World Bank

## Market overview

- The UK previously only had market access for pork and dairy products. The market access gained for beef products provides a valuable opportunity for British beef. In 2022, the UK entered the US lamb market, where one of the priorities is to improve its access to facilitate export
- The consumption of sheep meat per year per person is 10 times lower than in the UK where it sits at around 4 kg.<sup>22</sup> However, with a population of over 329 million, it adds up to 162,000 t each year
- With a population from the Middle East, the Caribbean, and Africa, the Northeast hold great opportunity for lamb products. The consumer is described as an urbanised, older individual who likes high-quality cuts
- The limited sheep meat production makes the USA a net importer. In 2021, over half of the sheep meat consumed was imported. The key exporters are Australia (about 75%) and New Zealand (about 24%)<sup>23</sup>
- AHDB estimates that just over 6% of UK lamb exports could eventually be exported to the USA. It is forecasted that over the next 10 years, total lamb consumption will remain unchanged. However, this implies displacing Australian and/or New Zealand imports to take a 6% share of the total US imports
- The USA tends to import higher value cuts, with an average import price of \$9/kg (£6.80), according to US trade data. In context, UK lamb exports average \$6.4/kg (£4.80), with whole carcasses dominating the trade. This indicates the potential of this premium market<sup>23</sup>



## Strengths

- A high income and diverse population
- A large market supported by a constant food legislative framework
- Awareness of EU culture

## Weaknesses

- A high level of competition combined with the size of the market requires prudent product positioning
- Retail outlets are monopolistic

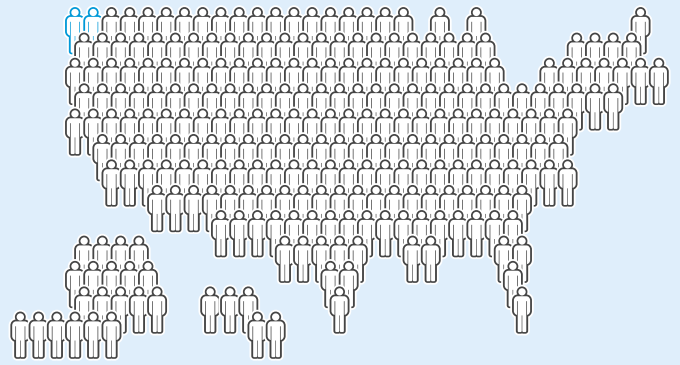
## Opportunities

- A large market with niche opportunities
- Opportunities in the Muslim community

## Threats

- Strong lobby to protect home produce
- US producers mainly supply the meat market
- Tariff quotas for some meat commodities

### MUSLIM POPULATION

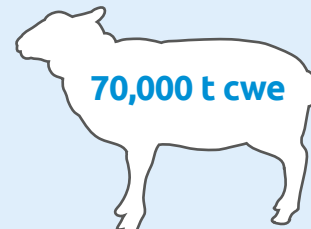


The Muslim population is steadily increasing. In **2015**, around **3.45 million** Muslims were living in America, about **1%** of the total population. This number is expected to double by **2050**.

Source: [pewresearch.org/fact-tank/2016/01/06/a-new-estimate-of-the-u-s-muslim-population/](http://pewresearch.org/fact-tank/2016/01/06/a-new-estimate-of-the-u-s-muslim-population/)

### CONSUMPTION OF MEAT

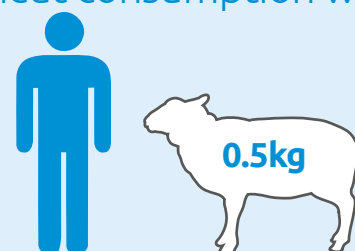
In **2021**, the average annual **sheep meat** production was **70,000 t cwe**.



In **2021**, the average annual **import of sheep meat** was **120,000 t cwe**.



In **2021**, the average annual per capita sheep meat consumption was **0.5 kg**.



Source: AHDB

## Market overview

- Mexico is among the world's 15 largest economies and is the second-largest economy in Latin America
- In 2021, the UK gained entry into Mexico's pig meat market for striated muscle only. Our priority is to expand the scope of pork meat to include offal and edible byproducts
- Mexico relies on the import of pig meat as the growth in its national pig meat production cannot meet the domestic growth. The USA is the country's largest supplier representing around 80% of its exports
- The growth of production has surpassed the rate of consumption in recent years, which has led to an increased rate of exports. In 2019, the main countries for Mexican pork were Japan, followed by China, and the USA
- Pork remains an affordable protein option in Mexico. If consumers do look to trade down in protein choice, pork offal is often a popular choice (source: AHDB)
- Import volumes may increase as street food stalls and restaurant activities restart. Export volumes are also expected to grow. Most Mexican pig meat exports are of high-value, labour-intensive products to the USA, Japan, and South Korea<sup>24</sup>
- Changes in its demographic profile are one of the key drivers influencing food and beverage consumption. In the past year, the population of Mexico has consistently increased, with a forecasted rise by 2030 in the middle class. It is anticipated this will lead to the consumption of more expensive meat proteins. The growing number of single-person households also impacts consumption patterns. A high level of obesity has led to an increased demand for healthy food and organic products
- Looking forward, the Market Access team is aware of the opportunities beyond Mexico that Latin America holds





## Strengths

- New segments emerging as the market is changing
- Meat consumption is growing

## Weaknesses

- Price-sensitive market
- Challenging market entry and requirements

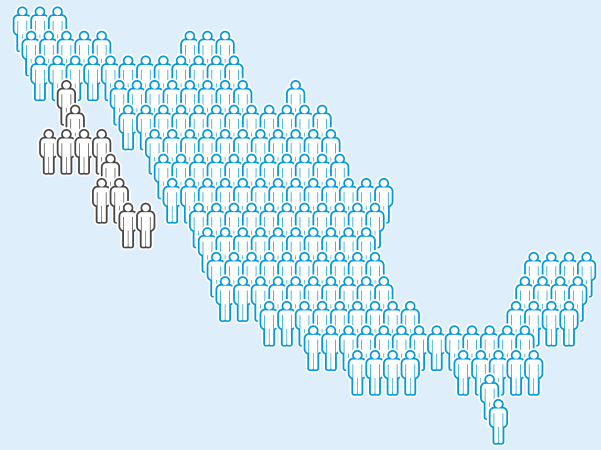
## Opportunities

- Mexico is part of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)
- An increasing middle-class population with disposable income
- The price of pork is rising as production costs are rising

## Threats

- Fresh vs frozen – the USA is a major importer of fresh meat to Mexico

### GROWING POPULATION

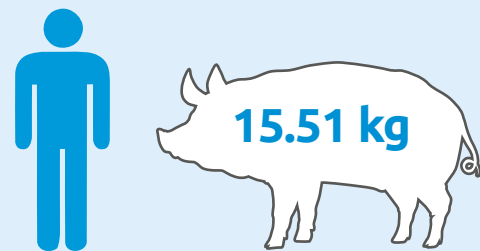


Mexico's population is expected to continue to grow. In **2022**, Mexico had a population of approximately **129 million**. It is the **10th most populated country in the world**.

Source: [statista.com/statistics/263748/total-population-of-mexico/](https://www.statista.com/statistics/263748/total-population-of-mexico/)

### CONSUMPTION OF MEAT

The consumption per capita of **pig meat** is expected to continue to grow to approximately **15.51 kg** per capita in **2031**.



Source: [statista.com/statistics/756997/mexico-per-capita-consumption-of-pork/](https://www.statista.com/statistics/756997/mexico-per-capita-consumption-of-pork/)

# The Caribbean

## Market overview

- Despite the size of the market and level of competition, the Caribbean offers good export opportunities to the UK beef, lamb, and pork industries
- The Caribbean Community (CARICOM) is a grouping of 20 countries: 15 member states and 5 associate members. These member states are Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago
- CARICOM has a growing population of approximately 16 million citizens, 60% of whom are under the age of 30
- The UK has access to the beef, lamb and pork market in a number of CARICOM countries and is looking to build on this existing relationship. The UK is strategically exploring expanding its portfolio by gaining and/or improving access for beef, lamb and pork to those markets with limited or no access, such as Jamaica, Bahamas, St Lucia and British Virgin Islands
- Jamaica has started increasing its imports of beef and sheep meat which comes mainly from the USA and Latin America



List of supplying markets for a product imported by Jamaica – product: 0202 Meat of bovine animals (frozen)

Exporters	2017	2018	2019	2020	2021
	Imported quantity (tonnes)				
World	2,328	2,640	2,920	1,552	2,127
USA	879	1,129	1,448	683	1,005
Costa Rica	642	666	772	497	801
Panama	542	355	469	208	233
Australia	198	202	98	40	86
Ireland					3
Canada		51	5		
New Zealand	69	236	128	120	
Saint Lucia				5	

List of supplying markets for a product imported by Jamaica – product: 0203 Meat of swine (fresh, chilled or frozen)

Exporters	2017	2018	2019	2020	2021
	Imported quantity (tonnes)				
World	851	1,253	1,240	203	1,046
Canada	627	1,128	1,165	203	901
USA	1	1	49		77
Ireland	223	124	26		68

List of supplying markets for a product imported by Jamaica – product: 0204 Meat of sheep or goats (fresh, chilled or frozen)

Exporters	2017	2018	2019	2020	2021
	Imported quantity (tonnes)				
World	2,160	2,693	2,599	2,220	1,835
Australia	1,617	2,371	2,277	1,970	1,772
New Zealand	385	84	122	129	35
USA	141	210	199	120	27
Austria	18				
China			0		
France		13			
Saint Lucia				1	
United Kingdom		16			

# MENA

## Market overview

- MENA is a vast and diverse region that holds great trade opportunities. MENA had a total population of just over 472 million in 2021.<sup>25</sup> In 2022, it accounted for around 6% of the global population, which is described as a young and increasingly educated population. MENA has a GDP per capita that has increased from 2020 to reach just under US\$17.7 in 2021<sup>26</sup>
- Some of the UK country priorities in the MENA regions include gaining meat market access in Egypt (lamb), Morocco (lamb/beef), and Oman (sheep)
- Sheep meat dominates MENA diets, although per capita consumption in some countries is higher than in others. The lower-tier foodservice sector is mostly supplied by imported muttons
- However, the changes in the population profile have led to a greater demand for imported lamb. Those are mostly driven by economic growth, higher disposable income, urbanisation, westernisation, and rising tourism. Where tourism is rising, growth in demand for premium lamb cuts in the high-end foodservice is noticed. In addition, increasing awareness of health and wellbeing may influence meat and lamb eating habits
- A series of technical trade barriers are present in the regions. Import requirements for religious slaughter apply to most of the MENA countries. Stringent import documentation, together with varying labelling and packaging requirements across the region, are observed
- Lamb imports are mainly distributed via retail, with a high demand for chilled lamb carcasses and to a lesser extent, leg and shoulder are also sold. Demand for premium cuts in tier-one retail is forecasted to rise. The MENA region's grocery retail sector is described as mostly fragmented except for the richest Gulf Cooperation Council (GCC) markets
- Driven by urbanisation and challenges faced by the domestic sheep-rearing industry, sheep meat import demand is predicted to increase. Key suppliers include Australia, New Zealand, India, and Pakistan. India supplies mostly chilled
- For the past 10 years, Egypt's population has been continuously increasing. It is forecasted to increase to around 112 million in 2024. GDP is expected to rise to \$403 in 2024. The GDP per capita is expected to rise with the recovery of economic growth within the country. This may create opportunities for the UK meat trade, although competition from nearer neighbours and issues around halal requirements may act as limiting factors
- Over the years, beef consumption has been increasing. It is anticipated to hit just over 8 kg/capita by 2029.<sup>2</sup> Lamb has also steadily been increasing. It is forecasted to reach an estimated 1.3 kg/capita by 2029<sup>26</sup>
- The tourism sector is growing in many countries, bringing fresh opportunities in foodservice. Dining out plays a crucial role in the social and business life in the region, with sheep meat being the protein of choice<sup>27</sup>
- Brazil is a key exporter of frozen beef to Egypt (69%), with India exporting 26% on average. Australia supplies over 70% of lamb, while the import of fresh/chilled beef is dominated by Sudan. The strong market shares have reportedly been linked to their proximity and meeting halal import requirements



## Strengths

- Growing meat consumption
- Meat's role in diets

## Weaknesses

- Strict market entry requirements included halal requirements
- Import tariffs for some regions and commodities

## Opportunities

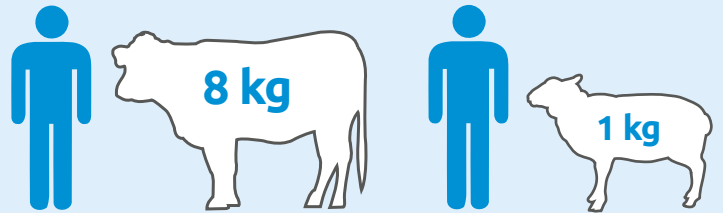
- Large market
- Demand for offal and edible byproduct demand (Egypt)

## Threats

- Strong competition from well-established exporters

### EGYPT'S MEAT CONSUMPTION

In **2022**, the consumption of **beef per capita in Egypt was around 7.8 kg**. It is expected to reach just over **8 kg** by **2029**. Despite a forecasted decrease, the consumption of **sheep meat** will still be just over **1 kg/capita by 2029**.



Source: OECD-FAO Agricultural Outlook (Edition 2021)

### EGYPT'S GDP

**Egypt's GDP** is expected to continue to grow to reach an estimated **US\$664bn** by **2027**.

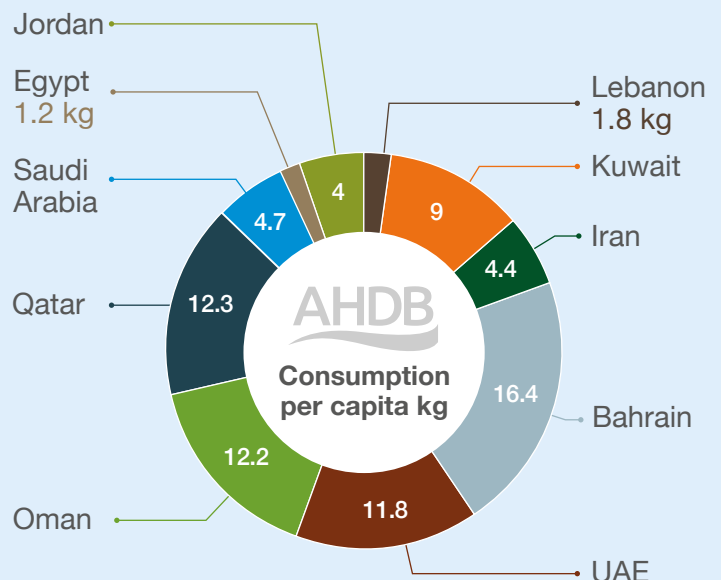
Source: IMF

### SHEEP MEAT CONSUMPTION

In **2021**, the consumption of sheep meat was forecasted to increase at an average compound annual growth rate of **+2.4%** from **2020** to **2025**.

Source: GIRA

### MENA countries – per capita sheep meat consumption



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