

# Market brief Malaysia

Financial year 2023/24

## Global exports to Malaysia

Rank #8 in the global dairy market (by volume).

Destination for over 470,000 tonnes of dairy product, worth over US\$1.3 billion (in 2023/24).

Exports to Malaysia have increased by 4% over five years (2019/20-2023/24).

The biggest volume growth (product categories exceeding US\$20 million) has been in:

- Buttermilk (58%)
- Butter (49%)
- Infant Powder (37%).

The biggest volume decline (products categories exceeding US\$20 million) has been in:

- Milk (-32%)
- Condensed Milk (-14%)
- SMP (-11%).

## Australian market share

Rank at #4 in the share of Malaysia import volume.

Destination for over 51,000 tonnes of Australian dairy product, worth US\$148 million (in 2023/24).

Exports to Malaysia have decreased by 9% over five years (2019/20 – 2023/24).

The biggest volume growth (product categories exceeding US\$1 million) has been in:

- Skim Milk Powder (293%)
- Butter Oil (225%)
- Whole Milk Powder (104%).

The biggest volume decline (product categories exceeding US\$1 Million) has been in:

- Milk (-64%)
- Butter (-16%)
- Yogurt (-6%).

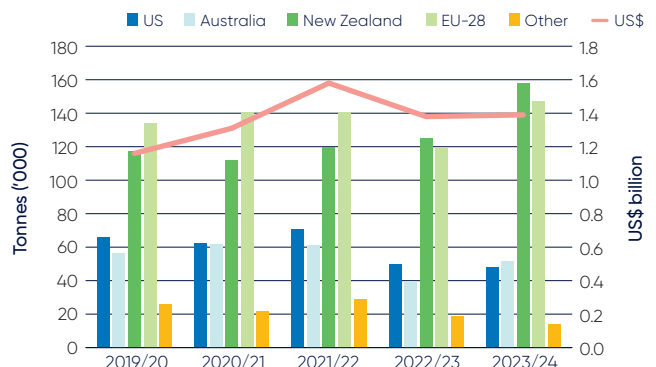
## Tariff environment

Australia and Malaysia are both party to the multilateral ASEAN, Australia, New Zealand, Free Trade Agreement (AANZFTA), the Malaysia Australia Free Trade Agreement and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). These agreements came into force on January 1, 2010, and January 15, 2013, and 30 September 2022, respectively. Under these agreements, tariffs on all Australian origin dairy imports to Malaysia have reached 0%, except for liquid milk. Country Specific Quotas (CSQ's) for Australian origin Liquid Milk are included in both the AANZFTA and MAFTA agreements with In Quota Tariffs of 0% and Out of Quota Tariffs of 20% for Australian origin Liquid Milk (subject to Import Permits). Under CPTPP a Treaty-Wide Quota is available.

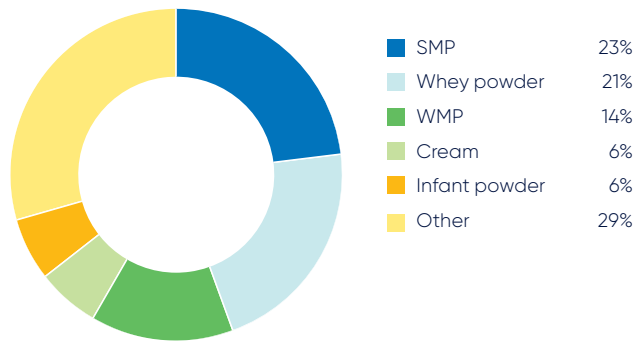
## Key international marketing programs and initiatives

Dairy Australia runs or is involved in a number of marketing programs and activities in Malaysia. These include the Southeast Asia Dairy Scholarship program, aimed at familiarising dairy and food industry professionals from the region, with aspects of the Australian dairy industry and the Southeast Asian Alumni Program from past scholars. Outside of COVID-19 travel restrictions, Dairy Australia regularly visits Malaysia and presents seminars to local industry players in key markets.

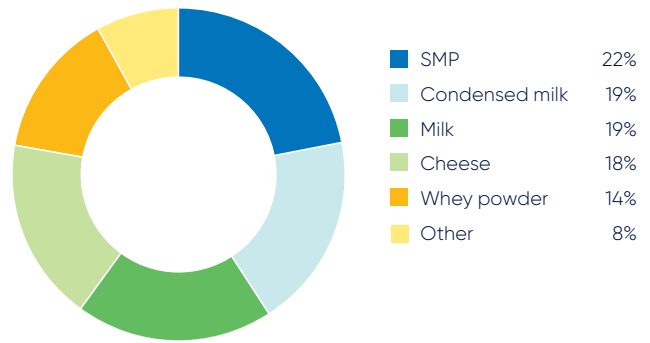
Figure 1 Dairy imports



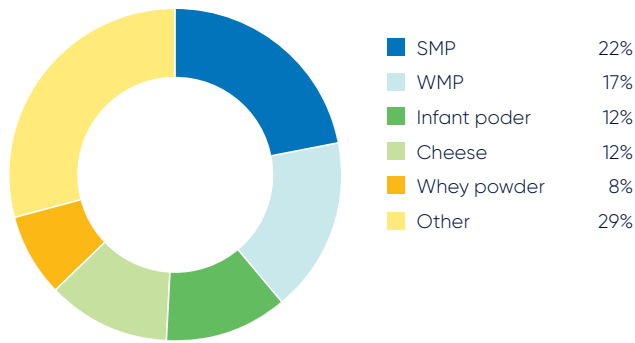
**Figure 2** Top dairy exports to Malaysia by volume



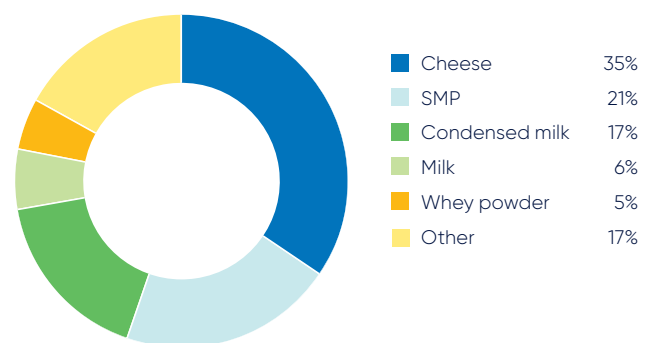
**Figure 4** Top Australian dairy exports by volume



**Figure 3** Top dairy exports to Malaysia by US\$ value



**Figure 5** Top Australian dairy exports by US\$ value



**Table 1** Australia exports

Product group	Market share (US\$ %)		Volume ('000)		Value (million US\$)	
	2018/2019	2022/23	2018/2019	2022/23	2018/2019	2022/23
SMP	2	10	2.83	11.10	7.61	30.52
Condensed Milk	79	73	10.30	9.90	21.04	24.61
Milk	74	40	26.99	9.74	20.59	8.87
Cheese	32	32	9.06	9.19	40.36	51.40
Whey Powder	5	7	3.85	7.39	4.59	7.86
<b>Total Imports</b>	<b>10</b>	<b>11</b>	<b>56.5</b>	<b>51.6</b>	<b>112.3</b>	<b>148.7</b>

**Table 2** Dairy tariffs

Tariff category	Product category	Applied tariff %
0401	Milk and cream, not concentrated nor containing added sugar or other sweetening matter.	0.0
0402	In powder, granules or other solid forms, of a fat content, by weight, exceeding 1.5%.	0.0
0405	Butter and other fats and oils derived from milk; dairy spreads.	0.0
0406	Cheese and curd.	0.0

Applied tariffs are drawn from Integration Point. Where Australia does not have a specific tariff agreement in place, the applied rate for qualifying product is the MFN rate. Where a specific tariff agreement exists, the applied rate for qualifying product is as per that agreement. The countries with specific agreements in place are: China (ChAFTA), Indonesia (AANZFTA), Japan (JAEPA), The Republic of Korea (KAFTA), Malaysia (MAFTA), Philippines (AANZFTA), Singapore (SAFTA), Philippines (TAFTA), and the USA (AUSFTA).

**Further information**

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