



# Sheep industry turn-off update

June 2025

A quarterly newsletter outlining changes in WA slaughter, live exports and interstate transfers and impacts this may have on the WA sheep flock.

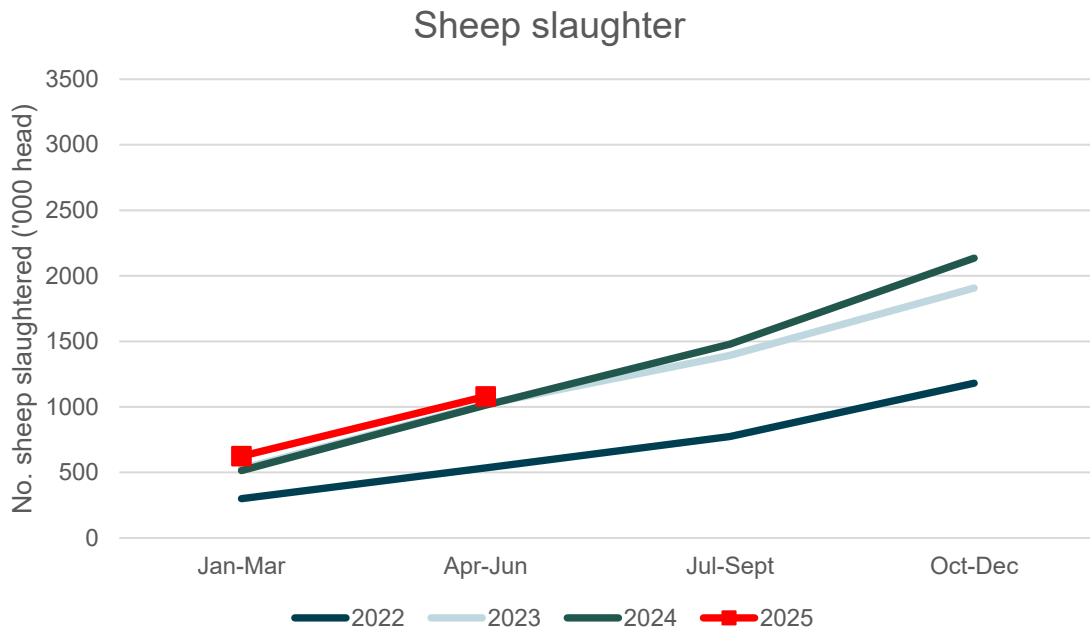
## Domestic slaughter

- In the first 6 months of 2025, total sheep and lamb slaughter reached 2.6 million head, down 2% compared to the same period in 2024 when total slaughter reached 2.7 million head (Table 1).
- Adult sheep slaughter remained above average for the third year in a row reaching 1.1 million head, a year-on-year (YOY) increase of 6% and the highest for this period since 2008.
- Lamb slaughter, while historically very strong, declined 8% YOY from 1.7 million in 2024 to 1.5 million in 2025.

*Table 1 Number of sheep and lambs slaughtered (thousand head) between January and June in WA (Based on Australian Bureau of Statistics (ABS) data, DPIRD analysis)*

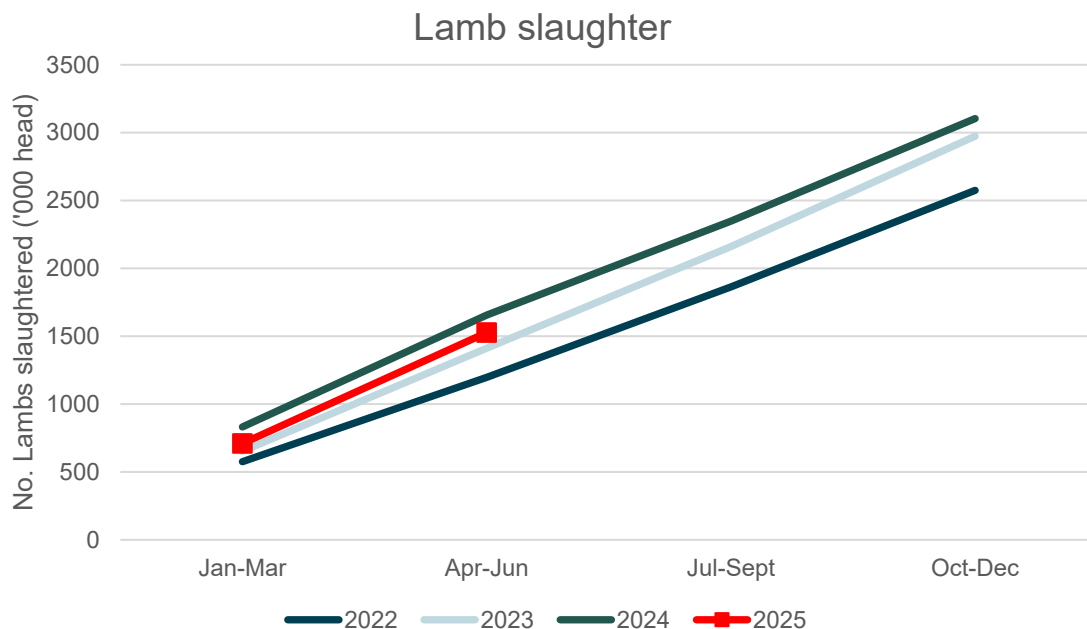
|              | 2023           | 2024           | 2025           | YOY change |
|--------------|----------------|----------------|----------------|------------|
| Sheep        | 1,020          | 1,014.2        | 1,079.7        | 6%         |
| Lambs        | 1,411.9        | 1,655.8        | 1,527          | -8%        |
| <b>Total</b> | <b>2,431.9</b> | <b>2,670.0</b> | <b>2,606.7</b> | <b>-2%</b> |

- Following 2 years of high sheep slaughter in 2023 and 2024, the trend appears to be continuing in the first half of 2025, however, did slow slightly in the June quarter.



*Figure 1 Cumulative WA sheep slaughter (Based on ABS data, DPIRD analysis)*

- Whilst lamb slaughter has declined in 2025 when compared to 2024, it remains higher than the previous 2 years and is the second highest on record for this period.



*Figure 2 Cumulative WA lamb slaughter (Based on ABS data, DPIRD analysis)*

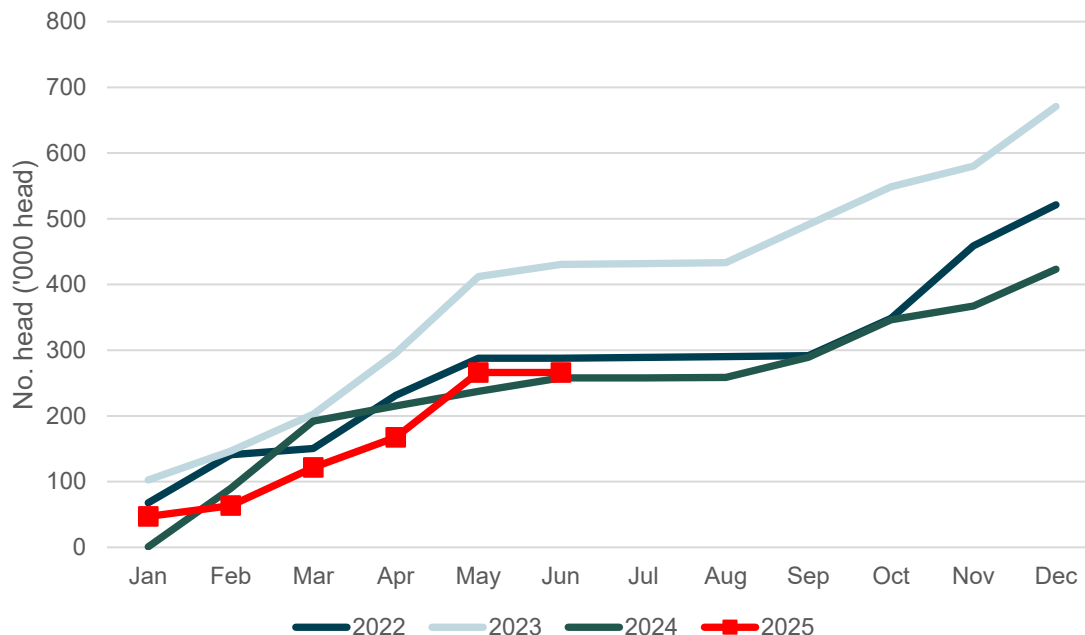
## Live export (by sea and air)

- In the first 6 months of 2025 there has been a marginal increase in the number of sheep exported live from WA. So far 266,100 sheep have been exported live, 3% more than this time in 2024.
- To date in 2025 Kuwait remains the top destination having received 101,200 sheep, up 53% on this time last year. Qatar has also increased its intake of WA sheep importing 33,000 sheep by June, compared to 1,200 last year. There have also been significant increases in the number of sheep exported to the United Arab Emirates and Oman.

*Table 2 Number of sheep exported live (thousand head) from WA between January and June (Based on ABS data, DPIRD analysis)*

|       | 2023  | 2024  | 2025  | YOY change |
|-------|-------|-------|-------|------------|
| Sheep | 430.5 | 257.9 | 266.1 | 3%         |

- January through April saw the number of sheep exported rise steadily each month until May when there was a significant increase with almost 100,000 sheep leaving through WA ports. This was the highest monthly total since March 2024 when 102,000 sheep were exported.
- As of June, we have entered the mid-year trading moratorium lasting until mid-September. During this time only small shipments by air are possible, however so far nothing has been exported this year.



*Figure 3 Cumulative live sheep exports from WA by sea and air (Based on ABS data, DPIRD analysis)*

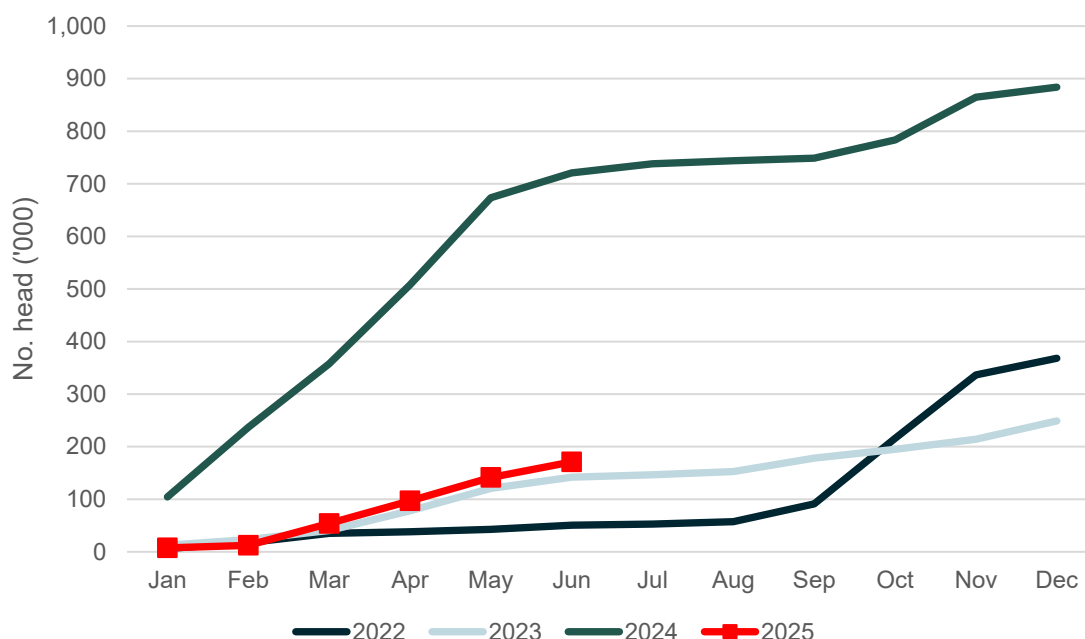
## Interstate transfers

- In the first 6 months of 2025 total interstate transfers reached 171,000 head, a 76% decrease from the 720,800 head that went east this time last year.
- There has been an 89% decrease in the number of adult sheep sent east and a 63% decline in the number of lambs.
- 76% of animals trucked east between January and June 2025 were lambs.

*Table 3 Number of sheep and lambs sold interstate (thousand head) between January and June from WA (Based on Primary Industries and Regions South Australia (PIRSA) data, DPIRD analysis)*

|              | 2023         | 2024         | 2025         | YOY change  |
|--------------|--------------|--------------|--------------|-------------|
| Sheep        | 35.8         | 367.3        | 40.6         | -89%        |
| Lambs        | 106.2        | 353.5        | 130.4        | -63%        |
| <b>Total</b> | <b>142.0</b> | <b>720.8</b> | <b>171.0</b> | <b>-76%</b> |

- The number of sheep and lambs sold interstate started the year very slowly with only 12,000 head trucked east in the first 2 months of 2025.
- Numbers picked up in March, reaching over 41,000, and have remained strong despite being much lower than experienced in 2024.



*Figure 4 Cumulative number of sheep and lambs sold interstate (Based on PIRSA data, DPIRD analysis)*

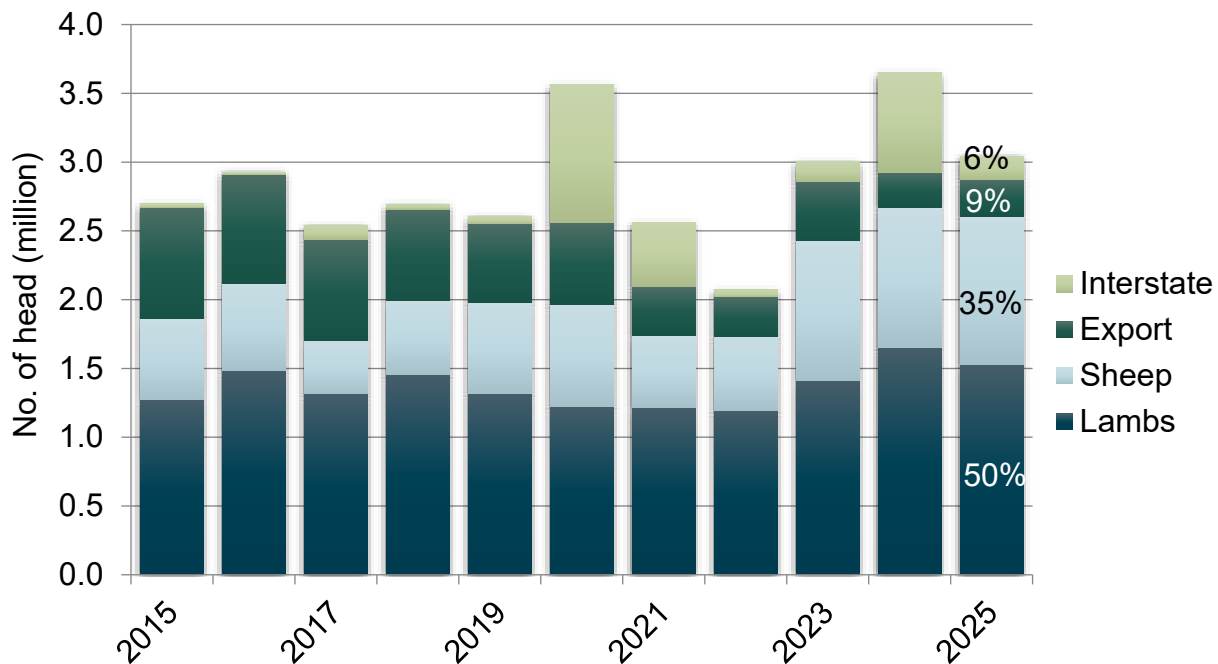
## Total sheep turn-off

- Total sheep and lamb turn-off reached 3.04 million by mid-2025, down 17% compared to this time in 2024, but very similar to 2023.

*Table 4 WA turn-off comparison 2022 - 2025 (million head) between January and June (Based on data from ABS & PIRSA, DPIRD analysis)*

|                     | 2022        | 2023        | 2024        | 2025        | YOY change  |
|---------------------|-------------|-------------|-------------|-------------|-------------|
| Lamb slaughter      | 1.20        | 1.41        | 1.66        | 1.53        | -8%         |
| Sheep slaughter     | 0.54        | 1.02        | 1.01        | 1.08        | 6%          |
| Live export         | 0.29        | 0.43        | 0.26        | 0.27        | 3%          |
| Interstate transfer | 0.05        | 0.14        | 0.72        | 0.17        | -76%        |
| <b>Total</b>        | <b>2.07</b> | <b>3.00</b> | <b>3.65</b> | <b>3.04</b> | <b>-17%</b> |

- Lamb slaughter made up 50% or 1.53 million of the total number of sheep sold and was the largest component of turn-off.
- Sheep slaughter accounted for 35% or 1.08 million head and was the highest we have seen in the last decade as both a proportion of turn-off and raw numbers.
- Live exports made up 9% or 0.27 million head while interstate transfers made up the remaining 6% or 0.17 million sheep. This time last year interstate transfers accounted for 20% of turn-off and has been the most variable avenue from year to year.



*Figure 5 Total WA sheep turn-off including sheep and lamb slaughter, live export and interstate transfers between January and June per year (Based on data from ABS, PIRSA, DPIRD analysis)*

## Impact on the WA sheep flock

- The WA sheep flock numbered 12.4 million as of July 2022 (ABS).
- Industry confidence during 2024 was low due to poor seasonal conditions, low prices, and uncertainty due to the Australian Government's announcement of the phase out of live export of sheep by sea.
- This combination led to very high rates of turn-off as producers reduced the size of their sheep enterprise.
- This has likely resulted in significant flock decline between 2022 and 2025.
- Via DPIRD modelling, it is estimated that the total WA flock size may have declined to between 8.6 and 9 million head by July 2025, however recent strong sheep prices may improve confidence levels in the industry and slow the flock sell down.

## Contact

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