Cattle industry update

March 2025

A quarterly newsletter outlining cattle numbers sold via domestic slaughter, live export and interstate transfers.

Total cattle turn-off

- Between January and March 2025 WA cattle turn-off totalled 168,800 head, a 2% increase year on year (YOY) compared to 2024 when it totalled 166,100.
- This is 5% higher than the 10-year average of 160,400 for this period.

Table 1 Total WA cattle turn-off between January and March (based on Australian Bureau of Statistics (ABS) & Primary Industries and Regions South Australia (PIRSA) data, Department of Primary Industries and Regional Development (DPIRD) analysis)

	2022	2023	2024	2025	YOY change
Cattle slaughter	81,600	93,400	106,700	115,000	8%
Calf slaughter	100	100	100	300	200%
Live export	38,300	29,800	34,700	46,000	32%
Interstate transfer	14,200	2,600	24,600	7,500	-69%
Total	**134,200**	**125,900**	**166,100**	**168,800**	**2%**

- Domestic slaughter was the most utilised avenue for selling cattle in the first quarter of 2025, accounting for 68% of turn-off. Over the last 10 years this has varied between a minimum of 47% of sales in 2020 and maximum of 74% in 2023.
- Live export accounted for 27% of turn-off while interstate transfers (southern channels only) accounted for 4%.
- Interstate transfers have grown in importance since 2020 averaging around 10% of turn-off compared to 1% prior to this.

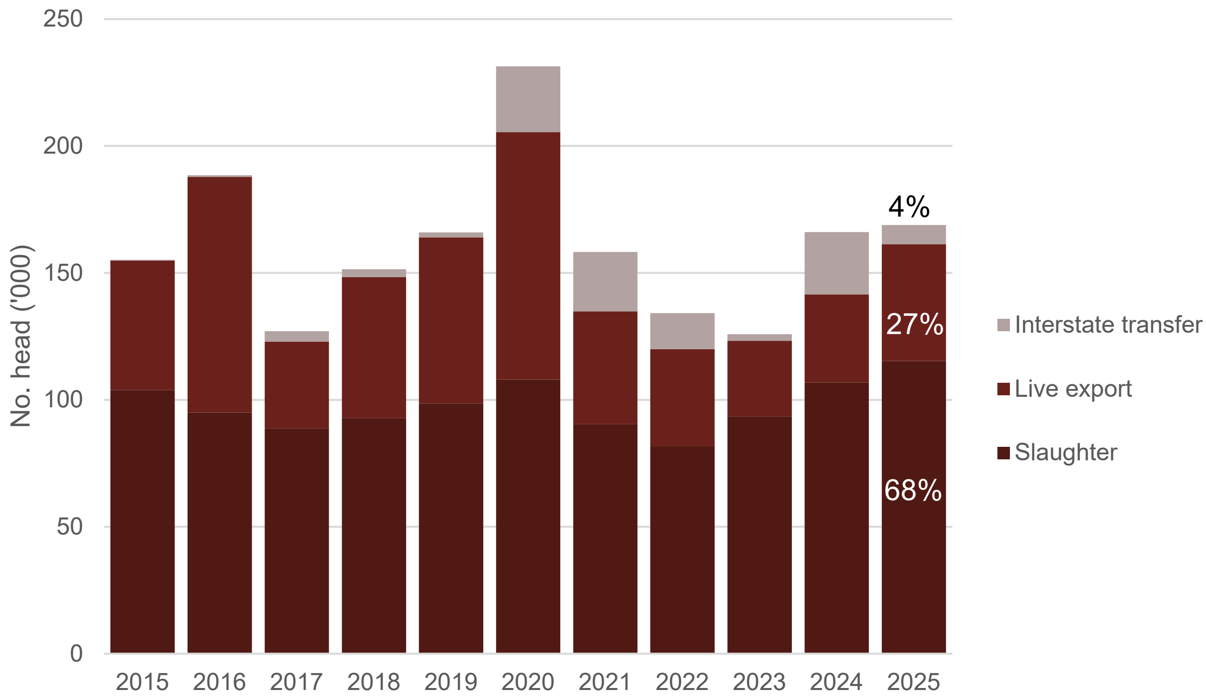

Figure 1 Total turn-off by sale avenue between January and March by year (Based on ABS & PIRSA data, DPIRD analysis)

Domestic slaughter

- In the first quarter of 2025, cattle and calf slaughter totalled 115,300, an 8% increase YOY.
- Male cattle slaughter totalled 45,600 head, down 3% on 2024, while female cattle slaughter increased 17% YOY from 59,500 to 69,400 head.
- Calf slaughter increased 200% YOY to 300 from a very low base.

Table 2 Number of cattle slaughtered in WA (thousand head) between January and March (Based on ABS data, DPIRD analysis)

	2023	2024	2025	YOY change
Male slaughter	44.5	47.2	45.6	-3%
Female slaughter	48.9	59.5	69.4	17%
Calf slaughter	0.1	0.1	0.3	200%
Total	**93.5**	**106.8**	**115.3**	**8%**

- Whilst male cattle slaughter has started 2025 lower than 2024, it remains higher than the preceding 2 years and, excluding last year, is the highest it has been for this period since 2018.

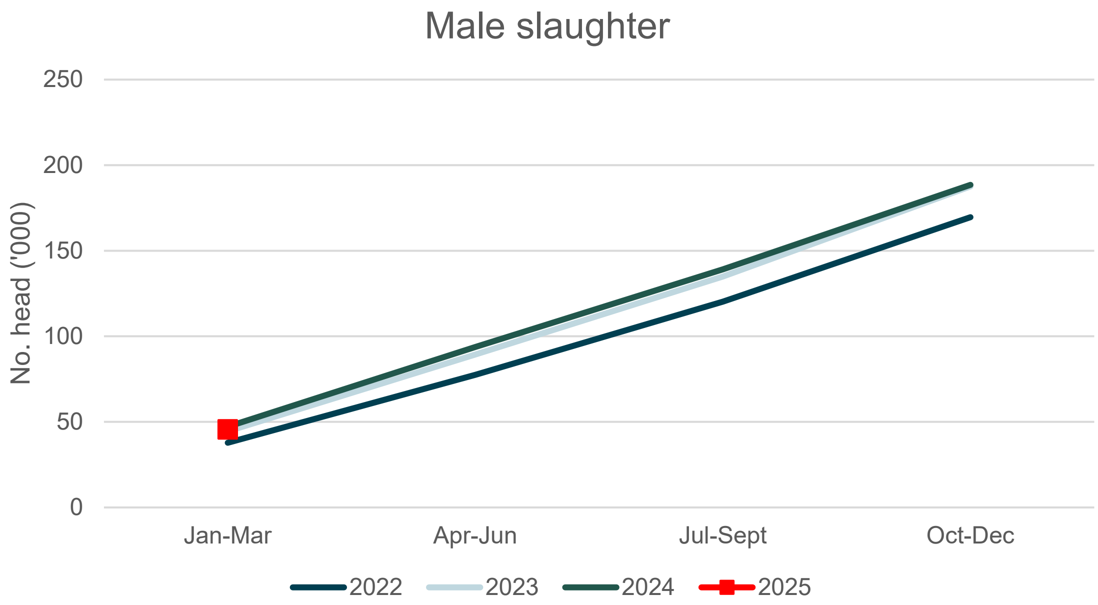

Figure 2 Cumulative male cattle slaughter in WA (thousand head) (Based on ABS data, DPIRD analysis)

- Female cattle slaughter reached 69,400 head in the first quarter of 2025, the highest it has been for this period since 2010, when southern WA was experiencing a severe drought. If female slaughter continues at this elevated rate for the remainder of 2025, it would indicate the southern WA beef herd is in a period of contraction, especially following the strong slaughter rates seen in 2024.
- Some female cattle from northern herds are also likely to be included in these figures but thought to be the minority.

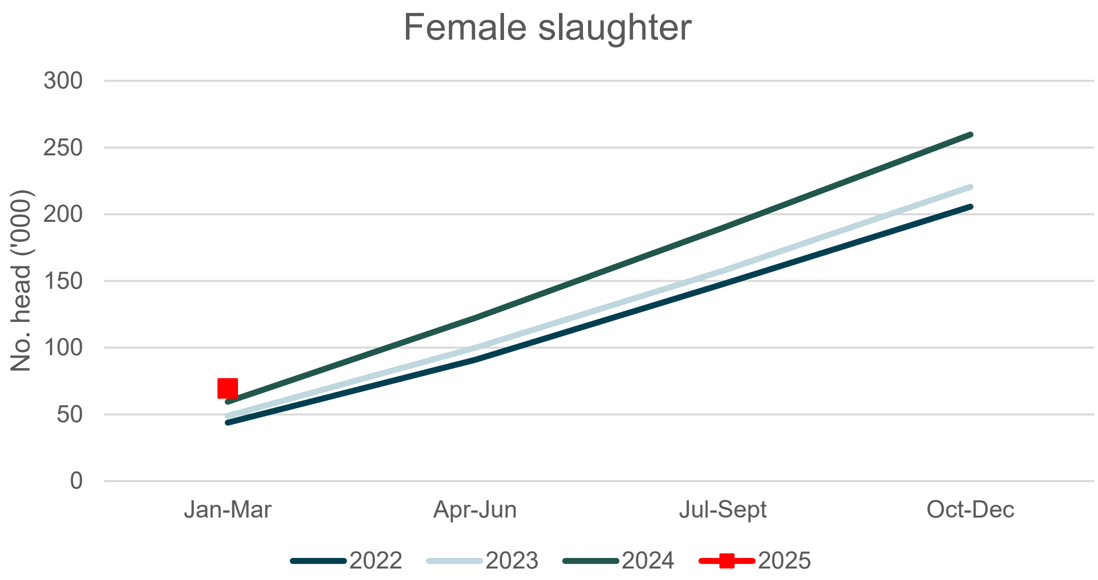

Figure 3 Cumulative female cattle slaughter in WA (thousand head) (Based on ABS data, DPIRD analysis)

Feedlot turn-off

- The number of cattle turned-off from WA feedlots over the first quarter totalled 51,200 head, a YOY increase of 10%.
- This is the strongest start to the year since 2021 and the third strongest on record (since 2006).
- Provided all these animals were sold to slaughter, this would make up 44% of slaughter this quarter.

Table 3 Number of cattle turned-off from WA feedlots between January and March (Based on Australian Lot Feeders Association (ALFA) data, DPIRD analysis)

	2023	2024	2025	YOY change
Feedlot turn-off	41,500	46,600	51,200	10%

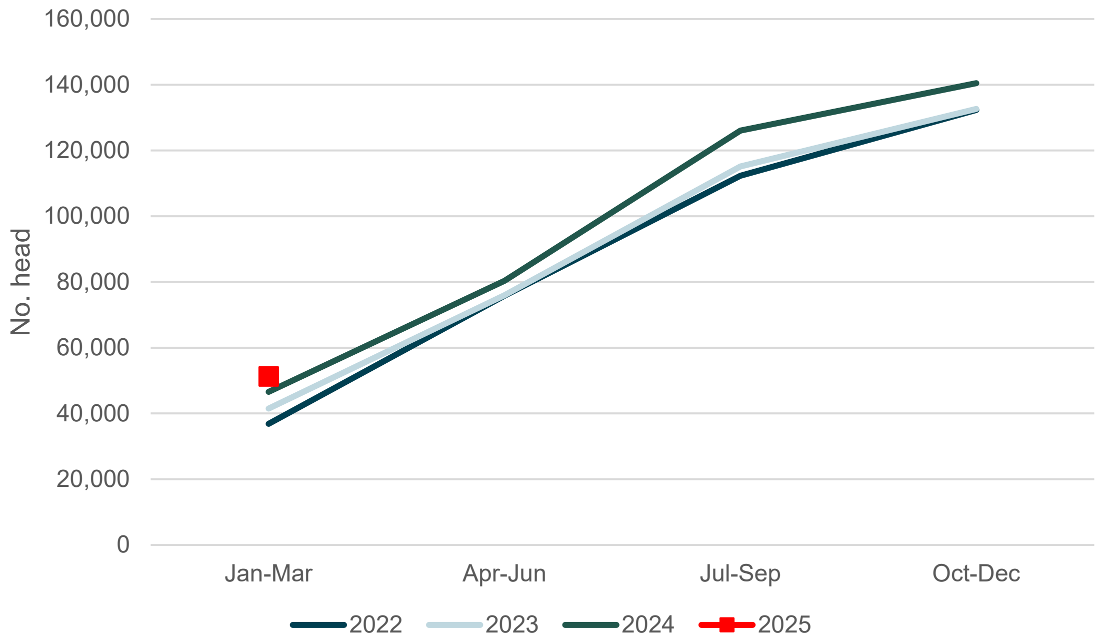

Figure 4 Cumulative cattle turn-off from WA feedlots (Based on ALFA data, DPIRD analysis)

Live export

- So far in 2025 a total of 46,000 cattle have been exported live from WA, a 32% increase on 2024.
- This has been due to increases in cattle sent to most markets, but especially Vietnam who increased from 5,300 in 2024 to 12,900 in 2025, a 141% increase for the first quarter. There has also been a 5,200 head increase in the number of cattle sent to Indonesia, bringing the total to 25,400 for the first quarter of 2025.

Table 4 Number of cattle exported from WA ports between January and March (Based on ABS data, DPIRD analysis)

	2023	2024	2025	YOY change
Live exports	29,800	34,700	46,000	32%

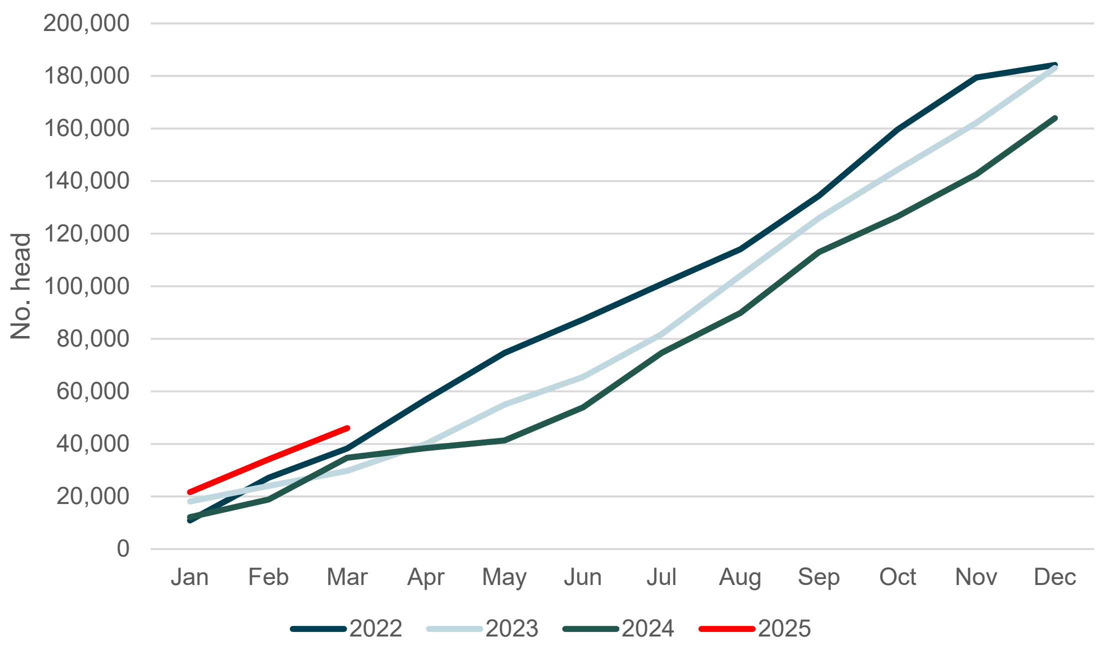

Figure 5 Cumulative number of cattle exported from WA (Based on ABS data, DPIRD analysis)

Interstate transfers (southern only)

- So far this year 7,500 cattle have been trucked east via Ceduna, a big decline on the 24,600 this time last year, however still quite strong compared to other years.

Table 5 Number of cattle sold east via Ceduna between January and March (Based on PIRSA data, DPIRD analysis)

	2023	2024	2025	YOY change
Interstate transfers	2,600	24,600	7,500	-69%

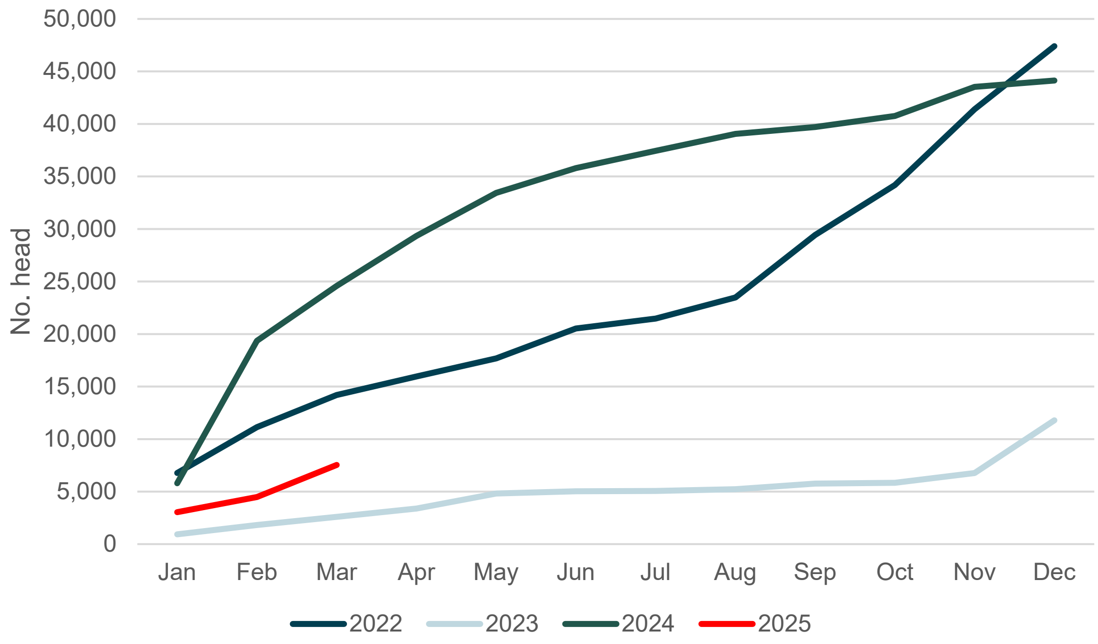

Figure 6 Cumulative number of cattle sold east via Ceduna (Based on PIRSA data, DPIRD analysis)

Saleyard prices

- The Western Young Cattle Indicator (WYCI) and Eastern Young Cattle Indicator (EYCI) saw record highs in early 2022 when the WYCI reached 1165 c/kg in April, whilst the EYCI reached the same high of 1165 c/kg, but in January.
- Following the highs seen in early 2022, the indicators decreased reaching lows of 397 c/kg in November 2023 and 358 c/kg in October for the WYCI and EYCI respectively.
- The eastern and western counterparts have historically been close in value, however diverged following these low points with the EYCI recovering quicker and reaching higher values than those seen in the west. However, in 2025 the WYCI has been making ground on the EYCI.
- As of May 2025, the WYCI had an average monthly value of 685 c/kg, 2% lower when compared to the 696 c/kg averaged by the EYCI (Figure 7).

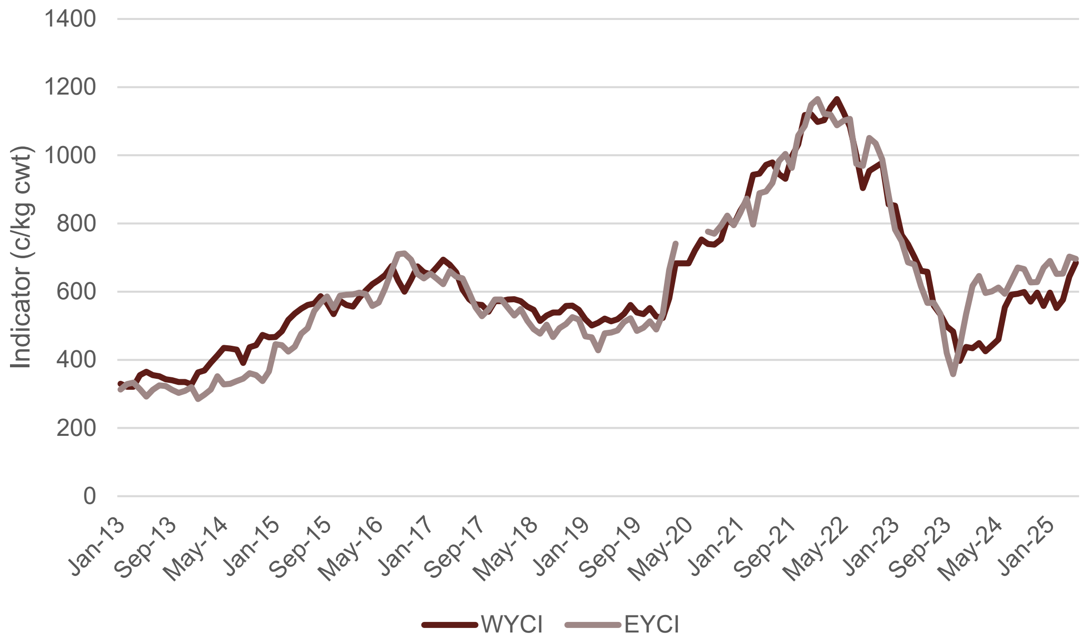

Figure 7 Saleyard indicator comparing the WYCI and the EYCI (Based on Meat and Livestock Australia (MLA) data, DPIRD analysis)

Contact

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