Cattle industry update

Summary of 2024

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

Total cattle turn-off

- The total number of cattle turned-off in 2024 reached 657,000, up 9% when compared to 2023.
- This is 4% below the 10-year average which was 684,400.

Table 1 Total WA cattle turn-off (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	YOY change
Cattle slaughter	375,300	408,100	448,100	10%
Calf slaughter	500	600	800	33%
Live export	184,200	183,100	164,000	-10%
Interstate transfer	47,400	11,800	44,100	274%
Total	**607,400**	**603,600**	**657,000**	**9%**

- The majority of animals sold in WA are sold via domestic slaughter. This totalled 68% of turn-off in 2024. 25% were sold to live exports and 7% interstate.
- There has been a shift in the avenues utilised to sell animals over the last 10 years.
- In 2014 60% of cattle were sold to domestic slaughter compared to 68% in 2024, while the percentage of cattle sold via live export declined from 39% of sales to 25%.
- Interstate transfers have been more volatile changing from year to year but seem to have settled at a higher baseline over the last five years.

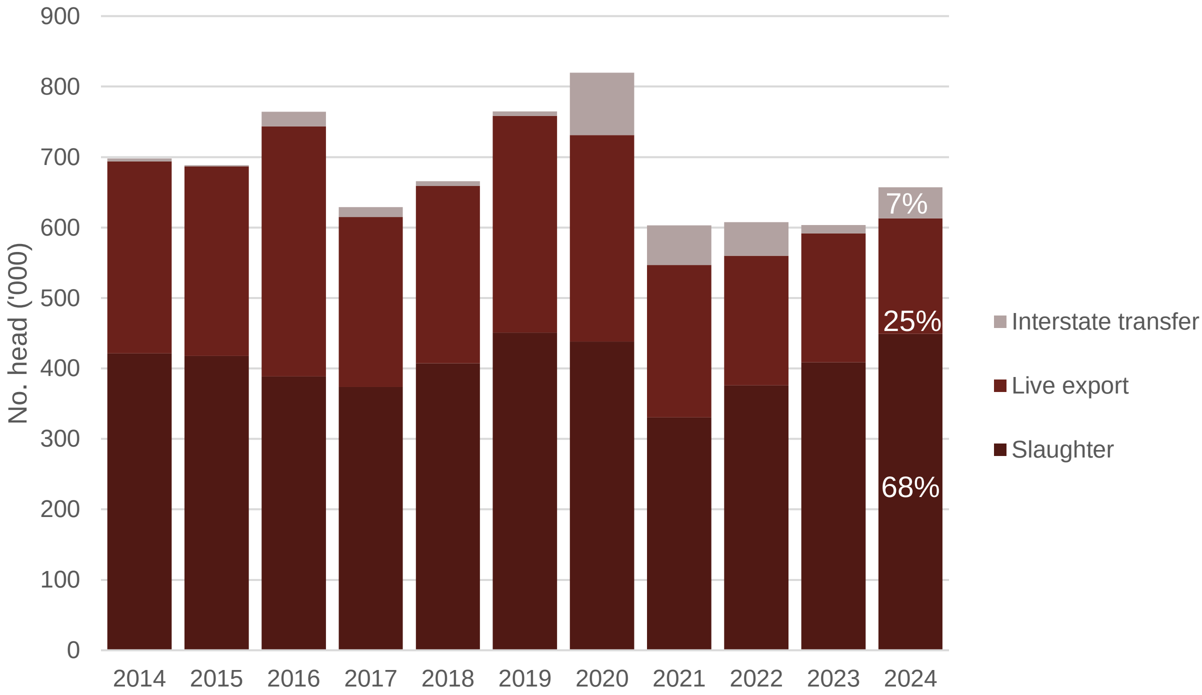

Figure 1 Total turn-off by sale avenue (Based on ABS & PIRSA data, DPIRD analysis)

Domestic slaughter

- In 2024 total WA cattle slaughter reached 448,900, a year-on-year (YOY) increase of 10%.
- 58% or 259,700 was made up of female cattle slaughter, a YOY increase of 18%, while 42% was male cattle slaughter which also increased slightly from 187,600 to 188,500.
- The increase in slaughter in 2024 followed a substantial increase between 2022 and 2023 so is likely indicative of herd liquidations in some areas.

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

	2022	2023	2024	YOY change
Male slaughter	169.6	187.6	188.5	0.5%
Female slaughter	205.7	220.5	259.7	18%
Calf slaughter	0.5	0.6	0.8	33%
Total	**375.8**	**408.7**	**448.9**	**10%**

- 2024 male cattle slaughter followed a very similar pattern to 2023, finishing 0.5% higher.
- Both 2023 and 2024 were strong years for male slaughter showing an increase on previous years but were not historically high. Prior to 2017, the 2023 and 2024 figures were common, however in the intervening years male slaughter appears to have been displaced by female slaughter.

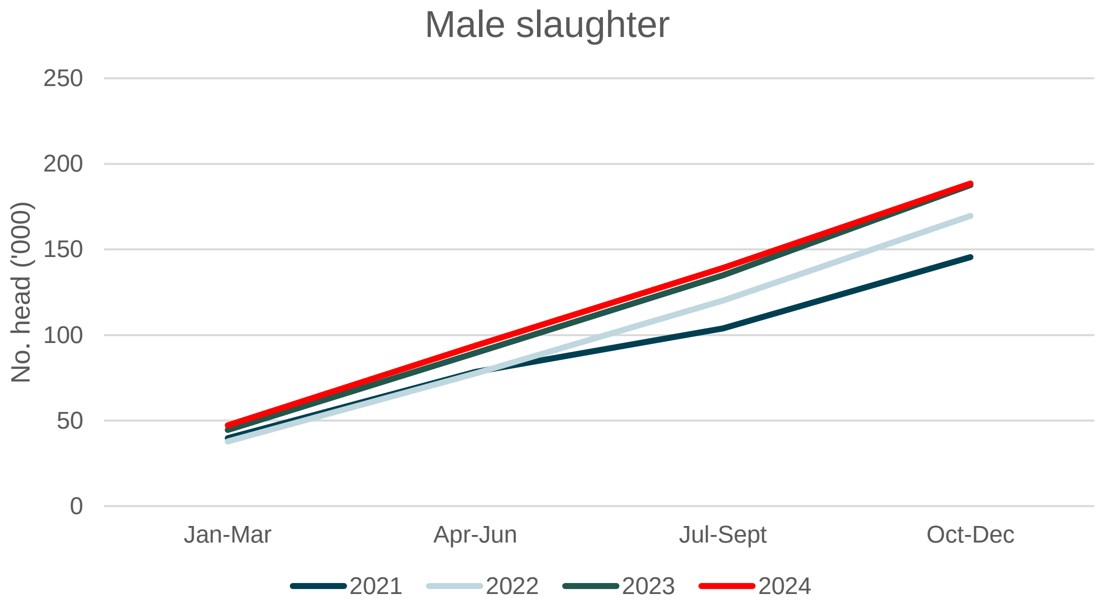

Figure 2 Cumulative male cattle slaughter in WA (thousand head) (Based on ABS data, DPIRD analysis)

- In 2024 female cattle slaughter reached 259,700, significantly higher than the previous three years and indicative of a possible reduction in the size of the WA breeding herd.
- Similar numbers were seen between 2018-2020, possibly in response to poorer seasonal conditions at that time.

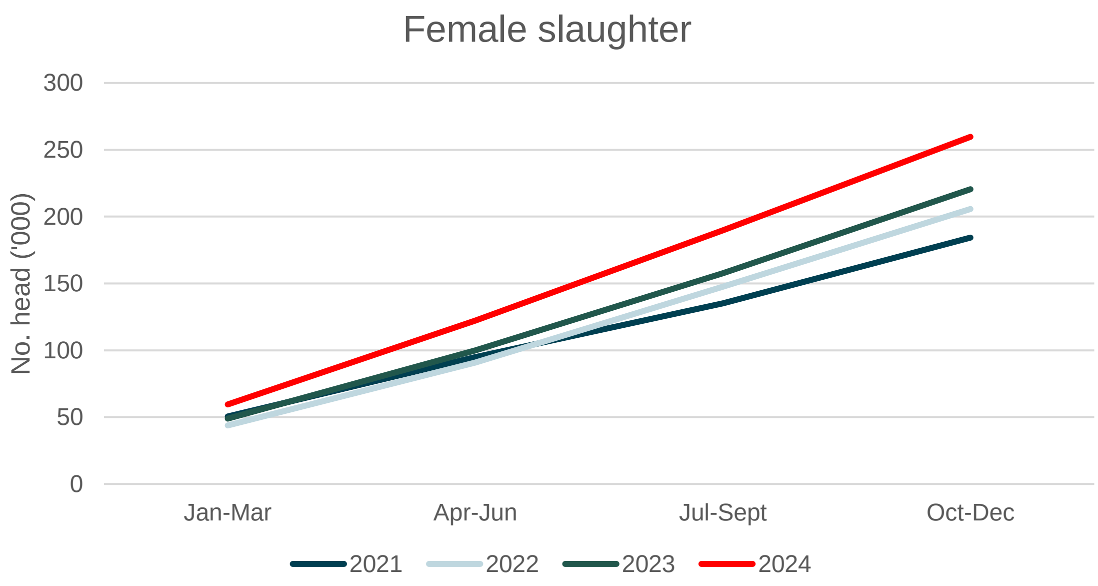

Figure 3 Cumulative female cattle slaughter in WA (thousand head) (Based on ABS data, DPIRD analysis)

Feedlot turn-off

- In 2024 the total number of cattle turned-off from WA feedlots numbered 140,500, up 6% YOY (Table 3) and similar in number to 2021.
- Assuming that these cattle are sold to slaughter as opposed to live export, this would make up 31% of total slaughter.

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

	2022	2023	2024	YOY change
Feedlot turn-off	132,300	132,600	140,500	6%

- The 1st quarter (Jan-Mar) is the busiest time for cattle turn-off from feedlots in recent years. In 2024 46,700 were turned off during the 1st quarter which accounted for 33% of the total turn-off for the year.
- The 4th quarter (Oct-Dec) was the quietest period with 10% of total turn-off or 14,400 turned-off during this time. A similar pattern was seen in prior years.

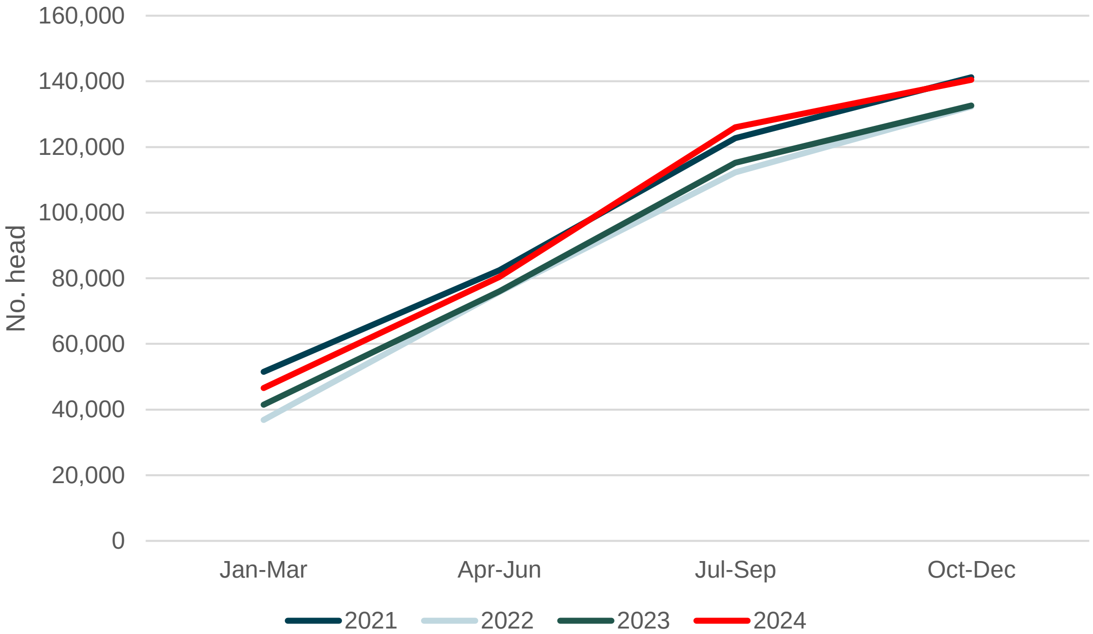

Figure 4 Cumulative cattle turn-off from WA feedlots (Based on ALFA data, DPIRD analysis)

Live export

- In 2024 the number of live cattle exported from WA totalled 164,000, down 10% compared to 2023 and the lowest in over 30 years.
- This has largely been due to Israel, who were previously one of WA's largest markets, reducing imports, having declined from over 75,000 cattle in 2023 to 6,000 in 2024.

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

	2022	2023	2024	YOY change
Live exports	184,200	183,000	164,000	-10%

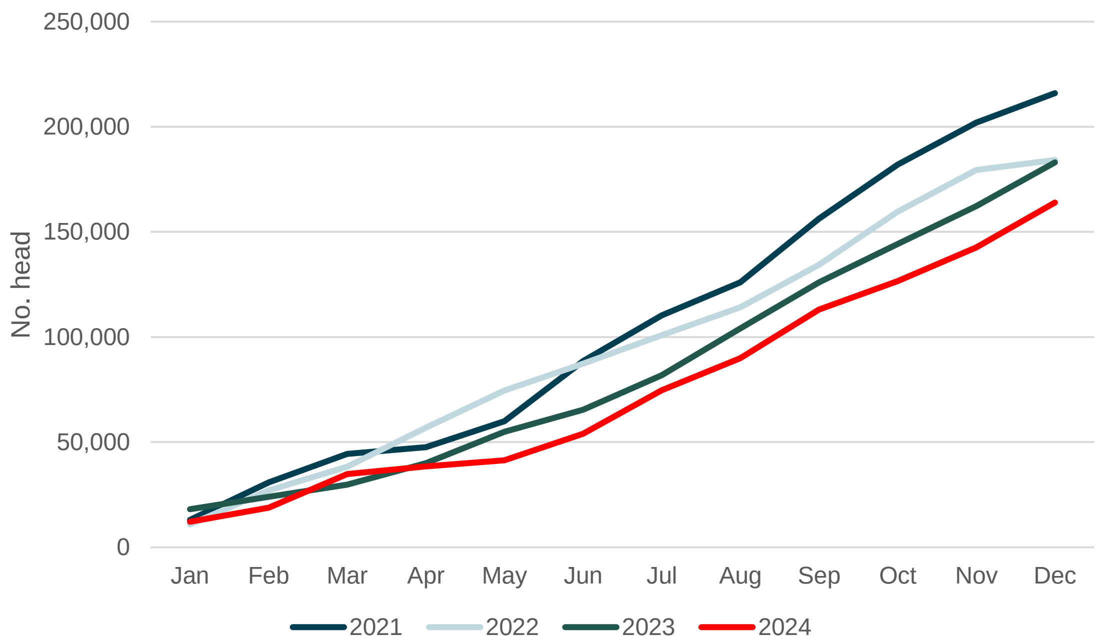

Figure 5 Cumulative number of cattle exported from WA (Based on ABS data, DPIRD analysis)

Interstate transfers (southern only)

- Following a quieter year in 2023, the movement of cattle across southern borders increased 274% in 2024 to over 44,000.
- However, the total number transferred in 2024 was still lower than the total amount in 2022 and 2021 (Figure 6).
- This is largely thought to be price driven as for the majority of 2024 WA cattle were at a lower price compared with their eastern counterparts.

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

	2022	2023	2024	YOY change
Interstate transfers	47,400	11,800	44,100	274%

- After a strong February where 13,600 cattle went east, numbers trucked east slowed until September before lifting slightly in spring.

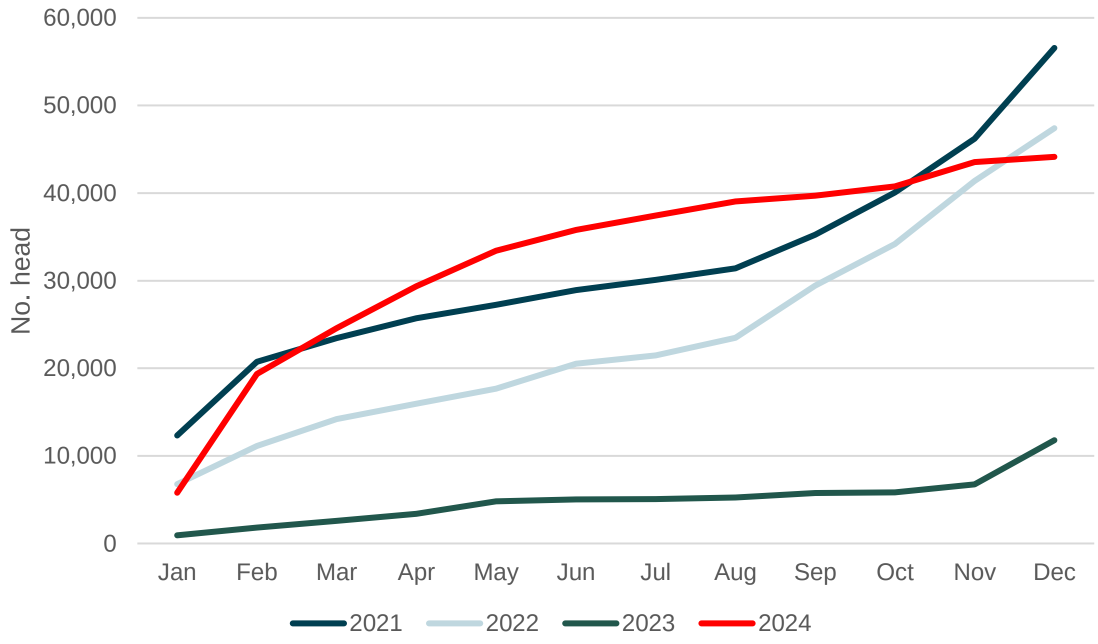

Figure 6 Cumulative number of cattle sold east via Ceduna (Based on PIRSA data, DPIRD analysis)

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.
- As of March 2025, the WYCI had an average monthly value of 576 c/kg, 12% lower when compared to the 653 c/kg averaged by the EYCI (Figure 7).

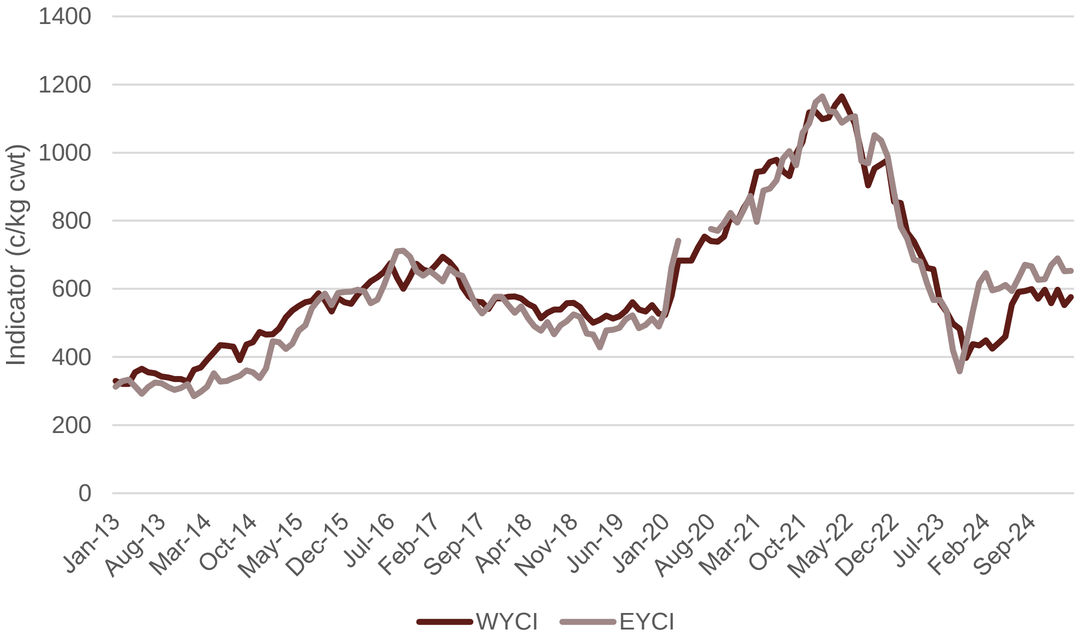

Figure 7 Saleyard indicator comparing the WYCI and the EYCI (Based on Meat and Livestock Australia (MLA) data, DPIRD analysis)

Contact

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