



# Sheep industry turn-off update

March 2025

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

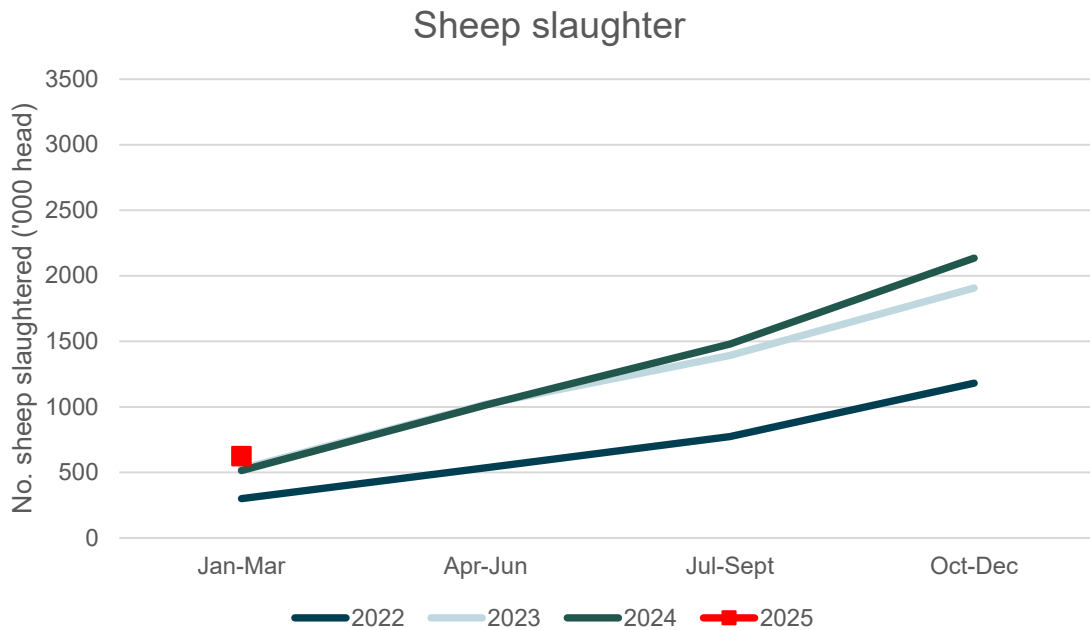
## Domestic slaughter

- In the first quarter of 2025, total sheep and lamb slaughter reached 1.3 million head, marginally less than this time last year, but 25% higher than the 10-year average of 1.1 million.
- A total of 624,200 adult sheep have been processed in WA, 22% higher than this time last year and the highest first quarter total since 2008.
- Lamb slaughter totalled 710,000, a 15% year on year (YOY) decline compared to 2024, but still historically high.

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

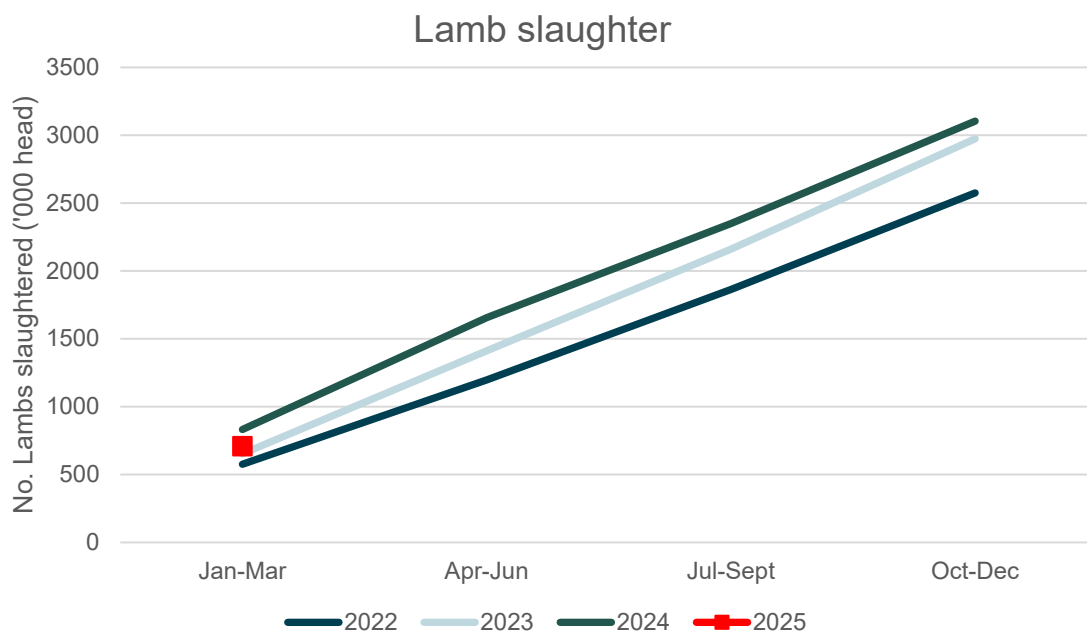
	2023	2024	2025	YOY change
Sheep	528.0	513.5	624.2	22%
Lambs	653.2	831.8	710.0	-15%
<b>Total</b>	<b>1,181.2</b>	<b>1,345.3</b>	<b>1,334.2</b>	<b>-1%</b>

- Following 2 years of high sheep slaughter in 2023 and 2024, the trend appears to be continuing in the first quarter of 2025. This may be indicative of further flock contraction and is likely impacting the breeding ewe base.



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

- Whilst lamb slaughter has declined in the first quarter of 2025 when compared to 2024, it remains higher than the previous 2 years.
- Given the anecdotally lower lambing rates in 2024 following a dry start to the year, the rate of lamb slaughter in comparison to lambs born is high, resulting in less replacement ewes available for the coming years.



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

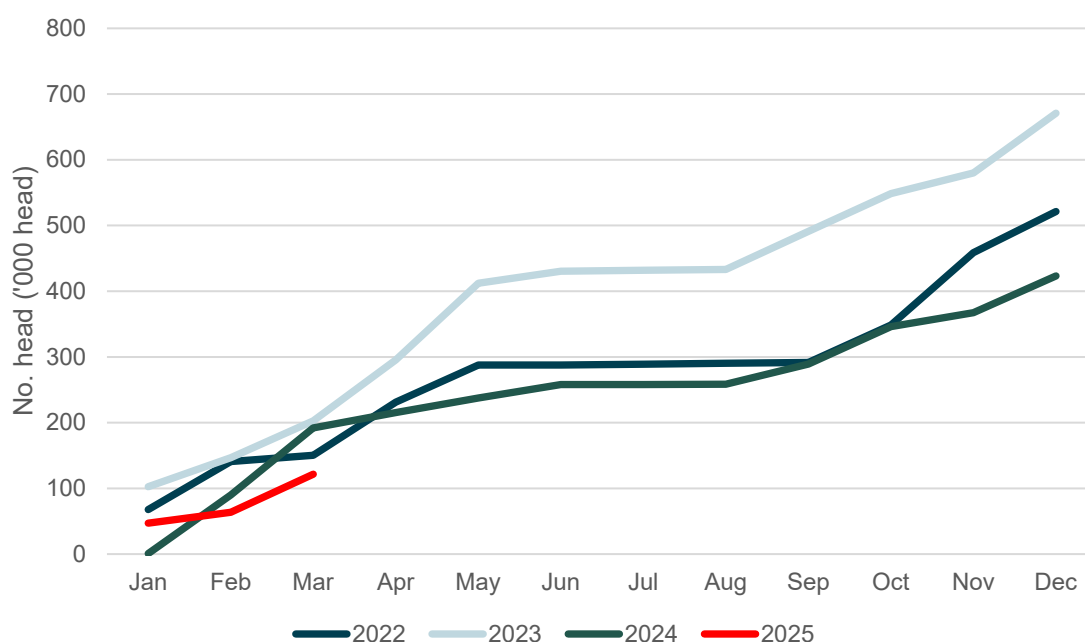
## Live export (by sea and air)

- The number of sheep exported live from WA reached 121,600 in the first quarter of 2025, a 37% reduction compared to 2024 and the lowest in over 30 years for this period.
- So far this year there has been marked declines in the number of sheep exported to Kuwait (-28%), Jordan (-78%) and Saudi Arabia (-74%), however the number of sheep exported to Oman and Qatar has increased significantly from 5,000 to 16,000 and 1,200 to 15,000 respectively.

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

	2023	2024	2025	YOY change
Sheep	202.7	192.1	121.6	-37%

- Following a strong start to the year with 47,100 sheep exported in January, February was relatively quiet with 16,500 leaving the state. In March numbers did pick up, returning to 58,000, bringing the total to 121,600.



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

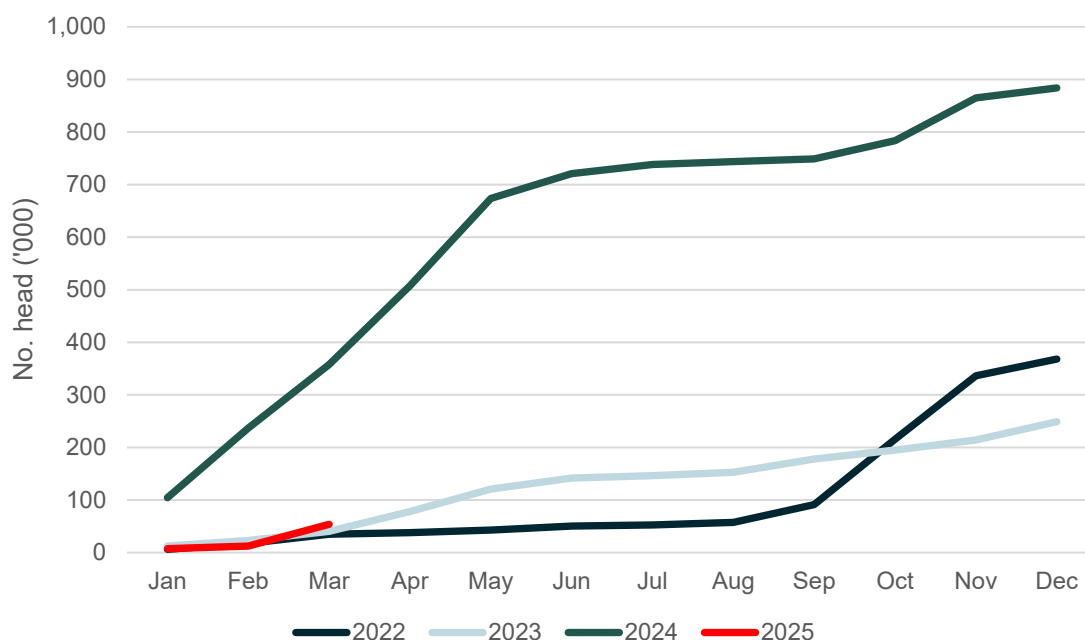
## Interstate transfers

- In the first quarter of 2025 interstate transfers totalled 53,900, a decline of 85% compared to this period in 2024.
- 67% the animals sold interstate between January and March were lambs.

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

	2023	2024	2025	YOY change
Sheep	15.3	205.8	17.8	-91%
Lambs	25.2	151.8	36.1	-76%
<b>Total</b>	<b>40.5</b>	<b>357.6</b>	<b>53.9</b>	<b>-85%</b>

- The number of sheep and lambs sold interstate started the year very slowly with only 12,000 head trucked east in the first two months of 2025.
- Numbers did pick up in March, reaching over 41,000, and have continued to increase since.
- Due to eastern states prices being higher than WA recently, the number of sheep and lambs crossing the Nullarbor is projected to rise in coming months subject to availability.



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

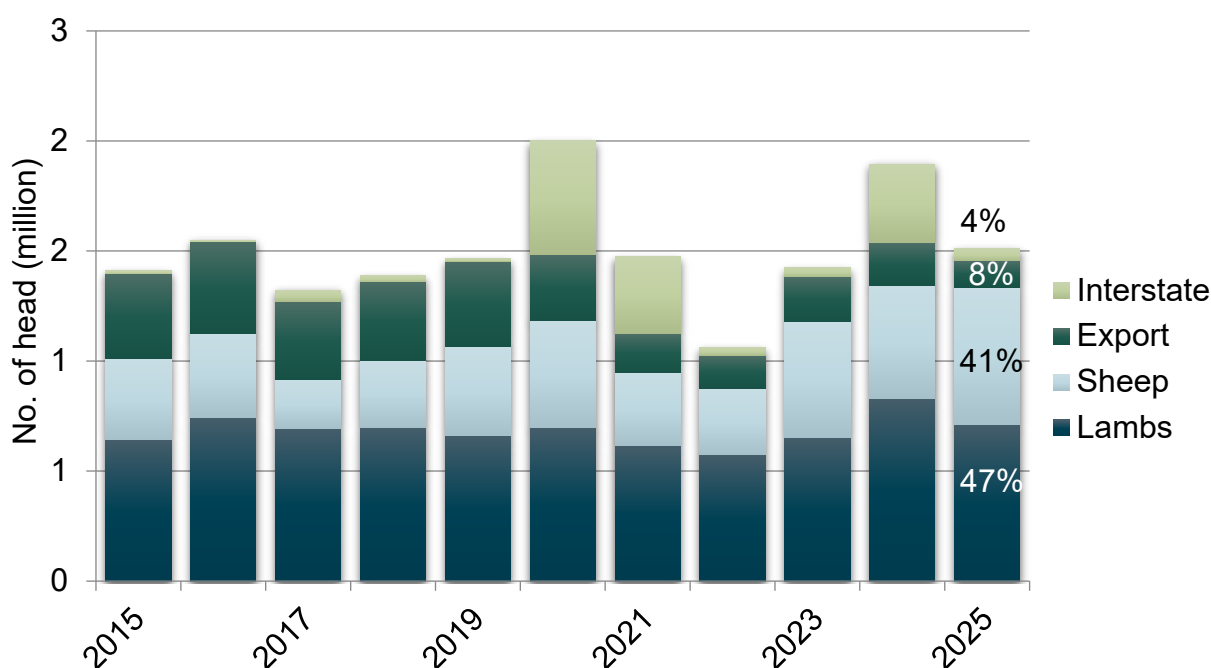
## Total sheep turn-off

- Total sheep and lamb turn-off has reached 1.51 million so far in 2025, down 20% compared to this time in 2024, but higher than the preceding 2 years.

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

	2022	2023	2024	2025	YOY change
Lamb slaughter	0.58	0.65	0.83	0.71	-15%
Sheep slaughter	0.30	0.53	0.51	0.62	22%
Live export	0.15	0.20	0.19	0.12	-37%
Interstate transfer	0.04	0.04	0.36	0.05	-85%
<b>Total</b>	<b>1.06</b>	<b>1.42</b>	<b>1.89</b>	<b>1.51</b>	<b>-20%</b>

- Lamb slaughter made up 47% or 0.71 million of the total number of sheep sold and was the largest component of turn-off.
- Sheep slaughter accounted for 41% or 0.62 million head. This time last year sheep slaughter accounted for 27% of turn-off.
- Live exports made up 8% or 0.12 million head while interstate transfers made up the remaining 4% or 0.05 million.



*Figure 5 Total WA sheep turn-off including sheep and lamb slaughter, live export and interstate transfers between January and March 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 2024 and will likely continue into 2025 unless the rate of sales slows significantly and seasonal conditions are favourable.
- Via DPIRD modelling, it is estimated that the total WA flock size may have been approximately 9.5 million as of July 2024.
- If current levels of turn-off are sustained for the remainder of 2024-25, the flock may decline further to between 8 and 8.5 million. This will be further reduced if 2025 lamb marking is lower than normal.

## Contact

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