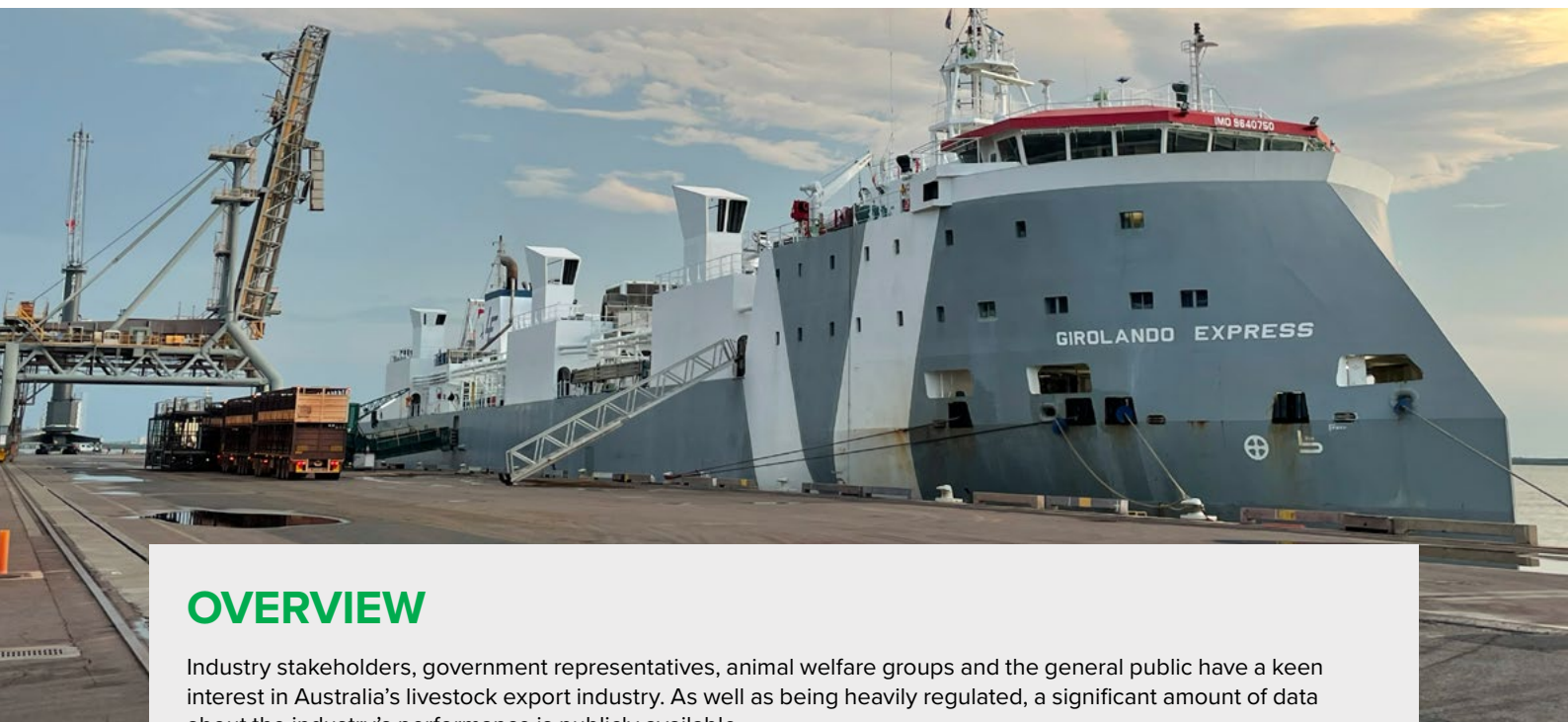


State of the Industry

A summary of statistics and performance measures for Australia's livestock exports in 2024



OVERVIEW

Industry stakeholders, government representatives, animal welfare groups and the general public have a keen interest in Australia's livestock export industry. As well as being heavily regulated, a significant amount of data about the industry's performance is publicly available.

This report brings together many of the key statistics for 2024, such as species exported, destinations, and delivery rates. It also provides information about the industry's activities in areas of most interest to the community, as identified in a series of national surveys conducted since 2019.

LIVEXCollect is the platform approved by the livestock export regulator – the Department of Agriculture, Fisheries and Forestry (department) – for reporting data from pre-export quarantine yards, sea voyages and air exports.

LIVEXCollect is the source used for the majority of export statistics in this report.

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Photo: The Livestock Collective



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1. OPERATING ENVIRONMENT

Factors affecting the livestock export industry in 2024 included Indonesia's national election, conflict in the Middle East and Australian Government policy.

Australia's biggest livestock export market, Indonesia, went to the polls in February 2024. The elected President, Prabowo Subianto, made a campaign promise to tackle malnutrition and stunting, which affect around one in five young children in Indonesia, by providing free meals to schools and pregnant women. Australian cattle exports already play an important role in boosting nutrition in Indonesia, which becomes even more important with this new policy. The industry has also started exploring opportunities to support Indonesian farmers to achieve the desired expansion of the country's beef and dairy cattle herds, including ways to leverage Australian expertise in tropical livestock management.

Efforts to control foot and mouth disease (FMD) and lumpy skin disease (LSD) in Indonesia continued throughout 2024. Supported by Australian Government grants, the livestock export industry continued to run programs to boost vaccination rates for both local livestock and imported cattle, and support capacity building for farmers and community representatives. These efforts will have lasting impacts through better understanding and use of biosecurity and disease management.

New markets were opened in Ecuador and Taiwan for breeder cattle, and in Morocco for slaughter and feeder cattle, sheep and goats. Turkey also re-confirmed protocol agreements for slaughter, feeder and breeder cattle after a hiatus in the trade of many years.

Export volumes for beef cattle increased in 2024, led by a resurgence in Indonesia. This was despite prices recovering to just below the 10-year average, after a dramatic plunge from record highs during the previous year. Demand for dairy cattle continued to weaken in the key market of China, with a corresponding decrease in export numbers. However, there was increased enquiry regarding both beef breeders and dairy cattle from a number of other potential markets.

Live sheep export numbers were affected by tensions in the Middle East and logistical issues affecting the availability of ships. This is despite the world's largest importer of live animals, Saudi Arabia, taking 104,000 sheep in its first year back in the market after more than a decade, and lower prices due to surplus sheep being turned off as a result of dry conditions in Western Australia.

In 2024, legislation to cease the export of live sheep by sea from 1 May 2028 was introduced by the Australian Government and passed by Parliament.

Exceptional circumstances

During 2024, there were two notable events where circumstances did not represent usual trade conditions.

In January, a ship travelling to the Red Sea was directed by the department to return to Australia due to rising tensions in the Middle East. The cattle and sheep were eventually unloaded in Fremantle, with some of the livestock later re-exported to their original destination. The regulator treats these as separate voyages in its statistics, and therefore this report does the same.

In March, 151 cattle died on a shipment from Australia to Indonesia. The findings¹ of the regulator's subsequent investigation indicated botulism as the most likely cause. The investigation confirmed the mortalities during transit were related to an existing animal health condition as the cattle were exposed to the botulism-causing bacteria while in Australia. The event was not related to or caused by any failure of exporter processes and controls or transport related factors.



¹ <https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/livestock/regulatory-framework/compliance-investigations/investigations-mortalities/actions-delegate-jantojun2024>

2. LIVESTOCK EXPORT STATISTICS

Australia's livestock export industry is highly regulated, including through the Australian Standards for the Export of Livestock ([ASEL](#)) and the Exporter Supply Chain Assurance System ([ESCAS](#)).

Significant amounts of data are collected along the supply chain and much of this is published by the department on its [website](#). This includes:

- Livestock export [numbers](#), including details like species, destination and mode of transport
- Shipboard [mortality rates](#)
- Results of [investigations](#)² conducted if mortality rates reach more than 1% for a sheep voyage or 0.5% for a cattle voyage
- Reports by government-employed [Independent Observers](#) who travel on some ships
- Exporter and third-party reports of [suspected non-compliance](#) with ESCAS in destination markets
- Results of [investigations](#)² into reports of ESCAS non-compliance.

The Australian Bureau of Statistics also collects data on the livestock export industry, including the value of cattle, sheep and goats exported from Australia.

LIVEXCollect is the approved platform for regulatory reporting against ASEL requirements. Unless stated otherwise, it is the source of statistics used in this report, with calendar year analysis based on departure date. LIVEXCollect data is only available from the date of its launch, in November 2020.

The different data sets available for the livestock export industry vary in their collection methods, sources, and reporting periods. This means that statistics may not align exactly, without that pointing to an error in any one source. This report reflects the most up-to-date data, incorporating any corrections to historical data necessary to ensure accuracy and consistency across all years.

LIVEXCollect

The industry's service provider, LiveCorp, co-designed the LIVEXCollect data collection platform with the department in 2020. LiveCorp oversees its management and continuing development, including the implementation in 2024 of a digital platform to replace Excel-based data collection for sea voyages. This was a key step in the industry's journey of continuous improvement.

LIVEXCollect is used for regulatory reporting by pre-export quarantine facilities, as well as sea and air exporters. On ships, the data is collected by LiveCorp Accredited Stockpersons and Australian Accredited Veterinarians responsible for overseeing the care of livestock on board.

The LIVEXCollect platform has improved the standardisation and quality of data. It also allows exporters to view their voyage information through custom-designed reports that provide data and analysis at an individual voyage level and aggregated longer term basis to allow data-driven decision making. At an industry level, LIVEXCollect data provides opportunities for reporting on the industry's performance (for instance, through this report) and helps to guide the development of research priorities, industry policies, submissions to regulatory reviews, and communication activities.



² The department was reassessing its approach to the publication of reports and, as such, investigation reports were not published in 2024.



Export values

In 2024, the Australian Bureau of Statistics reported that Australia exported a total of 1,168,281 livestock by sea and air, valued at more than \$911 million.

	Export volume (head)	Year on year change in volume	Export value (AUD FOB)	Year on year change in value
Cattle	722,085	↑16%	\$ 858,849,794	↓10%
Sheep	430,505	↓37%	\$ 43,854,259	↓41%
Goat	14,249	↓1%	\$ 7,492,317	↑6%
Buffalo	1,442	↓41%	\$ 1,488,517	↓38%
Total	1,168,281	↓12%	\$ 911,684,887	↓12%

Total exports

In 2024, LIVEXCollect data showed that 297 consignments³ were exported by sea.

- 91% went to South East Asia, primarily beef cattle from northern Australia to Indonesia and Vietnam. The average length of voyages to South East Asia was 8.2 days.
- 3% went to North Asia, primarily dairy cattle from southern Australia to China. The average length of voyages to North Asia was 19.7 days.
- 6% went to the Middle East and North Africa (MENA), primarily sheep from Western Australia to Saudi Arabia, Jordan and Kuwait. The average length of voyages to MENA was 21.3 days.

Livestock exported by air made up fewer than 3% of the total number of exports in 2024 (28,679 livestock, including a small number of alpacas, llamas and camels). The largest market was Malaysia, taking 70% of livestock exported by air, primarily sheep and goats.

The annual mortality rate for cattle exported by sea and air in 2024 was 0.06%, marginally higher than the previous year (0.05%). Excluding the shipment of cattle affected by botulism as an outlier brings the annual mortality rate to a record low of 0.04%.

The annual mortality rate for sheep exported by sea and air in 2024 was 0.12%, down from 0.18% the previous year and the lowest annual mortality rate ever recorded for sheep.

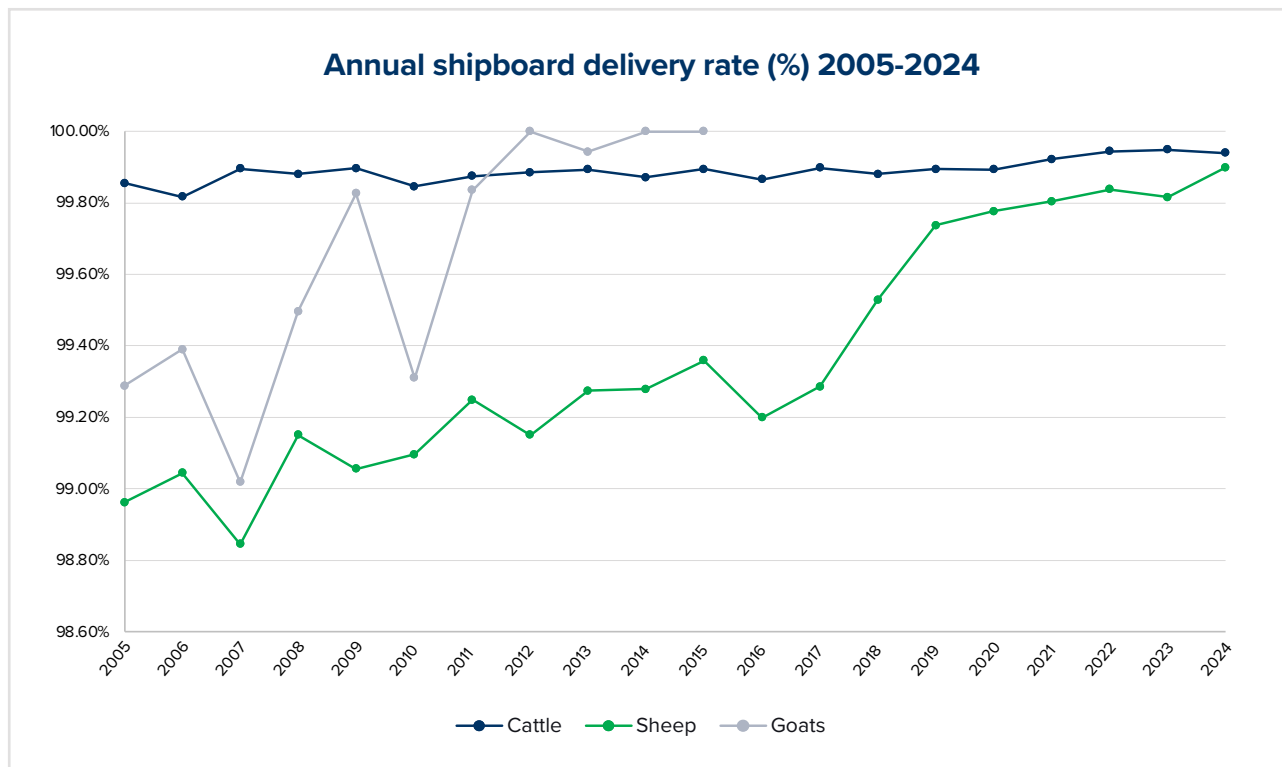
All goats are exported by air, and there were zero mortalities in 2024.

³ The Australian Standards for the Export of Livestock (ASEL) define a consignment as “a group of livestock that are under export preparation by one exporter and are destined for export, or have been exported, from a single seaport or airport”. This means a single consignment may be made up of multiple species and go to multiple ports, and there may be multiple consignments on a single ship.

Industry performance

Delivery rates for the livestock export industry have continuously improved over time. There has been a consistent strong performance for cattle shipments; a shift to exporting goats only by air; and significant improvement for sheep due to a mix of management and regulatory changes.

The chart below demonstrates that annual delivery rates for voyages have been better than 99% for more than 15 years.



Source: Reports to Parliament 2005 – 2020 calendar years and LIVEXCollect 2021 onwards

Cattle exports by sea

The majority of cattle exported by sea from Australia are beef cattle from northern Australia destined for South East Asia. Dairy cattle are also an important component of the industry, predominantly leaving from southern states to China.

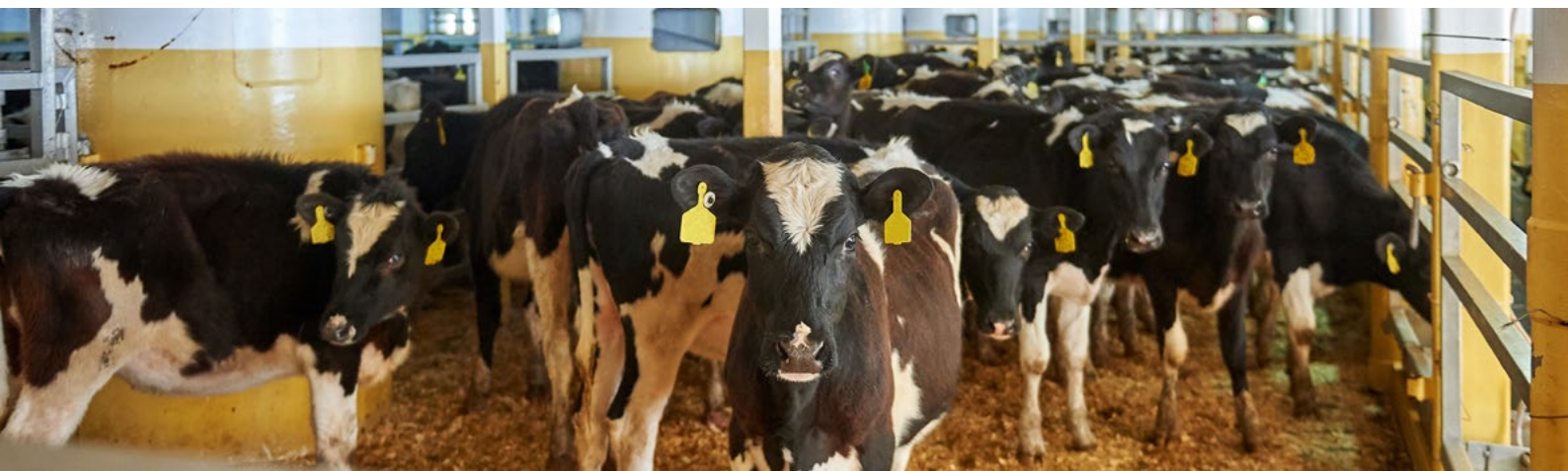
In 2024, the port of Darwin accounted for half of all cattle exported by sea, and nearly 92% of the cattle exported from Darwin went to Indonesia.

In 2024, a total of 759,505 cattle were exported by sea from Australia, up 12% compared to 2023. This was made up of 694,703 cattle exported for feeder and slaughter purposes, and 64,802 for breeding (both beef and dairy cattle).

The annual mortality rate for all cattle exported by sea in 2024 was 0.06% (451 mortalities).

The department receives a daily report from each voyage and if the mortality rate reaches 0.5% of the cattle on board, exporters must **notify the department** within 12 hours. In 2024, there were reportable mortality incidents on two shipments to Indonesia, in March and July.

More than 50% of all cattle voyages in 2024 had zero mortalities. This reflects overall low voyage mortality rates and voyage lengths.



	Total number of cattle	Year on year volume change	Annual mortality rate*	Average voyage length** (days)	Number of consignments***	Average consignment size (head)
SOUTH EAST ASIA	689,707	↑31%	0.06%	8.2	269	2,593
Indonesia	536,047	↑47%	0.06%	7.5	203	2,641
Vietnam	118,121	↓6%	0.05%	11.5	45	2,625
Other SE Asia	35,539	↑2%	0.05%	9.1	21	1,974
NORTH ASIA	52,599	↓33%	0.10%	19.7	9	5,844
China	52,599	↓33%	0.10%	19.7	9	5,844
MENA	14,972	↓80%	0.09%	20.6	18	1,248
Red Sea	8,692	↓88%	0.07%	19.9	9	1,449
Persian Gulf	683	↓82%	0.44%	19.1	5	342
Pakistan	5,096	↑100%	0.08%	22.1	3	1,699
Mediterranean	501	↑100%	0.20%	36.3	1	501
OTHER	2,227	↑100%	0.22%	40.7	1	2,227
Return to Australia	2,227	↑100%	0.22%	40.7	1	2,227
Total cattle exports	759,505	↑12%	0.06%	9.5	296	2,638

* Annual mortality rate is calculated based on the total number of mortalities divided by the total number of livestock loaded for the calendar year

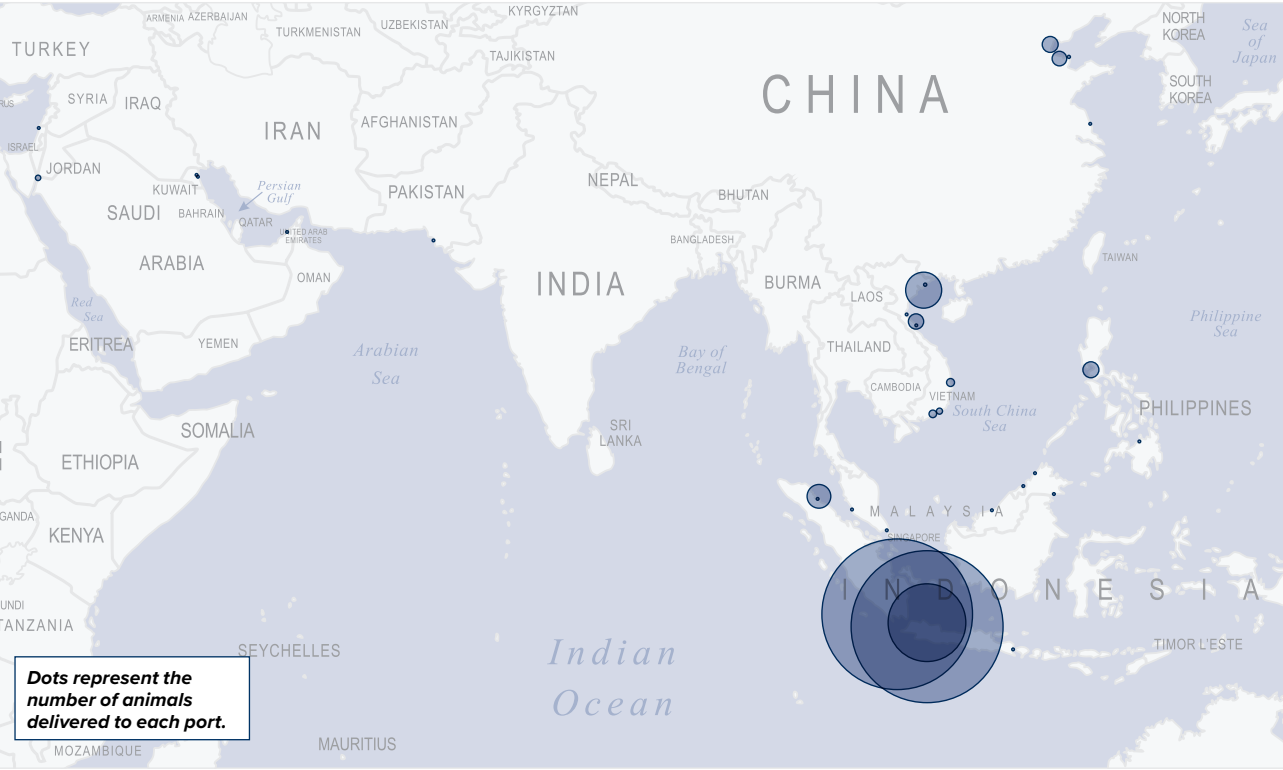
** ASEI defines voyage length as "the period from the time the first animal is loaded onto the vessel (the first day of the voyage) until the time the last animal is unloaded at the final port of disembarkation".

*** There may be more than one consignment on each vessel, there may be both cattle and sheep in a single consignment, and a consignment may discharge in more than one sub-region.

State of departure	Number of cattle	Share of total cattle exports	Year-on-year volume change
Northern Territory	378,157	49.8%	↑51%
Western Australia	170,790	22.5%	↓8%
Queensland	149,137	19.6%	↓9%
Victoria	61,421	8.1%	↓23%
Total cattle exports	759,505	100%	↑12%

Port of departure/ destination	Indonesia	Vietnam	Other SE Asia	China	Red Sea	Persian Gulf	Mediterranean	Pakistan	TOTAL
Darwin	91.8%	3.3%	4.9%	—	—	—	—	—	100%
Townsville	55.7%	44.3%	—	—	—	—	—	—	100%
Broome	69.7%	21.0%	9.3%	—	—	—	—	—	100%
Fremantle	37.3%	34.9%	9.3%	3.0%	13.7%	1.1%	0.8%	—	100%
Wyndham	100%	—	—	—	—	—	—	—	100%
Portland	3.6%	—	5.6%	82.5%	—	—	—	8.3%	100%

Cattle exports by destination sea port



Excludes the 'return to Australia' voyage.



Sheep exports by sea

All sheep exported by sea from Australia in 2024 were sourced from Western Australia and sent to the Middle East and North Africa.

In 2024, a total of 418,350 sheep were exported by sea from Australia, down 34% compared to 2023. All were exported for feeder and slaughter purposes.

The annual mortality rate for all sheep exported by sea in 2024 was 0.10% (436 mortalities).

The department receives a daily report from each voyage and if the mortality rate reaches 1% of the sheep on board, exporters must notify the department within 12 hours. There were no reportable mortality incidents for sheep exported by sea in 2024.

Due to the high number of sheep on each ship, zero mortality voyages are unlikely. However, regulatory and management changes in recent years have seen the annual mortality rate drop by 86% compared to a decade ago.

	Total number of sheep	Year on year volume change	Annual mortality rate*	Average voyage length** (days)	Number of consignments***	Average consignment size (head)
PERSIAN GULF	157,237	↓62%	0.16%	19.1	5	31,522
Kuwait	113,998	↓58%		17.9		
Oman	5,000	↓91%		15.5		
Qatar	11,993	↓25%		20.9		
Saudi Arabia	0	↓100%		—		
United Arab Emirates	26,246	↓63%		22.8		
RED SEA	233,305	↑25%	0.04%	19.9	9	25,952
Israel	0	↓100%		—		
Saudi Arabia	104,005	↑100%		18.4		
Jordan	129,300	↑25%		20.8		
MEDITERRANEAN	13,741	↑100%	0.16%	36.3	1	13,741
Israel	13,741	↑100%		36.3		
OTHER	14,068	↑100%	0.45%	40.7	1	14,068
Return to Australia	14,068	↑100%		40.7		
Total sheep exports****	418,350	↓34%	0.10%	21.3	16	26,170

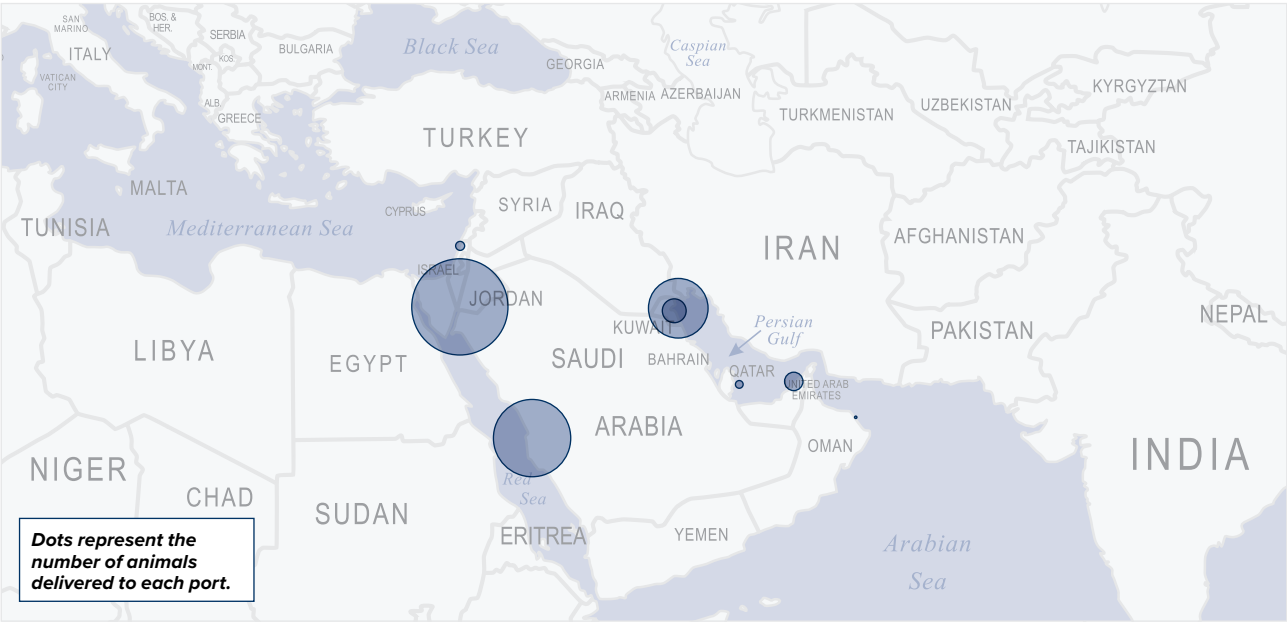
* Annual mortality rate is calculated based on the total number of mortalities divided by the total number of livestock loaded for the calendar year

** ASEL defines voyage length as "the period from the time the first animal is loaded onto the vessel (the first day of the voyage) until the time the last animal is unloaded at the final port of disembarkation". The Export Control (Animals) Rules 2021 state that, at certain times of the year, Kuwait must be the first port of unloading for voyages going to multiple countries.

*** There may be more than one consignment on each vessel, and both cattle and sheep in a single consignment. A consignment is allocated to a sub-region based on the discharge port in each country to reflect different shipping routes.

**** Due to the difficulty in accurately counting tens of thousands of sheep on each ship, the number listed at loading and discharge may not always align.

Sheep exports by destination sea port



Excludes the 'return to Australia' voyage.

Air exports

Air exports provide an opportunity for smaller consignments, and access to landlocked countries. All goats exported from Australia travel by air, along with a small proportion of cattle and sheep, and sometimes deer, camels, alpacas and llamas (which are covered by the same regulations).

In 2024, a total of 28,697 livestock were exported by air from Australia, down 29% compared to 2023. More than 60% of livestock exported by air departed from Sydney airport.

In a first, the Republic of Botswana imported Australian beef cattle in 2024 as part of efforts to boost the national herd through a subsidised breeding program to improve the livelihoods of its farmers.

The department receives a report from each flight and if the mortality rate reaches 1% of the sheep or goats, or 0.5% of the cattle on board, or three animals of any species, exporters must notify the department within 12 hours.

In August 2024, there was a reportable mortality event on a flight from Australia to Indonesia.

Destination	Total number of livestock					
	Cattle	Goat	Sheep	Alpaca/ Llama	Camel	TOTAL
China	–	3,243	113	561	–	3,917
Indonesia	50	415	1,666	188	–	2,319
Malaysia	2,124	9,483	8,177	173	50	20,007
Philippines	125	105	52	–	–	282
Singapore	–	–	1,218	–	–	1,218
OTHER	273	355	278	30	–	956
TOTAL	2,572	13,601	11,504	952	50	28,679

ASEL defines an air export journey as “the period from the time the first animal is loaded into a crate for transport by air (be it on the approved premises, other premises used for export preparation, at the airport or other), until the time the last animal is unloaded from the aircraft at the final destination”.

Livestock exports by air and destination



● Alpaca ● Camel ● Cattle ● Goat ● Llama ● Sheep



3. COMMUNITY SENTIMENT

A long-running series of national surveys has highlighted the complex and evolving nature of the relationship between the community and livestock exports. Carried out by an independent third party since 2019, the findings show that many Australians hold balanced views of the industry, rather than the binary, adversarial attitudes described by its critics.

In 2024, the main (anchor) survey coincided with national media coverage of a livestock export ship being directed back to Australia amid tensions in the Middle East. To see whether the publicity had a lasting impact, a smaller (pulse) survey was carried out some months later. This was underway during renewed coverage of the industry and the future of live sheep exports by sea.

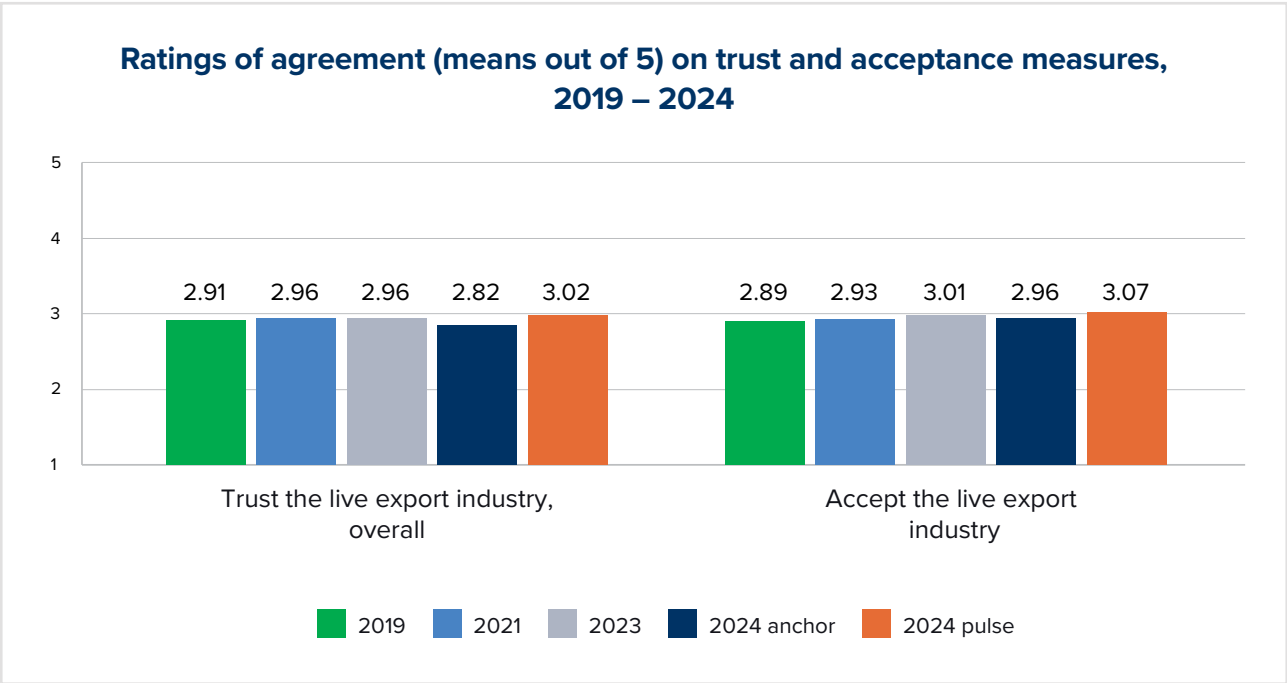
The results highlighted the critical role that social, economic and environmental context play in the community’s perception of livestock exports, with the anchor survey revealing a downturn in sentiment, and the pulse showing a notable recovery.

For instance, after participants have answered questions about different aspects of the industry, they are asked about the relative costs and benefits of livestock exports. Support for the industry reached its highest ever level in the pulse survey, with 76% agreeing that the benefits either outweigh (41%), or are equal to (35%), the costs.

As the graphs below show, positive sentiment toward livestock exports has been growing since the first survey in 2019. While both trust and acceptance dipped in the anchor survey, they rebounded in the pulse survey to the highest levels seen to date.

READ THE 2024 REPORT







Other key findings in the 2024 pulse survey:

- 64% of participants agreed that applying Australian welfare standards to our animals when sold overseas, improves animal welfare standards in those countries
- 64% agreed that “the industry supports the diet and nutrition of people overseas”
- equal numbers (36%) agreed and disagreed that “live exports should be stopped regardless of the impact on farmers” (25% neutral)
- 76% agreed that there should be more balanced news coverage about live exports
- 45% agreed that “conditions for animals on live export ships are not in line with Australian animal welfare standards” (40% neutral, 15% disagreed).

Participants acknowledged that animal welfare is a complex issue, and there were mixed results on a range of questions on this topic. Animal welfare remains one of the key drivers of trust and acceptance of the industry.

The community sentiment research aims to help the industry better understand the areas of the trade valued by the community, and its concerns. It serves as a valuable resource for guiding industry practices, policy development and stakeholder engagement.

The surveys show that a key component of building public trust and acceptance is Australians’ confidence that the industry is listening and responding to their concerns. This report outlines some of the activities being taken to address areas of interest identified through the research.

4. ANIMAL WELFARE

Animal welfare is a key focus when the Australian public thinks about livestock exports, and for those working in the industry.

More than half of all industry-funded research is dedicated to improving animal welfare, and exporters resoundingly voted (91%) in a 2024 survey that investment in “understanding and addressing animal health and welfare risks in the supply chain” was relevant or highly relevant.

Every livestock export ship must have at least one LiveCorp Accredited Stockperson (stockie) on board to manage the health, welfare and physical needs of the animals, with assistance from experienced crew members.

The stockies are highly skilled in recognising and treating animals with signs of illness or injury, and those that may not be eating well. They also have access to land-based veterinarians if there is not one on board. Ships carry a selection of veterinary medicines, and have dedicated ‘hospital pens’ for livestock being treated.

A shipboard stockperson training course is the first step to becoming accredited, and a review was carried out in 2024 to ensure the content and format remained current and fit for purpose. Applicants must have existing animal handling and husbandry skills, with the course designed to build on these competencies to prepare participants for managing livestock in the shipboard environment. The training is also designed to ensure participants understand the industry’s regulatory framework, and the requirements for monitoring and reporting on animal welfare during voyages. The review resulted in a new program with a mixed format of online modules and assessments, coursework delivered in person, and a practical session on animal health and low-stress stock handling principles.

Welfare data and research

There is complexity in understanding animal welfare, as it is inherently multifaceted and subjective, ranging over a large spectrum from negative to positive, and varying between individuals. A decade of industry research has identified an array of animal welfare indicators based around globally recognised principles and their associated criteria (see diagram, next page), and these have guided the list of daily animal welfare observations currently collected on ships.

Information is also collected about any health treatments given to livestock by the stockies or veterinarians responsible for their care, categorised into high level ‘body systems’ in the first instance. In 2024, the primary treatments for cattle related to ‘muscle/bone/joints/lame/downer’ conditions (including musculoskeletal issues such as foot abscesses and leg injuries) and ‘respiratory/breathing’ issues (including bovine respiratory disease and pneumonia). For sheep, treatments mostly related to ‘muscle/bone/joints/lame/downer’ conditions and issues with ‘eyes/ears’ (including pink eye).

The data from daily observations and health treatments are used for both short-term management decisions and longer-term analysis to improve the industry’s understanding of animal welfare outcomes, to inform regulatory reviews and guide potential research projects.

One of the industry research projects which began in 2024 was a pioneering initiative to create a system capable of interpreting the data being collected on ships by determining how best to weigh and combine the various measures. The aim is to provide insights to help inform real-time decision-making to improve welfare outcomes.

Research was also conducted at a more practical level, by identifying technologies and systems used in other countries and other industries, and running trials to see if they are suitable for adaptation or adoption in the livestock export supply chain.

Health treatment data has shown that livestock sometimes stumble or lose their footing while being loaded and unloaded from trucks and ships. In response, trials were conducted in 2024 using different types of rubber mats already used extensively in the dairy and equine industries. When installed at pre-export quarantine yards, on ramps and in ships, the additional traction provided by the mats successfully reduced the risk of injury.

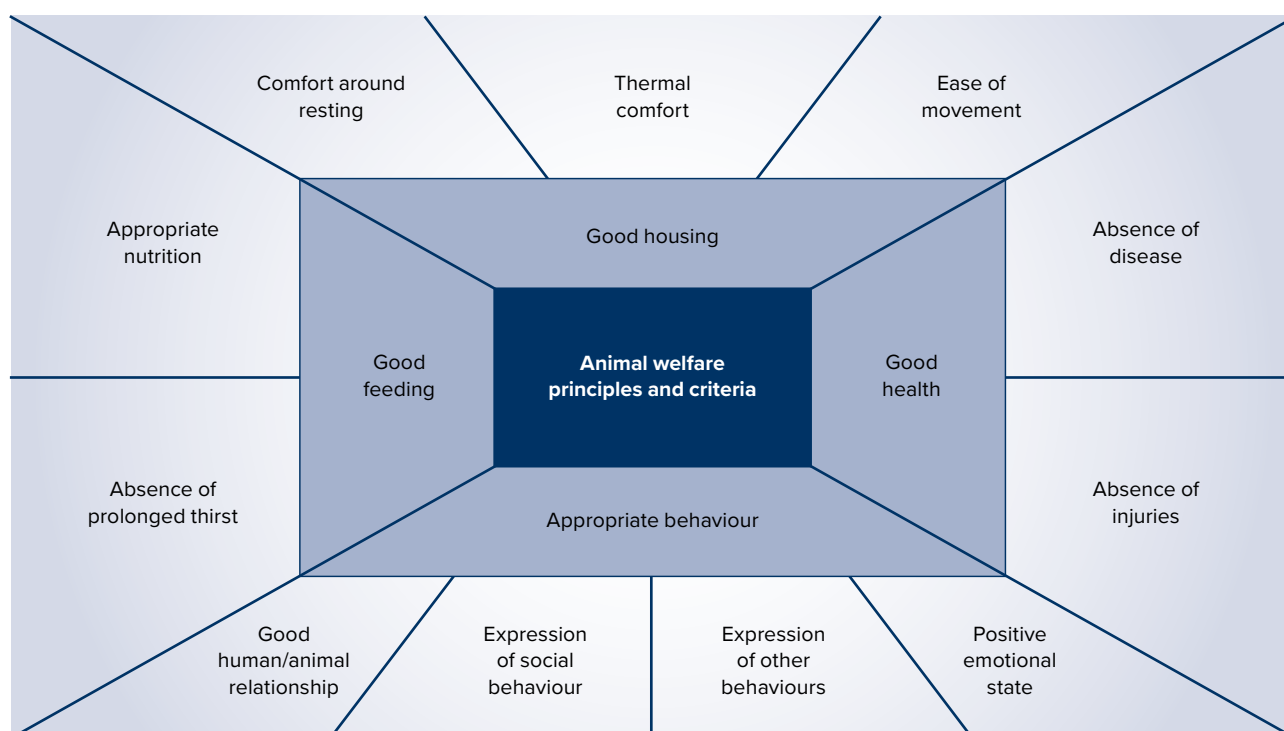
In another trial, automated air quality monitors developed for the poultry industry were installed on ships, successfully recording levels of ammonia, carbon dioxide and carbon monoxide as well as temperature and humidity. This has the potential to provide real-time alerts if conditions change, allowing preventative action to be taken.

**READ ABOUT THE
INTERPRETING
ANIMAL WELFARE
PROJECT**



**WATCH A VIDEO
ABOUT ANIMAL
WELFARE ON
SHIPS**





In-market welfare activities

Maintaining animal welfare once the livestock reach their destination overseas is another priority area for the industry, as well as being mandated through regulation. Exporters provide a significant amount of support to facilities such as feedlots and abattoirs, including advice on everything from infrastructure to animal handling practices, as well as ongoing training to ensure the standards required by Australian regulations are maintained.

In Indonesia, for instance, Animal Welfare Officers (AWOs) are employed in feedlots and abattoirs to train new staff about Australia's livestock export standards for animal handling and slaughter, and to monitor compliance. This has become a recognised profession, with more than 160 AWOs now working in the industry. AWOs utilise 'Forum AWO', a communication network set up with support from industry groups in Australia and Indonesia, to conduct training events in areas such as animal welfare, traceability and slaughter techniques.

Training programs run by industry in Indonesia in 2024 included AWO certification courses, professional development for Forum AWO members to strengthen their organisational and institutional capacity, training for livestock depots and feedlots in good animal welfare practices and Halal regulations, and intensive training in pre-slaughter stunning techniques.

Since foot and mouth disease (FMD) and lumpy skin disease (LSD) were detected in Indonesia in 2022, the Australian Government has provided support for local control efforts through several grants delivered by the livestock export industry and its partners in Indonesia.

This continued in 2024, with projects aimed at boosting vaccination rates for both local livestock and imported Australian cattle, and supporting capacity building for farmers and community representatives. These programs will have lasting impacts through better understanding and use of biosecurity and disease management, and will also help to protect Australia against the spread of exotic animal diseases.

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VACCINATION
SUPPORT**



BEHAVIOUR ON SHIPS

One of the many animal welfare indicators collected on livestock export ships is ‘general demeanour’. This is an increasingly recognised reporting method used to describe how animals behave and interact with each other and their environment — in effect, assessing their ‘body language’.

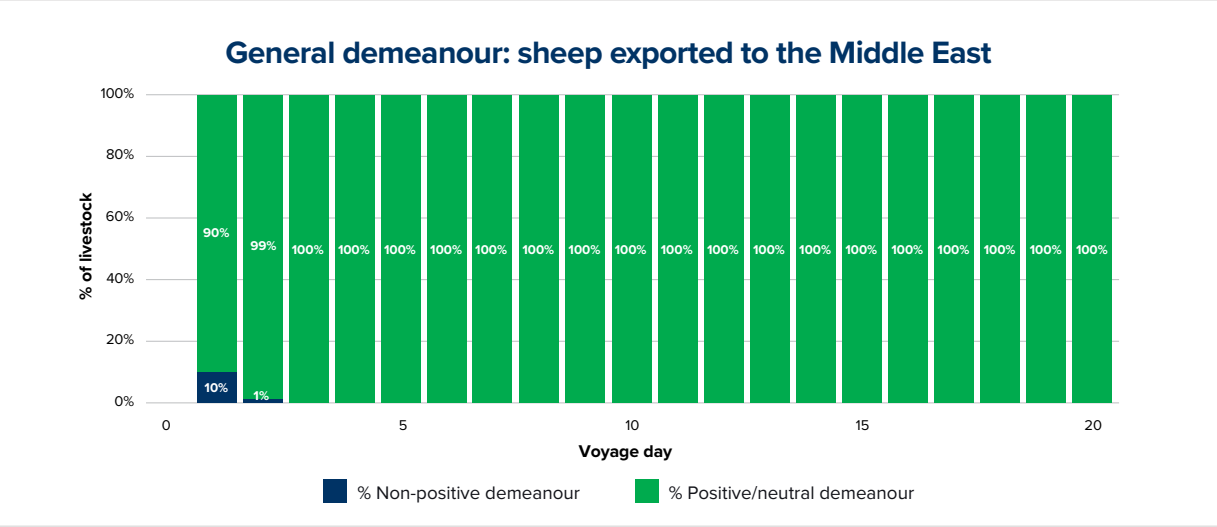
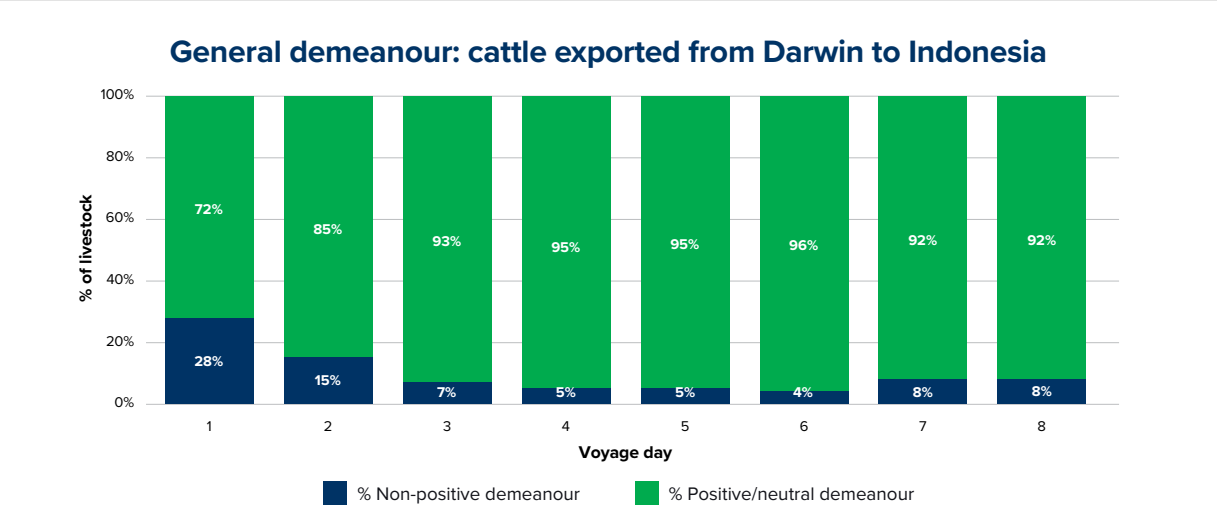
While most welfare indicators are limited to describing welfare issues or an absence of poor welfare, demeanour can be used to identify positive welfare states; for example, where animals appear content and engaged with their surroundings.

Demeanour is recorded every day during sea voyages, as a percentage of cattle and/or sheep on each deck displaying positive/neutral (e.g. active, alert, settled or content) and non-positive (e.g. anxious, dull or uncomfortable) demeanour.

The charts below suggest a relationship between positive attributes for demeanour and day of travel, as livestock adjust to the shipboard environment and their on-board routine. This is not unlike livestock in other contexts, such as feedlots, where there is a period of settling in to new surroundings and close human interaction.

The first chart draws on data from the most common short haul voyages, from Darwin to Indonesia. On day one, when livestock are loaded and the vessels depart, on average just over 70% of cattle display positive/neutral demeanour. The remaining cattle continue to settle as they adjust to the shipboard environment, with a small decrease in positive/neutral demeanour as un-loading begins.

The second chart, drawn from typical voyages from Fremantle to the Middle East, shows that sheep were generally observed with a positive/neutral demeanour after the initial day of voyages and this remained so throughout the journeys.



The methodology changed in 2024 with the introduction of the LIVEXCollect digital platform, from previously only capturing a single, predominant demeanour per deck in the Excel-based tool.

5. MORTALITY

Shipboard mortality remains the primary performance measure used by industry and the regulator, as it is absolute, objective and easily compared over time.

However, the industry recognises (and shares) the community's desire to complement mortality data with other metrics to better understand the animals' experience. More than a decade of research has been put into identifying scientifically valid, practical and meaningful measures of animal welfare. Those welfare observations are now conducted and reported daily on ships, with work underway to better interpret the data to further improve outcomes.

Alongside this, significant changes have been made to the selection and preparation of livestock, their management prior to and during export, and the regulations surrounding the industry. In combination, these factors have seen mortality rates fall to a fraction of previous levels, particularly for sheep.

All ships have a selection of veterinary medicines on board, and dedicated 'hospital pens' to house livestock being treated for illness or injury, or those that are not eating well. If the animals are in pain or unlikely to recover, they may be euthanised.

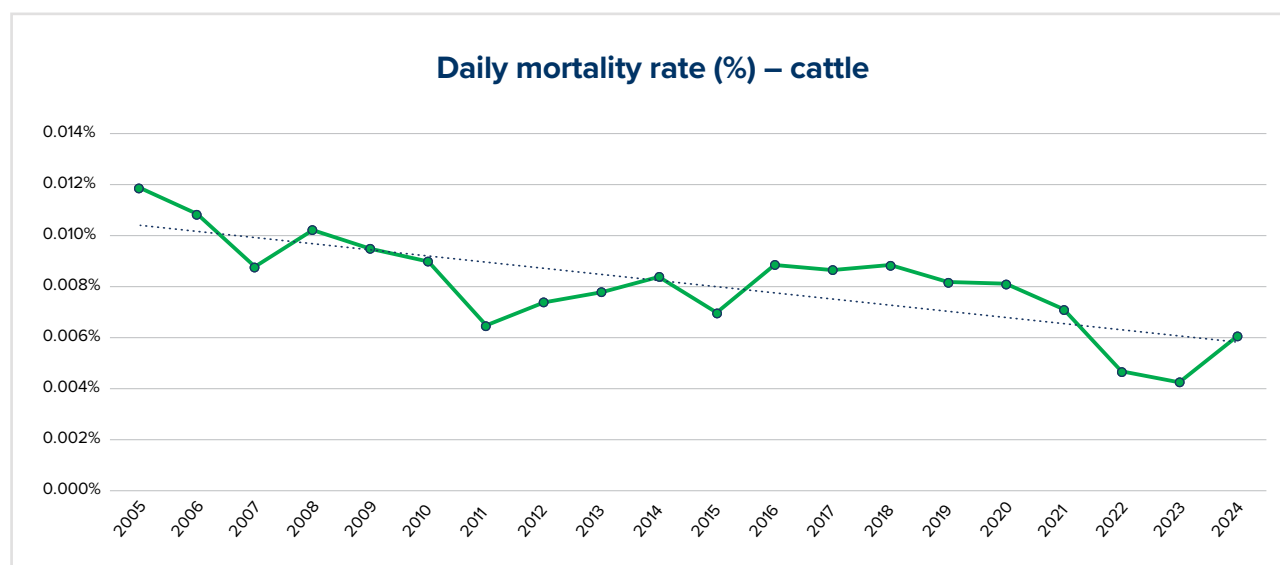
Health treatments, and any mortalities, are recorded and reported to the regulator via LIVEXCollect. They are categorised into high level 'body systems' in the first instance, allowing long term analysis to provide insights and information to guide continued industry improvement.

For cattle, the majority of mortalities in 2024 were attributed to 'muscle/bone/joints/lame/downer' conditions (including musculoskeletal issues such as foot abscesses and leg injuries) and 'respiratory/breathing' issues (including bovine respiratory disease and pneumonia). For sheep, mortalities were predominantly related to 'gastrointestinal/gut' findings (including enteritis and inanition) and 'respiratory/breathing' conditions.

Historically, the department and industry have used overall voyage mortality rate to assess livestock export performance. However, voyage mortality rates are influenced by voyage duration: other things being equal, the longer the voyage, the higher the voyage mortality rate will be. For this reason, daily mortality rates are an important measure of mortality performance as they remove the influence of voyage duration, and allow comparison to other sectors (e.g. farms).

Daily mortality rates have been calculated on a 'weighted average', accounting for the number of livestock per voyage. This replaces the straight 'average' methodology used in the previous report, and figures may differ as a result.

Cattle daily mortality rates over time

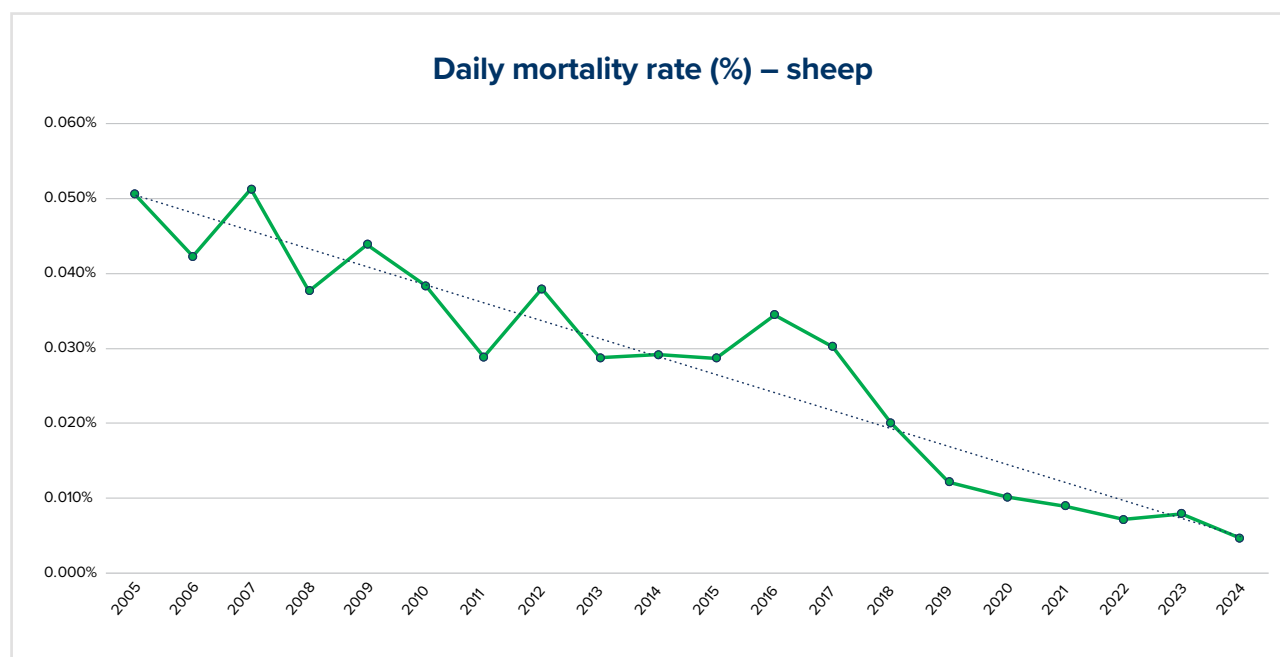


Source: Reports to Parliament 2005 – 2020 calendar years and LIVEXCollect 2021 onwards

Major points to note from the chart on the previous page:

- The average daily shipboard mortality rate for cattle in 2024 was 0.006%. This is just slightly higher than the lowest ever average of 0.004%, which was recorded the previous year. Excluding the shipment of cattle affected by botulism as an outlier brings the annual daily mortality rate equal to the previous record low of 0.004%.
- Over the past decade, average daily shipboard mortality rates for cattle have ranged from 0.004% to 0.009% with an overall downward trend.

Sheep daily mortality rates over time



Source: Reports to Parliament 2005 – 2020 calendar years and LIVEXCollect 2021 onwards

Major points to note from the chart above:

- The average daily shipboard mortality rate for sheep in 2024 was 0.005%, the lowest on record.
- The average daily shipboard mortality rates for sheep have displayed a strong downward trend over time. The 2024 rate is 85% lower than a decade ago, with an average daily mortality rate in 2014 of 0.029%.

While mortality rates from other livestock sectors are not reported as regularly or comprehensively, the livestock export industry compares favourably to data that is publicly available. For example, the Australian Bureau of Agricultural and Resource Economics and Sciences farm survey⁴ reported a sheep mortality rate of 4.5% in 2019-20. This equates to a daily mortality rate of 0.0123% on Western Australian farms.

⁴ ABARES (2021). Farm Survey Data for Beef, Lamb and Sheep Industries. All Sheep Industries Combined. Sources via An Industry Life Cycle Assessment for Sheep Production in Western Australia WA – DPIRD https://library.dpiird.wa.gov.au/cgi/viewcontent.cgi?article=1000&context=ap_researchrpts

6. REGULATION

Community sentiment surveys show that regulation is one of the key drivers of trust in the livestock export industry for members of the public. The industry operates under multiple pieces of legislation and regulation, starting when livestock are selected and enter pre-export quarantine facilities, through sea voyages and flights, to the point of slaughter overseas. The regulatory framework includes:

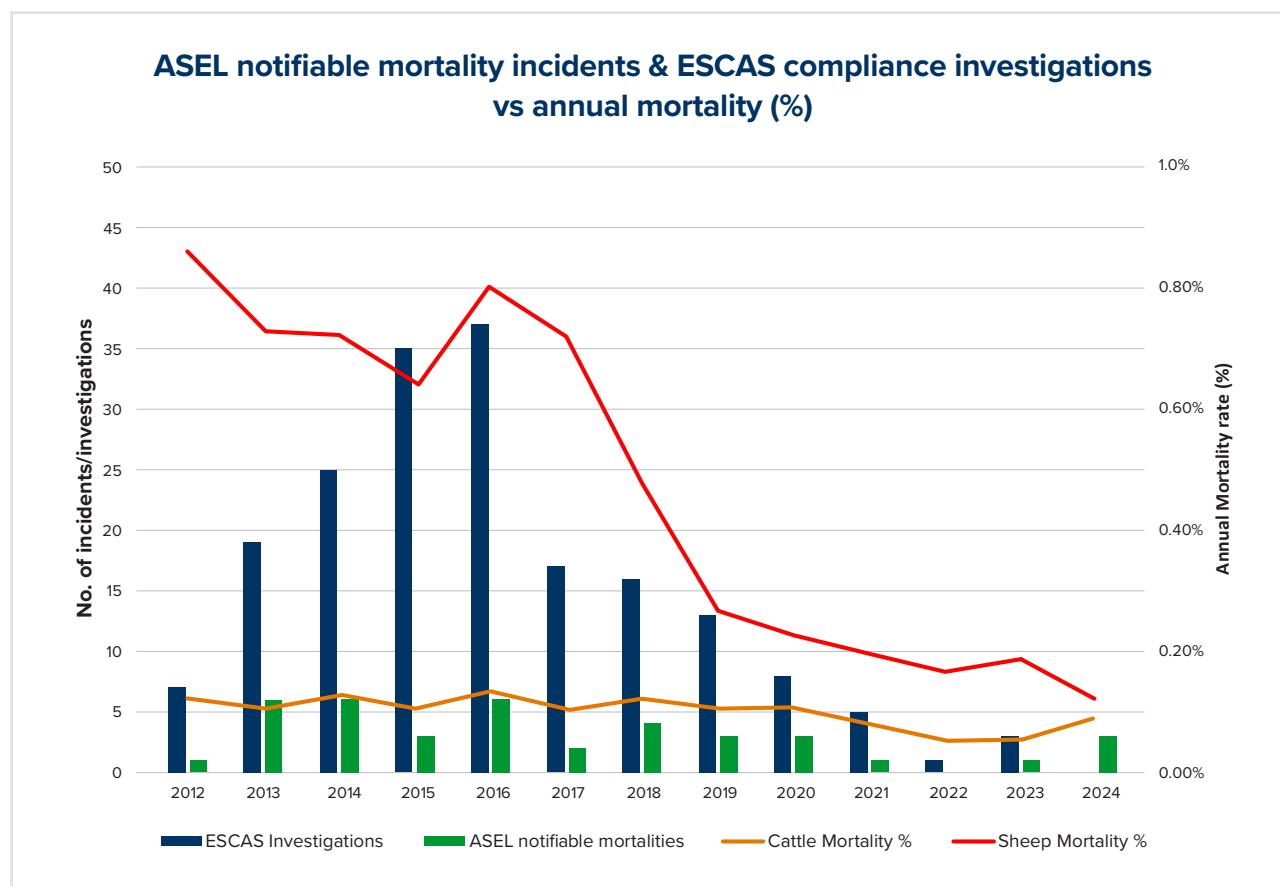
- *Export Control Act 2020* and *Export Control (Animals) Rules 2021*
- *Australian Standards for the Export of Livestock* (ASEL), which set out the minimum animal health and welfare standards exporters must meet during preparation and export of livestock
- *Exporter Supply Chain Assurance System* (ESCAS), which requires exporters to have arrangements in place for the humane handling and slaughter of livestock in importing countries. Australia is the only country in the world with this kind of regulatory system
- *Marine Order 43* (Cargo and cargo handling—livestock), which outlines the requirements to carry livestock from Australia by ship.

There is a significant level of transparency about the industry and its performance. The department regularly publishes a range of *statistics*, provides *Reports to Parliament* about mortality rates on each sea voyage, and releases the *results of investigations*⁵ should there be a notifiable mortality event on a ship or reported non-compliance with ESCAS.

Exporters must immediately notify the department if the mortality rate on a single voyage or flight reaches 1% for sheep and goats, 0.5% for cattle, or three animals of any species (whichever is greater).

ESCAS is underpinned by a system of reporting and independent audits, with exporters expected to demonstrate they have control of livestock throughout their journey, and that animal welfare is maintained. Exporters are required to report and address any non-compliance within their supply chains, and reports may also be made by auditors and third parties.

As the chart below shows, there has been continuous improvement in the industry's performance over time, with both mortality rates and reports/instances of non-compliance and notifiable mortalities on a long-term downward trend.



Source: Mortality rates as published in *Reports to Parliament*

⁵ The department was reassessing its approach to the publication of reports and, as such, investigation reports were not published in 2024.

7. ECONOMIC BENEFITS

In 2024, the value of livestock exported from Australia was more than \$911 million (ABS data):

- Sheep = \$43,854,259
- Cattle = \$858,849,794
- Goats = \$7,492,317
- Buffalo = \$1,488,517

No economic analyses of livestock exports were conducted during 2024. However, reports completed in recent years have shown that a significant majority of the value of the industry is retained by the producers who raise the animals being exported. Wide-ranging employment opportunities are also created by the industry, including farm workers, buyers, livestock transporters, veterinarians, shearers, feed suppliers, port workers and shipboard staff, as well as export company staff themselves.

The Australian community recognises these benefits, with 78% of respondents to the 2024 sentiment survey agreeing that the industry makes an important economic contribution to Australia. There is also recognition of the importance of the industry overseas, with 64% of respondents agreeing that livestock exports improve the diet and nutrition of people in destination markets.

Livestock exports and Australia's dairy industry have a mutually beneficial relationship. Selling excess dairy heifers allows farmers to diversify their income, and farms supplying cattle to the trade make more money than those which do not. Australian cattle are highly valued overseas for their genetics, health status and resilience to different climates.

READ THE
REPORT ON DAIRY
CATTLE EXPORTS



With fewer marketing options than the east coast, the live sheep export trade increases competition for farmers in Western Australia and supports sheep prices. It also provides an important way to reduce flock numbers during dry conditions. Researchers have predicted a 19% fall in the potential value of Merino wethers (male sheep) following a halt in live sheep exports. This may be as high as 33% during a period of high supply and low demand.

READ THE
REPORT ON
SHEEP EXPORTS



A report released in 2022 showed that nationally, live cattle exports contributed up to \$1.4 billion to the Australian economy and employed more than 6,573 people full time (directly and indirectly). Its impact is particularly important in northern Australia, which provided 74% of the farm gate value and accounted for 82% of all direct employment.

READ THE REPORT
ON NORTHERN
CATTLE EXPORTS

