

State of the Industry

A summary of statistics and performance measures for Australia's livestock exports in 2025



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 2025, 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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Contents

1. OPERATING ENVIRONMENT.....	3
2. LIVESTOCK EXPORT STATISTICS	4
3. COMMUNITY SENTIMENT.....	12
4. ANIMAL WELFARE.....	13
5. MORTALITY	18
6. REGULATION	20
7. INDUSTRY SUSTAINABILITY	21

1. OPERATING ENVIRONMENT

Indonesia remained a significant focus for the livestock export industry in 2025, with strong export numbers, political support for the trade, and continuing outbreaks of foot and mouth disease (FMD) and lumpy skin disease (LSD).

More than half of all livestock exported from Australia went to Indonesia in 2025, including the most cattle since 2019. This was due to large herd numbers and competitive prices for cattle in northern Australia, and Indonesian feedlots being filled at the end of the year to be ready for Ramadan and Eid Al Fitr in early 2026 – traditionally one of the busiest times of the year.

Following the May federal election, the re-elected Australian Prime Minister made Jakarta his first international visit, later stating in a letter to the livestock export industry that “Australia has no more important relationship than with Indonesia”. Meanwhile, the Indonesian Government publicly recognised that fattening imported cattle supports more employment than buying in boxed beef, and reduced the volumes of Indian buffalo meat available in the local market.

Australia continued to provide support for Indonesian efforts to control FMD and LSD, including through grants delivered in partnership with the livestock export industry to build the capacity of smallholder farmers to improve biosecurity. This not only protects livelihoods but slows the spread of the disease towards Australia.

There was significant diversification in the export of dairy cattle, with shipments to Mexico and Türkiye for the first time in almost a decade. An increase in the number of breeder cattle (beef and dairy) was largely responsible for the overall increase in live cattle exports in 2025, compared to the previous year.

Meanwhile, a new market opened in Iraq for feeder and slaughter cattle.

The live sheep export trade continued to be affected by domestic and international factors, resulting in subdued export volumes in 2025 despite strong demand. This included ongoing tensions in the Middle East, and a reduction in the sheep flock in Western Australia, which pushed up sheep prices. The export of sheep by sea is legislated to end in May 2028.

Australian goat prices were subdued in 2025 due to high flock numbers, which prompted strong demand from international buyers and the highest number of goats exported since 2016.



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](#) 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](#) 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.

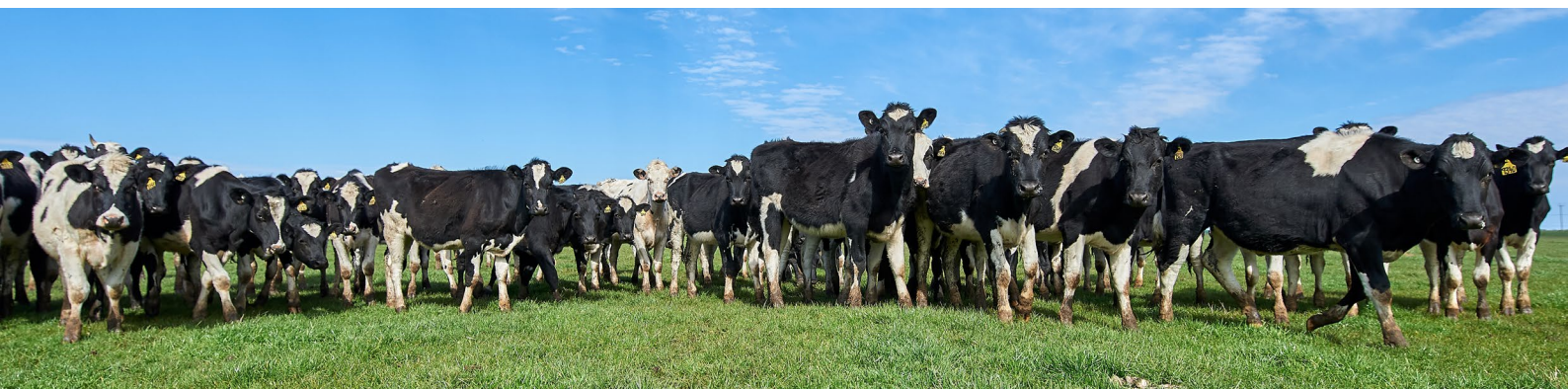
The different data sets available for the livestock export industry vary in their collection methods, sources, and reporting periods. This means that statistics may not align exactly, without that pointing to an error in any one source. This report reflects the most up-to-date data, incorporating any 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 Australian Accredited Veterinarians or LiveCorp Accredited Stockpersons 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.





Total exports

In 2025, the Australian Bureau of Statistics reported that Australia exported a total of 1,169,405 livestock by sea and air, valued at more than \$1.09 billion.

	Export volume (head)	Year on year change in volume	Export value (AUD FOB)	Year on year change in value
Cattle	804,111	↑11%	\$1,037,479,647	↑20%
Sheep	330,445	↓23%	\$49,599,580	↑13%
Goats	33,117	↑132%	\$4,897,935	↓35%
Buffalo	1,732	↑20%	\$2,351,423	↑58%
Total	1,169,405	↑0.1%	\$1,094,328,585	↑20%

Source: Australian Bureau of Statistics

In 2025, LIVEXCollect data showed that 295 consignments¹ were exported by sea.

- 89% 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 7.9 days.
- 4% went to North Asia, primarily breeder cattle from southern Australia to China. The average length of voyages to North Asia was 19.6 days.
- 5% went to the Middle East and North Africa (MENA), primarily sheep from Western Australia to Kuwait, Qatar, the United Arab Emirates and Oman. The average length of voyages to MENA was 27.3 days, an increase on previous years due largely to renewed exports to Türkiye, and some vessels going around the Cape of Good Hope rather than through the Red Sea as a result of tensions in the Middle East.
- Livestock exports to Mexico resumed for the first time since 2016. The average length of these voyages was 24.3 days.

Livestock exported by air made up just over 4% of the total number of exports in 2025 (50,631 animals, including a small number of alpacas, llamas and camels). The largest market was Malaysia, taking 79% of livestock exported by air, primarily sheep and goats.

The annual mortality rate for cattle exported by sea and air in 2025 was a record low of 0.04%, down from 0.06% the previous year.

The annual mortality rate for sheep exported by sea and air in 2025 was 0.13%, making it the second lowest on record after the previous year (0.12%).

All goats were exported by air, and there were zero mortalities in 2025.

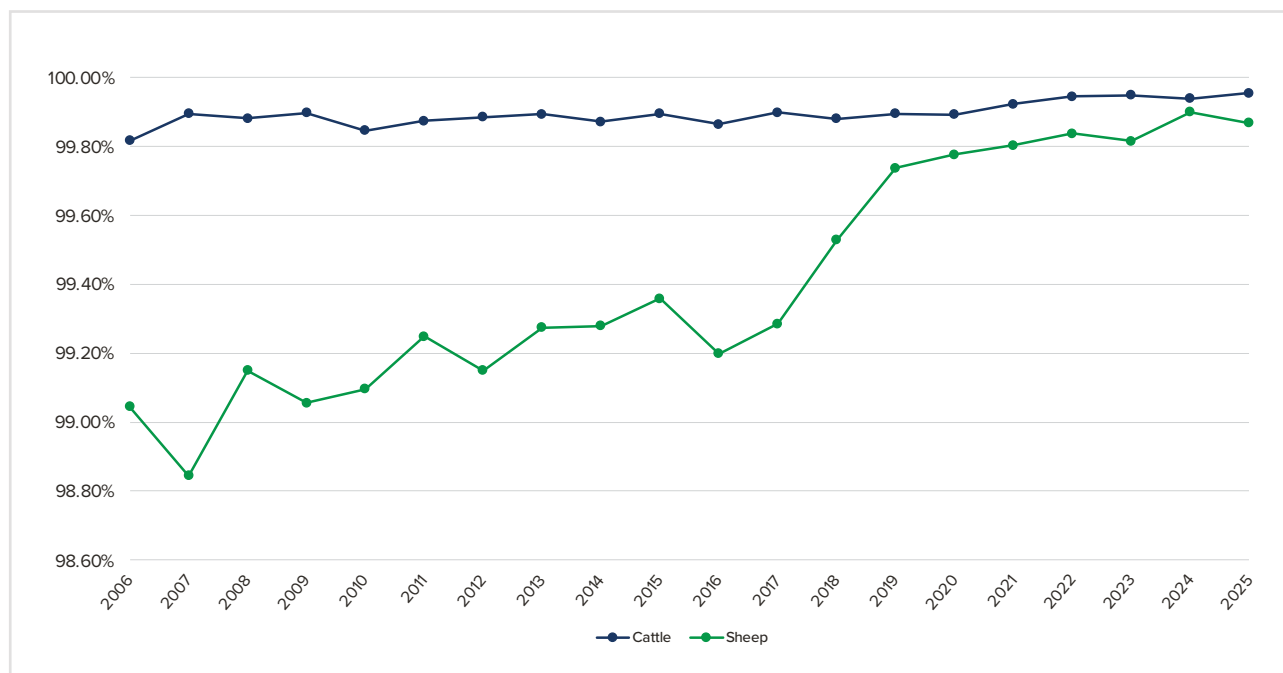
1. The Australian Standards for the Export of Livestock (ASEL) define a consignment as “a group of livestock that are under export preparation by one exporter and are destined for export, or have been exported, from a single seaport or airport”. This means a single consignment may be made up of multiple 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 are continuously improving, even though they have been better than 99% for more than 18 years, as shown by the chart below on voyage outcomes.

- The consistent strong performance for cattle shipments has stepped up even further over the past decade, with delivery rates increasing from 99.87% in 2016 to 99.96% in 2025, closing the gap toward 100% delivery by approximately 70%.
- The live sheep trade has seen the most significant improvements due to a mix of management and regulatory changes, from 99.20% in 2016 to 99.88% in 2025.

Annual shipboard delivery rate (%) 2006-25



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.

For many years, China was the primary market for breeders (especially dairy cattle). However, diversification in 2025 included shipments to Mexico and Türkiye for the first time in around a decade and increased shipments to Indonesia, most of these exported from the port of Portland. A combination of new markets and conflict in the Middle East also resulted in several new routes and regions for live cattle exports in 2025.

In 2025, the port of Darwin accounted for more than half of all cattle exported by sea, and nearly 90% of the cattle exported from Darwin went to Indonesia.

In 2025, a total of 789,232 cattle were exported by sea from Australia. This is an increase of 5% overall compared to 2024, largely driven by the export of 91,723 beef and dairy cattle for breeding (up 41%, year-on-year). The bulk were made up of 698,672 cattle exported for feeder and slaughter purposes.

The annual mortality rate for all cattle exported by sea in 2025 was a record low of 0.04% (354 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 2025, there was one reportable mortality incident, which occurred on a shipment to Indonesia in June. The resulting investigation found no evidence of regulatory breaches.

More than 50% of all cattle consignments in 2025 had zero mortalities. This reflects overall low voyage mortality rates and voyage lengths.

2025 cattle shipments

	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	704,306	2%	0.03%	7.9	262	2,693
Indonesia	583,345	9%	0.03%	7.3	212	2,735
Vietnam	84,837	-28%	0.04%	11.0	30	2,829
Other SE Asia	36,124	2%	0.06%	9.5	20	2,039
MENA	32,132	115%	0.10%	27.2	14	2,295
Mediterranean	6,219	1,141%	0.11%	37.2	2	3,110
Pakistan	1,598	-69%	0.06%	21.5	2	799
Persian Gulf	2,901	325%	0.07%	21.5	4	726
Red Sea	11,273	30%	0.04%	22.0	3	3,758
Türkiye	10,141	new	0.17%	37.1	3	3,380
NORTH ASIA	31,967	-39%	0.16%	19.6	11	2,906
China	31,967	-39%	0.16%	19.6	11	2,906
OTHER	20,827	100%	0.18%	24.3	5	4,165
Mexico	20,827	new	0.18%	24.3	5	4,165
Return to Australia****	0	-100%				
Total cattle exports	789,232	4%	0.04%	9.5	292	2,707

Source: LIVEXCollect

* 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".

*** 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.

**** In 2024, a ship was directed by the department to return to Australia due to rising tensions in the Middle East.

Cattle exports by state of departure

	Number of cattle	Year-on-year volume change	Share of total cattle exports
Northern Territory	447,626	19%	57%
Queensland	80,357	-44%	10%
Victoria	67,563	10%	9%
Western Australia	193,686	13%	25%
Total	789,232	4%	

Source: LIVEXCollect

Destination countries as a percentage of exports from each port

Port of departure	Destination										
	Indonesia	Vietnam	Other SE Asia	China	Gulf	Mediterranean	Pakistan	Red Sea	Türkiye	Mexico	Total
Brisbane			100.0%								100%
Broome	66.5%	21.3%	12.2%								100%
Darwin	89.7%	5.6%	4.8%								100%
Fremantle	35.7%	27.5%	3.9%	6.7%	1.4%	8.5%		15.4%	0.8%		100%
Geraldton	100.0%										100%
Portland	4.2%		5.6%	40.1%	2.8%		2.4%		14.1%	30.8%	100%
Townsville	74.7%	25.3%									100%
Wyndham	100.0%										100%
Total	73.3%	10.7%	5.2%	4.1%	0.4%	0.8%	0.2%	1.4%	1.3%	2.6%	100%

Source: LIVEXCollect

Cattle exports by destination sea port



Source: LIVEXCollect

Sheep exports by sea

All sheep exported by sea from Australia in 2025 were sourced from Western Australia and sent to the Middle East and North Africa.

In 2025, a total of 318,820 sheep were exported by sea from Australia, down 24% compared to 2024. All were exported for feeder and slaughter purposes.

The annual mortality rate for all sheep exported by sea in 2025 was 0.14% (438 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 have been no reportable mortality incidents for sheep exported by sea for eight years.

Due to the high number of sheep on each ship, zero mortality voyages are unlikely. However, management and regulatory changes in recent years have seen the annual mortality rate drop by 83% compared to a decade ago.

2025 sheep shipments

	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	261,502	66%	0.16%	23.8	5	52,243
Kuwait	146,996	29%		18.1		
Oman	28,838	477%		25.1		
Qatar	38,105	218%		20.8		
Saudi Arabia	17,780	–		17.9		
United Arab Emirates	29,783	13%		22.7		
RED SEA	57,606	-75%	0.06%	21.6	2	28,803
Jordan	40,839	-68%		21.6		
Saudi Arabia	16,767	-84%		20.7		
OTHER	0					
Israel	0	-100%		–		
Return to Australia****	0	-100%		–		
Total sheep exports*****	319,108	-24%	0.14%	23.2	7	45,546

Source: LIVEXCollect

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

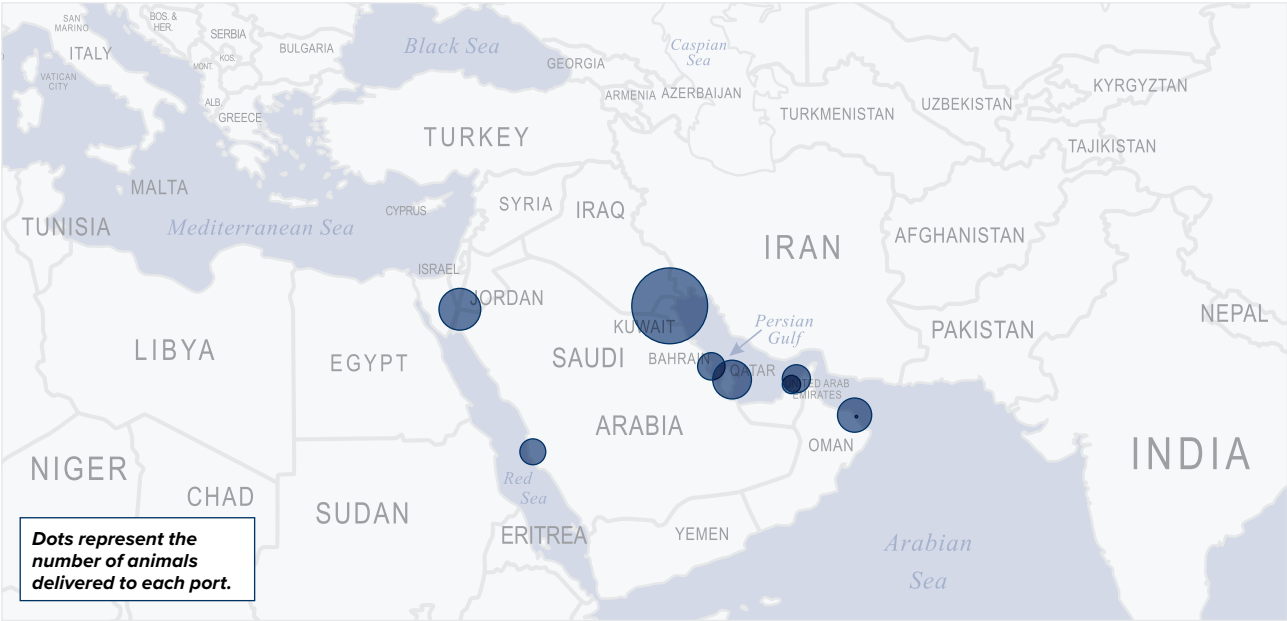
** ASEL defines voyage length as “the period from the time the first animal is loaded onto the vessel (the first day of the voyage) until the time the last animal is unloaded at the final port of disembarkation”. The Export Control (Animals) Rules 2021 state that, at certain times of the year, Kuwait 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.

**** In 2024, a ship was directed by the department to return to Australia due to rising tensions in the Middle East.

***** 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



Source: LIVEXCollect

Air exports

Air exports provide an opportunity for smaller consignments, and access to landlocked countries. Goats exported from Australia nearly always 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 2025, a total of 50,631 livestock were exported by air from Australia, up 55% compared to 2024 and the highest volume since 2019. A decrease in Australian goat prices led to a strong resurgence in goat exports, which more than doubled year-on-year and accounted for approximately 60% of all livestock exported by air in 2025.

There were zero mortalities associated with air exports in 2025.

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

2025 shipments by air

Destination	Total number of livestock					
	Alpacas	Camels	Cattle	Goats	Sheep	TOTAL
Indonesia	50	30	64	445	1,284	1,873
Malaysia	183	12	1,837	30,050	11,328	43,410
Philippines			240	553	1,466	2,259
Singapore				148	899	1,047
Other	613		452	8	969	2,042
Total	846	42	2,593	31,204	15,946	50,631

Source: Department of Agriculture, Fisheries and Forestry ‘all livestock exports’

Air exports by species and destination



Source: Department of Agriculture, Fisheries and Forestry 'all livestock exports'



3. COMMUNITY SENTIMENT

The most comprehensive and consistent data set on Australian attitudes toward livestock exports shows increased acceptance of the industry since a series of national surveys began in 2019. It also highlights the nuanced nature of the relationship, beyond the simple ‘for’ or ‘against’ positions put forward in some arenas.

The 2025 survey found continued recognition that the industry “makes an important contribution to Australia” (80% agreement) and is “an important part of the agricultural industry” (89% agreement). Participants were also aware of its role in overseas countries, with 70% agreement that the industry helps to ensure “citizens have access to safe sources of meat” and that “some overseas markets prefer fresh meat, including from imported animals, over imported frozen meat”.

Animal welfare has been a key driver of trust and acceptance of the industry in every survey, with participants acknowledging it “is a complex issue” (74% agreement in 2025). While this means there are often mixed results on key questions, over time there has been a dramatic decrease in concern about some aspects of the industry.

For instance, agreement that “conditions for animals on live export ships are not in line with Australian welfare standards” fell from 54% in 2019 to 37% in 2025, while agreement that “applying Australian animal welfare standards to our animals when sold overseas improves welfare standards in those countries” reached its highest level yet in 2025, at 60%.

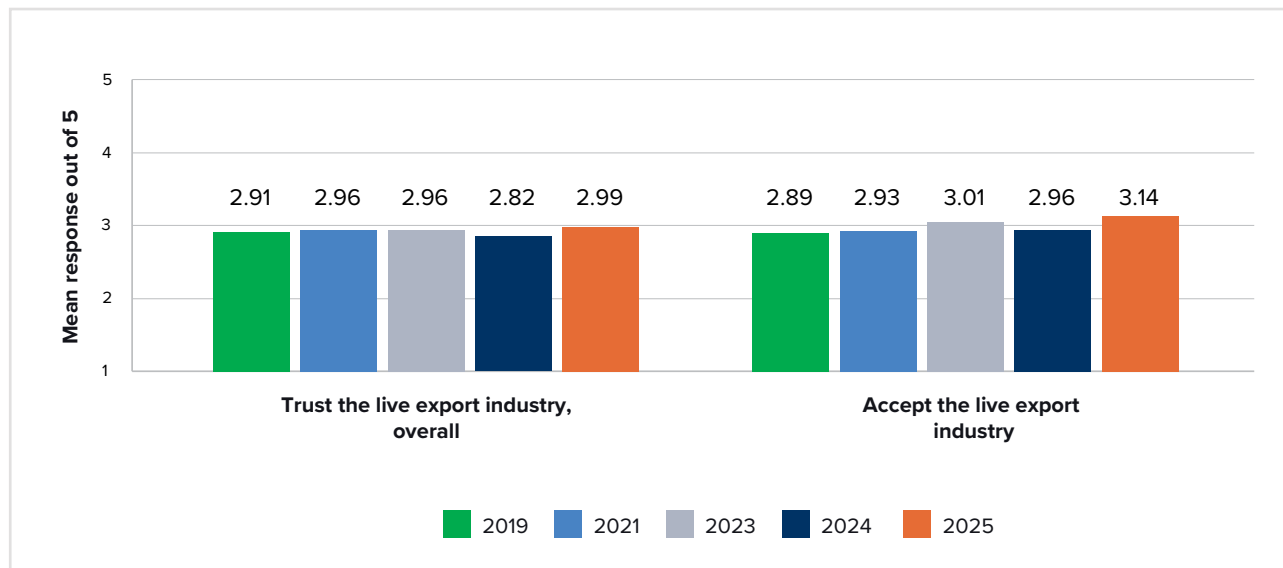
As the graphs below show, positive sentiment toward livestock exports has been growing since the first survey in 2019. When asked to weigh the relative costs and benefits of live exports, the 2025 survey once again showed around three quarters of respondents agreeing that the benefits either outweigh (39%) or are equal to (36%) the costs. Agreement that “Australia should stop the export of live animals to overseas markets, regardless of the impacts on Australian farmers” was the lowest ever recorded in 2025, at 26%.

The sentiment research provides an understanding of the community’s reasons to support or feel concern about livestock exports, which helps to ensure the right information can be provided to shed light on industry performance in key areas – including through this report.

**READ THE 2025
REPORT**



Mean ratings of trust and acceptance, 2019-25



Source: Voconiq, 2025, *Live Exports and the Australian Community 2025*

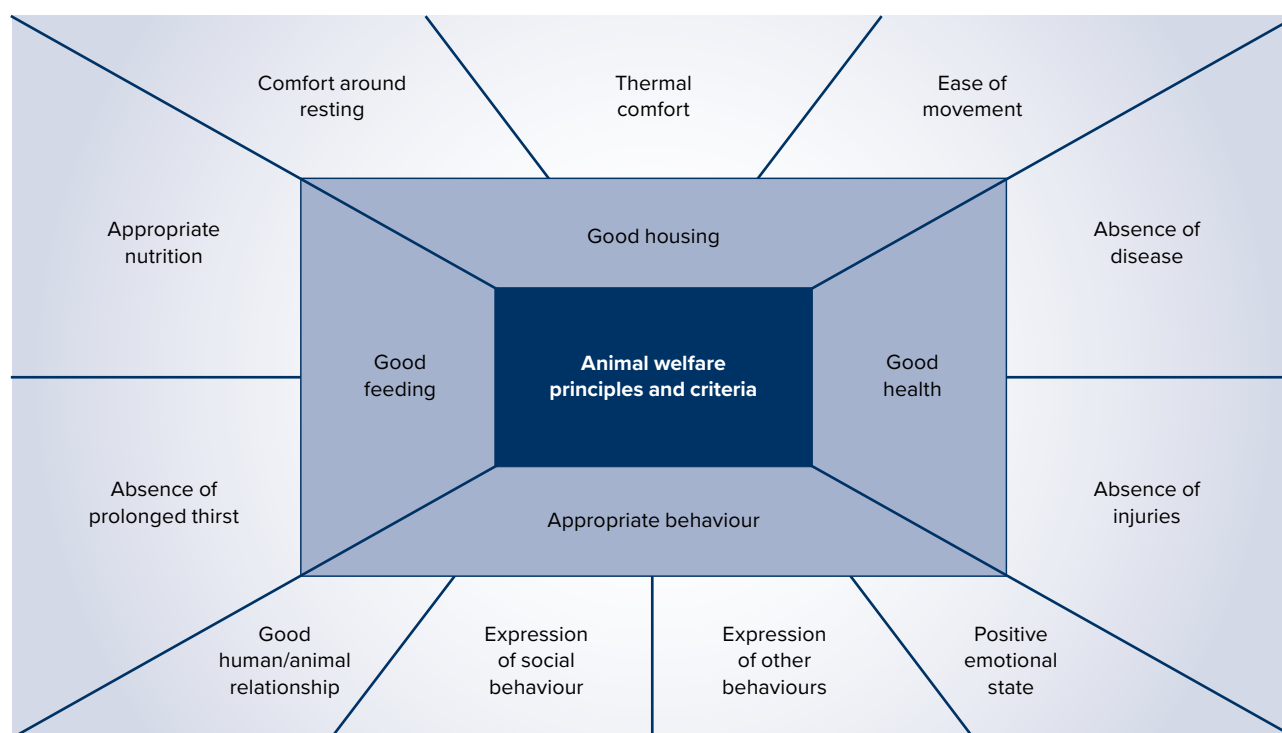
4. ANIMAL WELFARE

The livestock export industry shares the community's desire for the continuous improvement of animal welfare outcomes. It funds ongoing research, development and extension which extends beyond compliance, using science, data and practical initiatives to inform the management of livestock throughout the export process.

Animal welfare is inherently subjective, ranging over a large spectrum from negative to positive, and varying between individuals. Since 2020, a series of animal welfare observations have been collected daily on livestock export ships, based around globally recognised principles and their associated criteria (see diagram below) – with ongoing investment and training to standardise the data being collected.

Throughout 2025, significant progress was made on an initiative aimed at creating a scientifically based system of interpreting the various environmental and animal welfare indicators being collected. The research team tested combinations of indicators against actual voyage outcomes to determine which ones provide the most reliable and meaningful insights into animal welfare. The first stage of modelling has shown it is able to predict an overall welfare score for each voyage, and work continues to further validate the model and incorporate it into existing industry reporting. The ultimate aim is to provide insights to allow post-voyage analysis to support continuous improvement.

A framework for welfare assessment



Source: European Union Welfare Quality® project.

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. All ships carry a selection of veterinary medicines and have dedicated 'hospital pens' for livestock being treated.

The first step in becoming a LiveCorp Accredited Stockperson is a training course, designed to build on existing animal handling and husbandry skills 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. Following a review of the content and format, a pilot course was delivered in 2025, featuring a mix of online modules and assessments, coursework delivered in person, and a practical session on animal health and low-stress stock handling principles.

The daily welfare observations on livestock export ships include all health treatments given to the livestock. In 2025, the primary treatments for cattle related to musculoskeletal conditions such as lameness and leg injuries, and respiratory conditions including pneumonia. For sheep, treatments also mostly related to musculoskeletal and respiratory conditions.

While the incidence of illness and injury is low, especially for cattle, the industry is addressing the most common conditions in multiple ways to minimise any issues.

A series of webinars on cattle health and welfare at sea was delivered in 2025 to provide stockies with the latest information and practical strategies on early detection, risk reduction and treatment. Topics were based around the daily welfare data, including lameness, respiratory disease, eye conditions and antimicrobial use, delivered by experienced veterinarians and industry experts. Improved internet availability allowed some participants to join from on board ships for the first time, meaning crew members were among the 90+ participants alongside shipboard stockpersons and veterinarians.

A project also commenced in 2025 to enhance cattle welfare during voyages, with a focus on bedding management, lameness prevention and thermal comfort. This is building on existing research and industry data to identify practical opportunities to further reduce welfare risks, particularly for heavier cattle and voyages through hotter climatic regions. Clear, evidence-based guidelines will be produced, focusing on prevention and proactive management in these key areas.

FIND OUT MORE ABOUT THE ROLE OF SHIPBOARD STOCKIES



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 around 200 AWOs certified and more than half of them working in the industry. AWOs utilise 'Forum AWO', a community of practice set up with support from industry groups in Australia and Indonesia, to provide communication, information, and education in areas such as animal welfare, traceability and slaughter techniques.

Training programs run by industry in Indonesia in 2025 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, infrastructure maintenance in abattoirs, and intensive training in pre-slaughter stunning techniques.

Capacity building workshops were also run for smallholder farmers, government officials and animal health staff in communities around Indonesian feedlots holding imported Australian-bred cattle. Designed to support local efforts to control foot and mouth disease (FMD) and lumpy skin disease (LSD), these were funded through Australian Government grants, and included the vaccination of thousands of local livestock. The program 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.

In 2025, the industry's research program ran a series of practical trials to see if rubber matting provided greater traction for cattle on port discharge ramps, in feedlot unloading areas and on the tailgates of livestock trucks in Indonesia. The project was in response to observations that livestock sometimes stumble or lose their footing while being loaded and unloaded, and the installation of the mats resulted in falls being eliminated entirely and slips being significantly reduced across all sites. Discussions are underway on potential roll-out and adoption.

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BEHAVIOUR ON SHIPS

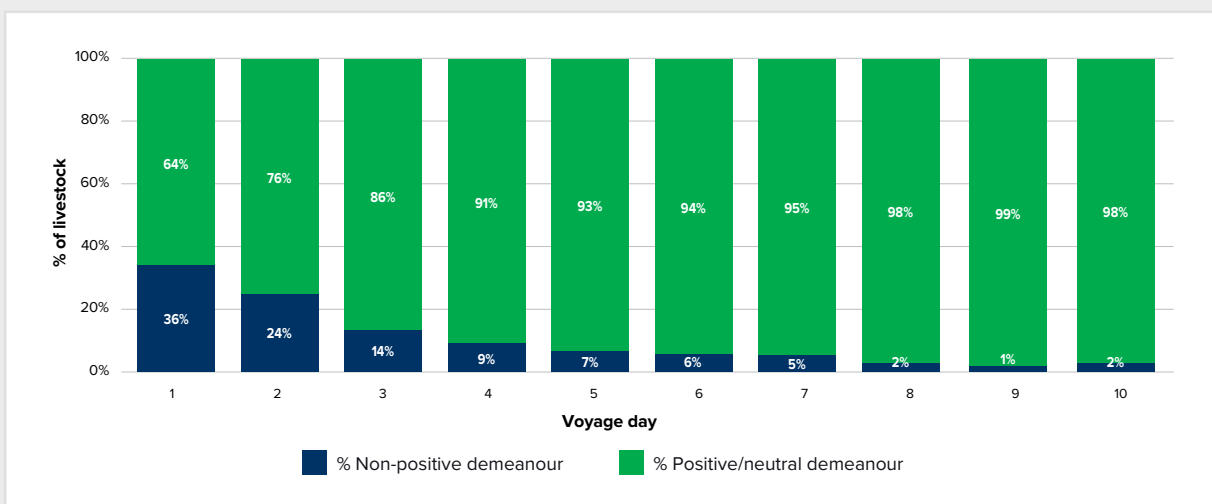
'General demeanour' is an indicator which allows the identification of positive states of animal welfare. It is used on livestock export ships to assess how animals behave and interact with their surroundings, essentially reflecting their 'body language'. As one of the regulatory observations reported daily during voyages, it captures the percentage of livestock exhibiting positive/neutral demeanour (e.g. active, alert, settled or content) versus non-positive demeanour (e.g. anxious, dull or uncomfortable).

The charts below illustrate general demeanour in cattle across different voyage types, and how patterns change as they adjust to shipboard conditions. For northern cattle, positive or neutral demeanour is displayed by around two-thirds of the animals on the first day of loading and departure. This proportion increases over subsequent days, with the majority showing calm, settled behaviour for the remainder of the voyage. Southern cattle maintain consistently high levels of positive or neutral demeanour, close to 100 per cent, from the first day of loading through to the end of the journey.

The differences early in the voyage are likely due to the amount of handling experienced by the cattle before export: southern cattle are generally more accustomed to regular human contact, whereas northern cattle typically have had less interaction with humans.

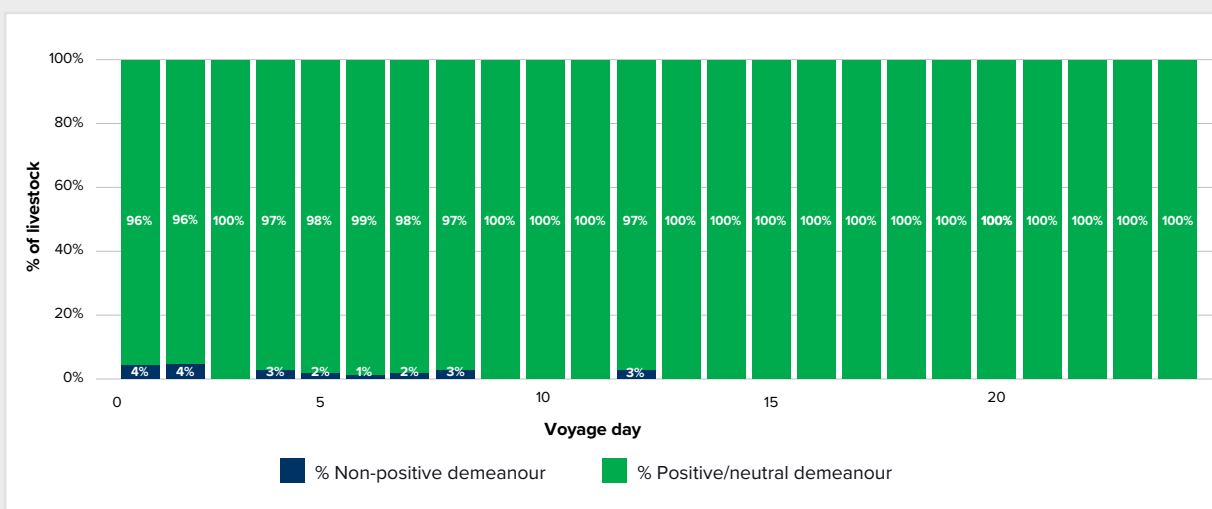
Overall, the patterns suggest that, much like in feedlots or other new environments, livestock generally undergo a short adjustment period before reaching a stable, settled state.

General demeanour: northern cattle short haul voyages



Source: LIVEXCollect

General demeanour: southern cattle long haul voyages



Source: LIVEXCollect

SHIPBOARD FEED MANAGEMENT

The effective management of livestock feed underpins both animal welfare and commercial success during export voyages and requires continuous monitoring and adjustment throughout the journey. It is another critical skill for shipboard stockies.

Livestock are mainly fed specially formulated shipping pellets to support nutrition, gut function and thermal comfort during voyages. The pellets are often provided in combination with chaff as roughage.

The amount of feed loaded on a ship is based on calculations outlined in the regulations and the expected length of the voyage. This includes a minimum feed requirement as a percentage of body weight, which for standard classes of cattle and sheep is 2% per day. Additional feed must also be loaded as a reserve to allow for potential delays or emergency situations.

Different classes of cattle and sheep have distinct nutritional requirements and vary in how they respond to environmental conditions. Feeding management is therefore dynamic and responsive, with strategies adjusted on a daily basis to suit voyage conditions and the livestock on board.

The shipboard stockies oversee feed allocation, feeding frequency and the use of roughage across the ship and down to individual pen level, using observations of the animals' behaviour, intake and body condition as a guide. In practice, feeding levels are typically higher than the required minimum amounts.

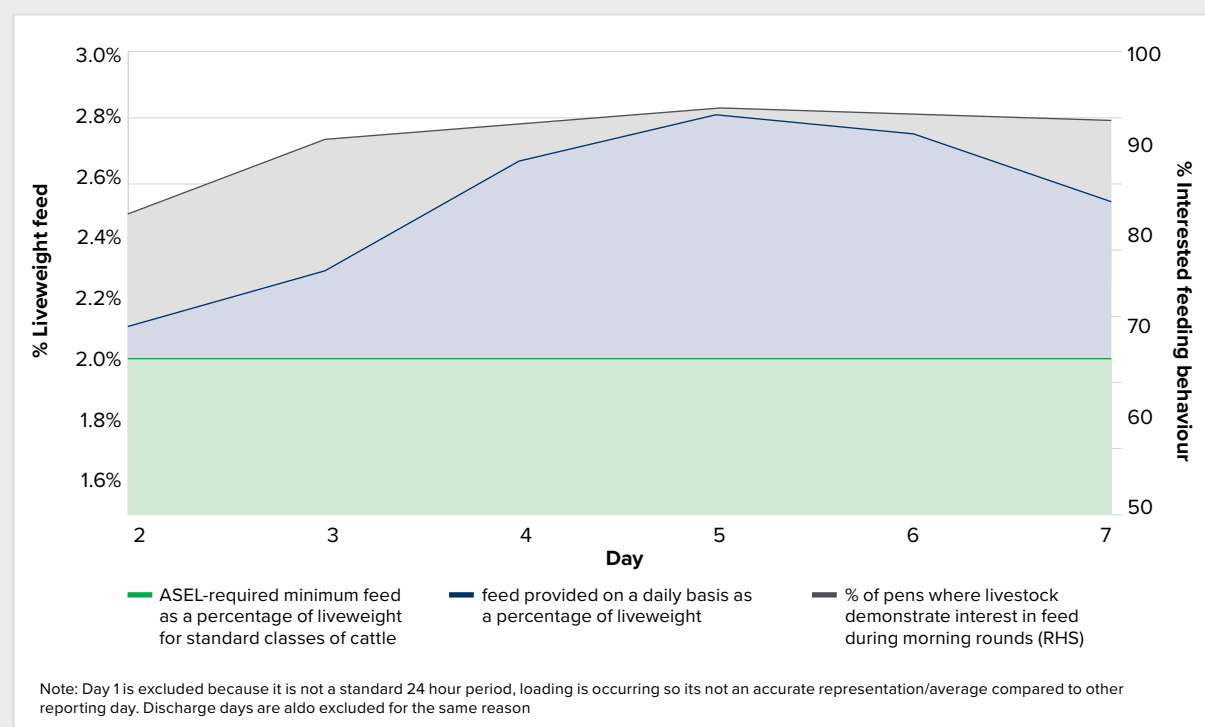
Assessments are made and reported to the regulator every day, not only on how much feed is provided and how much remains on board, but how animals respond when the feed is delivered, as feeding behaviour and animal health demonstrate whether the livestock are consuming an appropriate ration. This approach supports day-to-day decision making on board and helps identify issues early, such as reduced intake or excessive competition for feed. Over time, consistent reporting also supports ongoing improvement in management, regulatory standards and animal welfare outcomes.

Cattle are typically fed twice a day, in the morning and afternoon. The figure on the following page shows the relationship between the amount of feed being provided and the feeding behaviour of cattle during voyages from Darwin to ports in Indonesia, which is a key route for the industry. On these voyages, management is centred on maintaining the amount of feed available while keeping the cattle interested and responsive but not overly competitive when fresh feed is delivered, thereby maximising intake. The decline in feed being provided in the final days reflects the progressive discharge of cattle at destination ports; fewer cattle remaining on board need less feed. The figure shows that cattle are fed above the required minimum, and show high levels of interest in feed across the voyage.

The majority of sheep exported from Australia by sea leave from Fremantle and are destined for the Middle East. The figure on the following page demonstrates the minimum standard required for sheep on a daily basis on these voyages in comparison to the average amount of feed actually provided, both expressed as a percentage of liveweight. Feed is continuously made available for sheep, so they typically do not exhibit a pronounced response to having fresh feed placed in the troughs, and therefore this is not displayed.

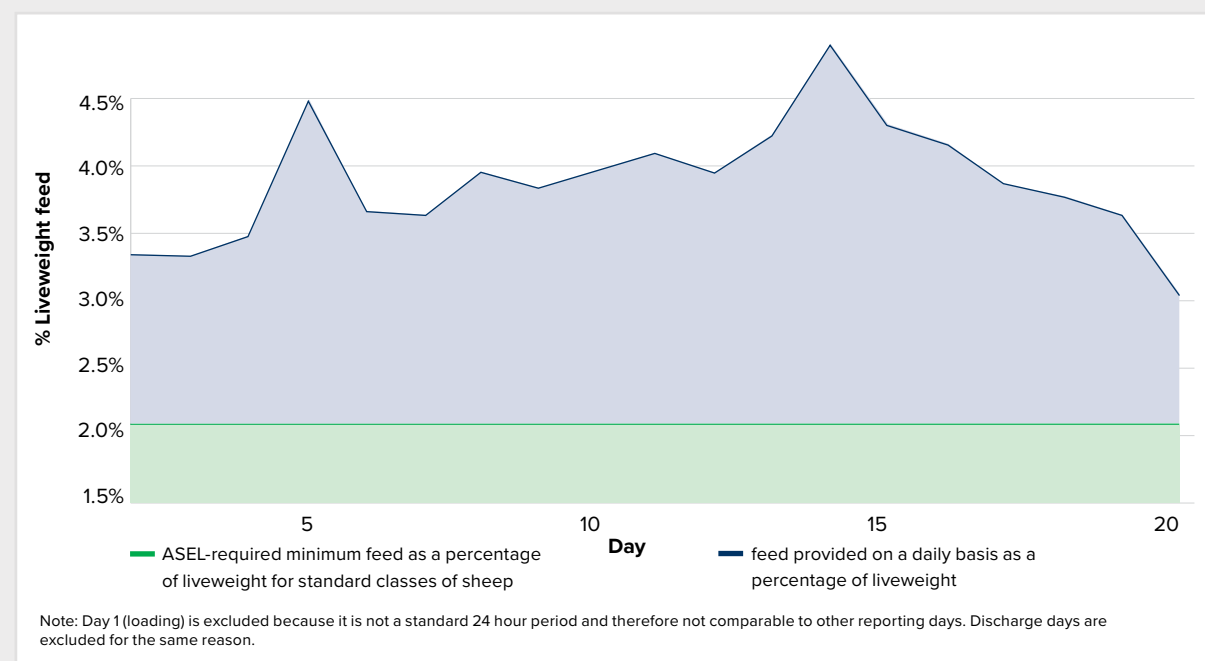


Feed provision and feeding behaviour: Darwin to Indonesia



Source: LIVEXCollect

Feed provision: Fremantle to the Middle East



Source: LIVEXCollect

5. MORTALITY

The industry recognises (and shares) the community's desire to better understand the experience of animals being exported from Australia, rather than relying on mortality data as a measure of performance.

Scientifically valid, practical and meaningful indicators of animal welfare developed over more than a decade are now measured and reported daily on ships, and work is underway to better interpret and act on the data.

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.

While these provide assurance that animal welfare outcomes continue to improve, mortality remains an important metric for both industry and the regulator, as it is absolute, objective and easily compared over time. The data shows that mortality rates have fallen to a fraction of previous levels over recent years, particularly for sheep.

Both health treatments and any mortalities are recorded and reported to the regulator via LIVEXCollect. 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.

LIVEXCollect categorises the reports into high level 'body systems' in the first instance, allowing long term analysis to provide insights and information to guide continued industry improvement.

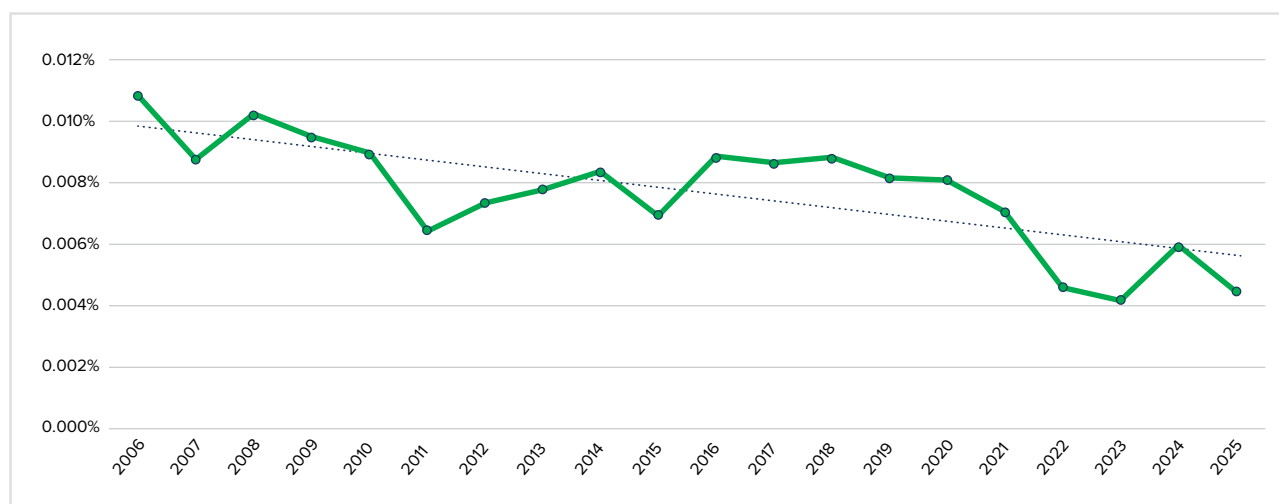
For cattle, the majority of mortalities in 2025 were attributed to musculoskeletal conditions such as lameness and leg injuries, and respiratory conditions including pneumonia. For sheep, mortalities were predominantly related to gastrointestinal issues and respiratory conditions.

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

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 survey² reported an annual sheep mortality rate of 4.5% in 2019-20. This equates to a daily mortality rate of 0.0123% on Western Australian farms.

The daily mortality rates below have been calculated on a 'weighted average', accounting for the number of livestock per voyage.

Cattle daily mortality rates over time



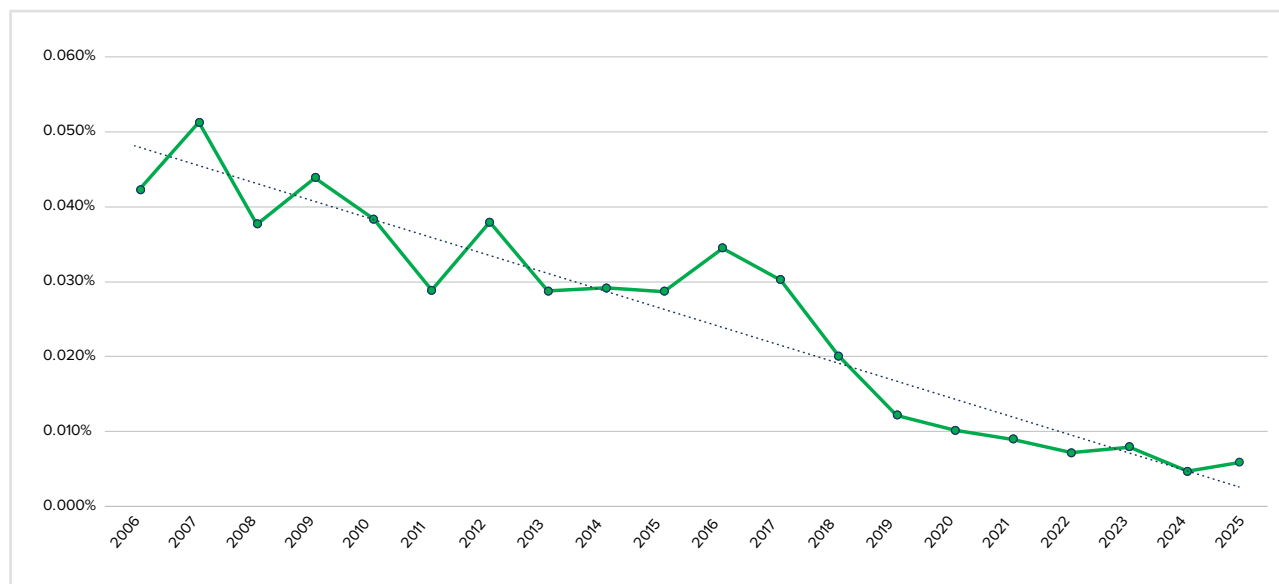
Source: Reports to Parliament 2005 to 2020 calendar years, and LIVEXCollect from 2021

2. ABARES (2021). Farm survey data for beef, lamb and sheep industries using 'all sheep industries combined'. Sourced 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

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

- The average daily shipboard mortality rate for cattle in 2025 was 0.005%. This is lower than 2024 but higher than the historic low of 0.004% in 2023.
- 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 to 2020 calendar years, and LIVEXCollect from 2021

Major points to note from the chart above:

- The average daily shipboard mortality rate for sheep in 2025 was 0.006%, slightly higher than the previous year's record low of 0.005%.
- The average daily shipboard mortality rates for sheep have displayed a strong downward trend over time. The 2025 rate is approximately 83% lower than a decade ago, when the 2016 daily mortality rate was 0.0345%.



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.

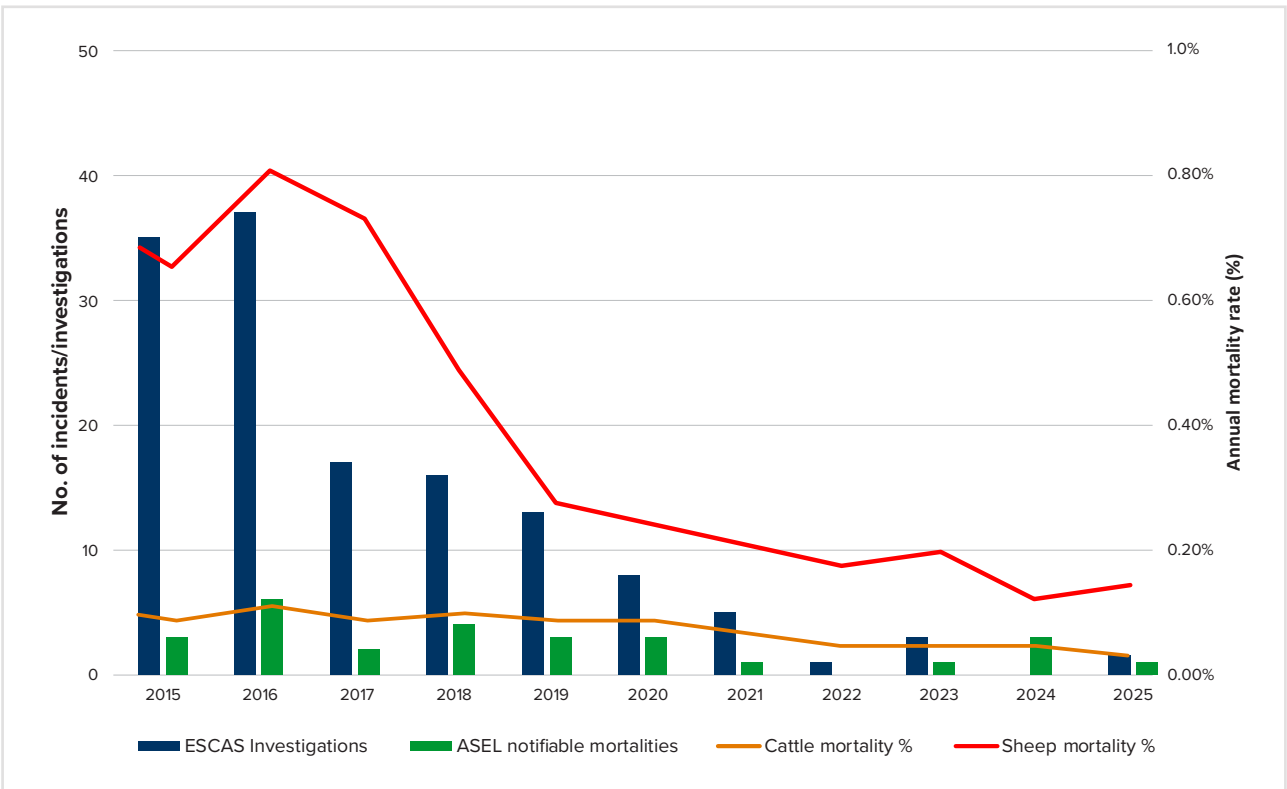
There is a significant level of transparency about the industry and its performance. The department regularly publishes a range of *statistics*, provides *Reports to Parliament* about mortality rates on each sea voyage, and releases the *results of investigations* should there be a notifiable mortality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

Under ASEL, 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 effective control of livestock movements through approved supply chains, and that animal welfare is maintained.

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.

ASEL notifiable mortality incidents & ESCAS compliance investigations vs annual mortality (%)



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

7. INDUSTRY SUSTAINABILITY

Economic benefits

In 2025, the value of livestock exported from Australia was more than \$1.09 billion (ABS data):

- Sheep = \$49,599,580
- Cattle = \$1,037,479,647
- Goats = \$4,897,935
- Buffalo = \$2,351,423

No economic analyses of livestock exports were conducted during 2025. However, previous research has 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.



International development goals

Australia's livestock export industry makes a strong and measurable contribution to the sustainable development of destination nations well beyond the value of the animals themselves. The impacts include improved food security, job creation, skills development, higher animal welfare standards, more responsible production practices, and enduring international partnerships.

This is well understood by the community, with 70% of respondents to the 2025 sentiment survey agreeing that “the live export industry helps overseas countries ensure their citizens have access to safe sources of meat” and 66% agreeing that “livestock export creates employment opportunities in foreign countries”.

In 2025, a structured framework was developed to assess the benefits of the industry to destination countries using robust, evidence-based data explicitly linked to the United Nations Sustainable Development Goals.

The research project focused on four key supply chains: feeder cattle to Indonesia, slaughter cattle to Vietnam, slaughter sheep to Kuwait, and dairy breeder cattle to China. The table below summarises the key figures from the report.

Contribution of livestock exports in destination markets

Theme	Contribution	Relevant UN SDGs
Economic development	- Investment in infrastructure - Employment throughout the supply chain - Generation of wealth \$929 million wholesale revenue in Indonesia in 2024 \$360 million wholesale revenue in Vietnam in 2024 \$52 million wholesale revenue in Kuwait in 2024 \$886 million wholesale revenue in China in 2024	  
Capacity building	- Training in biosecurity, animal welfare and supply chain efficiency for more than 14,000 Indonesians since 2021 - Abattoir management training for 76 Vietnamese workers in 2018-19 - More than 180 Indonesian students on exchange to the Northern Territory since 2013	  
Food security	91,000 tonnes of beef from feeder cattle, feeding 32.1 million Indonesians in 2024 28,000 tonnes beef* from cattle, feeding 3.1 million Vietnamese in 2024 5,919 tonnes lamb* from sheep, feeding 411,000 Kuwaitis in 2024 - Products from more than one million exported dairy cows meeting demand and improving diets for 35.7 million Chinese	
Animal health and welfare	- Improved animal handling and slaughter through infrastructure investment and training - Active promotion of animal health and welfare outcomes - Investments in abattoirs, holding facilities and stunning equipment have made stunning a common practice in Indonesia and Vietnam - Australian support has facilitated the vaccination of more than 405,000 cattle against FMD and LSD in Indonesia	

*excluding offal and bone

Theme	Contribution	Relevant UN SDGs
Waste reduction, responsible production and consumption	- Cassava peel silage, pineapple by-products, palm kernel extract and rice bran are commonly used as feed for livestock in Indonesia - Processing in destination countries minimises waste through the diversity of cuts, greater use of the carcase and strong markets for offal for human consumption	
Partnerships for international development	- The 2013-23 Indonesia–Australia Partnership on Food Security in the Red Meat and Cattle Sector, which was jointly funded by both Governments - Formal alliances like free trade agreements (e.g., with China) and comprehensive strategic partnerships (e.g., with Vietnam) - Informal relationships, such as Australia’s 60-year history of livestock exports to Kuwait, foster enduring ties	   

Greenhouse gas emissions

The community, governments and trading partners are increasingly interested in the emissions profile of agriculture (and other industries).

A life cycle carbon assessment of Australia’s livestock export supply chain was undertaken in 2025 to help the industry understand its position and have a benchmark against which to measure future initiatives. The project updated assumptions made in a 2011 report, aligned the methodology with current greenhouse gas accounting standards, and measured air freight for the first time.

The findings showed the export stage (from quarantine to destination port) remains a low-impact stage within the supply chain. Average emissions were 17.1 kg CO₂-e per head per day for cattle and 4.8 kg CO₂-e for sheep, mainly due to shipping fuel and methane from the animals.

Across the entire lifecycle, including the use of updated methodology, cattle emissions were 30% lower than the previous benchmark due primarily to improved breeding herd performance. Sheep emissions were 10% higher because of lower shipboard stocking densities as well as flock performance. Water use remained modest owing to the production of desalinated water on the ships.

A case study developed as part of the project revealed that finishing imported Australian-bred cattle in Indonesian feedlots resulted in a supply chain footprint comparable to Australian production systems.

Air freight is a relatively high emissions transport option, as it is for all industries. It represents a small proportion of total livestock exports and serves specific needs such as breeding animals and small consignments to landlocked countries.

Another project in 2025 conducted an analysis of the industry’s existing knowledge and gaps in understanding when it comes to greenhouse gas emissions accounting and reporting. Funded by an Australian Government grant, it identified challenges created by a reliance on broad industry averages due to limited and inconsistent data across much of agriculture, including multiple stages of the livestock export supply chain.

READ THE LIFE CYCLE CARBON ASSESSMENT





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