



Sheep industry turn-off update

March Quarter 2026

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

- During the first 3 months of 2026 total WA sheep and lamb slaughter came to just over 1 million head, a decline of 23% compared to the same time period in 2025, driven by a decline in adult sheep slaughter (Table 1).
- Adult sheep slaughter has come back sharply between January and March this year falling by 52% year on year (YOY) to 296,900.
- Lamb slaughter on the other hand has remained steady, increasing 2% YOY from 710,000 to 724,600 head.

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)

	2024	2025	2026	YOY change
Sheep	513.5	624.2	296.9	-52%
Lambs	831.8	710.0	724.6	2%
Total	1,345.3	1,334.2	1,021.5	-23%

- The last half of 2025 saw adult sheep slaughter begin to slow compared to the 2 years prior. This decline has accelerated in the first quarter of 2026 with the total number of adult sheep slaughtered being less than half that in the March quarter of 2025.

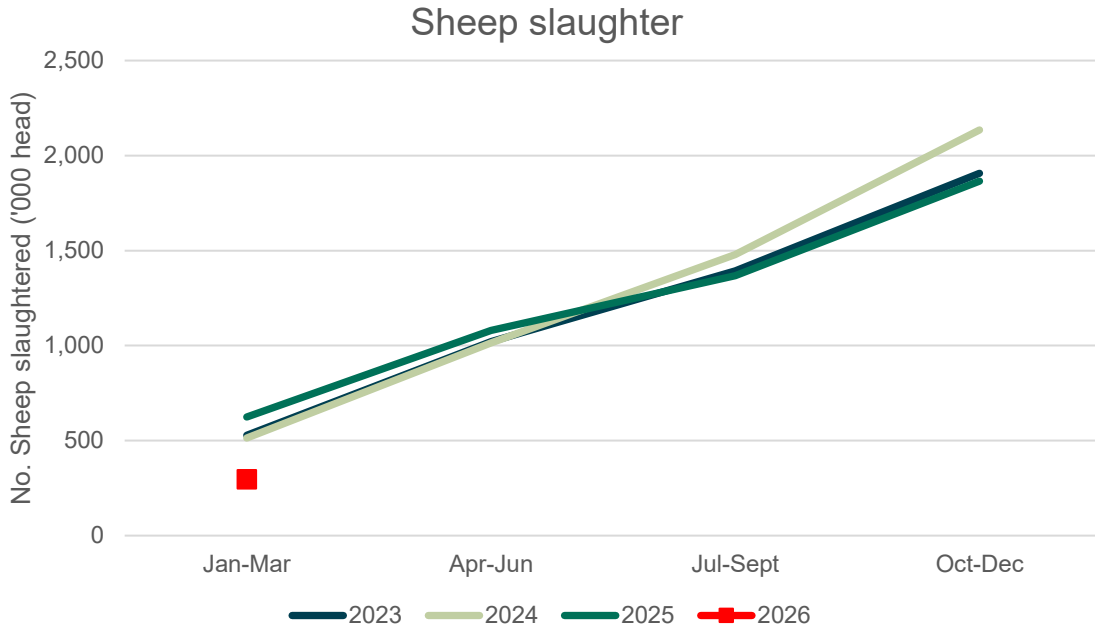


Figure 1 Cumulative annual WA sheep slaughter (Based on ABS data, DPIRD analysis)

- Like sheep slaughter, lamb slaughter also declined in the latter half of 2025, however, seems to have strengthened in the first 3 months of 2026.

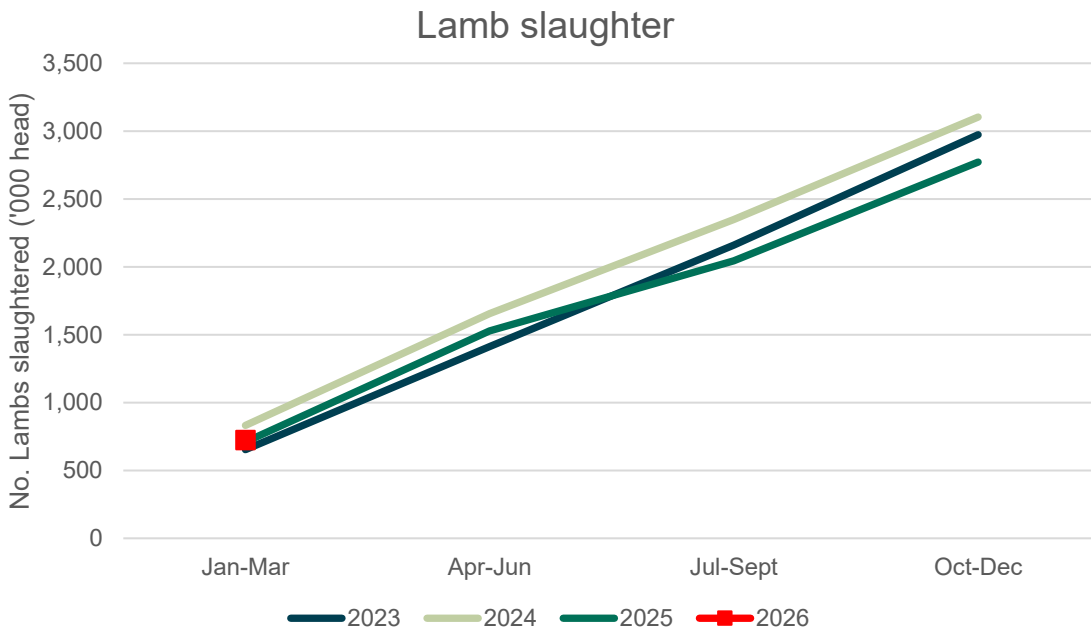


Figure 2 Cumulative annual WA lamb slaughter (Based on ABS data, DPIRD analysis)

Live export (by sea and air)

- In 2025, the number of sheep exported live from WA declined 25% YOY to 317,700 head.
- This trend has accelerated in 2026 with no live sheep shipments leaving WA between January and March. The war in the Middle East combined with high prices driven by supply shortages has created additional pressures on the live export industry.

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

	2024	2025	2026	YOY change
Sheep	192.1	121.6	0.0	-100%

- Between January and March no sheep were exported live from WA. There has been one shipment in April, however, with the summer moratorium beginning in June and lasting until mid-September, it is unlikely that large numbers will be exported in 2026.

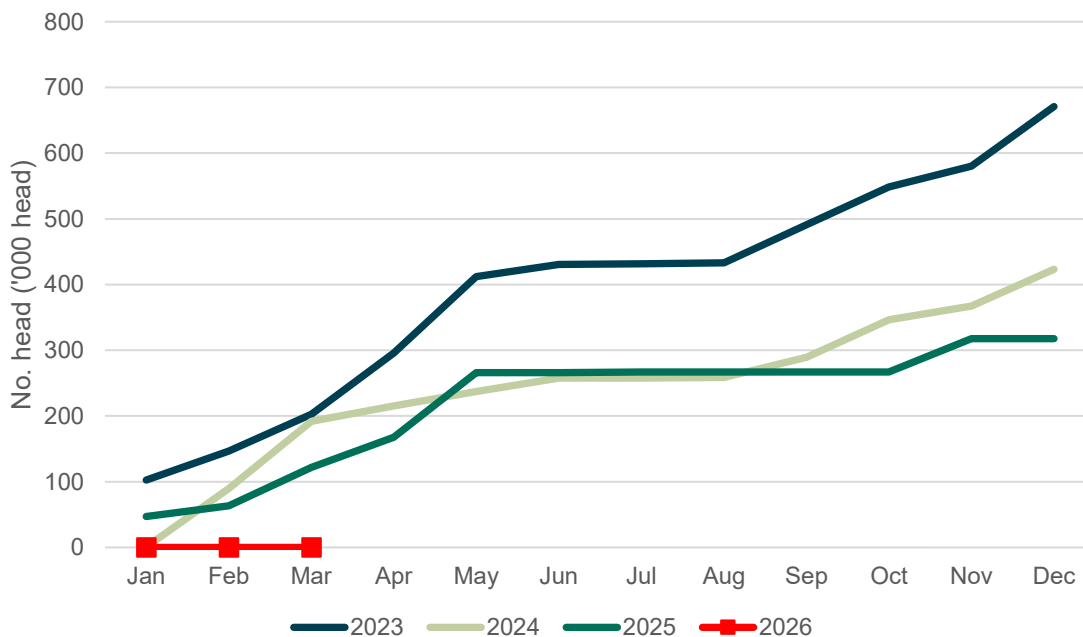


Figure 3 Cumulative annual live sheep exports from WA by sea and air (Based on ABS data, DPIRD analysis)

Interstate transfers

- The first quarter of 2026 has seen a 187% increase in the number of sheep and lambs trucked interstate from WA from 53,900 to 154,500 head.
- There has been a 72% increase in the number of adult sheep sold east and a 244% increase in the number of lambs.
- Despite this, numbers are significantly lower than experienced at this time in 2024, however 2024 was unusually high and one of the highest years on record.

- 81% of animals trucked east in the first quarter of 2026 have been 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)

	2024	2025	2026	YOY change
Sheep	205.8	17.8	30.5	72%
Lambs	151.8	36.1	123.9	244%
Total	357.6	53.9	154.5	187%

- The number of sheep and lambs sold interstate started the year strongly with 20,000 animals trucked east in January. This increased significantly in March when 93,000 animals were trucked east following some large lamb sales held at Muchea and Katanning where there was a large eastern buying presence.

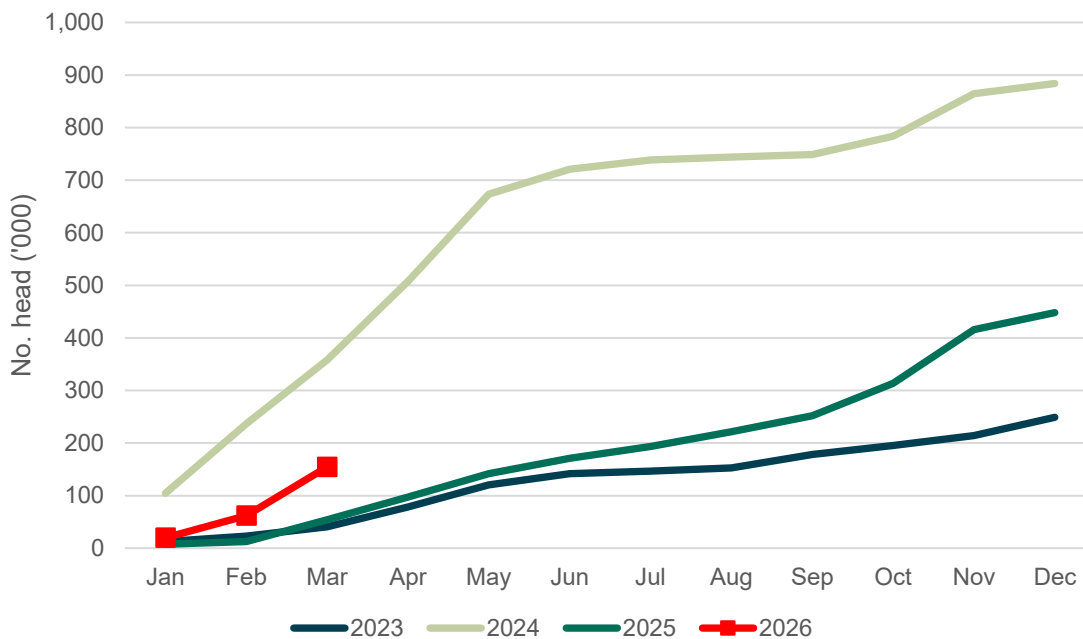


Figure 4 Cumulative annual number of sheep and lambs sold interstate (Based on PIRSA data, DPIRD analysis)

Total sheep turn-off

- Total sheep and lamb turn-off reached 1.18 million between January and March 2026, a decline of 22% YOY. This was also 22% lower than the 10-year average for this time period of 1.51 million.
- Whilst there were increases in both lamb slaughter and interstate transfers, there were sharp declines in both sheep slaughter and live exports which were also well below the 10-year average.

Table 4 WA turn-off comparison 2023 - 2026 (million head) between January and March
(Based on data from ABS & PIRSA, DPIRD analysis)

	2023	2024	2025	2026	YOY change	10 yr av	% change
Lamb slaughter	0.65	0.83	0.71	0.72	2%	0.69	5%
Sheep slaughter	0.53	0.51	0.62	0.30	-52%	0.41	-28%
Live export	0.20	0.19	0.12	0.00	-100%	0.27	-100%
Interstate transfer	0.04	0.36	0.05	0.15	187%	0.14	10%
Total	1.42	1.89	1.51	1.18	-22%	1.51	-22%

- Lamb slaughter made up 62% or 0.72 million of the total number of sheep sold and was the largest component of turn-off.
- Sheep slaughter accounted for 25% or 0.3 million head. This time last year, sheep slaughter accounted for 41% of total turn-off.
- Interstate transfers made up the remaining 13% or 0.15 million sheep.

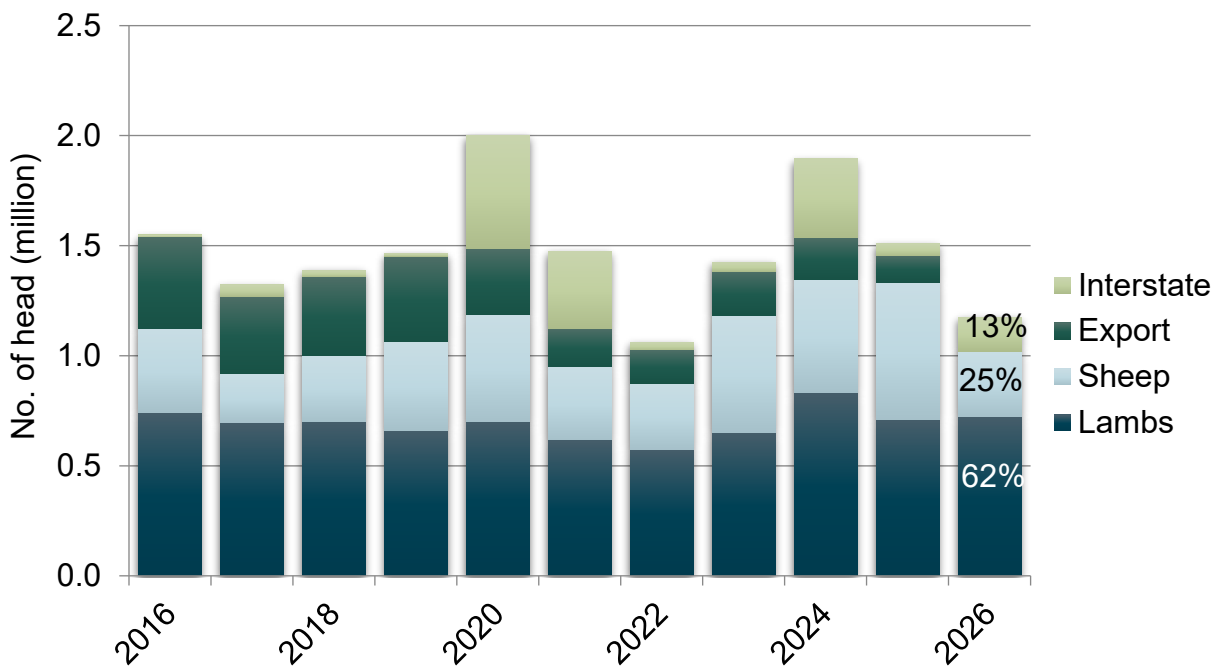


Figure 5 Total WA sheep turn-off including sheep and lamb slaughter, live export and interstate transfers between January and March per year (Based on data from ABS, PIRSA, DPIRD analysis)

Impact on the WA sheep flock

- The WA sheep flock numbered 12.8 million as of July 2022, falling to 11.5 million in July 2024 according to ABS figures. The flock is expected to have contracted further in 2025 with DPIRD modelling estimating the flock may have numbered between 10.1 million and 10.9 million as of December 2025.
- The reduction in turn-off in early 2026, especially in adult sheep, may indicate that producers are retaining breeding ewes on farm bringing an end to the sell down seen over the last couple of years.
- This may result in the WA flock stabilising and possibly lead to flock recovery in the future provided seasonal conditions are positive.
- Strong sheep prices may also be providing some renewed confidence in the sector; however, this is balanced by rising input costs especially, but not limited to, fuel and fertiliser.

Contact

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