



**Impact Report Prepared for the
National Rural Women's Coalition
Australian Government Ban on Live Sheep Exports by Sea**

Date: July 2025

Prepared by: Agenda Ag Advisory. July 2025



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Author: Ms. Pip Job. Agenda Ag Advisory

For further information, contact:

Name: Pip Job

Telephone: +61 428 168 240

Email: agenda.ag.advisory@gmail.com

Impact Report: Australian Government Ban on Live Sheep Exports by Sea

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This report summarises the identified impacts on Western Australia resulting from the Australian Government's decision to phase out live sheep exports by sea from 1st May 2028. It is intended to inform advocacy and engagement activities of the National Rural Women's Coalition.

It provides an overview of publicly available reports, inquiries, and media coverage related to the ban's impacts. It is not intended to be a comprehensive or exhaustive review.

This report should be read in conjunction with the prior Situation Report (June 2025).

Methodology:

This report was prepared using a review of publicly available literature (2021–2025), government documents, and industry publications, alongside indicative sentiment drawn from online stakeholder commentary, surveys, and formal submissions. It does not constitute a comprehensive economic impact assessment and does not reflect formal legal or policy advice.

It is important to note that existing reports largely rely on industry averages and may overlook the diverse circumstances of individual businesses, such as their lifecycle stage, business management capacity, and resilience to adapt to this exogenous policy shock.

Moreover, these reports often do not account for the fact that for some sheep producers, enterprise changes—such as a shift to cropping or fat lamb production—may not be economically viable or feasible due to land type, soil condition, or other constraints. Some producers may not have the financial capacity to change enterprises in a short time frame to maintain income levels and meet household requirements. Similar challenges are likely to be experienced by business owners in supply chain sectors that support the live sheep export industry.

1. Economic Disruption and employment losses

The WA Government estimates that a 15% reduction in the state sheep flock could result in an annual economic loss of \$123 million without land reallocation, and up to 387 direct job losses even with reallocation to cropping (DPIRD, 2023).

Regional Australia Institute (2023) reported that policy induced change in the live sheep export industry will have an impact on employees and business owners directly involved in live sheep export. This will involve farm business adaption to manage the extra flock, particularly wethers, increasing vulnerability to climatic events, eroding of wool and meat prices, and reducing business diversification.

Further, they reported that processing industry has indicated that a current lack of capacity could impact the processing of extra supply, potential limits include access to labour, employee accommodation and cold storage capacity at abattoirs and ports.

2. Flow-on Impacts to Related Rural and Supply Chain Sectors

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Beyond sheep producers, the phaseout of live exports is having ripple effects across several rural and supply chain sectors that rely on a viable sheep industry. These include:

- Shearing Industry:
- Freight and Transport Sector:
- Saleyards and Stock Agents:
- Veterinary Services:
- Feed and Fodder Suppliers:
- Small Businesses and Community Services

In addition to the categories of supply chain participants mentioned above, there are other businesses involved in the live sheep trade. These businesses work with exporters and importers to ensure the smooth transportation of each shipment. They include staff at registered facilities, sheep buyers, shipping services, dockworkers, livestock handlers, quality control experts, ship owners, and port authorities. These different entities play important roles in making sure the live sheep trade operates effectively, meeting key standards in terms of animal welfare and trade regulations.

These cumulative effects are prompting calls for a whole-of-supply-chain transition strategy that includes freight, labour, infrastructure, and regional resilience investment—not just farm-level support.

3. Industry Sentiment and Wellbeing

According to the AWI-MLA Sheep Producers Intentions Survey (2023), WA producers reported the lowest confidence in the sheep sector nationally. Nearly half (46%) expected to reduce their breeding ewe numbers, citing rising costs, limited eastern market access, and export uncertainty. Without coordinated transition support, the WA sheep sector faces contraction and a decline in on-farm employment.

Episode 3 was commissioned by DAFF in 2023 to report on the potential effects of phasing out live sheep exports by sea. Episode 3 conducted a cross-sectoral survey to understand the impacts and intentions of those business owners. These results were compared with AWI-MLA Sheep Producers Intentions Survey (2023) for sheep producer sentiment. The Key findings were:

3.1 Sheep Producers:

- Overall, the national sentiment indicator for wool sector producers sat at a score of +13. However, in WA this sentiment was the lowest of all states at just +1. Negative sentiment within the sheep meat sector in WA was even more pronounced with a score of -48. All other states recorded positive sentiment scores for their respective sheep meat producers, and this boosted the national overall to a sentiment score of +27.
- The following graph from the Episode 3 report shows the intentions of sheep producers

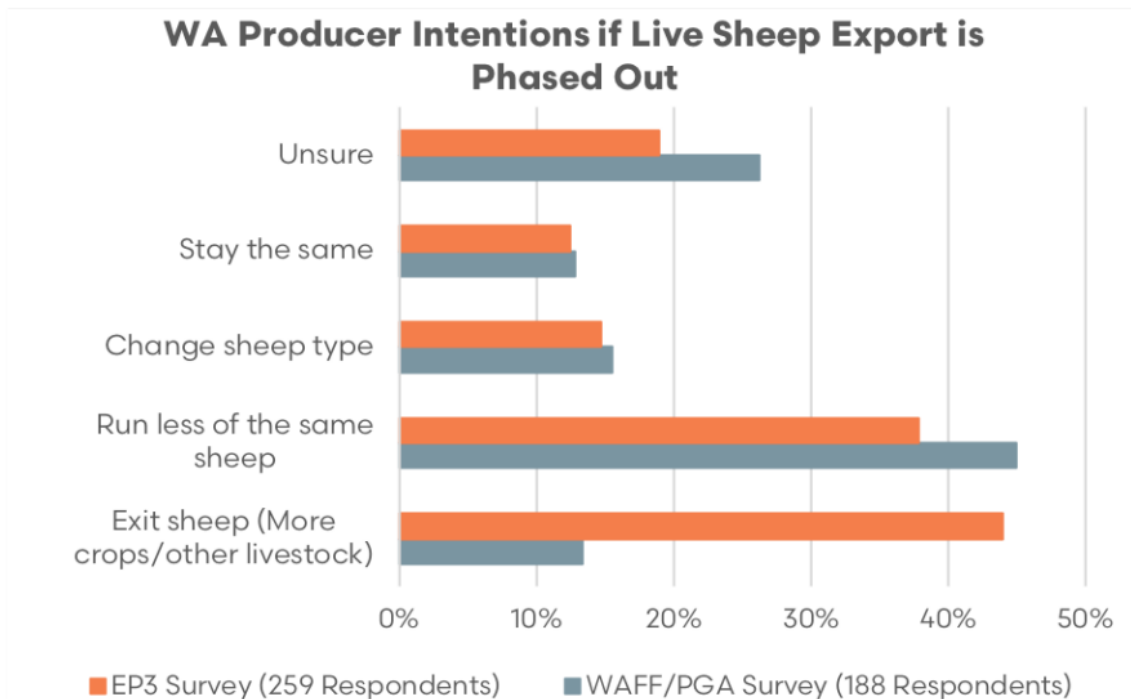


Figure 39 WA Sheep Producer Intentions, Sources: EP3

3.2 Shearing sector:

- The shearing sector reported the retention of staff is already a challenge for shearing managers, and consultation with shearing industry representatives in WA indicate that it will become even more difficult if there is a halt in demand from the live trade. Shearing services do not heavily rely on the purchase of technical inputs or other services for their operation. However, there is a significant benefit to regional and rural communities resulting from shearing contracting operations with shearing teams often spending on food, fuel and sometimes accommodation when travelling around the state undertaking shearing contracts.
- Shearers surveyed feared that a smaller WA sheep flock and reduced holding of Merino sheep would result in less work. Most shearers indicated that they would exit the industry if work wasn't available throughout the season.
- In terms of government assistance to successfully transition away from the live export trade most shearers indicated that they would benefit from training to re-skill and/or assistance to relocate.

3.3 Transport Operators:

- Transporting livestock on roads necessitates specialised skills, customised vehicles, and specific facilities and loading equipment. Stock trucks are designed exclusively for transporting livestock, which limits the transportation opportunities available to these operators.
- Due to the prohibition on live sheep exports during the summer period in the northern hemisphere, some individual truck operators have faced business closures. This prohibition has also caused a ripple effect on their suppliers in regional towns. Mechanics, engineers, welders, tire suppliers, and fuel depots have been affected as the side-lined trucks have had an impact on their businesses.

- A recent survey of the Australian Livestock & Rural Transporters Association (ALRTA) WA members indicated that “the removal of live sheep exports would have an impact of between 30 and 40% to their bottom line. 64% of the respondents said they will need to terminate at least one driver and 27% would terminate more than two drivers.
- Surveying of WA transport operators demonstrated that nearly 40% of respondents intended to exit the industry if the live sheep export phaseout was to proceed.

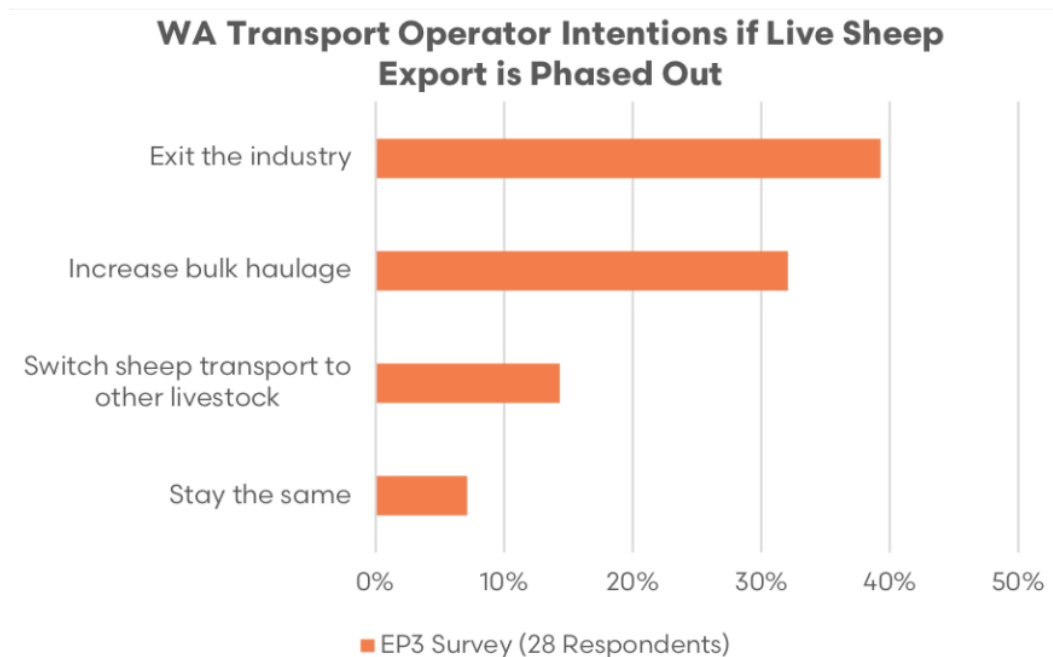


Figure 42 WA Transport Operator Intentions, Sources:EP3

3.4 Agency Services

- Agents play a significant role in sourcing sheep for the live export industry, which constitutes an important aspect of their business. The elimination of this market segment could remove a key revenue stream. If these animals are redirected to domestic markets for processing, there is a high risk that many of them will be sold directly to processors over-the-hooks, bypassing agents and thereby diminishing agency business.
- Nearly 43% of livestock agents that responded indicated that the phaseout of the live sheep trade and the subsequent reduction in the WA sheep flock that could follow the phaseout would be significantly detrimental to their agency and that they would not have a sustainable operation. Similarly, 30% of wool agency businesses that responded to the survey felt that a phaseout of the trade would reduce the wool clip in WA by between 15% to 25% and this would result in a similar reduction in staff

3.5 Other sector participants:

- Participants, such as sheep buyers, registered facility staff & onboard livestock handlers that work completely within the live export process would be unemployed due to a closure of the trade. They have all indicated via the online survey that they would benefit from financial assistance to re-skill and possibly relocate as part of the phaseout transition.

Some sectors, such as meat processors and feed mills are optimistic about their ability to transition, and that the ban will not have a major impact on their business operation or workforce capability. New employment opportunities may emerge in response to increased meat processing and the potential expansion of on-farm lamb feedlots.

Media reports since the announcement of the ban indicate high levels of stress, anxiety, and mental health challenges, particularly among sheep producers who rely on the live sheep trade. ABC has reported in [August 2023](#), increased demand for mental health services, as well as heightened concern around farmer suicide in certain regions. This report also cited that farmers have additional stressors, such as uncertainty arising from the revocation of the Aboriginal Cultural Heritage Act 2021.

Richard Dewar, Senior Associate and Lead of Agriculture Department at HHG Legal Group stated in an interview with the Western Independent on the [3rd April 2025](#), that “the people who will really suffer are the country towns and these country towns may not survive” and that “shearers are really going to suffer because there will be less sheep and farmers are getting rid of sheep”.

4. Impacts on rural and regional women

In reviewing these reports, there is a lack of gender-disaggregated data and reporting on the perspectives and experiences of women. This highlights a gap in understanding and the ability to design tailored support that addresses the specific needs of impacted rural and regional women in Western Australia.

The following can be assumed as impacts:

4.1 Employment and Business Participation

Women in Western Australia’s rural communities are engaged in agriculture and industry supply chain roles. For example, women in the shearing sector often manage administration, finance, and support services. A decline in sector activity reduces both employment and small business ownership opportunities. In small towns, reduced farm and supply chain activity places additional pressure on women-led enterprises and off-farm income streams.

4.2 Leadership, Caregiving and Mental Load

Women frequently contribute to community leadership through school boards, volunteer groups, and local networks. Population decline weakens these civic structures.

During transition periods, women may carry increased mental and emotional loads, particularly as household incomes fall or families consider exiting the sector.

4.3 Financial Vulnerability

Women in farming partnerships may face shared debt obligations and limited re-employment prospects. Without gender-sensitive transition policies, there is a risk of exacerbating existing financial inequalities, undermining women’s access to training, continuity of business ownership, and long-term security.

It is known that in households experiencing financial hardship, there is an increased risk of domestic abuse, alcohol misuse, mental health issues, and other social and relational stresses that can negatively impact family wellbeing.

The phase-out of live sheep exports by sea will create deep structural change in Western Australia’s regional economy. The effects will be concentrated in supply-chain-reliant communities and among women engaged in farm and service sectors. Early and tailored support will be vital to a resilient transition, and the Australian Government would benefit from considering the role of gendered support programs as part of the transition package.

Source and Reference List for the Situational and Impact Reports:

Author/Organisation	Title	Year
ABARES	The economic impacts of regulating live sheep exports	2021
ABARES	Phase out of live sheep exports by sea. Background information and analysis	2023
ACIL Allen	Performance and value of the live sheep export trade Final Report	2023
Australian Farmers	Understanding the ban on live sheep export [https://farmers.org.au/news/understanding-the-ban-on-the-live-sheep-export/]	2024
Australian Government	Transition Advocate – Terms of Reference	2024
Australian Government	Phase out of live sheep exports by sea. Transition Plan Implementation Approach	2024
Australian Government	Phase out of live sheep exports by sea. Australian Government response to the independent panel report	2024
Australian Government – DAFF	Phase Out of Live Sheep Exports by Sea: Transition support package – What we heard	2024
DAFF	Department of Agriculture, Fisheries and Forestry Submission: Inquiry into the Export Control Amendment (Ending Live Sheep Exports by Sea) Bill 2024	2024
DAFF – Decision Page	Decision and how it was made [https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/livestock/live-sheep-exports-phase-out/decision]	2024
DAFF – Have Your Say	Live Sheep Export Phase-Out Consultation [https://haveyoursay.agriculture.gov.au/live-sheep-phase-out]	2023
Department of Primary Industries and Regional Development (DPIRD)	WA Government Submission to the Live Sheep Export Phase-Out	2023
Episode 3	Phasing Out Live Sheep Export from Australia – Strategies to target minimal impact upon farmers and supply chain participants	2023
Independent Panel Report	Phase out of live sheep exports by sea	2023
Keep The Sheep	Explainer Factsheet	2024

Livestock Collective	Why is live sheep exports by sea being phased out? [https://www.thelivestockcollective.com.au/]	2025
LiveCorp	Australia's changing live sheep export trade [https://livecorp.com.au/publication/5NYKpOk39M9vxPamsJMKHK]	2023
Mercado	Value Analysis of the Australian Live Sheep Export Trade	2019
MLA	MLA Middle East & North Africa Market Snapshot Beef & Sheepmeat January 2024	2024
MLA-AWI	Sheep Producers Intentions Survey	2023
Parliament NSW	Impact of the phase-out of Australian live sheep exports by sea on New South Wales	2025
Parliament of Australia – Parliamentary Library	Live export – a chronology	2019
Pegasus Economics	Review of Assumptions in Reports on the Live Sheep Export Industry	2023
Pegasus Economics	Literature review on the live sheep export industry	2023
Regional Australia Institute	Responding to Regional Transitions: Australian Live Sheep Export Transition	2023
RSPCA Australia	Independent Observer Report Analysis – Live Sheep Export Journeys 2018–2023	2024
The Australian	Albanese warned over live sheep impact [https://www.theaustralian.com.au/]	2025
VoconiQ	Live Exports and the Australian Community: A national program of community sentiment research	2024