



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

Date: June 2025

Prepared by: Agenda Ag Advisory. June 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

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

Date: June 2025

This report provides a summary of the current state of play relating to the ban on live sheep exports by sea to inform advocacy and engagement positions by the National Rural Women's Coalition.

This report is an overview of the background context, the legislative changes and assistance package, and industry and community views, relating to the ban on live sheep export by sea. This report does not cover the impacts of the decision on the industry, supply chain, or community.

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.

Executive Summary

The Australian Government has legislated a phaseout of live sheep exports by sea, effective 1 May 2028. This policy, driven by animal welfare concerns and evolving public expectations, has sparked intense debate. According to the [Western Australian Government](#), Western Australia (WA) now accounts for over 99% of live sheep exports; therefore, WA is expected to be most affected.

For some producers, live export serves as a financial safety net and risk-management strategy. It helps stabilise on-farm income by offering a reliable market for surplus, lower-value, or older sheep; especially animals that are unsuitable for domestic processors due to weight, age, or condition.

This outlet becomes particularly important during poor seasons, drought, or feed shortages, when the domestic processing sector may be at capacity or offering lower prices. By maintaining demand, live export can underpin confidence and cash flow in mixed farming systems, allowing producers to reinvest in stock, pasture, or debt reduction. Its removal may leave producers more vulnerable to market downturns, with limited alternatives in geographically isolated regions like Western Australia (WA).

The live sheep export sector is an economic contributor to the Western Australian economy, with businesses and jobs across the supply chain; many of whom have a dependence on the live sheep export trade specifically.

1. Background: Live Sheep Export Industry

In 2022-23 Australia's sheep industry accounted for approximately 10% (\$7.98billion) of the total value of agricultural, fisheries and forestry exports through the export of wool, sheep meat and live sheep (ABARES 2023) comprising:

- Sheep meat (\$4.5billion)
- Wool (\$3.4 billion)
- Live sheep exports by sea (\$76.9million)
- Live sheep exports by air (\$8million)

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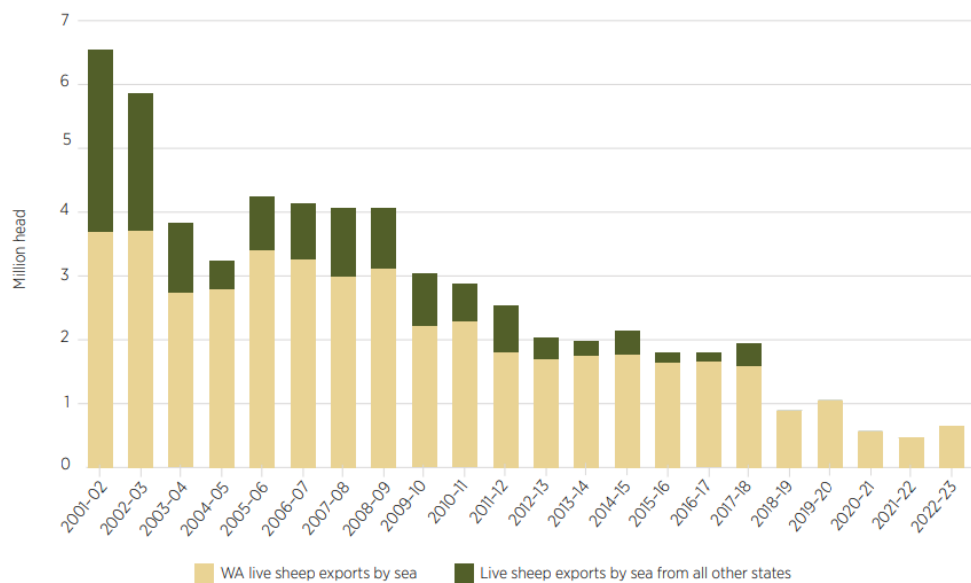
According to MLA (2024), Australia has been a key sheepmeat supplier to the Middle East and North Africa (MENA) markets for over 50 years where sheepmeat is a culturally important item in MENA.

Live export allows producers to sell sheep not suited for domestic meat processors, especially older wethers in wool-producing systems, into MENA markets where there is a strong, positive reputation of Australian sheepmeat (MLA, 2024).

Approximately 664,000 live sheep were exported from WA in 2022-23 (including approximately 652,000 by sea), valued at more than \$80million. This represented 6% of the total value of WA sheep meat and wool exports, and around 0.5% of the total value of WA agricultural exports (ABARES 2023).

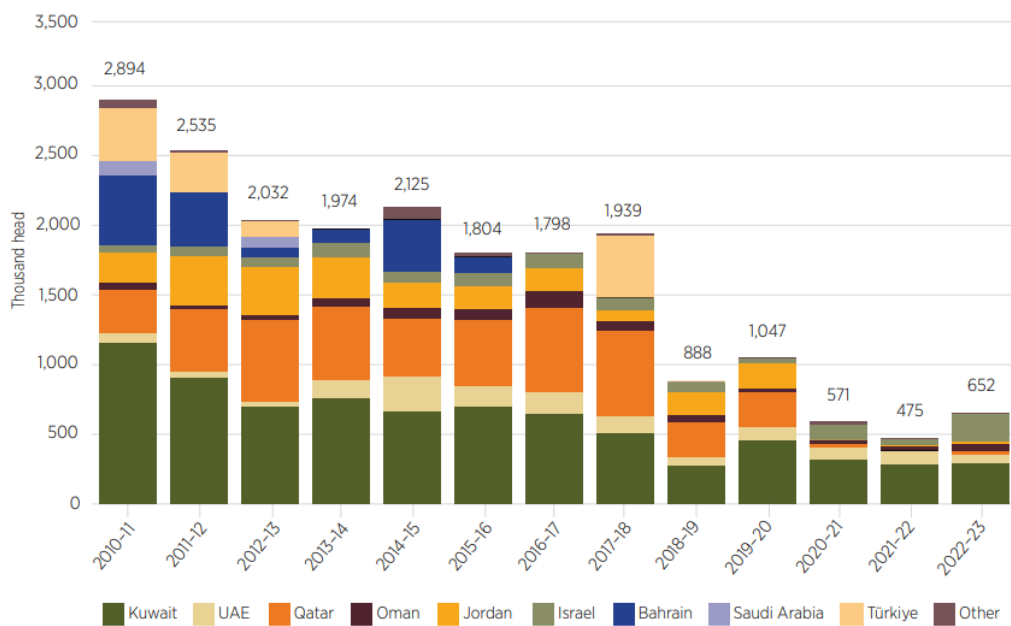
The [LiveCorp State of Industry Report](#) states that in 2024, all sheep exported by sea were sourced from WA and sent to NEMA. A total of 418,350 sheep were exported (16 consignments), down 34% compared with 2023. The annual mortality rate for all sheep exported by sea was 0.10% (436 mortalities). The average length of voyages to NEMA was 21.3 days. The report also states that it's the lowest mortality rate ever recorded for sheep. Regulatory and management changes in recent years have seen the annual mortality rate drop by 86% compared to a decade ago.

Figure 1: Australian live sheep exports by sea, 2001-02 to 2022-23 Source: ABARES Trade Dashboard



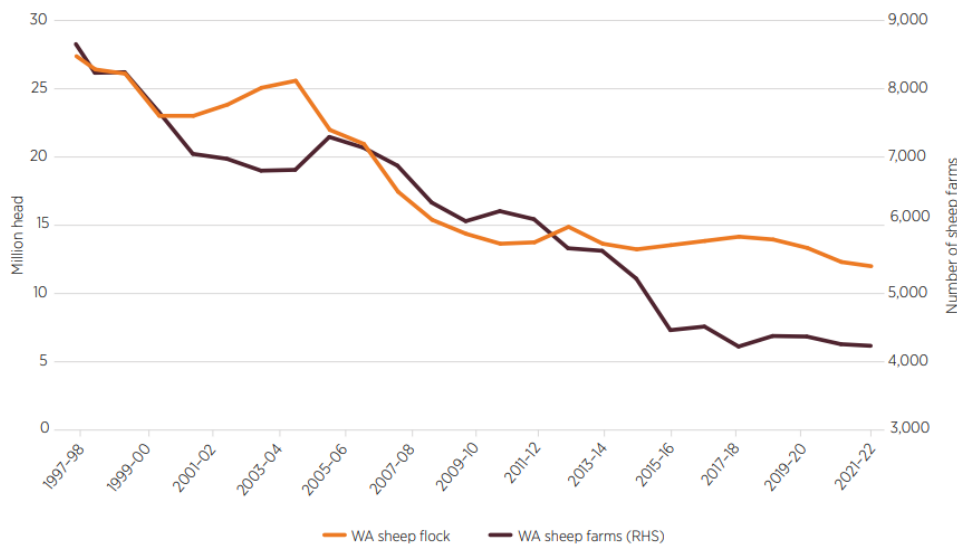
According to ABARES, since 2010, live sheep exports have reduced (Figure 1), as to have the number of overseas destinations (Figure 2). Saudi Arabia has not imported live sheep from Australia since 2012-13 and Bahrain last imported live sheep from Australia in 2015-16. Both countries have imported boxed meat from Australia and will continue doing so.

Figure 2: Volume of live sheep exported from Australia by sea, 2010-11 to 2022-23. Source: ABARES Trade Dashboard



Both the number of WA sheep farms and the size of the WA sheep flock have fallen over the last 3 decades (Figure 3). The reduction in the sheep flock has corresponded to an increase in the area under cropping.

Figure 3: WA sheep flock and sheep farm numbers, 1997-98 to 2021-22. Source, ABS



ABARE estimates that there are around 2,200 ‘specialist sheep farms’ in WA that derive at least 50% of farm receipts from sheep meat and/or wool but may also derive income from other livestock or cropping (ABARE 2023).

According to ACIL Allen (2023), the live sheep export industry had an annual total (indirect plus direct) contribution of between \$62million and 200 FTEs, and \$71million and 249 FTEs, to the WA economy.

2. Government Policy and Legislative Decision

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Following the death of 2,400 sheep on the Awassi Express in August 2017, the then Shadow Minister for Agriculture, Fisheries and Forestry, Joel Fitzgibbon MP, announced on 3 May 2018 that a Labour government, if elected, would phase out the export of live sheep by sea. This was affirmed in the 2022 Labour election commitment on strengthening animal welfare.

Various reviews of the live sheep trade have prompted changes to export controls over an extended period. The government has stated that it does not consider that these changes have entirely removed the risks inherent in the trade of live sheep by sea and observed that the Australia public continues to hold concerns. The government has therefore judged it is necessary to take this action to protect the welfare of sheep.

The Minister appointed an Independent Panel comprising Chair, Philip Glyde, and Hon Warren Snowden, Sue Middleton and Heather Neil, in March 2023, to provide advice on how and when the government should phase out live sheep exports by sea.

The Independent Panel undertook [extensive consultation](#). It considered over 800 written submissions, 3,300 survey responses, a wide range of existing data and specifically commissioned analysis. An [Independent Panel Report](#) was submitted to the Government with their recommendations in October 2023.

- Announcement: In May 2024, the Albanese Government confirmed it would legislate to end live sheep exports by sea, fulfilling an election commitment and responding to sustained pressure from animal welfare groups and public sentiment.
- The Government released their [response](#) to the Independent Panel Report in May 2024. This response included the Department of Agriculture, Forestry & Fisheries [submission](#).
- The amendments to the *Export Control Act 2020* to end the trade on 1 May 2028 came into effect on 10 July 2024.
- Legislation: [Export Control Amendment \(Ending Live Sheep Exports by Sea\) Act 2024](#). Effective 1st May, 2028.

Reasons cited by government for the ban:

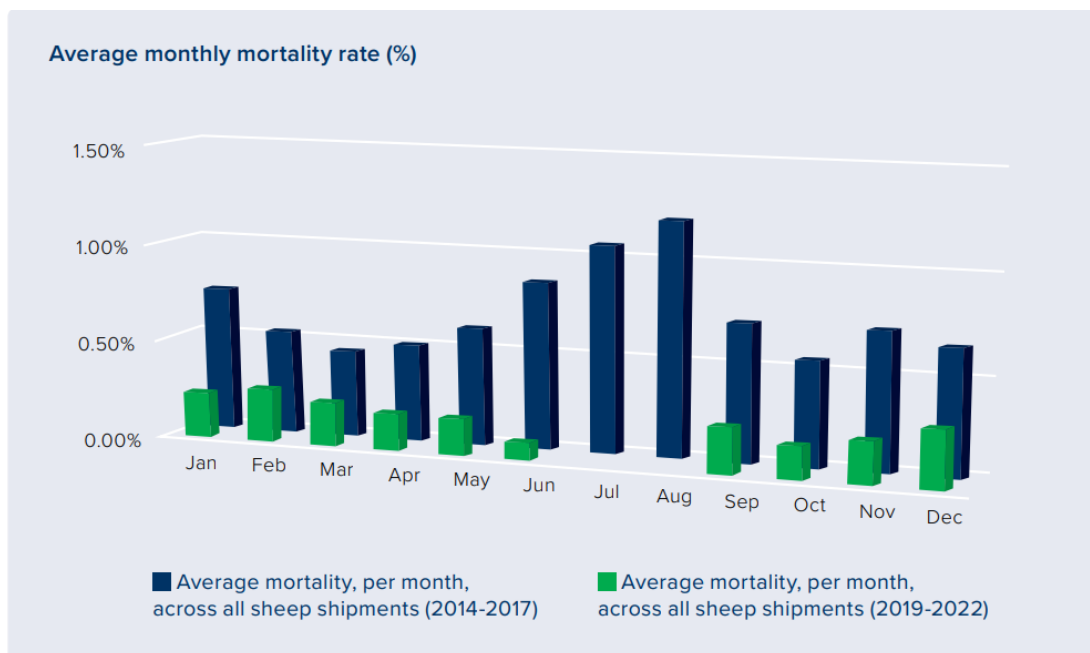
Animal Welfare Concerns:

- Cited as the primary reason. Sea transport of live sheep, especially to the Middle East during the northern summer, has historically led to high risks of heat stress, injury, and mortality.
- A defining moment was the 2018 Awassi Express scandal, where video footage revealed over 2,400 sheep died on a voyage to the Middle East due to heat stress. This triggered public outrage and multiple reviews.

Mortality Data:

- Government data shows that mortality rates have declined (Figure 4) due to regulatory reforms, such as the [Northern Summer Moratorium](#), [improved ventilation and space and mandatory mortality reporting](#), but seasonal risks remain.

Figure 4: Significant decline in shipboard mortalities since major changes to regulation were introduced in 2018, across every month. Source: LiveCorp Reports to Parliament.



Reputation and Trade Risk:

- Continued negative media coverage creates a risk to consumer confidence and potential trade negotiations with other countries.

Public and Political Pressure:

- Surveys, such as [RSCPA Australia’s](#) in 2023, found that more than seven in ten Western Australian still want live sheep exports to end.
- The Labor Party had campaigned on the ban, and key crossbench and [Greens MPs](#) advocated strongly for its implementation.

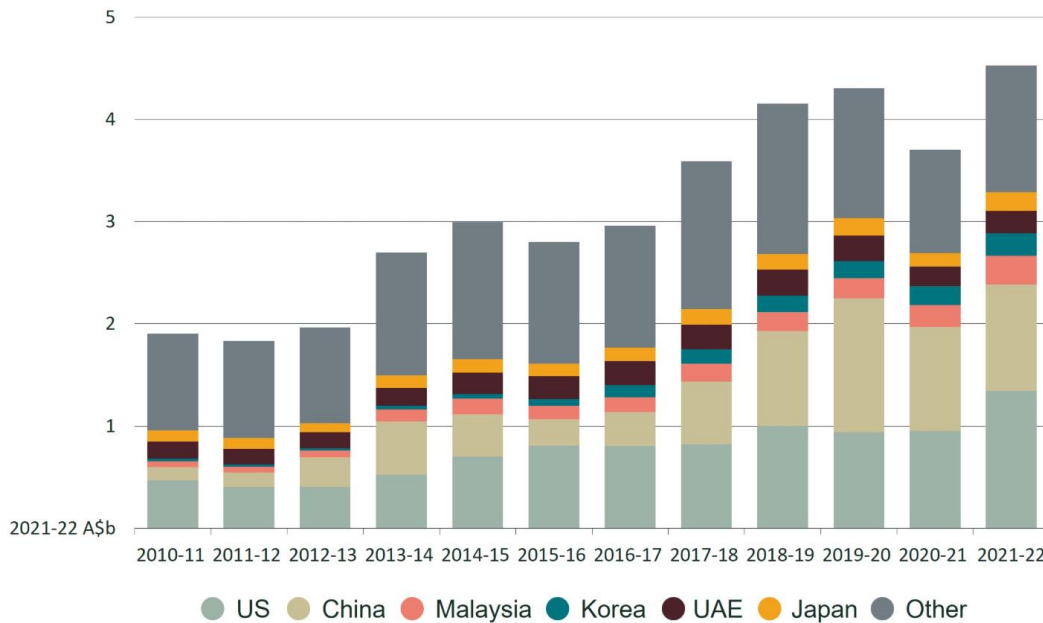
Scope of Ban:

The legislation applies only to the sea transport of live sheep for export purposes.

In its [public statements](#), the government has emphasised that this policy is specific to sheep and based on historical welfare failures unique to that species, especially under high heat-stress conditions.

The Department of Agriculture has stated that exports of cattle, goats, and sheep by air will continue, and has emphasised the trade in processed sheep meat which was worth \$4.5 billion nationally in the 2021-22 financial year ([DAFF 2023](#)) as a viable alternative to support producers and meet overseas demand (Figure 5), and expansion of regional infrastructure in WA, and overseas markets in a key component of the Transition Plan.

Figure 5: Australian sheepmeat exports by destination 2010-11 to 2021-22. Source DAFF 2023



3. Transition Assistance and Government Support

Recognising WA’s dependence on live export, the government has committed \$139.7 million towards the [Transition Plan](#) with assistance to support affected producers and communities. The package is intended to mitigate immediate disruptions and build long-term resilience in the WA sheep sector.

Key Measures:

- **Transition Advocate: \$1.7million over 5 years from 2024-25.**

Dr Chris Rodwell was appointed as the Transition Advocate to provide two-way communication between industry and government, build trust in the process, and support implementation. His role includes leading industry engagement, overseeing the rollout of support programs, and conducting a 2026–27 progress stocktake. ([Terms of Reference](#)).

- **Co-design of on-ground assistance for producers and supply chain businesses: \$45.5million over 3 years from 2025-26**

Help impacted sheep producers and supply chain businesses (livestock transporters, shearers, feed growers, millers, etc) to plan and act for when the trade ends; providing impacted producers and businesses with a choice in how they are going to adapt. Programs expected to be open in the 2025-26 financial year.

- **Processing capacity grant program: \$40million over 3 years from 2025-26**

Expand onshore processing supply chain capacity in WA to assist producers and supply chain businesses. Seeks to incentivise early investment in infrastructure and expand processing supply chain capacity. In partnership with WA Government.

- **Boost to Rural Financial Counselling Services in WA: \$2.4million over 4 years from 2024-25**

Increase targeted and localised financial and agri-business counselling to support financial self-reliance and resilience, through increased number of financial counsellors.

- **Community wellbeing grant program: \$1.5million over 2 years from 2024-25**

Strengthen community wellbeing and resilience by building connections through supported events and activities that support local, impacted communities. In partnership with WA Government.

- **Counsellors (Agriculture) in the Middle East and North Africa (MENA) Region: \$8.6million over 4 years from 2024-25**

Maintain viable bilateral ties and diplomatic relationships with MENA countries to ensure successful trade and market access outcomes for Australian exporters. Extension of 2 Counsellors.

- **Market development Grant: \$3million over 3 years from 2024-25**

MLA will promote, market and advocate for Australian sheep meat and sheep products in Australian and key global markets.

- **Enhancing Market Demand Grant Program: \$4.4m over 4 years from 2024-25**

Competitive grants for projects that increase understanding and knowledge about potential market opportunities and stronger business-to-business relationships – interstate and overseas markets and the NEMA region.

- **Enhancing Market Demand (Austrade): \$9million over 3 years from 2024-25**

Austrade will deliver marketing and promotional activities to drive increased demand for Australian sheep products.

- **Policy implementation, engagement and monitoring: \$11.1million over 5 years from 2024-25**

DAFFs implementation of the policy and Transition Plan. Monitoring and tracking and identifying factors impacting confidence and action being taken (or not taken).

These measures are designed to support the long-term restructuring of the sheep industry toward a more value-added, domestically focused model, ensuring viability beyond the 2028 phaseout deadline.

4. Reviews and Inquiries

A range of reports have been commissioned by the Independent Review Panel, as well as reports submitted through the consultation process. Additionally, NSW State Government has undertaken an Inquiry.

Industry has raised concerns with original reports commissioned by the Independent Review Panel, citing they failed to adequately assess the financial implications of the ban. [WA Farmers commissioned their own report](#) by Mercado, which was counter reviewed by the Government. These reports, and subsequent reviews, were factored into the [Independent Review Panels final report](#).

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As of May 2025, only the Western Australia and New South Wales Governments have conducted formal submissions or inquiries specifically addressing the impacts of the live sheep export phaseout. Other state Governments, such as South Australia and Victoria, have not undertaken public parliamentary inquiries but are monitoring implications, particularly for domestic processing capacity and pricing impacts.

Livestock industry groups in South Australia and Queensland have voiced concerns about the national precedent the sheep ban may set for other live export trades, such as cattle. No additional formal reports or inquiries have been issued by other state governments at this time.

- **[WA Government Submission \(2023\)](#)**: The WA Government acknowledges that several market factors, compounded by the proposed phase-out of live sheep exports by sea, are contributing to negative sentiment among WA sheep producers, despite growing global demand for sheepmeat. If international demand and domestic processing capacity are strong enough to sustain profitable returns, many producers may be able to adjust their enterprises with minimal disruption. However, if the transition proceeds too rapidly—before local processing capacity and market adjustments can be made—an oversupply of sheep could depress prices and reduce profits across the industry, not just for those currently reliant on live exports. The submission emphasises that successful transition requires clear direction, adequate time, and substantial support across the supply chain. Poorly managed implementation risks widespread impacts, with producers facing lower prices, tighter specifications, and increased costs. Modelling also shows that changes to flock structure alone cannot fully mitigate profitability losses, and that economic impacts will extend beyond producers to supply chain businesses and employment. As such, the WA Government strongly advocates for a well-resourced and extended transition period to support a sustainable and diversified future for WA’s sheep industry.
- **[NSW Parliamentary Inquiry \(2024\)](#)**: In April 2024, the Parliament of New South Wales Legislative Council released [Report No. 60 – Impact of the phase-out of Australian live sheep exports by sea on NSW](#). The inquiry examined the potential economic and social consequences for NSW sheep producers and associated industries, particularly in the western regions and in processing sectors. While the report acknowledged NSW was not the primary exporter of live sheep by sea, it found there would still be negative spillover effects through increased competition in the domestic processing market, downward pressure on prices, and potential job losses. The report recommended the federal government work closely with all states and territories to manage transitional impacts and consider freight equalisation support for eastern states.

5. Current Status and Industry Response (June 2025)

Legislation Passed: The ban is now law with full implementation due by 1 May 2028. The legislation passed with support from the Labor Government, Greens, and key crossbenchers. Implementation is governed by federal oversight, with WA-specific programs under development (as above Section 3).

Industry Opposition:

There has been continued strong resistance to the ban from industry and WA-based groups including, but limited to, WA Farmers Federation, Pastoralists and Graziers Association (PGA), LiveCorp, Livestock and Rural Transport Association of WA, WA Shearing Association, Australian Wool Innovation (AWI), Western Australian Shearing Industry Association, National Council Wool Selling Brokers of Australia, AgForce Qld, and Sheep Producers Australia.

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[‘Keep The Sheep’](#) is a grassroots network formed in late 2023 in response to the ban, representing the impact the ban has on farmers, rural communities, the shearing industry and livestock transport industry. Keep The Sheep’s aim is to stop the ban.

Industry, and groups such as Keep The Sheep, have raised concerns about sector loss of income, closure of small farms, and potential decline in regional service industry activity that depend on the live trade.

According to submissions by industry, there is also frustration at what is perceived to be a city-driven policy with inadequate rural consultation.

[Livestock SA has condemned](#) the Australian Governments legislation citing the animal welfare and lack of social licence grounds that the policy was built on have been disproven time and again.

The Country Women’s Association of NSW at their 2025 annual conference [passed a motion](#) to advocate for the removal of the live sheep export ban.

Multiple protests have occurred including a [farmer convoy to Canberra in September 2024](#), regional rallies, and coordinated media campaigns. Industry groups have argued the transition period is too short and poorly targeted.

Transition Timeline Debate: Calls for Extended Phaseout Period

One of the most contested elements of the live sheep export phaseout is the timeline. While the current legislation mandates a cessation by 1 May 2028, some stakeholders argue this is insufficient to enable a just and viable transition.

The Independent Panel commissioned a report from Episode 3 on the [Phase Out of Live Sheep Exports](#) from Australia which strongly recommended extending the transition period to 15 years, rather than the current 4-year window.

“A 15-year transition would provide sufficient time for the market and supply chain to adjust, avoid oversupply, and reduce harm to communities and individuals, including mental health impacts.”

It argues that this longer timeframe is essential to allow adequate reinvestment in local processing infrastructure, provide realistic pathways for workforce reskilling and business model adaptation, and prevent rushed destocking, forced farm exits, and market saturation.

The report warns that a short timeline risks compounding mental health pressures, regional inequality, and negative gendered impacts. Further, [Episode 3 conducted a survey in 2023](#), with 95% of respondents involved in the live sheep export supply chain believed the phaseout should take five years or more.

A majority of peak industry bodies have called for a longer transition plan. Examples include:

WA Farmers Federation (WA Farmers)

WA Farmers has consistently advocated for a longer transition period to phase out live sheep exports. In their communications, they emphasise the need for sufficient time to develop domestic processing infrastructure, recruit and train workforce, and establish market demand.

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Pastoralists and Graziers Association of WA (PGA)

The PGA expressed strong opposition to a rapid phaseout of live sheep exports. Note: As of January 2025, the PGA entered voluntary administration, as publicly reported.

National Farmers Federation (NFF)

The [NFF stands in full support of WA farmers and will continue to call for the ban on live sheep exports to be repealed](#).

Country Women's Association of WA (CWA of WA)

The CWA of WA issued [correspondence](#) to the Government requesting a transition period of no less than 5 years, and that suitable measures be put in place to support mental wellbeing.

Independent Panel Review (2023)

Although it recommended a 4-year phaseout, the panel noted there were diverse views across industry regarding how long a transition would need to be to be "fair and effective."

6. Community Sentiment

Since 2019, a national program of community sentiment research has undertaken annual sentiment testing in relation to the live export industry. The VenconciQ [2024 Community Sentiment Report](#) found that while animal welfare remains a core concern for many Australians, community views on the live sheep export phase-out are more complex and regionally varied than often portrayed. Key findings from the VoconciQ 2024 Community Sentiment Report include:

- **Animal Welfare as Primary Driver:** Most support for the phase-out is grounded in concerns about animal welfare, particularly during long sea voyages.
- **Mixed National Sentiment:** Although there is general support for improving animal welfare, only 18% of respondents were aware of the government's decision to phase out the trade by 2028. Once informed, public support was more conditional, with many concerned about the economic impacts on rural communities.
- **Perception of Industry Reform:** The report noted that only a minority of respondents were aware of the animal welfare reforms introduced by the industry in recent years.
- **Rural and Regional Concerns:** Participants from rural areas expressed significant anxiety over the potential socio-economic impacts of the phase-out, such as job losses and regional decline.
- **Desire for Balanced Transition:** There was strong support across all regions for a managed, staged transition that protects both animal welfare and regional economies.

7. Support for the Ban of Live Sheep Export of Sea:

Lobbying and advocacy for the ban of the live sheep export by sea trade has been occurring, by some organisations, for two decades.

Animal welfare organisations such as RSPCA Australia, Animals Australia, Australian Alliance for Animals, World Animal Protection Australia, Humane Society International (Australia) and Animal Liberation and Four Paws Australia have been explicitly calling for the banning of live export by sea.

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Vets Against Live Export advocates for a complete ban based on professional veterinary observations and that no level of regulation can eliminate the suffering experienced on long sea voyages.

Their position emphasises that reforms in regulation cannot eliminate the inherent risks of long-haul voyages. They point to the Awassi Express and other welfare incidents as examples of system failure and argue for a transition to chilled/frozen meat exports to retain market share while upholding welfare standards. The [RSPCA Australia Independent Observer Report Analysis](#) for live sheep export journeys 2018-2023 highlights a lack of reporting transparency and cites continuing animal welfare issues such as hunger (shy feeding and inanition), poor feed quality, heat stress of varying degrees, loading practices that led to greater handling, on-voyage movements, the poor management of ill or injured animals and poor selection of animals for loading.

It's important to note that the Independent Expert Panel, appointed to review the ban, also found evidence to support the ban, including:

- Cited strong animal welfare science and overwhelming community sentiment.
- Determined that the trade could not ensure acceptable animal welfare outcomes, even under regulation.
- Recommended an orderly transition with industry support, leading to the current 2028 timeline.

8. Looking Forward: Risks of Policy Extension to Other Livestock Sectors

While the current legislation only applies to live sheep exported by sea, there is emerging concern within the agriculture sector that this policy could signal future changes for other live animal trades, particularly live cattle and goat exports.

Government Position - The Albanese Government has repeatedly stated there are no plans to ban live exports of cattle or goats. The 2024 legislation explicitly limits the ban to sheep by sea and excludes air transport and other species.

However, risk signals include:

Animal Welfare Advocacy - Major organisations such as RSPCA, Australian Alliance for Animals, Animals Australia and World Animal Protection Australia continue to campaign for a complete phaseout of all live exports. Vets Against Live Export also support the phaseout of all live exports.

Political Momentum - The live sheep ban may be viewed as setting a precedent, further encouraging support from some crossbench and Greens MPs who have previously supported the ban of live export.

With growing ESG scrutiny and trade ethics framing global markets, some stakeholders have expressed concern that this may pave the way for future regulation of other species.

International Pressure - Trade partners, such as those in the European Union (EU) and the United Kingdom (UK), as well as premium consumer markets in Asia, are increasingly demanding higher animal welfare assurances as part of market access, brand positioning and regulatory compliance. Australia's reputation as an ethical exporter could come under pressure unless consistent welfare standards are applied.

International Precedents - New Zealand banned exports for slaughter in 2003, and fully banned live exports by sea in 2023. The United Kingdom & Denmark restricted live exports, instead investing in local processing to improve welfare and local economies.

While there is no immediate legislative threat to cattle or goat exports, industry stakeholders are encouraged to:

- Monitor advocacy and political developments closely.
- Continue to invest in transparent welfare practices and traceability.
- Diversify trade strategies and develop domestic value chains to mitigate future regulatory risk.

Source and Reference List:

WA Government	WA Government Submission Live Sheep Export Phase-Out	2023
ACIL Allen	Performance and value of the live sheep export trade Final Report	2023
Australian Government	Transition Advocate – terms of Reference	2024
RSPCA Australia	Independent Observer Report Analysis – Live Sheep Export Journeys 2018-2023	2024
Parliament NSW	Impact of the phase-out of Australian live sheep exports by sea on New South Wales	2025
Australian Government	Phase out of live sheep exports by sea. Transition Plan Implementation Approach	2024
Mercado	Value Analysis of the Australian Live Sheep Export Trade	2019
ABARES	Phase out of live sheep exports by sea. Background information and analysis	2023
Pegasus Economics	Review of Assumptions in Reports on the Live Sheep Export Industry	2023
Keep The Sheep	Explainer Factsheet	2024
Independent Panel Report	Phase out of live sheep exports by sea	2023
Episode 3	Phasing Out Live Sheep Export from Australia – Strategies to target minimal impact upon farmers and supply chain participants	2023
DAFF	Department of Fisheries and Forestry Submission: Inquiry into the Export Control Amendment (Ending Live Sheep Exports by Sea) Bill 2024	2024
VoconiQ	Live Exports and the Australian Community 2024. A national program of community sentiment research	2024
Australian Government	Phase out of live sheep exports by sea. Australian Government response to the independent panel report	2024
ABARE	The economic impacts of regulating live sheep exports	2021
Pegasus Economics	Literature review on the live sheep export industry	2023
LiveCorp	Australia’s changing live sheep export trade	2023
DAFF – Decision and how it was made	https://livecorp.com.au/publication/5NYKpOk39M9vxPamsJMKHK https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/livestock/live-sheep-exports-phase-out/decision?utm_source=chatgpt.com	
DAFF – Have Your Say	https://haveyoursay.agriculture.gov.au/live-sheep-phase-out	2023
MLA	MLA Middle East & North Africa Market Snapshot Beef & Sheepmeat January 2024	2024
Parliament of Australia – Parliamentary Library	Live export – a chronology	2019