Beef Producer Intentions Survey

[BPIS: April 2025]

May 2025

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About the research

The survey, undertaken by MLA, is used to help industry determine grassfed beef cattle production forecasts and to understand the breed composition of the Australian herd on a national, state and regional basis. It is one of the inputs into the MLA beef industry forecasting models.

The research has three primary objectives, namely to:

- ✓ **Measure and report** on herd population, demographics, beef cattle supply information and producer production intentions.
- ✓ Ensure estimates are reliable and based on sufficiently large sample sizes to ensure the **robustness and accuracy** of estimates. The sample should be representative or weighted to be representative of the producer population structure.
- ✓ Provide capacity to **explore and investigate results** at a smaller area and segment level. This will include – among other things – across states and MLA reporting regions.

The following report provides an overview of results for the **APRIL 2025** survey.

The April 2025 survey

Feedback was sought from grassfed beef cattle producers over the period 31st March 2025 – 14th May 2025. Producers were initially invited to complete an online survey, with up to 3 reminders sent over the period.

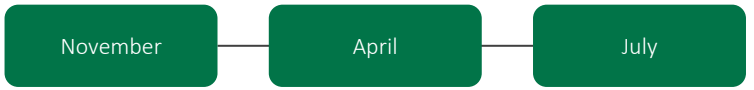
A total of 3,116 producers from across Australia respond to the survey invitation. The feedback was then weighted, using the latest available data from the Levy Payer Register, to produce industry estimates. There were slightly fewer Northern producers in the April 2025 survey because of the impact of recent weather events in the Queensland regions.

A full breakdown of the sample make up, plus a description of the Levy Payer Register data used and the weighting approach is included as an attachment to this report.

Please note that the current survey design (commencing with the November 2023 survey) was constructed to support the industry with reliable data because of the reduction in the scope of agricultural surveys being conducted by the ABS. There are number of new design elements and so some caution should be exercised when comparing these results with previously released data.

An overview of the research design

Three separate but integrated surveys will be conducted across the calendar year. Each survey will have a specific focus and purpose, as described below.



FULL SURVEY
Provides an estimate of herd sizes, a profile of the grassfed beef cattle herd and measures of producer intentions.

FULL SURVEY
Provides feedback on producers plans for the upcoming breeding program and other related issues.

PULSE SURVEY
Provides a quick update on results from the November and April surveys.

More detail on the research design is included in the Attachments to this report.

A note on weighting and producer population estimates:

As detailed in the Appendices, the weighting structure was updated with the most recent available information and data on the estimated population of agricultural businesses with grassfed beef cattle across two factors: State and Levy Band. This change was required due to the cessation of the ABS Agricultural Census data.

With this update, the estimated population of businesses has increased from 77,407* to 81,910† (a 5.8% increase). Consideration of this increase in the estimated population of businesses should be taken when interpreting results in this report.

* Source: Levy Payer Register for the previous financial year (2022-23)
† Source: Levy Payer Register for the most recent financial year (2023-24)

State of play: an overview of the industry analysis

The beef cattle market is a highly dynamic market. Analysts are identifying a period of price stability nationally, although recognise that there are very different forces operating among northern and southern producers.

While Northern Australia had been experiencing favorable conditions, weather conditions earlier this year, including widespread flooding and cyclone damage, did impact producers in Queensland. That said, for some producers the rainfalls were seen as creating a more positive operating environment. As a result, there were fewer Northern producers who were able to complete the April 2025 BPIS.

Southern Australia continues to experience drier and drought conditions.

The export and trading environments became somewhat more complex with new tariffs announced and responses to new tariffs likely to disrupt the expected patterns of export and trade.

Regardless of these different and changing conditions, the operating environment for beef cattle producers remains fluid.

The content opposite provides a brief overview of the beef cattle sector by the agribusiness units within Rabobank and ANZ Agribusiness. The discussion provides a useful context for interpreting the results in the April 2025 Beef Producers Intentions Survey.

RABOBANK Commentary

- ✓ Rain boosts an otherwise steady market.
- ✓ There are reports that Chinese buyers are switching to Australian producs. An increase in Chinese demand for Australian beef would be a positive for the Australia cattle market.
- ✓ After higher volumes in February, live export cattle numbers dropped back down in March to levels similar to 2023. This may be a result of the rains through northern Australia in late March, which limited access to stock and allowed producers to hold onto stock. We expect live export numbers to lift over the coming months.

ANZ Agribusiness Commentary:

- ✓ Though all categories have seen a fall in yardings as we move into the end of the summer, processor cows and store heifers have seen the biggest fall in numbers • Exports are absorbing a higher portion of production with South Australia seeing the biggest growth in exports
- ✓ The United States remains in a herd rebuild phase with ongoing drought limiting their ability to produce enough beef and volatile tariff arrangements causing uncertainty.
- ✓ National beef slaughter has risen through the early part of 2025, following an easing over the Christmas period. While slaughter numbers are high and up year on year, productivity gains are also being seen through increasing average carcase weights, up 9 percent over the last 5 years.

1. Rabobank: Agribusiness Monthly for May 2025. Source: https://www.rabobank.com.au/content/dam/ranz/au/pdf/agribusiness-monthly/2025/australia-agribusiness-monthly-may-2025.pdf
2. ANZ Agri InFocus: Commodity Insights – Autumn 2025. Source: https://www.anz.com.au/content/dam/anzcomau/documents/pdf/commodity-insights-autumn-2025.pdf

About the report

The report provides a summary of the feedback provided by producers who completed the April 2025 Beef Producer Intentions Survey (BPIS). Estimates of herd size, sentiment and forward projections presented in this report are made using the data collected in the survey.

There are several aspects about the survey design that should be considered when reviewing or interpreting the results from the April 2025 BPIS survey.

With these design issues in mind, the results from the April 2025 Beef Producers Intention Survey (BPIS) are presented.

The report structure

Producer sentiment about the next 12 months for the beef cattle industry

A profile of the on-farm grassfed adult beef cattle herd

Producer intentions for their on-farm grassfed adult beef cattle herd

Complementary diagnostics

An overview of producer's breeding program

An overview of producer's sales program

The survey data has been weighted

Estimates provided in this report are made from weighted survey data. Weighting of the survey data was important to ensure the sample of 3,116 producers who responded to the survey were representative of the total base of Australian grassfed beef cattle producers. Details on the weighting is provided in the attachments to this report.

Different production systems

There are many different production systems in operation across this market. For the purposes of the survey, two main production systems were used as a framework to collect the data from producers. A set of questions for 'Southern producers' and for 'Northern producers' were developed. While there is significant crossover in the questions between the two surveys, there are nuances which accommodated the clear differences that exist. That said, even within these two broad production system descriptions, individual producers will have developed, adapted and continue to evolve their own specific practices.

National level estimates

Bearing in mind the sometimes different on-farm practices and systems, an effort was made in the analysis and report to calculate and provide national level estimates. There are likely to be nuances when aggregating results from different production systems and this should be considered when looking at national level results.

The report covers several core measurement areas

The April 2025 report includes coverage of several different measurement areas, including:

Producer sentiment	Herd profiles	Breeding programs	Producer intentions	Sales to date and forecast

BPIS just one input into the MLA forecasting models

It is acknowledged that the estimates from BPIS will be just one of the inputs into the well-established forecasting models developed and supported by MLA. The models provide a more comprehensive approach to forecasting and provide important measures for industry. Results from the current BPIS survey should be considered in this context.

Lower response from Queensland producers

The weather events (floods and cyclone related damage) has impacted some Queensland producers capacity to complete the April 2025 BPIS. While the survey responses are still at a level that provides robust estimates, it is noted that there were fewer responses from Queensland producers for this survey.

observations and insights

Beef Producers Intentions Survey

April 2025

We spoke to 3,116 producers about their industry sentiment and the profile and intentions for their on-farm grassfed adult beef cattle herd...

Sentiment of the Beef Cattle Industry

+53	= 62%	− 8%
Nett Sentiment	% Positive sentiment	% Negative sentiment

Beef Cattle Herd Profile

27.94 million Estimate of on-farm grassfed adult beef cattle herd on hand at 31 March 2025

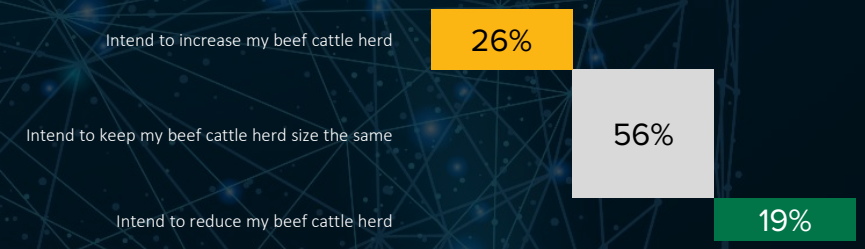
13.65 million	Breeding cows
5.55 million	Heifers (joined and unjoined)
6.67 million	Steers (under 2)
0.62 million	Bulls (12m+)
1.45 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made from 1 January to 31 March 2025	Expected sales to be made between 1 April to 30 June 2025
51%	49%

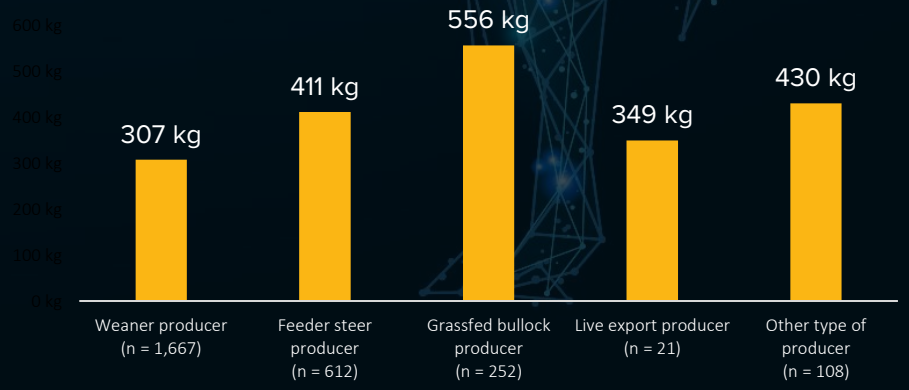
Beef Cattle Herd Intentions

Producers provided their intention to increase, reduce or maintain their beef cattle herd over the next 12 months. Results (ignoring the size of the herd) were:



Breeding Program Turn-off Weights

Producers were asked what weights they will turn cattle off at (specifically asked about their breeding program e.g. weaner, feeder steer, etc.)



Observations and insights

While the purpose of the research did not include the presentation of an interpretation of the survey results, some initial observations and insights has been provided in the following discussion.

Producer sentiment

Producers outlook for the future of the beef cattle industry over the next 12 months continues to strengthen. Results indicate that producers are optimistic about the future of the beef cattle sector (Nett Sentiment: +53 up from +47 in November), with more than six in ten producers responding to the survey reporting a positive outlook and less than one in ten reporting a negative outlook (62% positive, 8% negative).

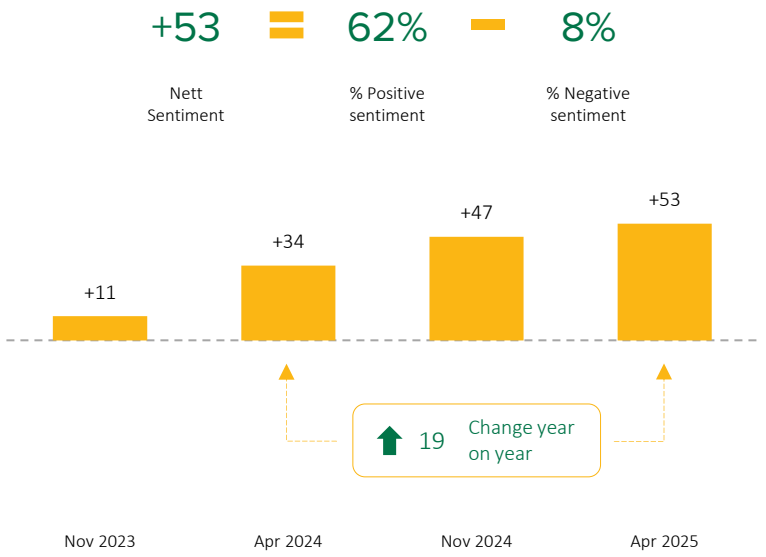
It is important to note that the sentiment of those Queensland producers significantly impacted from the floods were not included in these estimates. It's not possible to determine the potential impact this may have had on the following estimates, but needs to be considered when interpreting these results. That said, from the analysis we note that:

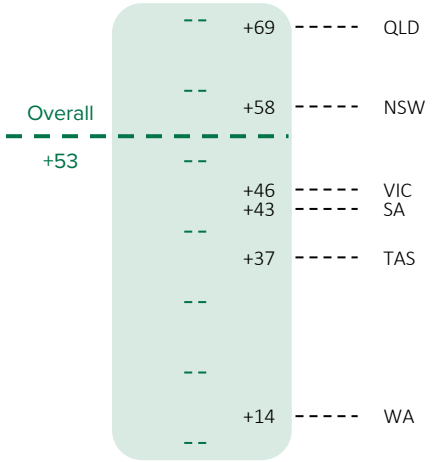
- Northern producers are more positive (Nett Sentiment of +65 up from +56) than Southern producers (+52 up from +46).
- There are variations across states, but the result suggest that Queensland, New South Wales and Victorian producers continue to be more positive than producers in other states. Confidence among Western Australian producers has improved (+14 up from -25) but remains the lowest result across all states.
- The confidence about the future was consistent across producers of all sizes.

Producers were asked as to whether their outlook had changed over the last 6 months. Interestingly:

- Among producers who had a positive outlook, about one in four said their outlook had improved over the last six months (the report explores the reasons for this); while
- Among producers who had a negative outlook, about three in four said their outlook had become more negative over the last six months.

Producers outlook for the next 12 months will be one of the factors in their planning and forecasting for this same period.





Observations and insights

A profile of the on-farm grassfed adult beef cattle herd

The April 2025 BPIS had, amongst other measures, a focus on measuring some of the demographics of Australia's herd. From the results, we note that:

From the survey it has been estimated that there are approximately just under 28M on-farm grassfed adult beef cattle on hand.

Almost half of the on-farm grassfed adult beef cattle on hand are breeding cows with heifers making up an additional 20% of the total estimated herd size.

Based on the information provided by producers responding to the survey:

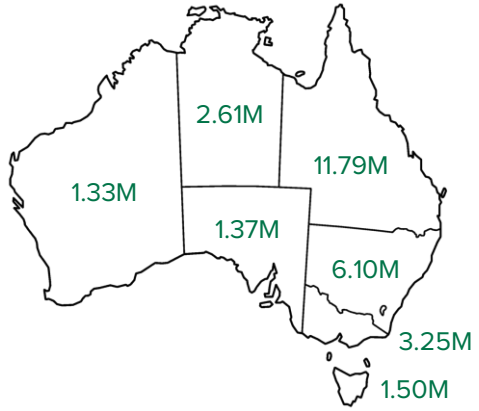
- Southern Australia makes up approximately 54% of the total estimated on-farm grassfed adult beef cattle herd size; while
- Northern Australia accounts for the remaining 46%

Across the states, we see that Queensland accounts for almost half the herd size (42%), with NSW 22% and the remaining states making up the balance.

When producers were asked about their actual and planned sales over the first half of 2025 the survey has estimated that

- An estimate of just under 2.45M cattle is reported to have been sold in the first quarter of 2025 (representing some 51% of total planned sales in the first half of 2025).
- Producers also reported that around 2.4M will be sold in the second quarter of 2025.
- Southern Australia producers reported slightly more sales in the first quarter compared to the second quarter (53% of the forecast sales in the first quarter and 47% in the second quarter). In contrast, Northern Australia producers reported sales program slightly weighted to the second quarter (47% in the first quarter and 53% in the second quarter).

Total estimated on-farm grassfed adult beef cattle herd size:	27,938,755	
		% of total herd size
Breeding cows	13,652,719	49%
Heifers	5,545,974	20%
Steers (under 2 years old)	6,665,859	24%
Bulls	620,667	2%
Castrated males (2+ years)	1,453,535	5%



Observations and insights

Producer intentions

Analysis of the feedback provided shows that:

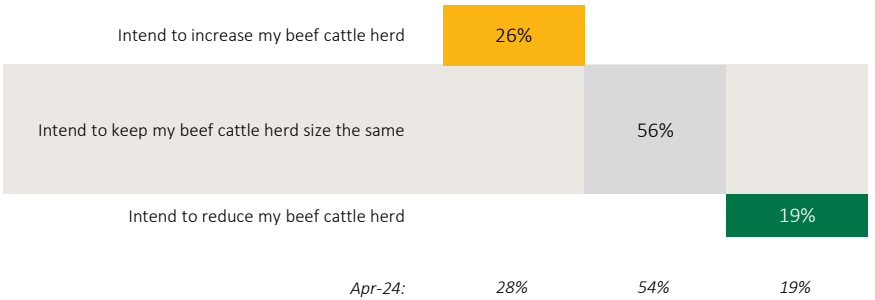
- At the producer level (that is considering each producer equal), there is a net intention to increase their on-farm grassfed adult beef cattle herd in the next 12 months:
  - 26% indicating they would increase their herd size;
  - 56% indicating it would remain unchanged; and
  - 19% indicating they would decrease their herd size.

  These results are very consistent with those reported 12 months previously.

  We also note that:

  - Producer intentions are largely consistent across both Northern and Southern Australia producers, with slightly fewer producers in Northern Australia indicating an intention to reduce their herd.
  - Producers in New South Wales, Queensland and Tasmania were more slightly more likely to report an intention to increase their herd size than producers from other states.
  - The results are consistent with the sentiment and outlook producers have. A more positive outlook is typically correlated with an intention to grow.

The detailed results from the April 2025 Beef Producer Intentions Survey (BPIS) now follow.



	Southern Australia	Northern Australia
Intend to increase my beef cattle herd	26%	29%
Intend to keep my beef cattle herd size the same	55%	59%
Intend to reduce my beef cattle herd	19%	13%

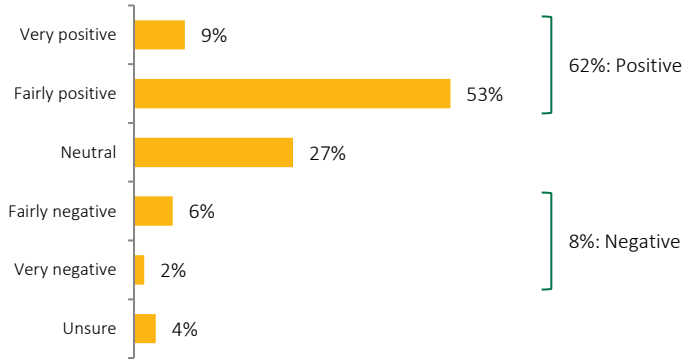
These results will not necessarily reflect actual volumes as the results are produced at a producer level (assuming all producers equal) and does not take into account actual forecast volumes (so the increase could be small or large, but for this analysis is still reported as an increase).

The results should be taken as indicative and a signal to producer intentions.

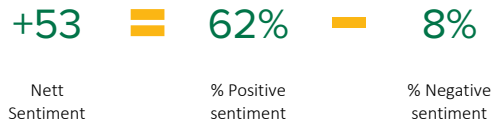
producer sentiment about the next 12 months of the beef cattle industry

Sentiment: outlook for the beef cattle sector

Q4. How do you feel about the future of the **beef cattle** industry over the next 12 months? Would you say you feel…?
Base: All respondents, n = 3,116



Nett Sentiment
(scale of -100 to +100)



The outlook of the future for the grassfed beef cattle industry continues to strengthen with producers reporting a stronger outlook in the April 2025 survey.

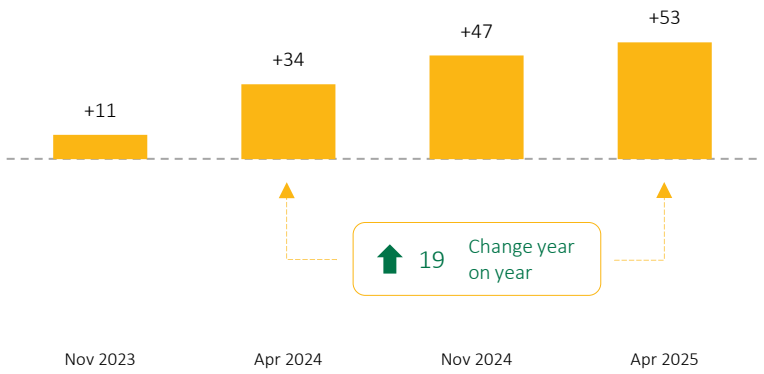
More than six in ten (62%) producers see a positive future over the next 12 months, while a much smaller cohort see a negative outlook (8%). About one in three (27%) are uncommitted and most likely uncertain about the next 12 months.

There are differences between Northern (+65) and Southern producers (+52) and across states.

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,145*	*659*	*153*	*121*	*771*	*252*	*1,690*	*547*	*375*	*325*	*109*	*70*
Nett Sentiment	+58	+69	+43	+37	+46	+14	+50	+53	+62	+66	+63	+59

Sentiment trend of the beef cattle sector

Trend of Nett Sentiment of the beef cattle industry



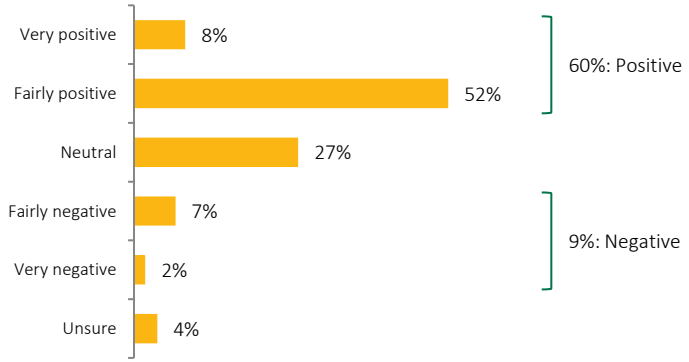
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Nett Sentiment – Apr 2024	+42	+44	+18	+7	+35	-25	+33	+32	+40	+45	+58	+44
Nett Sentiment – Apr 2025	+58	+69	+43	+37	+46	+14	+50	+53	+62	+66	+63	+59
Change	Up 16	Up 25	Up 25	Up 30	Up 11	Up 39	Up 17	Up 21	Up 22	Up 21	Up 5	Up 15

Sentiment: outlook for the beef cattle sector

Southern Australia

Q4. How do you feel about the future of the **beef cattle** industry over the next 12 months? Would you say you feel…?

Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,743



Nett Sentiment
(scale of -100 to +100)

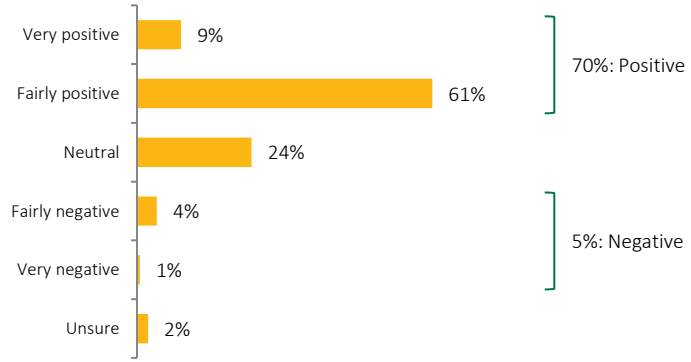
+52 = 60% − 9%

Nett Sentiment | % Positive sentiment | % Negative sentiment

Northern Australia

Q4. How do you feel about the future of the **beef cattle** industry over the next 12 months? Would you say you feel…?

Base: All respondents categorised or self-identified as a Northern Australian producer, n = 373



Nett Sentiment
(scale of -100 to +100)

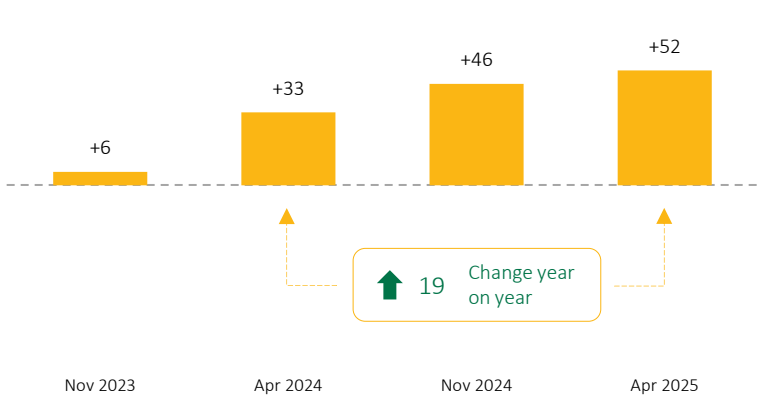
+65 = 70% − 5%

Nett Sentiment | % Positive sentiment | % Negative sentiment

Sentiment trend of the beef cattle sector

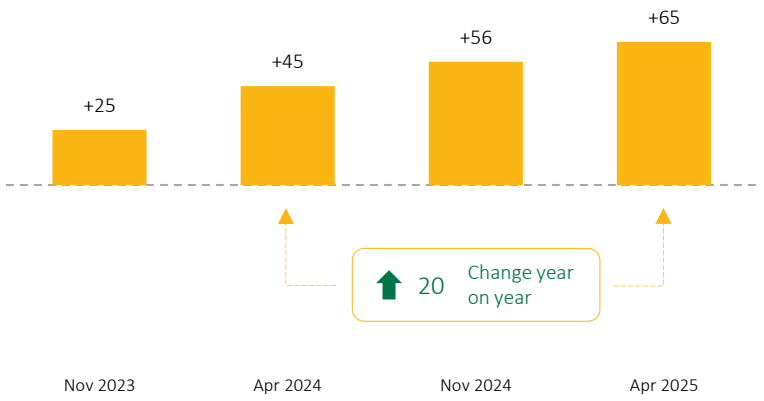
Southern Australia

Trend of Nett Sentiment of the beef cattle industry



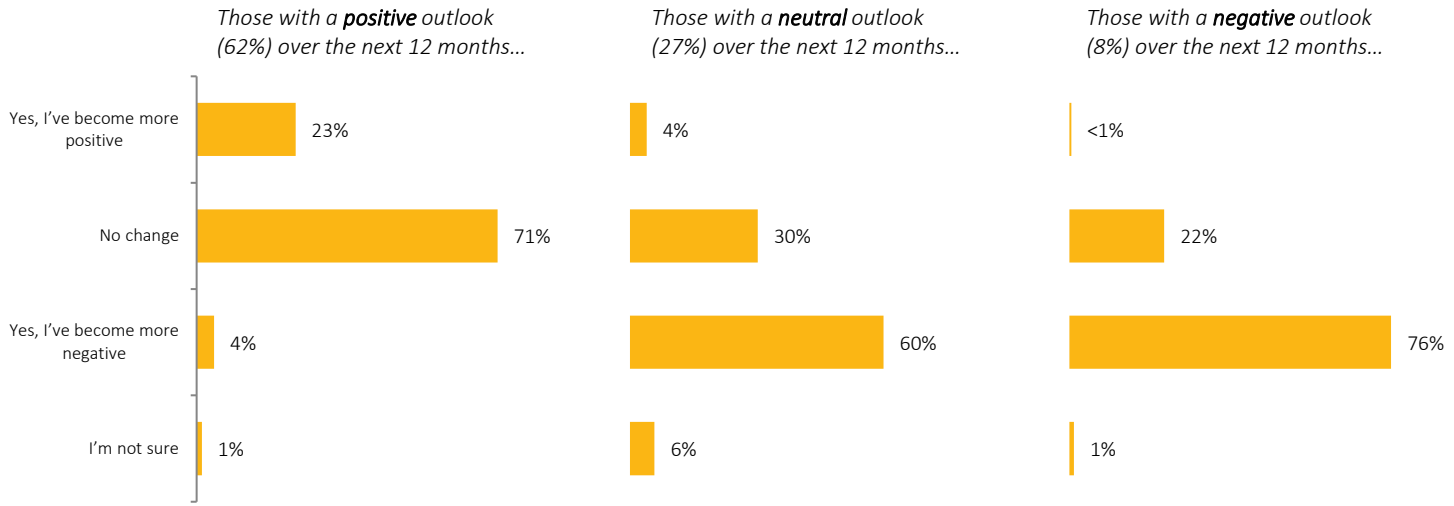
Northern Australia

Trend of Nett Sentiment of the beef cattle industry



Sentiment: has their outlook changed in the last 6 months?

Q5. Have you changed your outlook in the last 6 months?
Base: All respondents, n = 3,116



Producers' outlook for the future changes as the operating, trading and environmental (including climate) conditions move and adjust to movements in domestic and global markets.

In the April 2025 BPIS, producers were asked if their outlook for the industry had changed.

Among producers who had a positive outlook, about one in five (23%) said their outlook had improved over the last six months (the report explores the reasons for this); while

Among producers who had a negative outlook, more than three in four (76%) said their outlook had become more negative.

The results reflect the fluidity of markets and producers' assessment of the future and their own farming businesses. It also highlights that the same issue can be interpreted in different ways by different producers.

Sentiment: factors causing a more positive outlook

Q6. What factors have emerged over the last 6 months that has caused your outlook of the future of the beef cattle industry to be more **positive**?

Base: All respondents who have become more positive in their outlook over the last 6 months AND provided a valid response, n = 497

- 33% - Improving prices
- 19% - Improving prices / demand due to rains / floods in QLD
- 18% - More rain
- 13% - Demand - domestic and global
- 12% - Prices and supply in overseas markets
- 11% - Stronger market options / opportunities including exports
- 11% - Geopolitics / tariff-related market instability / uncertainty
- 10% - Stronger seasonal conditions
- 5% - Farm / Business management related feedback
- 5% - Steady markets / prices - domestic and global
- 5% - Drought / Low numbers due to drought
- 4% - Lack of supply
- 4% - Weather
- 3% - More feed available
- 3% - Stronger / Improved confidence

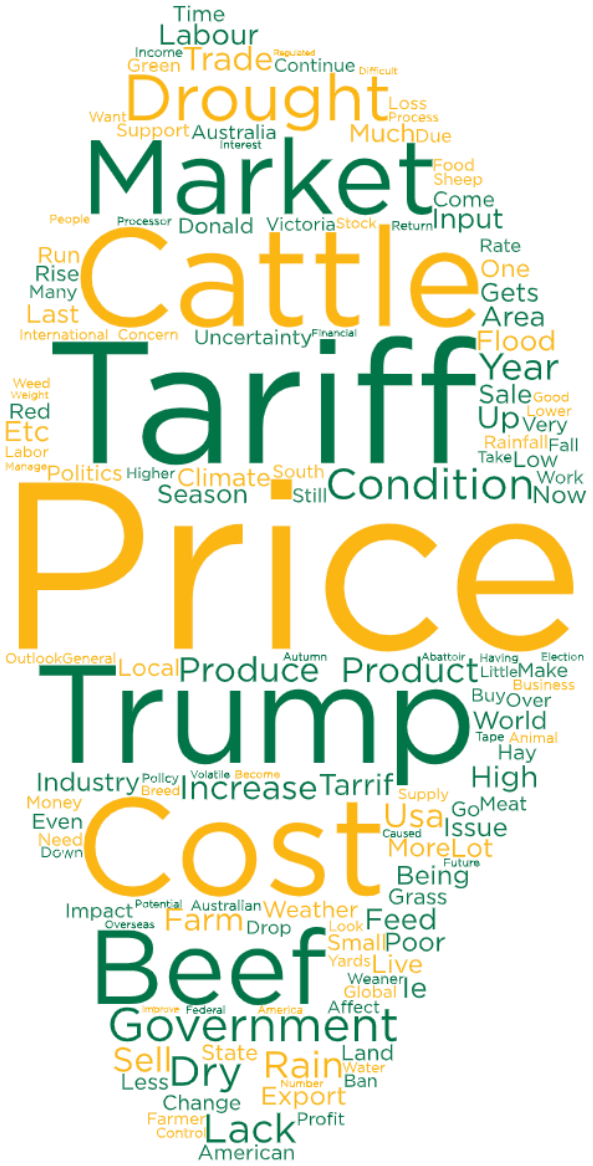
Results shown if mentioned by at least 2% of respondents.
Results are provided unweighted and are a subjective coding of the open-ended questions.

Sentiment: factors causing a more negative outlook

Q6. What factors have emerged over the last 6 months that has caused your outlook of the future of the beef cattle industry to be more **negative**?

Base: All respondents who have become more negative in their outlook over the last 6 months AND provided a valid response, n = 563

- 49% - Geopolitics / tariff-related market instability / uncertainty
- 29% - Lack of rainfall / dry conditions / drought leading to feed shortage
- 17% - Lower than expected prices / price falls
- 17% - Cost of production / input costs
- 16% - Government: regulations / policies (inc. Aus Election, live exports, biosecurity) and lack of support
- 5% - Volatile / uncertain prices
- 4% - Issues with processors / abattoirs (inc. small businesses absorbed into larger ones)
- 4% - Current seasonal conditions
- 3% - Supermarket-related feedback (price of cattle compared to retail prices of beef)
- 2% - Heavy rains / flooding
- 2% - Farm-related issues
- 2% - Weather
- 2% - Prices (no further information)
- 2% - Lack of demand
- 2% - Oversupply of cattle



Results shown if mentioned by at least 2% of respondents.
Results are provided unweighted and are a subjective coding of the open-ended questions.

a profile of the on-farm grassfed adult beef cattle herd

Herd profile breakdown

Q7. The next set of questions look to get an estimate of your current grassfed beef cattle herd. When considering estimates, please include a count across **all properties** and include **all breed types**.

On **31 March 2025**, what were the total number of the following types of cattle (not including calves) on hand across your grassfed beef cattle herd?
Base: All respondents, n = 3,116

Total estimated on-farm grassfed adult beef cattle herd size: **27,938,755**

		% of total herd size	% of producers with type of cattle
Breeding cows	13,652,719	49%	85%
Heifers †	5,545,974	20%	73%
Steers (under 2 years old)	6,665,859	24%	76%
Bulls	620,667	2%	70%
Castrated males (2+ years)	1,453,535	5%	21%

Definitions of cattle types presented to producers:

Breeding cows	No definition provided.
Heifers †	Female joined or to be joined to have her first calf regardless of age. Please include both joined and unjoined heifers.
Steers (under 2 years old)	Steers less than 2 years old.
Bulls	Bulls used or intended for breeding (12 months or older).
Castrated males (2+ years)	Castrated males (2 years or older).

Important note about the estimates

When considering the estimate of the national on-farm grassfed adult beef cattle herd size (reported above), it should be noted that:

- *This estimate is based on survey respondent data.*
- *The estimates have been weighted by the number of producers reported on the Levy Payer Register. This includes producers of all sizes and is substantially larger than the number of producers reported in the ABS surveys.*
- *The estimate does not include any measure of the number of calves born so far (at the date of the survey) or likely to be born in the next few months*

† The definition of heifers provided to producer now included "unjoined heifers". Please note that the heifer definition prior to Apr-25 was "Female joined to have her first calf regardless of age".

Herd profile breakdown

Southern Australia

Q7. The next set of questions look to get an estimate of your current grassfed beef cattle herd. When considering estimates, please include a count across **all properties** and include **all breed types**.

On **31 March 2025**, what were the total number of the following types of cattle (not including calves) on hand across your grassfed beef cattle herd?
Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,743

Total estimated on-farm grassfed adult beef cattle herd size:	15,035,599		
		% of total herd size	% of producers with type of cattle
Breeding cows	7,762,198	52%	84%
Heifers †	3,109,469	21%	71%
Steers (under 2 years old)	3,499,539	23%	75%
Bulls	320,956	2%	68%
Castrated males (2+ years)	343,437	2%	18%

Northern Australia

Q7. The next set of questions look to get an estimate of your current grassfed beef cattle herd. When considering estimates, please include a count across **all properties** and include **all breed types**.

On **31 March 2025**, what were the total number of the following types of cattle (not including calves) on hand across your grassfed beef cattle herd?
Base: All respondents categorised or self-identified as a Northern Australian producer, n = 373

Total estimated on-farm grassfed adult beef cattle herd size:	12,903,156		
		% of total herd size	% of producers with type of cattle
Breeding cows	5,890,521	46%	91%
Heifers †	2,436,505	19%	83%
Steers (under 2 years old)	3,166,320	25%	82%
Bulls	299,711	2%	85%
Castrated males (2+ years)	1,110,098	9%	42%

† The definition of heifers provided to producer now included “unjoined heifers”. Please note that the heifer definition prior to Apr-25 was “Female joined to have her first calf regardless of age”.

Herd profile breakdown

Q7. The next set of questions look to get an estimate of your current grassfed beef cattle herd. When considering estimates, please include a count across **all properties** and include **all breed types**.

On **31 March 2025**, what were the total number of the following types of cattle (not including calves) on hand across your grassfed beef cattle herd?
Base: All respondents, n = 3,116

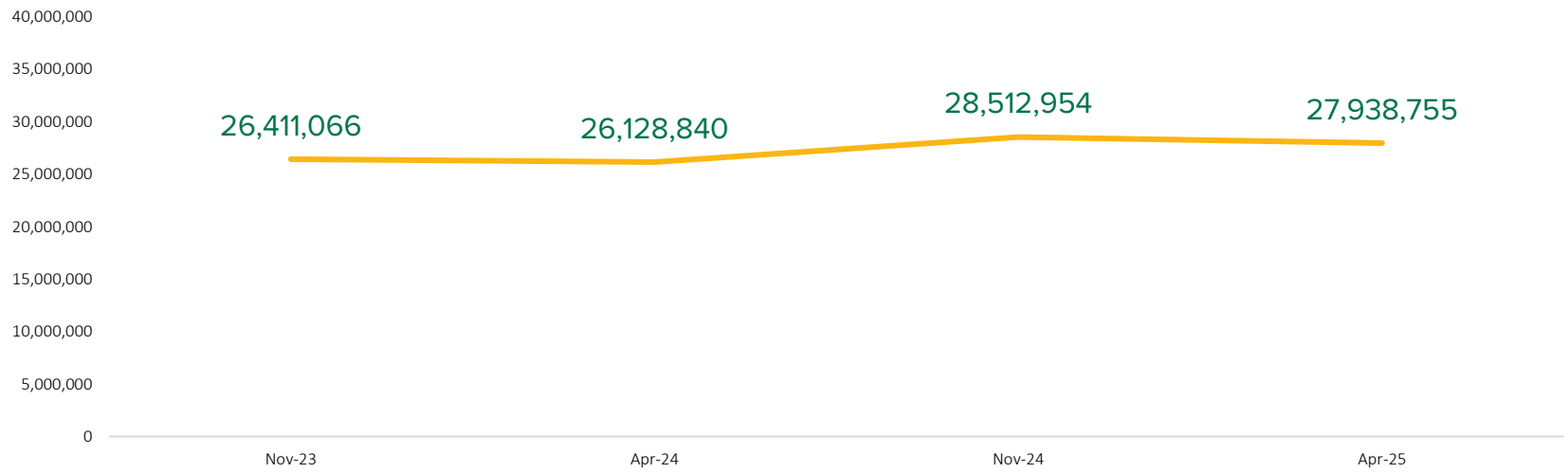
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,145*	*659*	*153*	*121*	*771*	*252*	*1,690*	*547*	*375*	*325*	*109*	*70*
Total herd size reported	**6,061,528**	**11,792,888**	**1,372,027**	**1,496,981**	**3,245,887**	**1,325,719**	**4,836,930**	**2,498,781**	**3,313,285**	**4,083,022**	**3,297,824**	**9,908,912**
% of total herd size	-	-	-	-	-	-	-	-	-	-	-	-
Breeding cows	53%	46%	49%	45%	52%	59%	53%	61%	49%	53%	40%	45%
Heifers †	20%	18%	25%	26%	19%	18%	18%	15%	20%	22%	18%	22%
Steers	22%	27%	24%	26%	22%	17%	23%	20%	26%	20%	36%	22%
Bulls	2%	2%	2%	2%	2%	3%	2%	2%	2%	2%	2%	3%
Castrated males	2%	7%	1%	1%	4%	3%	4%	2%	4%	3%	4%	8%
% of producers with type of cattle	-	-	-	-	-	-	-	-	-	-	-	-
Breeding cows	89%	87%	83%	73%	80%	87%	83%	86%	87%	92%	92%	91%
Heifers †	74%	81%	73%	72%	63%	74%	68%	73%	79%	90%	92%	95%
Steers	74%	81%	79%	83%	73%	72%	74%	75%	81%	82%	86%	91%
Bulls	74%	81%	61%	63%	54%	78%	63%	78%	82%	89%	86%	87%
Castrated males	18%	32%	11%	22%	18%	18%	20%	17%	23%	25%	31%	42%

Estimate of the national on-farm grassfed adult beef cattle herd size

Q7. The next set of questions look to get an estimate of your current grassfed beef cattle herd. When considering estimates, please include a count across **all properties** and include **all breed types**.

On **31 March 2025**, what were the total number of the following types of cattle (not including calves) on hand across your grassfed beef cattle herd?

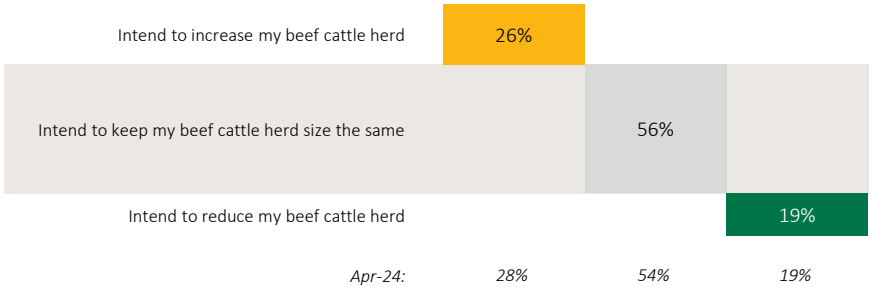
Base: All respondents, n = 3,116



producer intentions for their on-farm grassfed adult beef cattle herd

Producer intentions on herd size over the next 12 months

Q8. Do you intend to increase, keep the same or reduce your beef cattle herd over the next 12 months?
Base: All respondents, n = 3,116



Producers provided an indication of their intention for their on-farm grassfed adult beef cattle herd over the next 12 months.

Among the producers responding to the April 2025 survey, just over one in four (26%) reported they would be increasing their herd, with 19% indicating some level of downsizing of their herd.

This provides a useful producer sentiment, with the following analysis exploring the impact of this stated intention on the forecast herd (remembering producers have different herd sizes).

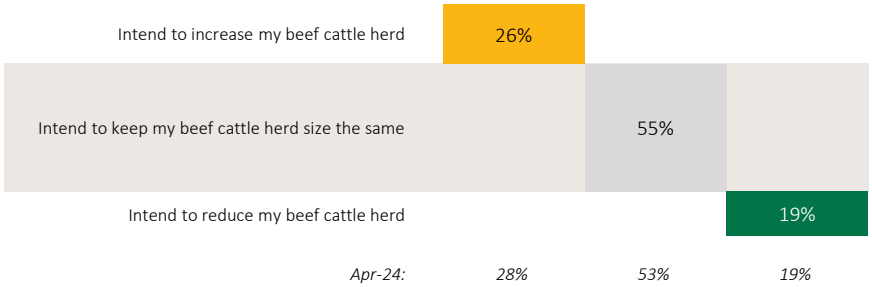
	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,145*	*659*	*153*	*121*	*771*	*252*	*1,690*	*547*	*375*	*325*	*109*	*70*
Intend to increase	28%	29%	25%	28%	21%	21%	25%	25%	28%	28%	39%	33%
Intend to keep the same	54%	58%	46%	48%	58%	59%	54%	58%	56%	64%	51%	49%
Intend to reduce	18%	13%	29%	24%	22%	20%	21%	17%	16%	8%	10%	18%

Producer intentions on herd size over the next 12 months

Southern Australia

Q8. Do you intend to increase, keep the same or reduce your beef cattle herd over the next 12 months?

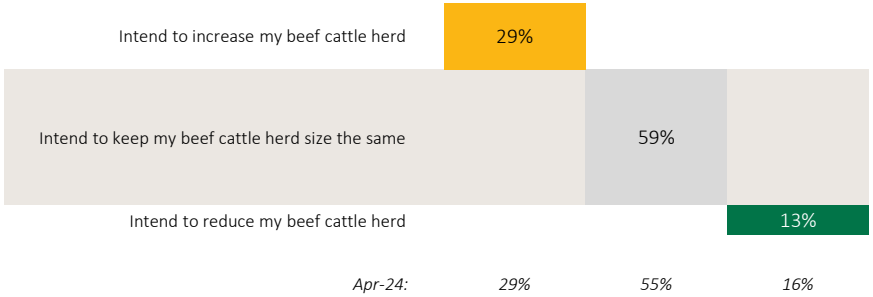
Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,743



Northern Australia

Q8. Do you intend to increase, keep the same or reduce your beef cattle herd over the next 12 months?

Base: All respondents categorised or self-identified as a Northern Australian producer, n = 373



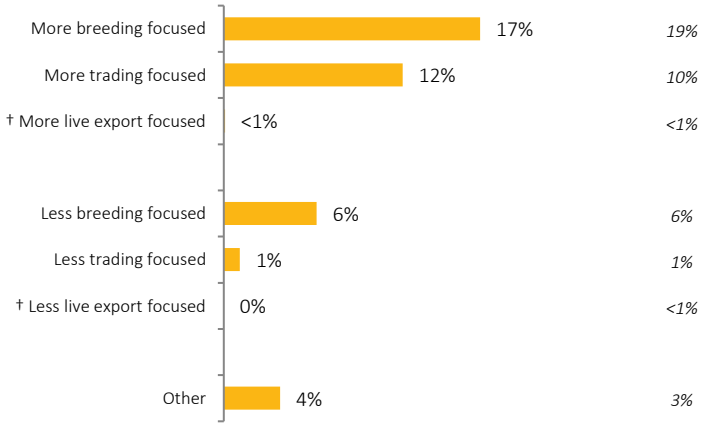
Producers' intention for their on-farm grassfed adult beef cattle herd over the next 12 months was consistent between Southern and Northern producers.

While there are mixed responses (some increasing, some decreasing), at least one in two producers (50%+) are indicating no change.

Producer intentions on changing their herd profile

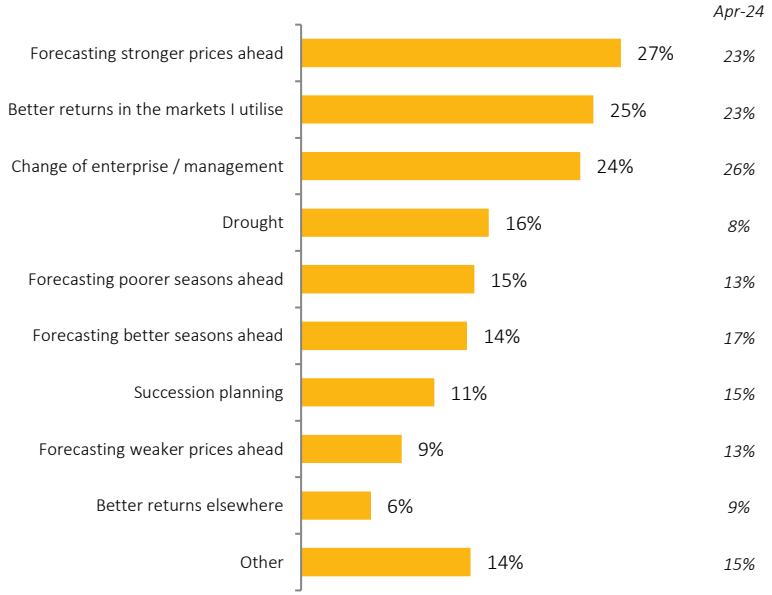
Q9. Are you intending on changing the profile of your herd in 2025?
Base: All respondents, n = 3,116

39% of producers indicated they intend to change the profile of their herd in 2025:



61% reported they had no intention to change the profile of their herd in 2025. *61%*

Q10. What factors are influencing your intentions for changing the profile of your herd in 2025?
Base: All respondents who intend to change the profile of their herd in 2025, n = 1,219



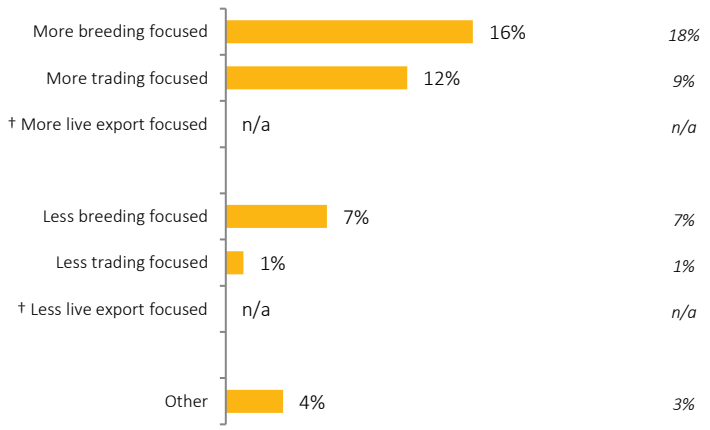
† Not asked to Southern producers.

Producer intentions on changing their herd profile

Southern Australia

Q9. Are you intending on changing the profile of your herd in 2025?
Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,743

39% of Southern producers indicated they intend to change the profile of their herd in 2025:

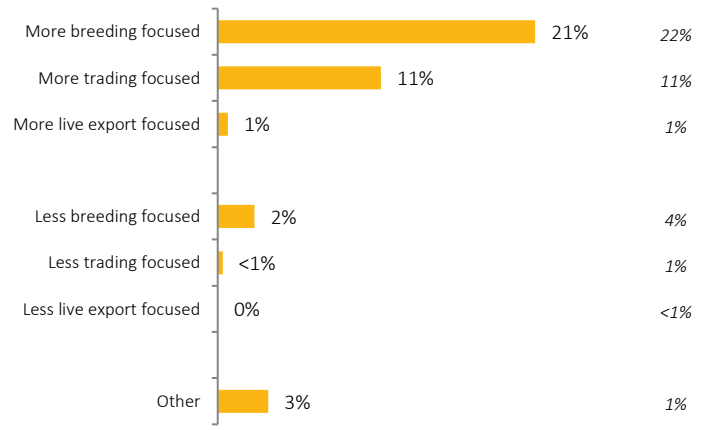


61% reported they had no intention to change the profile of their herd in 2025. *61%*

Northern Australia

Q9. Are you intending on changing the profile of your herd in 2025?
Base: All respondents categorised or self-identified as a Northern Australian producer, n = 373

38% of Northern producers indicated they intend to change the profile of their herd in 2025:



62% reported they had no intention to change the profile of their herd in 2025. *59%*

† Not asked to Southern producers.

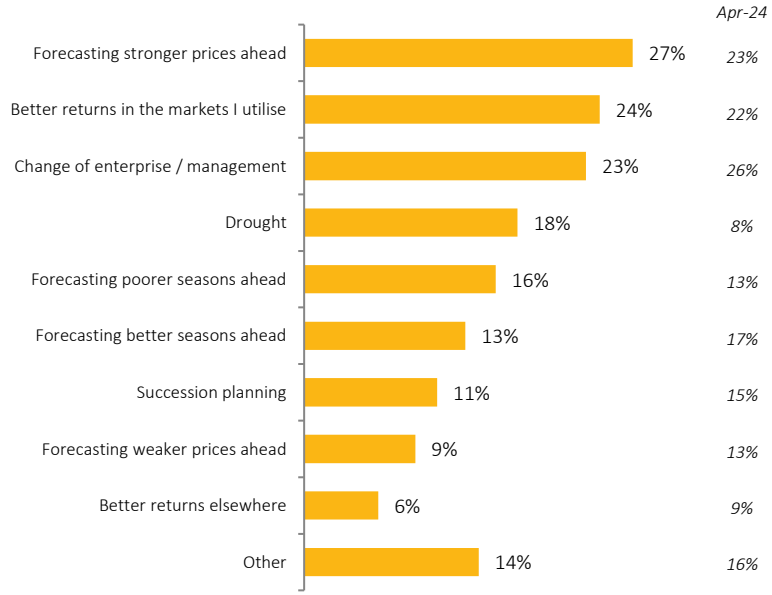
Producer intentions on changing their herd profile

Southern Australia

39% of Southern producers indicated they intend to change the profile of their herd in 2025:

Q10. What factors are influencing your intentions for changing the profile of your herd in 2025?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who intend to change the profile of their herd in 2025, n = 1,071

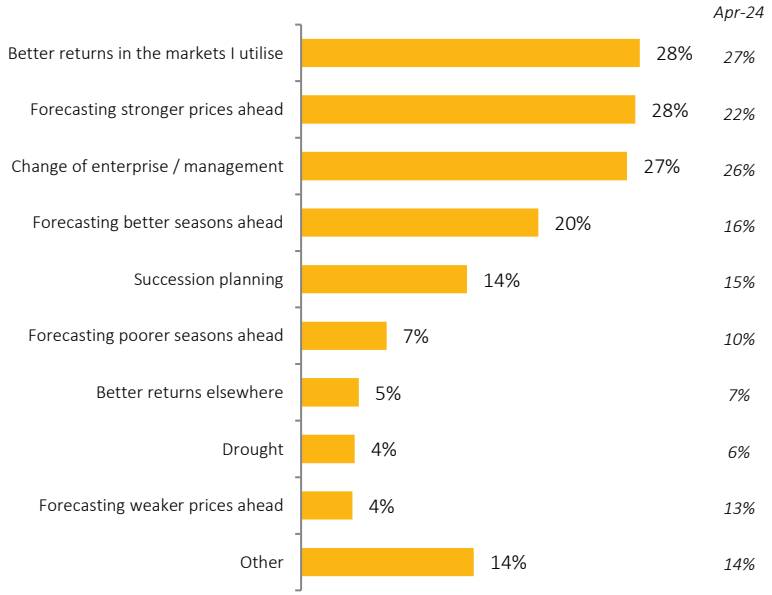


Northern Australia

38% of Northern producers indicated they intend to change the profile of their herd in 2025:

Q10. What factors are influencing your intentions for changing the profile of your herd in 2025?

Base: All respondents categorised or self-identified as a Northern Australian producer AND who intend to change the profile of their herd in 2025, n = 148



an overview of producer's breeding program

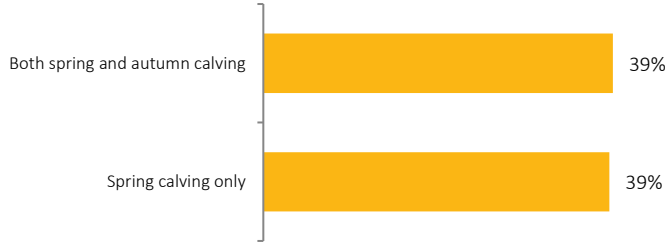
Spring breeding program – % of producers

Q3. (Southern Australia only) Do you join cows and heifers to deliver calves in spring, autumn, or both seasons?

Base: All respondents categorised or self-identified as a Southern Australian producer AND reported being a cow/calf producer, n = 2,332

77% of Southern producers indicated they join cows and heifers to deliver calves in spring

The following pages asked these producers about their spring breeding program.



	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,021*	*265*	*128*	*87*	*616*	*212*	*1,277*	*430*	*275*	*246*	*74*	*30*
% producing for spring	90%	95%	46%	82%	67%	25%	78%	78%	77%	72%	85%	84%
Both spring and autumn calving	47%	47%	32%	21%	32%	16%	41%	38%	38%	26%	26%	27%
Spring calving only	43%	48%	14%	62%	35%	9%	37%	40%	39%	47%	58%	57%

Spring breeding program – spring calf branding percentage

Q12. (Southern Australia only) What was your branding percentage for the spring calves that were delivered?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND reported typically joining cows/heifers to deliver calves in spring, n = 1,765

Specified a branding percentage	64%
I'm not sure	33%
N/A – did not have spring calves	3%

Mean reported branding percentage for spring calves 84%

	Apr-24
	84%

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*915*	*251*	*59*	*72*	*415*	*50*	*979*	*323*	*207*	*170*	*61*	*25*
% specifying a branding percentage	63%	74%	68%	63%	58%	57%	58%	71%	74%	81%	79%	92%
Of those who specified…												
Mean branding percentage	83%	89%	83%	88%	81%	94%	81%	90%	87%	90%	91%	93%

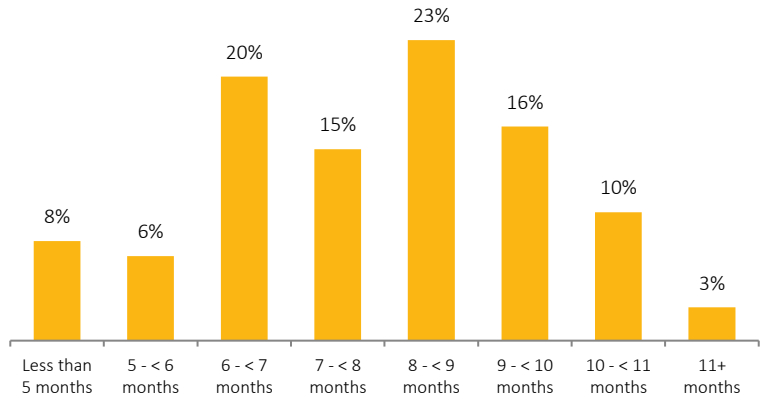
Spring breeding program – age of spring calf weaning

Q13. (Southern Australia only) At what age did you (or will you) wean most of your spring calves?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND reported typically joining cows/heifers to deliver calves in spring, n = 1,765

		Apr-24
Provided an answer (in weeks or months)	88%	
Not sure	12%	
Of those who provided an answer…		
Mean age (in months)	7.34	7.25

Distribution of reported mean weaning age (in months)



	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*915*	*251*	*59*	*72*	*415*	*50*	*979*	*323*	*207*	*170*	*61*	*25*
% provided an answer	88%	89%	82%	98%	88%	87%	86%	92%	91%	98%	90%	100%
Of those who provided an answer…												
Mean age (in months)	7.29	7.39	7.11	7.44	7.45	7.24	7.30	7.52	7.48	7.29	7.09	6.58

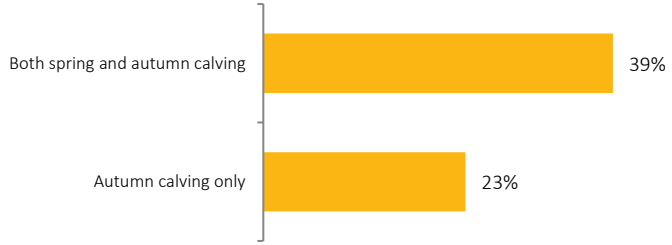
Autumn breeding program – % of producers

Q3. (Southern Australia only) Do you join cows and heifers to deliver calves in spring, autumn, or both seasons?

Base: All respondents categorised or self-identified as a Southern Australian producer AND reported being a cow/calf producer, n = 2,332

61% of Southern producers indicated they join cows and heifers to deliver calves in autumn

The following pages asked these producers about their autumn breeding program.



	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,021*	*265*	*128*	*87*	*616*	*212*	*1,277*	*430*	*275*	*246*	*74*	*30*
% producing for autumn	57%	52%	86%	38%	65%	91%	63%	60%	61%	53%	42%	43%
Both spring and autumn calving	47%	47%	32%	21%	32%	16%	41%	38%	38%	26%	26%	27%
Autumn calving only	10%	5%	54%	18%	33%	75%	22%	22%	23%	28%	15%	16%

Autumn breeding program – breeding herd joining and calving rates

Q14. (Southern Australia only) For this year's autumn breeding program, thinking about your breeding herd, how many cows / heifers were joined for your autumn breeding?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND reported typically joining cows/heifers to deliver calves in autumn, n = 1,439

Breeding herd on hand at 31 March 2025 (Autumn breeders only)	5,468,397	
Breeding herd joined	3,015,032	
		Apr-24
Breeding herd join rate	55%	*61%*

Q15. (Southern Australia only) How many autumn calves have been delivered or are expected from the autumn breeding program across the following two time points?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND joined their breeding herd for autumn breeding, n = 1,351

Breeding herd joined	3,015,032	
Calves delivered or expected	2,387,324	
Actual calves born to 31 March 2025	1,222,456	
Actual and expected calves to be born between 1 April – 30 June 2025	1,164,868	
		Apr-24
Breeding herd calving rate	79%	*79%*

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*570*	*136*	*110*	*33*	*394*	*195*	*820*	*265*	*170*	*138*	*32*	*14*
Breeding herd at 31 March 2025	2,119,010	548,411	694,058	122,911	1,354,269	609,637	1,762,187	883,134	830,171	1,022,136	352,985	617,783
Breeding herd joined	1,036,306	329,762	316,926	99,130	717,146	495,662	904,391	419,617	463,916	631,678	213,755	381,675
Breeding herd join rate	49%	60%	46%	81%	53%	81%	51%	48%	56%	62%	61%	62%
Breeding herd joined	1,036,306	329,762	316,926	99,130	717,146	495,662	904,391	419,617	463,916	631,678	213,755	381,675
Calves delivered or expected	792,157	209,408	277,587	34,558	637,043	436,570	689,449	340,938	395,500	527,262	155,028	279,147
Breeding herd calving rate	76%	64%	88%	35%	89%	88%	76%	81%	85%	83%	73%	73%

Note on analysis: Where producers provided data that resulted in a joining rate / calving rate of over 100%, the mean rate for their State and Levy Band was used instead.

Autumn breeding program – autumn calf branding percentage

Q16. (Southern Australia only) Of the autumn calves that have been delivered so far, what is your current branding percentage?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer AND reported typically joining cows/heifers to deliver calves in autumn, n = 1,439

Specified a branding percentage	35%
I'm not sure	38%
N/A – no autumn calves delivered yet	27%

Mean reported branding percentage for autumn calves 74%

Apr-24

73%

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*570*	*136*	*110*	*33*	*394*	*195*	*820*	*265*	*170*	*138*	*32*	*14*
% specifying a branding percentage	31%	43%	39%	25%	36%	40%	32%	41%	44%	38%	35%	61%
Of those who specified…												
Mean branding percentage	69%	70%	77%	79%	78%	77%	71%	82%	80%	62%	61%	92%

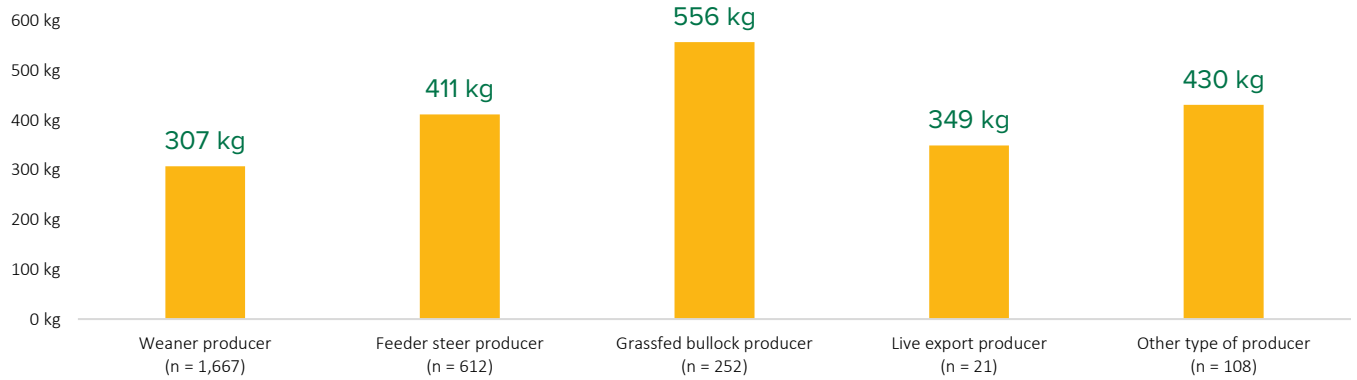
Breeding program – producer turn-off weights

Q17. As a [PRODUCER TYPE AT Q2], what weights will you turn cattle off at?
Base: All respondents who reported being a cow / calf producer, n = 2,660

It is important to note that these estimates of turn-off weights are produced from cow/calf producers only. Turn-off weight estimates for backgrounders / traders / growers / fatteners are provided separately.

	% provided a turn-off weight estimate	Mean turn-off weight (in kg)	*Apr-24*
Weaner producer (n = 1,667)	71%	307 kg	*307 kg*
Feeder steer producer (n = 612)	84%	411 kg	*406 kg*
Grassfed bullock producer (n = 252)	77%	556 kg	*552 kg*
Live export producer (n = 21)	85%	349 kg	*360 kg*
Other type of producer (n = 108)	70%	430 kg	*424 kg*

	Southern Australia	*Apr-24*	Northern Australia	*Apr-24*
Weaner producer	312 kg (n = 1,512)	*312 kg*	268 kg (n = 155)	*269 kg*
Feeder steer producer	413 kg (n = 521)	*408 kg*	399 kg (n = 91)	*400 kg*
Grassfed bullock producer	561 kg (n = 199)	*557 kg*	538 kg (n = 53)	*533 kg*
Live export producer	448 kg (n = 5)	*362 kg*	318 kg (n = 16)	*360 kg*
Other type of producer	424 kg (n = 95)	*420 kg*	471 kg (n = 13)	*470 kg*



an overview of producer's sales program

Producer sales – actual and expected volumes

Q19, Q21, Q23, Q25, Q26. Earlier, you described yourself as a [PRODUCER TYPE AT Q2]. How many sales have already been made and how many do you expect to sell through the following time periods?

Base: All respondents who reported being a cow / calf producer, n = 2,660

It is important to note that these estimates of sales are produced from cow/calf producers only. Sales estimates for backgrounders / traders / growers / fatteners are provided separately.

Total actual and expected sales

4,823,088

	Actual sales already made from 1 January to 31 March 2025	Expected sales to be made between 1 April to 30 June 2025
	2,447,942	**2,375,146**
% of total sales	**51%**	**49%**
Apr-24:	*43%*	*57%*

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,024*	*565*	*128*	*87*	*616*	*226*	*1,419*	*471*	*314*	*300*	*98*	*58*
Total actual and expected sales	**1,324,610**	**1,731,565**	**167,739**	**275,015**	**701,189**	**266,959**	**994,627**	**510,811**	**638,219**	**673,413**	**438,772**	**1,567,246**
% of total sales												
Actual sales 1 Jan – 31 Mar	46%	47%	62%	71%	62%	56%	43%	46%	43%	50%	47%	61%
Expected sales 1 Apr – 30 Jun	54%	53%	38%	29%	38%	44%	57%	54%	57%	50%	53%	39%

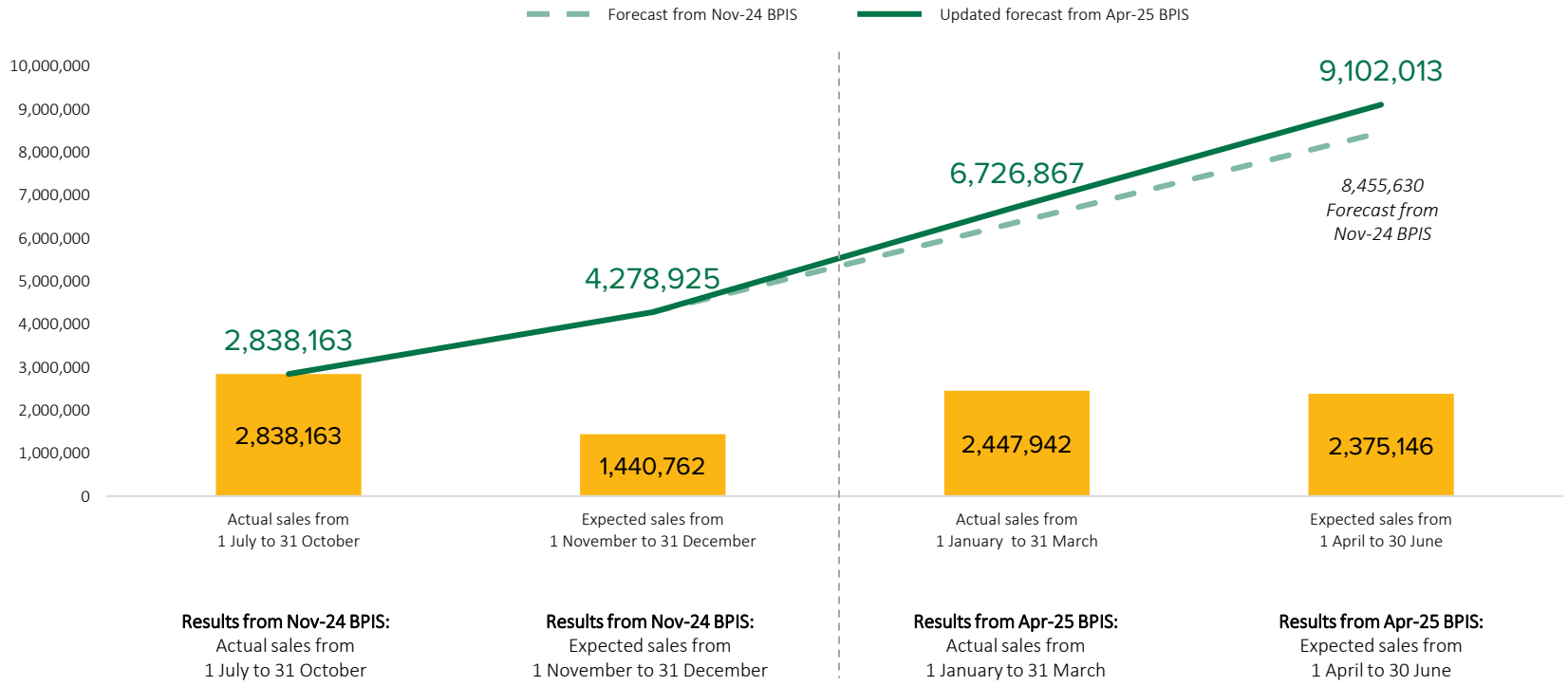
Estimate of producer sales from July 2024 to June 2025

An aggregation of results across the Nov-24 and Apr-25 BPIS surveys.

The results shown in the chart below are taken from the actual and forecast sales data collected in the November 2024 and April 2025 BPIS surveys.

The reported actual and forecast sales reported by producers in the Nov-24 and Apr-25 BPIS are shown below. The result illustrate the stronger level of actual and forecast sales in Apr-25 BPIS for the first half of 2025 than was planned for when producers reported in the Nov-24 survey.

The stronger sales plans reflect good prices but also are likely to be impacted by the current operating conditions in the southern states.



Producer sales – actual and expected volumes

Southern Australia

Q19, Q21, Q23, Q25, Q26. Earlier, you described yourself as a [PRODUCER TYPE AT Q2]. How many sales have already been made and how many do you expect to sell through the following time periods?

Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a cow / calf producer, n = 2,332

Total actual and expected sales	3,056,861	
	=	% of total sales
Actual sales already made from 1 January to 31 March 2025	1,619,426	53%
	↓	
Expected sales to be made between 1 April to 30 June 2025	1,437,436	47%

Northern Australia

Q19, Q21, Q23, Q25, Q26. Earlier, you described yourself as a [PRODUCER TYPE AT Q2]. How many sales have already been made and how many do you expect to sell through the following time periods?

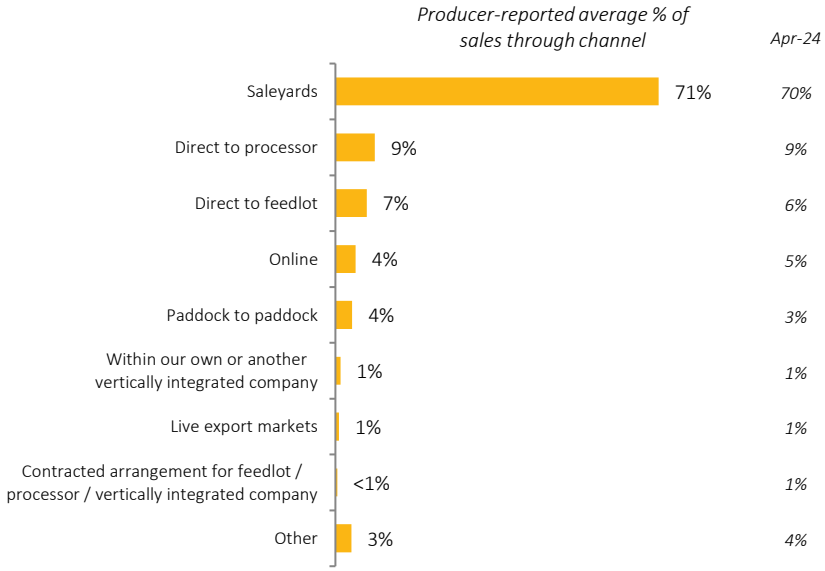
Base: All respondents categorised or self-identified as a Northern Australian producer AND who reported being a cow / calf producer, n = 328

Total actual and expected sales	1,766,227	
	=	% of total sales
Actual sales already made from 1 January to 31 March 2025	828,516	47%
	↓	
Expected sales to be made between 1 April to 30 June 2025	937,710	53%

Producer sales – sales channels

Q20, Q22, Q24, Q25, Q27. Of the expected sales to be made in the first half of 2025, what proportion will be made through the following sales channels?

Base: All respondents who reported being a cow / calf producer AND reported sales (actual and/or expected) in the first half of 2025, n = 2,171



	Southern Australia (n = 1,884)	Northern Australia (n = 287)
Saleyards	73%	56%
Direct to processor	8%	15%
Direct to feedlot	6%	12%
Online	5%	3%
Paddock to paddock	4%	0%
Within our own or another vertically integrated company	1%	2%
Live export markets	<1%	5%
Contracted arrangement for feedlot / processor / vertically integrated company	1%	0%
Other	3%	8%

Producers responding to the April 2025 BPIS have indicated saleyard auctions will continue to be the primary channel for beef cattle sales.

The results are largely consistent across Northern and Southern producers.

Producer sales – sales channels

Q20, Q22, Q24, Q25, Q27. Of the expected sales to be made in the first half of 2025, what proportion will be made through the following sales channels?

Base: All respondents who reported being a cow / calf producer AND reported sales (actual and/or expected) in the first half of 2025, n = 2,171

	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*884*	*478*	*89*	*67*	*475*	*165*	*1,127*	*404*	*261*	*240*	*87*	*52*
Producer-reported average % of sales through channel												
Saleyards	77%	62%	69%	35%	77%	57%	78%	74%	64%	41%	24%	12%
Direct to processor	5%	12%	15%	27%	8%	9%	7%	8%	10%	18%	16%	18%
Direct to feedlot	6%	11%	4%	9%	4%	7%	3%	6%	12%	17%	39%	38%
Online	5%	4%	3%	9%	4%	3%	3%	4%	7%	12%	8%	14%
Paddock to paddock	3%	2%	5%	14%	3%	11%	4%	3%	3%	4%	<1%	<1%
Within our own or another vertically integrated company	1%	2%	1%	2%	1%	1%	1%	1%	1%	1%	<1%	4%
Live export markets	0%	1%	0%	0%	0%	6%	1%	<1%	<1%	1%	5%	10%
Contracted arrangement for feedlot / processor / vertically integrated company	1%	<1%	0%	2%	<1%	1%	<1%	1%	1%	2%	0%	0%
Other	3%	6%	4%	2%	1%	6%	4%	3%	1%	4%	7%	5%

attachments

Beef Producers Intentions Survey – Southern Producers

April 2025

We spoke to 2,743 Southern Australian producers about their industry sentiment and the profile and intentions for their on-farm grassfed adult beef cattle herd...

Sentiment of the Beef Cattle Industry

+52	= 60%	- 9%
Nett Sentiment	% Positive sentiment	% Negative sentiment

Beef Cattle Herd Profile

15.04 million Estimate of on-farm grassfed adult beef cattle herd on hand at 31 March 2025

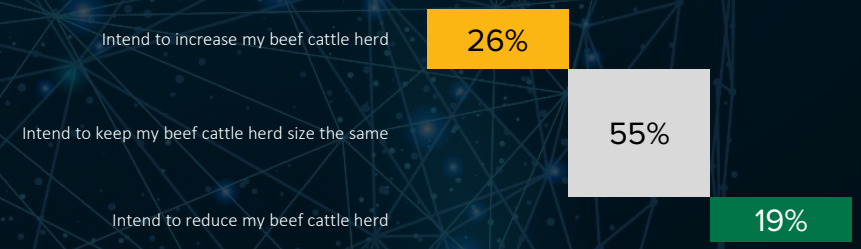
7.76 million	Breeding cows
3.11 million	Heifers (joined and unjoined)
3.50 million	Steers (under 2)
0.32 million	Bulls (12m+)
0.34 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made from 1 January to 31 March 2025	Expected sales to be made between 1 April to 30 June 2025
53%	47%

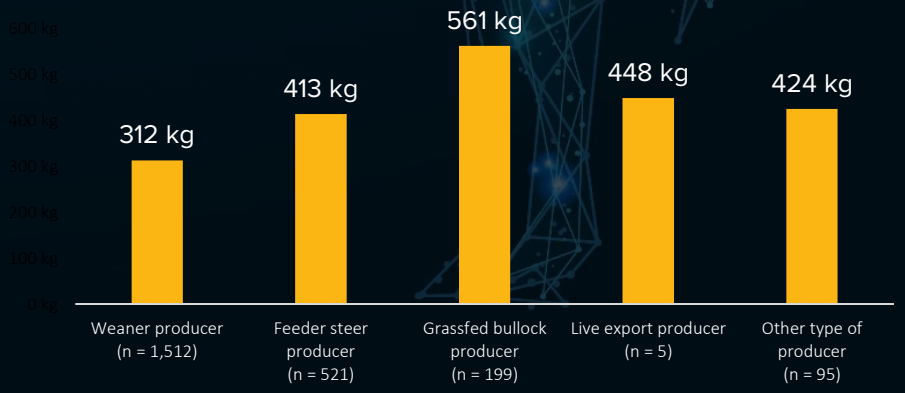
Beef Cattle Herd Intentions

Producers provided their intention to increase, reduce or maintain their beef cattle herd over the next 12 months. Results (ignoring the size of the herd) were:



Breeding Program Turn-off Weights

Producers were asked what weights they will turn cattle off at (specifically asked about their breeding program e.g. weaner, feeder steer, etc.)



Beef Producers Intentions Survey – Northern Producers

April 2025

We spoke to 373 Northern Australian producers about their industry sentiment and the profile and intentions for their on-farm grassfed adult beef cattle herd...

Sentiment of the Beef Cattle Industry

+65	= 70%	– 5%
Nett Sentiment	% Positive sentiment	% Negative sentiment

Beef Cattle Herd Profile

12.90 million Estimate of on-farm grassfed adult beef cattle herd on hand at 31 March 2025

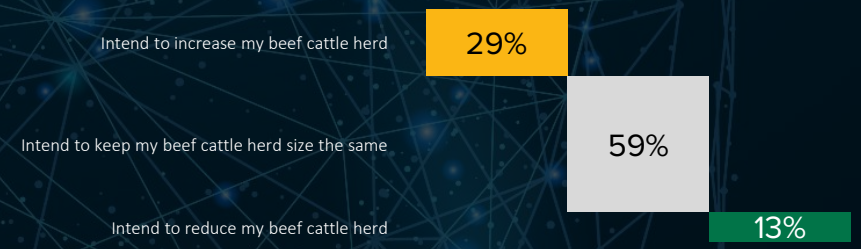
5.89 million	Breeding cows
2.44 million	Heifers (joined and unjoined)
3.17 million	Steers (under 2)
0.30 million	Bulls (12m+)
1.11 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made from 1 January to 31 March 2025	Expected sales to be made between 1 April to 30 June 2025
47%	53%

Beef Cattle Herd Intentions

Producers provided their intention to increase, reduce or maintain their beef cattle herd over the next 12 months. Results (ignoring the size of the herd) were:



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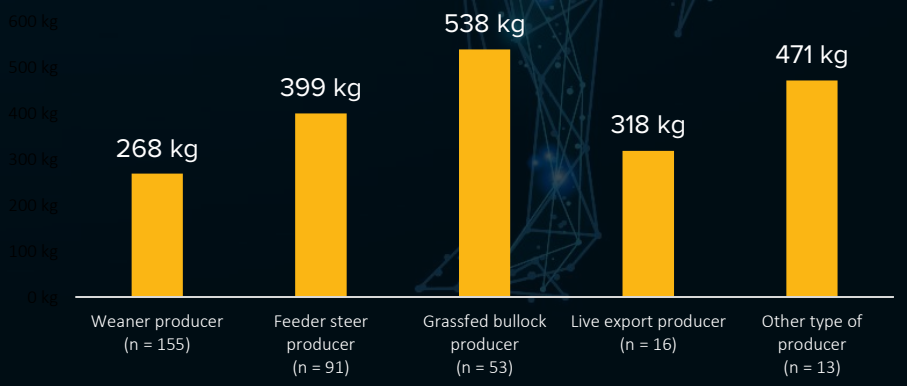
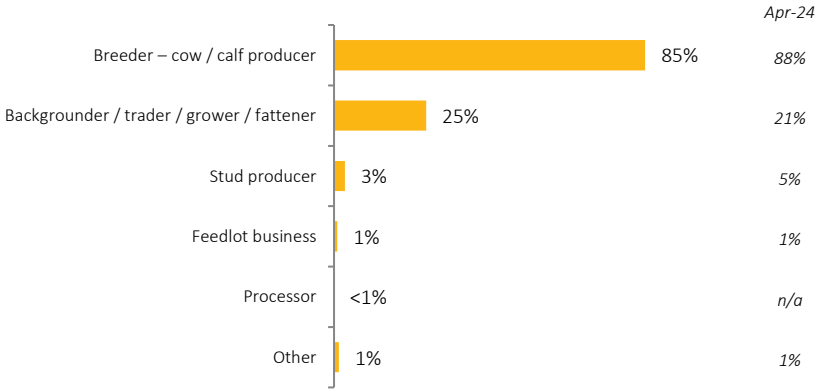


Key results by state

	Overall (n = 3,116)	NSW (n = 1,145)	QLD (n = 659)	SA (n = 153)	TAS (n = 121)	VIC (n = 771)	WA (n = 252)
Sentiment of the Beef Cattle Industry							
Nett Sentiment	**+53**	+58	+69	+43	+37	+46	+14
% positive	**62%**	64%	72%	56%	48%	56%	37%
% negative	**8%**	7%	3%	13%	12%	10%	23%
Beef Cattle Herd Profile (in millions)							
Estimate of on-farm grassfed adult beef cattle herd on hand at 31 March 2025	**27.94**	6.06	11.79	1.37	1.50	3.25	1.33
Breeding cows	**13.65**	3.23	5.44	0.67	0.67	1.70	0.78
Heifers (joined or unjoined)	**5.55**	1.24	2.07	0.34	0.39	0.63	0.24
Steers (under 2)	**6.67**	1.34	3.19	0.33	0.39	0.73	0.23
Bulls (12m+)	**0.62**	0.12	0.24	0.03	0.03	0.07	0.04
Castrated males (2+)	**1.45**	0.13	0.85	0.01	0.02	0.11	0.04
Actual / Expected Sales from Cow / Calf Producers							
Actual sales already made from 1 January to 31 March 2025	**51%**	46%	47%	62%	71%	62%	56%
Expected sales to be made between 1 April to 30 June 2025	**49%**	54%	53%	38%	29%	38%	44%
Beef Cattle Herd Intentions							
Intend to increase my beef cattle herd	**26%**	28%	29%	25%	28%	21%	21%
Intend to keep my beef cattle herd size the same	**56%**	54%	58%	46%	48%	58%	59%
Intend to reduce my beef cattle herd	**19%**	18%	13%	29%	24%	22%	20%
Breeding Program Turn-off Weights (in kg, bases vary by producer)							
Weaner producer	**307**	297	271	330	329	342	345
Feeder steer producer	**411**	411	392	453	463	427	384
Grassfed bullock producer	**556**	559	563	563	550	567	382
Live export producer	**349**	-	360	480	-	550	301
Other type of producer	**430**	403	540	300	500	388	475

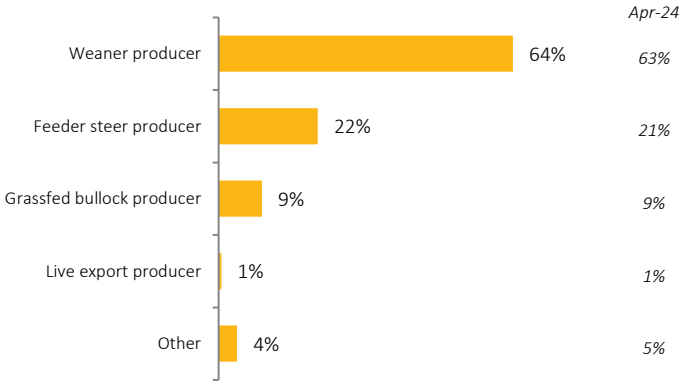
Description of business and end market

Q1. Which of the following would describe your beef cattle business? Please select all that apply.
Base: All respondents, n = 3,116



Breeder ONLY	75%	*79%*
Backgrounder / trader / grower / fattener ONLY	15%	*12%*
Both a breeder AND a backgrounder / trader / grower / fattener	10%	*9%*

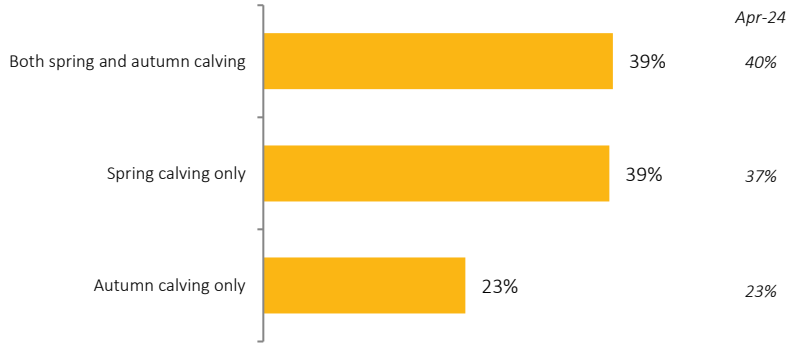
Q2. You said you were a breeder or cow/calf producer. What do you consider best describes your on-farm cattle production focus?
Base: All respondents who reported being a cow / calf producer, n = 2,660



(Southern) Seasonal joining

Q3. (Southern Australia only) Do you join cows and heifers to deliver calves in spring, autumn, or both seasons?

Base: All respondents categorised or self-identified as a Southern Australian producer AND reported being a cow/calf producer, n = 2,332

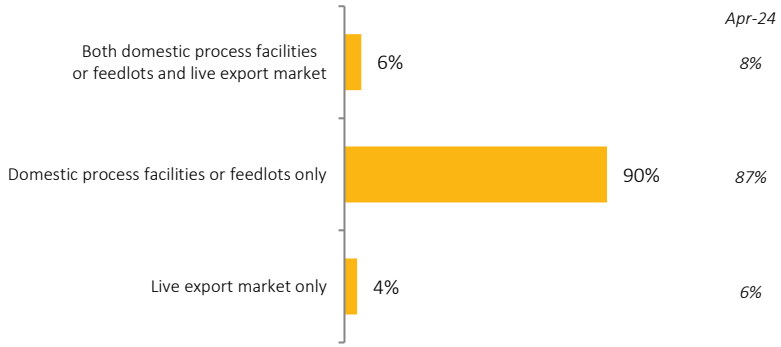


	State						Levy Band					
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
Base:	*1,021*	*265*	*128*	*87*	*616*	*212*	*1,277*	*430*	*275*	*246*	*74*	*30*
Both spring and autumn calving	47%	47%	32%	21%	32%	16%	41%	38%	38%	26%	26%	27%
Spring calving only	43%	48%	14%	62%	35%	9%	37%	40%	39%	47%	58%	57%
Autumn calving only	10%	5%	54%	18%	33%	75%	22%	22%	23%	28%	15%	16%

(Northern) Domestic or live export end markets

Q3. (Northern Australia only) Producers have different end markets for their livestock. Which of the following describes your end market as a breeder/producer of cattle?

Base: All respondents categorised or self-identified as a Northern Australian producer AND reported being a cow/calf producer, n = 328



Cattle program – B/T/G/F turn off weights

Q18. As a backgrounder / trader / grower / fattener, what weights will you turn cattle off at?
Base: All respondents who reported being a backgrounder / trader / grower / fattener, n = 792

	% provided a turn-off weight estimate	Mean turn-off weight (in kg)	*Apr-24*
Backgrounder / trader / grower / fattener (n = 792)	86%	498 kg	*502 kg*

	Southern Australia	*Apr-24*	Northern Australia	*Apr-24*
Backgrounder / trader / grower / fattener	503 kg (n = 635)	*505 kg*	476 kg (n = 157)	*495 kg*

B/T/G/F sales – bought in, actual and expected volumes

Q28. Earlier, you described yourself as a backgrounder / trader / grower / fattener. How many cattle were bought in for trading, growing out or fattening before 31 March 2025?

Base: All respondents who reported being a backgrounder / trader / grower / fattener, n = 792

Estimate of cattle bought in for trading before 31 March 2025:

2,516,261

Q29. Of the current cattle you have on hand either trading, backgrounding, for growing out or fattening, how many sales have already been made been made and how many do you expect to sell through the following time periods?

Base: All respondents who reported being a backgrounder / trader / grower / fattener, n = 792

Total actual and expected sales

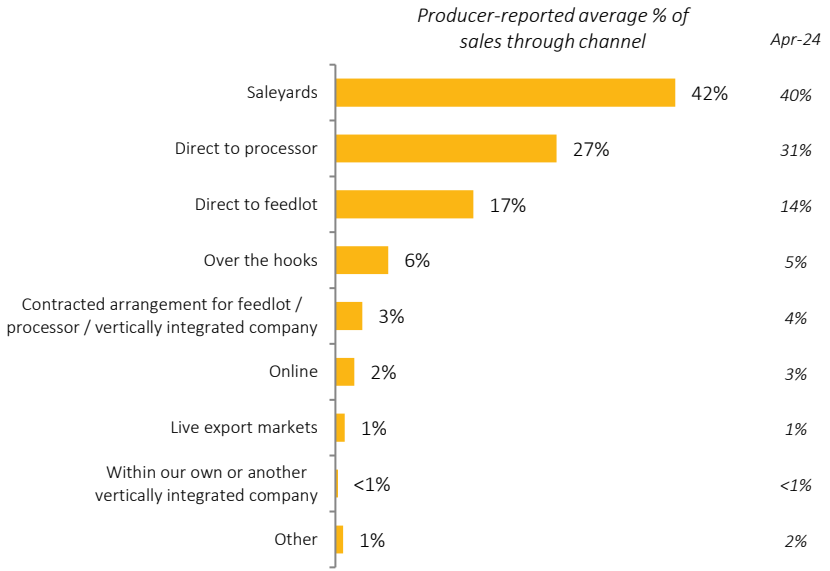
1,950,782

	Actual sales already made from 1 January to 31 March 2025	Expected sales to be made between 1 April to 30 June 2025
	1,323,814	1,192,447
% of total sales	53%	47%
Apr-24:	*43%*	*57%*

B/T/G/F sales – sales channels

Q30. Of the expected cattle sales via your trading/backgrounding / via growing out/fattening to be made in the first half of 2025, what proportion will be made through the following sales channels?

Base: All respondents who reported being a backgrounder / trader / grower / fattener AND reported sales (actual and/or expected) in the first half of 2025, n = 635



	Southern Australia (n = 507)	Northern Australia (n = 128)
Saleyards	46%	26%
Direct to processor	21%	49%
Direct to feedlot	17%	15%
Over the hooks	8%	0%
Contracted arrangement for feedlot / processor / vertically integrated company	4%	0%
Online	3%	1%
Live export markets	0%	6%
Within our own or another vertically integrated company	0%	1%
Other	1%	2%

For B/T/G/F producers, saleyard auctions and direct to either processors or feedlots will be the primary channels for beef cattle sales this year.

Northern producers (among B/T/G/F) have reported a higher disposition to use direct to processor as the most often reported channel.

Research design

Survey Program

The Beef Producers Intentions Survey, undertaken by MLA, is used to help industry determine on-farm grassfed adult beef cattle production forecasts and to understand the breed composition of the herd on a national, state and regional basis. It is one of the inputs into the MLA beef industry forecasting models.

Methodology

The April 2025 survey used a mixed-method approach. Producers with email contact details were provided with the opportunity to respond to an online survey invitation. Producers were initially invited to complete an online survey, with up to 3 reminders sent over the period.

Sample lists

Approval was sought and received to use the Levy Payer Register as the sample. This data was cleaned for any duplicates by email and phone number before use in the research.

Questionnaire

A 15-minute questionnaire was used to collected the required information. The survey questionnaire covered, amongst others, the following topic areas:

- Producer sentiment about the next 12 months of the beef cattle industry
- A profile of the on-farm grassfed adult beef cattle herd
- Producer intentions for their on-farm grassfed adult beef cattle herd
- An overview of producer's breeding program
- An overview of producer's sales program

Sample size

A total of n = 3,116 responses were provided by producers as follows:

	Overall	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
# of surveys	**n = 3,116**	n = 2	n = 1,145	n = 13	n = 659	n = 153	n = 121	n = 771	n = 252

Timing

The interviewing was undertaken between 31st March 2025 – 14th May 2025.

Weighting

The survey results were weighted. A description of the weighting process used for the April 2025 Beef Producers Intentions Survey follows next.

Weighting of survey data

Survey data is often weighted to ensure estimates provide a representative match of the population being estimated and the estimates deliver statistical reliable measures.

For the Beef Producers Intentions Survey, data has been weighted to ensure the sample provides a strong representation of the population of producers as possible. For this survey, it was considered important to weight the survey data to ensure we have:

- Coverage across the various regions as producers will have different operating conditions. For our purposes, a region is a state – so we need to weight so that our final sample is representative of the distribution of producers across states.

- Coverage across farm businesses of different sizes – larger businesses have larger herds so ensuring we have an appropriate mix of small, medium, large and very large producers is vital for the estimation process. As there is no up-to-date record of the herd sizes of producers nationally, we have used the Levy Band the producer is within (11 categories) as a proxy to this. For higher levy bands (categories 6 and above), a national representation was used as opposed to a state representation given the smaller number of producers in these levy bands.

There may be other variables that help describe the possible differences across producers, but these two variables (state and levy band) will more than likely account for the likely differences that exist in the population of all producers.

For this survey, the most recent Levy Payer Register (FY 2023-24) was used as the population structure that guided the weighting approach. Data at a state and levy band segment from the register was approved for use - this data is summarised opposite. The weighting approach involved using the estimate of the total number of agricultural businesses with grassfed beef cattle from the Levy Payer Register as the population estimates (after cleaning for possible duplicate businesses).

This final weighting matrix was then used to weight the April 2025 Beef Producers Intentions survey data.

Estimated number of agricultural businesses with grassfed beef cattle (Levy Payer Register)

	OVERALL	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6+ (highest bands)
AUSTRALIA	**81,910**	**51,926**	**12,636**	**8,460**	**5,815**	**1,823**	**1,251**
NSW	**29,211**	18,955	4,509	2,930	1,991	536	290
VIC	**21,026**	13,439	3,645	2,309	1,233	265	136
QLD	**20,151**	12,629	2,660	1,920	1,647	731	566
WA	**4,277**	2,454	728	520	380	92	104
SA	**4,126**	2,584	601	441	309	108	82
TAS	**2,718**	1,668	443	297	215	62	33
NT	**211**	67	20	22	34	29	40
ACT	**190**	130	30	23	6	1	1

Confidence intervals for survey estimates

Reliability of the estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

Calculation of confidence interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:

$$MoE = z * \sqrt{\frac{\hat{p}(1-\hat{p})}{n}}$$

where n is the sample size, $\hat{p}$ is the fraction of responses that you are interested in, and z is the critical value for the 95% confidence level (in this case, 1.96).

This calculation is based on the Normal distribution and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate	Sample SIze
Survey Estimate	3,116 (total surveys completed)
10%	± 1.05%
20%	± 1.40%
30%	± 1.61%
40%	± 1.72%
50%	± 1.76%
60%	± 1.72%
70%	± 1.61%
80%	± 1.40%
90%	± 1.05%

	Estimated Population	Sample Size	Margin of Error (assuming max survey estimate of 50%)
Australia	**81,910**	**3,116**	**± 1.76%**
NSW	29,211	1,145	± 2.90%
VIC	21,026	771	± 3.53%
QLD	20,151	659	± 3.82%
WA	4,277	252	± 5.99%
SA	4,126	153	± 7.92%
TAS	2,718	121	± 8.91%
NT	211	13	n/a
ACT	190	2	n/a

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed.
Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ($n\hat{p} < 10$ or $n(1-\hat{p}) < 10$).

Beef Producer Intentions Survey

[BPIS: April 2025]

This research was conducted by Intuitive Solutions on behalf of MLA.
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