February 2024

Beef Producer Intentions Survey
[BPIS: November 2023]

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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 **NOVEMBER 2023** survey.

The November 2023 survey

Feedback was sought from grassfed beef cattle producers over the period 13th November 2023 – 18th December 2023. Producers were initially invited to complete an online survey with the final sample complemented with a smaller number of phone interviews.
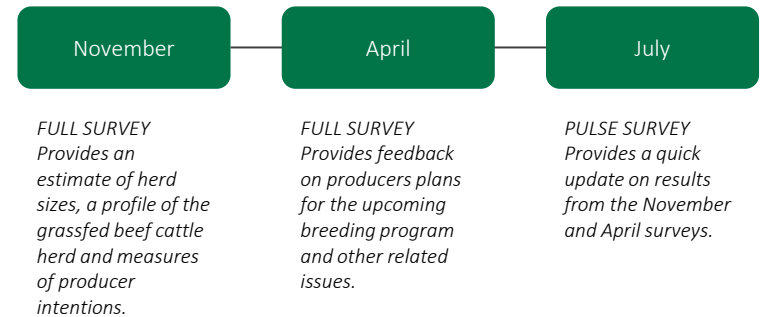
A total of 3,767 producers from across Australia respond to the survey invitation. The feedback was then weighted, using the latest available data from the Levy Payer Register, to produce industry estimates.

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 November 2023 survey instituted 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.

November	April	July

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.

State of play: an overview of the industry analysis

State of play…

The beef cattle market is a highly dynamic market.

Forecasts of El Niño have been counterbalanced with some early rains across eastern and northern Australia. There remains significant pressures on producers including increasing input costs, challenges around workforce shortages as well as supply chain and market pressures (domestic and global).

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 November 2023 Beef Producers Intentions Survey.

RABOBANK Commentary

✓ Cattle slaughter will lift in the order of 10%-15% in 2024 after an estimated 18% increase in 2023.
✓ Increasing cattle inventory and an increase in processing capacity will be the two reasons for the rise.
✓ Breeding inventory will continue to increase albeit at a much smaller rate than the last three years.
✓ Areas in the northern half of Australia still have capacity to increase stock numbers while southern areas will be more stable.

ANZ Agribusiness Commentary:

✓ Due to the destocking, the gap between indicator prices for the three main indices (National Feeder Steer, National Heavy Steer and National Restocker Yearling Steer) has moved the closest it has in 4 years

✓ Destocking is driving a premium for finished stock (coupled with higher input costs) meaning processors are paying a higher premium for stock that requires no further inputs

✓ Market sentiment is showing some confidence in the forecast shorter dry period with producers holding onto their lighter stock with a view to hold them through the season and be well placed once rebuild starts

✓ Labour shortages still remain an issue for processors although this is not expected to impact numbers through processing facilities, with beef production forecast to be up 14 percent for 2023/24

✓ With higher Australian production numbers, exports are forecast to increase by 15 percent with the increased volume well placed to fill emerging opportunities internationally

1. Rabobank. Australia Agribusiness Outlook, January 2024. Source: Rabo Agri Knowledge Hub (rabobank.com.au)
2. ANZ Agribusiness: Commodity Insights – Summer 2023/2024. Source: Commodity-insights-summer-2023.pdf (anz.com.au)

About the report

The report provides a summary of the feedback provided by producers who completed the November 2023 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 November 2023 BPIS survey.

With these design issues in mind, the results from the November 2023 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
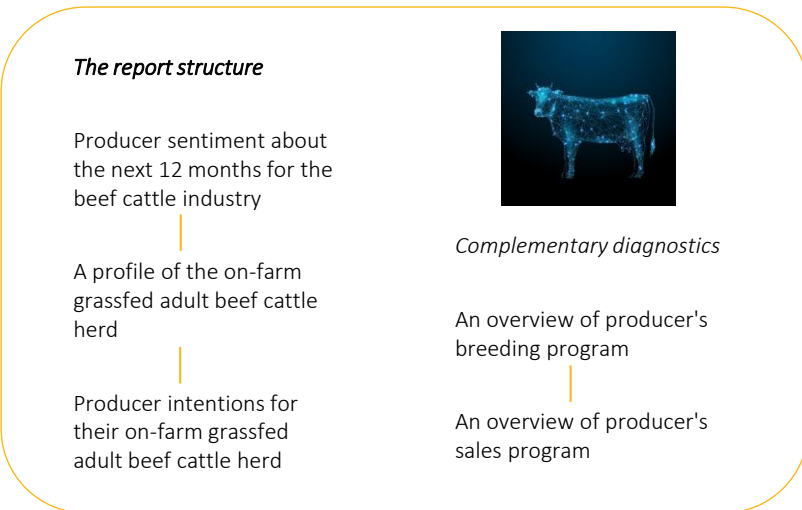
The survey data has been weighted

Estimates provided in this report are made from weighted survey data. Weighting of the survey data was important to ensure the sample of 3,767 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 specific 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 2023 report includes coverage of several different measurement areas, including:

o Producer sentiment
o Herd profiles
o Breeding diagnostics
o Producer intentions
o Sales to date and forecast

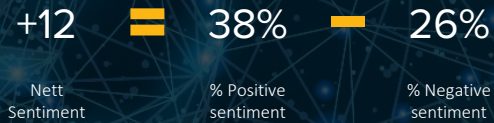*BPIS just one input into the MLA forecasting models*

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.

observations and insights

Beef Producers Intentions Survey

We spoke to 3,767 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

+12

Nett Sentiment

= 38%

% Positive sentiment

− 26%

% Negative sentiment

Beef Cattle Herd Intentions

24.22 million

Reported beef cattle herd size for 2023

24.44 million

Forecast beef cattle herd size for 2024

+ 1%   Forecasted change in beef cattle herd

The estimates above indicate the forecast change in on-farm grassfed adult beef cattle herd numbers. Producer-level intentions for increases, decreases or maintaining herd levels (ignoring the size of the herd) were:

Increase from 2023 to 2024   **38%**

No change   **15%**

Decrease from 2023 to 2024   **47%**

Producers who forecast an increase in their on-farm grassfed adult beef cattle herd report three major factors influencing their plans for the next 12 months:

44%
Looking to expand our beef operations

30%
Expect cattle prices to be stronger

29%
Expect good conditions over the next 12 months

Beef Cattle Herd Profile

24.22 million   Estimate of on-farm grassfed adult beef cattle herd on hand at October 31 2023

12.48 million	Breeding cows
3.80 million	Heifers
6.12 million	Steers (under 2)
0.52 million	Bulls (12m+)
1.30 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made to October 31	Expected sales to be made for the remainder of the year	Expected sales in the first half of 2024 (January to June)
31%	8%	61%
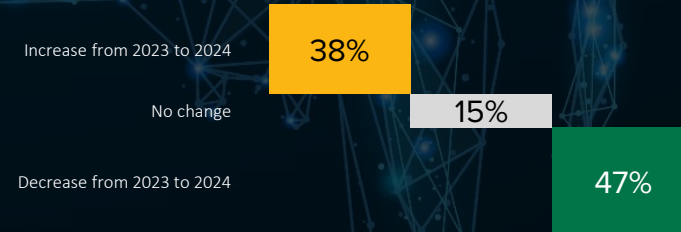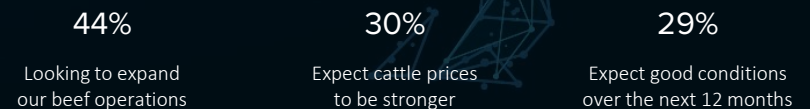
Observations and insights
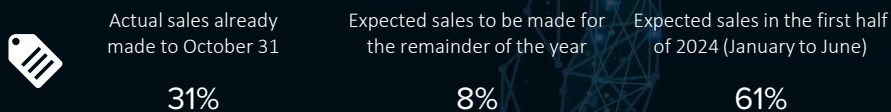
While the purpose of the research did not include the presentation of an interpretation of the survey results, some initial observations and insights has been provided in the following discussion.

Producer sentiment

There were mixed views about the future of the beef cattle industry over the next 12 months. While results indicate that nationally producers are cautiously optimistic about the future of the beef cattle sector (Nett Sentiment: +12), there was a substantial proportion of producers with a negative outlook (38% positive: 26% negative).

From the analysis we note that:

o Northern producers are more optimistic (Nett Sentiment of +26) than southern producers (+7)

o There are variations across states, but the result suggest that Queensland producers are more positive than producers in other states (+27) while producers in WA held a far less positive outlook (-25).

o The larger producers were most positive in their outlook than smaller producers.

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

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

The October 2023 BPIS had a specific focus on understanding the profile of Australia's herd. Of the estimated on-farm grassfed adult beef cattle on hand:

o Angus and Hereford breeds dominate herds among southern producers (accounting for an estimated 79% of their herd).

o Among northern producers, Brahman and Droughtmaster breeds are most prominent (accounting for an estimated 55% of their herd).

o The survey has estimated that

▪ An estimated 39% of the beef cattle to be sold are forecast to be sold in the 2023 calendar year. Northern producers reported a much more forward leaning sales plan with some 57% forecast to be sold in 2023.

▪ Producers have reported most of these beef cattle scheduled to be sold in 2023 will be sold through saleyard auctions (65%). Not surprisingly, smaller producers are more likely to use just a single sales channel with the larger producers using more than one. For the larger producers, sales direct to feedlots and processors are used more often than other producer cohorts.

Observations and insights

Producer intentions

Analysis of the feedback provided shows that:

o At the producer level (that is considering each producer equal), there is a net intention to decrease their on-farm grassfed adult beef cattle herd in the next 12 months:

- 38% indicating they would increase their herd size;
- 15% indicating it would remain unchanged; and
- 47% indicating they would decrease their herd size.

The decrease posture was consistent across all states. The result was also consistent between northern and southern producers.

There were some differences when looking at larger producers where they were more likely to have a net growth posture.

o Analysis of the reported change in the number of beef cattle suggests a forecast increase of approximately 1% over the 2023 herd size. This result highlights the importance of considering the reported changes in herd size rather than just producers' disposition to change.

Details on the forecast change estimate – showing the impact from producers who have reported an increase as well as producers who were forecasting a decrease in their herd size – is shown opposite.

Producers in WA were forecasting the largest decrease in herd size (7%) while in contrast Queensland producers were more buoyant (reporting a forecast 4% increase).

The detailed results from the November 2023 Beef Producer Intentions Survey (BPIS) now follow.
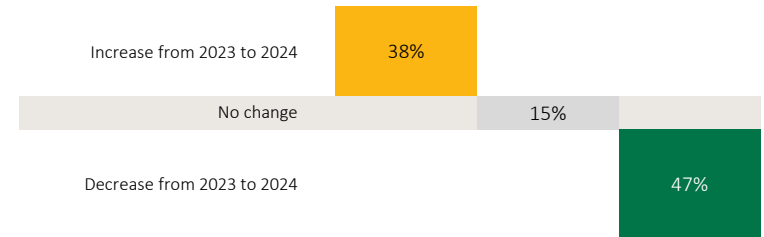
Increase from 2023 to 2024	38%
No change	15%
Decrease from 2023 to 2024	47%

2024 ON-FARM GRASSFED ADULT BEEF CATTLE HERD FORECAST

Total estimated herd size for 2023:	24,215,186
Total expected herd size for 2024:	24,442,596
Difference of:	+ 227,410
% forecast change on 2023:	+ 1%

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

Sentiment: outlook for the beef cattle sector

Q5. Firstly, 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 = 3,767

Nett Sentiment
(scale of -100 to +100)

Very positive	5%
Fairly positive	33%
Neutral	30%
Fairly negative	19%
Very negative	7%
Unsure	5%

38%: Positive (Very positive + Fairly positive)

26%: Negative (Fairly negative + Very negative)

+12 = **38%** − **26%**

Nett Sentiment | % Positive sentiment | % Negative sentiment
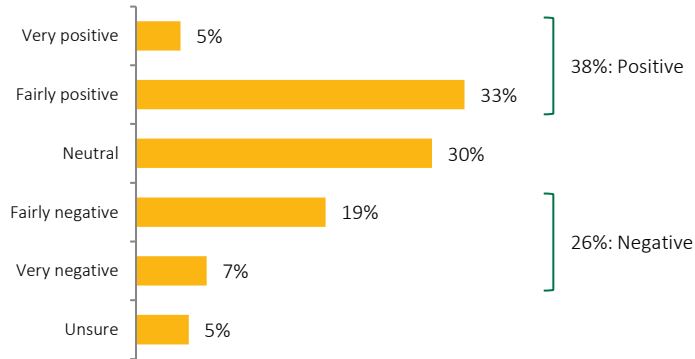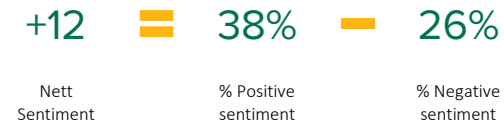
At the national level, producer sentiment is mixed.

While slightly more producers see a positive future over the next 12 months (38%), a sizeable cohort see a negative outlook (26%). About one in three (30%) are uncommitted and probably uncertain about the next 12 months.

There are clear differences between northern (+26) and southern producers (+7) and across states. Larger producers hold a distinctly more positive outlook than smaller producers.

This mixed response about the future is likely to play forward for planning and intentions over the next 12 months.

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,299*	*864*	*189*	*144*	*930*	*311*	*508*	*367*	*398*	*554*	*419*	*201*	*206*	*414*	*269*	*164*	*267*
Nett Sentiment	+8	+27	+4	-12	+14	-25	+10	-2	+2	+11	+3	+17	+20	+18	+20	+29	+31

Sentiment: outlook for the beef cattle sector

Southern Australia

Northern Australia

Q5. Firstly, 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 = 2,885

Q5. Firstly, 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 = 882

Southern Australia

Category	%
Very positive	4%
Fairly positive	32%
Neutral	30%
Fairly negative	21%
Very negative	8%
Unsure	6%

36%: Positive

29%: Negative

Northern Australia

Category	%
Very positive	7%
Fairly positive	37%
Neutral	32%
Fairly negative	14%
Very negative	5%
Unsure	5%

45%: Positive

19%: Negative

Nett Sentiment
(scale of -100 to +100)

+7	36%	29%
Nett Sentiment	% Positive sentiment	% Negative sentiment

Nett Sentiment
(scale of -100 to +100)

+26	45%	19%
Nett Sentiment	% Positive sentiment	% Negative sentiment
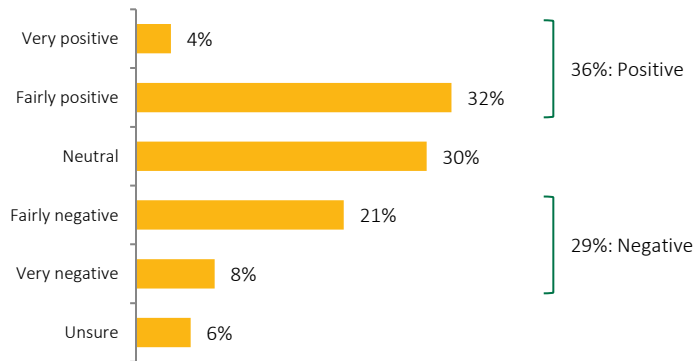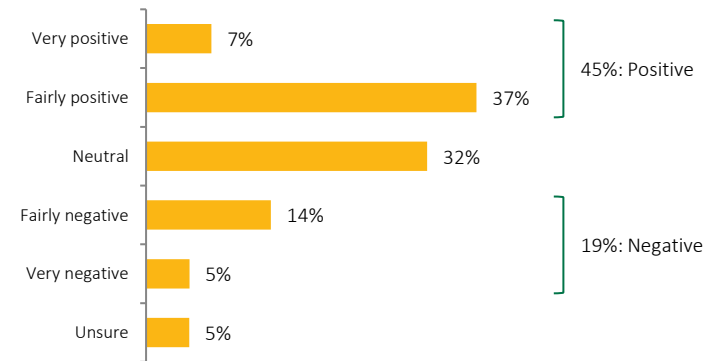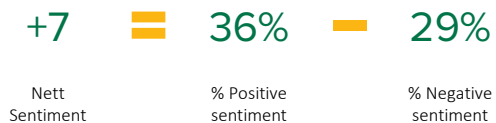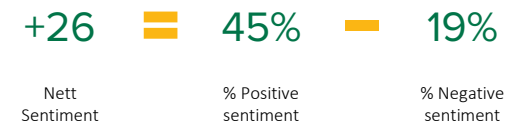
a profile of the on-farm grassfed adult beef cattle herd

Herd profile breakdown

Q6-7, Q9-11. The next set of questions look to get an estimate of your current grassfed beef cattle herd (not including calves) on hand at 31 October 2023. When considering estimates, please include a count across **all properties** and include **all breed types**.
Base: All respondents, n = 3,767

Total estimated on-farm grassfed adult beef cattle herd size: **24,215,186**

		% of total herd size	% of producers with type of cattle			Definitions of cattle types presented to producers:
Breeding cows	12,481,669	52%	89%	- - - - - - -	Breeding cows:	No definition provided.
Heifers	3,796,514	16%	76%	- - - - - - -	Heifers:	Female joined to have her first calf regardless of age.
Steers (under 2 years old)	6,119,588	25%	85%	- - - - - - -	Steers (under 2 years old):	Steers less than 2 years old.
Bulls	520,574	2%	80%	- - - - - - -	Bulls:	Bulls used or intended for breeding (12 months or older).
Castrated males (2+ years)	1,296,841	5%	34%	- - - - - - -	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:

o   *This estimate is based on survey respondent data.*

o   *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.*

o   *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*

Herd profile breakdown

Southern Australia ---- Northern Australia

Q6-7, Q9-11. The next set of questions look to get an estimate of your current grassfed beef cattle herd (not including calves) on hand at 31 October 2023. When considering estimates, please include a count across **all properties** and include **all breed types**.
Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,885

Q6-7, Q9-11. The next set of questions look to get an estimate of your current grassfed beef cattle herd (not including calves) on hand at 31 October 2023. When considering estimates, please include a count across **all properties** and include **all breed types**.
Base: All respondents categorised or self-identified as a Northern Australian producer, n = 882

Southern Australia		% of total herd size	% of producers with type of cattle
Total estimated on-farm grassfed adult beef cattle herd size:	12,275,400		
Breeding cows	6,549,979	53%	89%
Heifers	1,845,312	15%	75%
Steers (under 2 years old)	3,004,212	24%	84%
Bulls	296,625	2%	79%
Castrated males (2+ years)	579,271	5%	32%

Northern Australia		% of total herd size	% of producers with type of cattle
Total estimated on-farm grassfed adult beef cattle herd size:	11,939,786		
Breeding cows	5,931,690	50%	89%
Heifers	1,951,202	16%	80%
Steers (under 2 years old)	3,115,376	26%	87%
Bulls	223,948	2%	85%
Castrated males (2+ years)	717,570	6%	41%

Herd profile breakdown

Q6-7, Q9-11. The next set of questions look to get an estimate of your current grassfed beef cattle herd (not including calves) on hand at 31 October 2023. When considering estimates, please include a count across **all properties** and include **all breed types**.
Base: All respondents, n = 3,767

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,299*	*864*	*189*	*144*	*930*	*311*	*508*	*367*	*398*	*554*	*419*	*201*	*206*	*414*	*269*	*164*	*267*
Total herd size reported	5,865,260	10,775,327	961,815	586,245	3,857,111	1,372,032	1,078,169	878,423	1,023,320	1,422,185	1,219,862	639,649	822,777	2,896,876	2,166,524	2,260,767	9,806,634
% of total herd size	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Breeding cows	55%	49%	56%	50%	49%	60%	52%	58%	51%	54%	55%	52%	56%	54%	54%	53%	48%
Heifers	15%	16%	16%	17%	15%	15%	16%	18%	13%	14%	13%	15%	13%	15%	16%	18%	16%
Steers	24%	27%	23%	25%	27%	18%	24%	17%	24%	24%	24%	25%	23%	23%	24%	23%	28%
Bulls	3%	2%	2%	2%	2%	3%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%
Castrated males	3%	6%	3%	6%	7%	4%	6%	5%	10%	6%	6%	6%	5%	5%	5%	4%	5%
% of producers with type of cattle	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Breeding cows	92%	89%	90%	83%	84%	93%	85%	87%	87%	87%	90%	89%	91%	94%	92%	94%	93%
Heifers	77%	80%	79%	79%	71%	79%	69%	72%	73%	73%	77%	82%	81%	85%	80%	89%	87%
Steers	81%	87%	85%	88%	87%	81%	86%	85%	82%	85%	82%	81%	86%	85%	85%	81%	94%
Bulls	83%	85%	77%	75%	72%	89%	67%	71%	77%	80%	86%	88%	89%	92%	90%	94%	90%
Castrated males	26%	41%	30%	40%	39%	32%	38%	37%	36%	32%	32%	27%	31%	34%	33%	33%	36%

Breeding herd – breeds on hand

Q13 and Q14. Producers often have different breeds on hand. Of these [TOTAL BREEDING FEMALE HERD] breeding cows and heifers you mentioned earlier, please tell us which of the following types of breeds you have across your properties. *Please note that a cattle breed is defined by having 51% or greater of the breed content.*
Base: All respondents with at least one breeding female (breeding cow or heifer), n = 3,438

Total estimated breeding female herd size :
16,278,184

Southern Australia

Total breeding female herd size reported: 8,395,291

		% of total herd size	% of producers with type of cattle
Angus	5,740,865	68%	76%
Brahman	43,456	1%	1%
Droughtmaster	14,126	<1%	1%
Hereford	951,465	11%	21%
Wagyu	130,444	2%	2%
Ultrablack / Brangus	38,214	<1%	1%
Santa Gertrudis	123,814	1%	2%
Charbray	0	0%	0%
Shorthorn	253,534	3%	6%
Euro (Simmentals, Limousin, etc.)	241,119	3%	10%
Charolais	168,218	2%	8%
Murray Grey	167,860	2%	7%
Speckle Park	87,134	1%	7%
Other	432,249	5%	10%

Northern Australia

Total breeding female herd size reported: 7,882,892

		% of total herd size	% of producers with type of cattle
Angus	484,761	6%	15%
Brahman	3,136,611	40%	27%
Droughtmaster	1,150,279	15%	41%
Hereford	127,143	2%	3%
Wagyu	660,391	8%	3%
Ultrablack / Brangus	741,846	9%	23%
Santa Gertrudis	506,721	6%	17%
Charbray	531,720	7%	17%
Shorthorn	42,194	1%	2%
Euro (Simmentals, Limousin, etc.)	31,776	<1%	2%
Charolais	71,386	1%	2%
Murray Grey	19,704	<1%	1%
Speckle Park	3,875	<1%	1%
Other	372,059	5%	12%

Please note that a very small number of producers did not provide a breed breakdown – individual breed estimates may not add to the total breeding female herd size reported.

Breeding herd – breeds on hand

Q13 and Q14. Producers often have different breeds on hand. Of these [TOTAL BREEDING FEMALE HERD] breeding cows and heifers you mentioned earlier, please tell us which of the following types of breeds you have across your properties. *Please note that a cattle breed is defined by having 51% or greater of the breed content.*
Base: All respondents with at least one breeding female (breeding cow or heifer) AND categorised or self-identified as a Southern Australian producer, n = 2,632

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,213*	*7*	*174*	*127*	*810*	*286*	*298*	*235*	*286*	*386*	*285*	*141*	*159*	*319*	*201*	*122*	*200*
Southern breeding female herd	4,108,019	90,983	556,486	389,792	2,458,364	781,701	461,082	218,529	429,251	610,937	554,246	313,839	379,098	1,115,274	900,792	952,650	2,459,593
% of total herd size																	
Angus	67%	61%	60%	82%	72%	62%	70%	55%	59%	67%	60%	61%	64%	62%	75%	66%	76%
Brahman	1%	<1%	<1%	0%	<1%	0%	1%	1%	1%	1%	2%	1%	<1%	1%	0%	0%	1%
Droughtmaster	<1%	0%	0%	0%	0%	<1%	0%	0%	1%	<1%	<1%	<1%	1%	0%	<1%	0%	<1%
Hereford	11%	3%	22%	6%	13%	3%	8%	11%	10%	12%	8%	12%	12%	14%	10%	14%	11%
Wagyu	1%	9%	<1%	<1%	1%	4%	1%	2%	4%	<1%	1%	1%	<1%	<1%	<1%	2%	3%
Ultrablack / Brangus	1%	10%	0%	0%	<1%	0%	1%	<1%	1%	1%	<1%	1%	<1%	1%	1%	0%	0%
Santa Gertrudis	3%	10%	0%	<1%	<1%	<1%	2%	6%	<1%	<1%	2%	3%	3%	3%	1%	<1%	<1%
Charbray	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Shorthorn	3%	0%	4%	4%	1%	8%	2%	3%	<1%	3%	10%	3%	3%	1%	2%	4%	3%
Euro (Simmentals, Limousin, etc.)	2%	7%	2%	1%	3%	7%	3%	7%	5%	5%	4%	4%	4%	4%	3%	2%	1%
Charolais	3%	0%	1%	<1%	1%	2%	3%	5%	2%	2%	3%	3%	2%	1%	2%	3%	1%
Murray Grey	1%	0%	3%	4%	1%	10%	4%	6%	2%	3%	2%	1%	3%	2%	1%	1%	1%
Speckle Park	1%	<1%	3%	1%	1%	<1%	2%	1%	2%	1%	1%	1%	1%	2%	1%	2%	<1%
Other (please explain)	6%	0%	5%	1%	5%	4%	4%	4%	12%	4%	7%	8%	5%	8%	3%	5%	3%

Breeding herd – breeds on hand

Q13 and Q14. Producers often have different breeds on hand. Of these [TOTAL BREEDING FEMALE HERD] breeding cows and heifers you mentioned earlier, please tell us which of the following types of breeds you have across your properties. *Please note that a cattle breed is defined by having 51% or greater of the breed content.*
Base: All respondents with at least one breeding female (breeding cow or heifer) AND categorised or self-identified as a Northern Australian producer, n = 806

|	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*2*	*779*	*1*	*0*	*0*	*10*	*147*	*93*	*71*	*108*	*95*	*41*	*33*	*76*	*50*	*37*	*55*
Northern breeding female herd	**6,097**	**6,943,205**	**135,351**	**-**	**-**	**255,808**	**266,529**	**451,138**	**230,637**	**351,818**	**277,198**	**116,726**	**194,054**	**899,421**	**599,152**	**649,783**	**3,846,438**
% of total herd size																	
Angus	0%	7%	0%	-	-	0%	7%	4%	6%	7%	16%	5%	14%	12%	16%	8%	2%
Brahman	82%	39%	0%	-	-	32%	15%	22%	26%	24%	15%	10%	18%	40%	30%	25%	54%
Droughtmaster	0%	14%	0%	-	-	21%	35%	23%	19%	18%	21%	19%	33%	14%	18%	27%	8%
Hereford	0%	2%	0%	-	-	0%	<1%	1%	20%	3%	2%	<1%	5%	1%	2%	<1%	1%
Wagyu	0%	10%	0%	-	-	0%	6%	4%	<1%	0%	3%	4%	1%	1%	1%	4%	15%
Ultrablack / Brangus	18%	10%	0%	-	-	4%	16%	3%	6%	6%	11%	16%	8%	7%	16%	8%	10%
Santa Gertrudis	0%	6%	0%	-	-	27%	7%	3%	12%	5%	17%	14%	4%	9%	4%	10%	5%
Charbray	0%	4%	100%	-	-	11%	3%	37%	3%	24%	5%	10%	7%	5%	6%	7%	3%
Shorthorn	0%	<1%	0%	-	-	3%	1%	<1%	<1%	<1%	0%	6%	1%	1%	<1%	0%	<1%
Euro (Simmentals, Limousin, etc.)	0%	<1%	0%	-	-	0%	<1%	<1%	<1%	1%	1%	0%	1%	<1%	2%	1%	<1%
Charolais	0%	1%	0%	-	-	0%	1%	0%	4%	2%	1%	1%	<1%	2%	3%	2%	<1%
Murray Grey	0%	<1%	0%	-	-	1%	<1%	1%	<1%	1%	<1%	0%	5%	0%	0%	<1%	0%
Speckle Park	0%	<1%	0%	-	-	0%	<1%	<1%	0%	<1%	<1%	<1%	<1%	0%	0%	0%	0%
Other (please explain)	0%	5%	0%	-	-	<1%	7%	1%	4%	7%	8%	16%	3%	7%	4%	9%	3%

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

Producer intentions over the next 12 months

Q16. And how many beef cattle are you expecting to have on hand at the same time next year, in 2024 (31 October 2024)?
Base: All respondents, n = 3,766 (n = 1 could not provide an answer)

Increase from 2023 to 2024	38%
No change	15%
Decrease from 2023 to 2024	47%
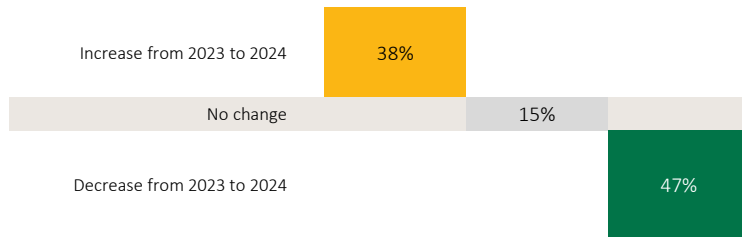
Producers provided an indication of their intention for their on-farm grassfed adult beef cattle herd over the next 12 months.

Among the producers responding to the November 2023 survey, over one in three (38%) reported they would be increasing their herd, with 47% 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	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,298*	*864*	*189*	*144*	*930*	*311*	*508*	*367*	*397*	*554*	*419*	*201*	*206*	*414*	*269*	*164*	*267*
Increase from 2023 to 2024	40%	38%	33%	32%	40%	35%	42%	35%	31%	35%	36%	41%	37%	37%	44%	48%	46%
No change	13%	14%	17%	18%	16%	17%	18%	17%	16%	12%	14%	9%	20%	13%	11%	15%	12%
Decrease from 2023 to 2024	47%	48%	50%	49%	45%	48%	40%	48%	53%	53%	50%	50%	44%	50%	45%	37%	42%

Producer intentions over the next 12 months

Southern Australia

Q16. And how many beef cattle are you expecting to have on hand at the same time next year, in 2024 (31 October 2024)?
Base: All respondents categorised or self-identified as a Southern Australian producer, n = 2,884
(n = 1 could not provide an answer)
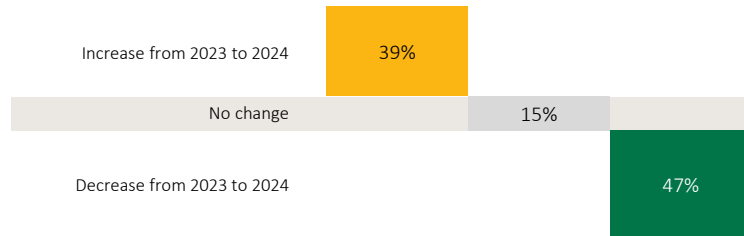
Increase from 2023 to 2024 — 39%
No change — 15%
Decrease from 2023 to 2024 — 47%

Northern Australia

Q16. And how many beef cattle are you expecting to have on hand at the same time next year, in 2024 (31 October 2024)?
Base: All respondents categorised or self-identified as a Northern Australian producer, n = 882

Increase from 2023 to 2024 — 38%
No change — 14%
Decrease from 2023 to 2024 — 48%
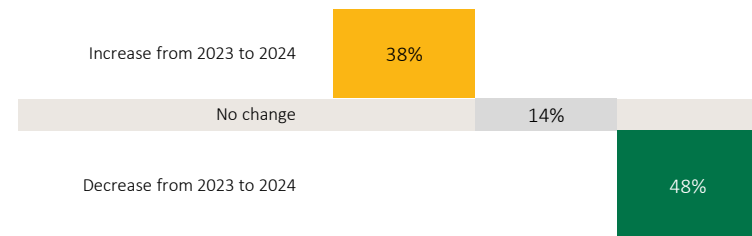
Producers' intention for their on-farm grassfed adult beef cattle herd over the next 12 months was consistent between southern and northern producers.

While there are mixed responses (some increasing, some decreasing), around one in seven (around 15%) are indicating no change. The result suggests most producers will make some change to their current herd sizes over the next 12 months.

Factors influencing the expected increase in 2024

38% of producers reported they are likely to have MORE beef cattle next year

We asked these producers what factors were influencing their plans to increase the number of beef cattle...

Q17. You've indicated that you are likely to have a **larger beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months?
Please select all the factors that are influencing your plans.
Base: All respondents who expect an increase in beef cattle herd size in 2024, n = 1,448

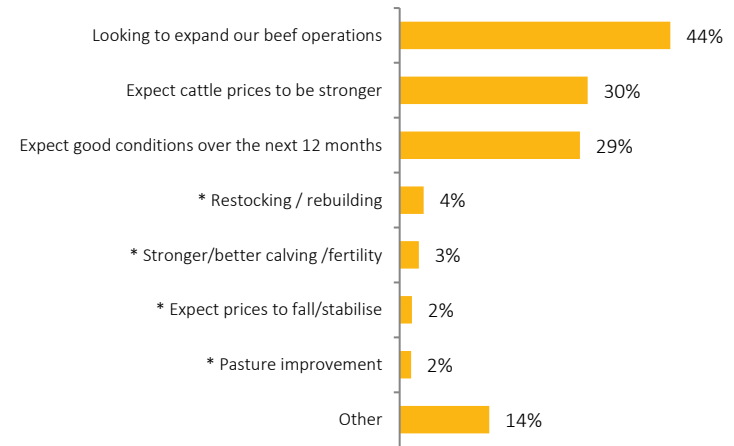| Factor	%
Looking to expand our beef operations	44%
Expect cattle prices to be stronger	30%
Expect good conditions over the next 12 months	29%
* Restocking / rebuilding	4%
* Stronger/better calving /fertility	3%
* Expect prices to fall/stabilise	2%
* Pasture improvement	2%
Other	14%

		State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	514	332	65	48	366	110	215	128	127	196	151	84	75	151	117	80	124
Looking to expand our beef operations	43%	38%	49%	53%	47%	52%	49%	43%	39%	39%	42%	33%	47%	43%	45%	46%	49%
Expect cattle prices to be stronger	29%	29%	30%	38%	33%	33%	27%	29%	33%	32%	33%	30%	27%	27%	34%	33%	34%
Expect good conditions over the next 12 months	34%	32%	23%	17%	26%	12%	24%	24%	38%	28%	28%	31%	27%	31%	34%	37%	34%
* Restocking / rebuilding	5%	3%	9%	0%	3%	0%	4%	5%	4%	2%	5%	7%	3%	5%	4%	5%	2%

* Coded from "Other (please specify)" answers. Segment table displays top 4 reasons at the overall level.

Factors influencing the expected increase in 2024

Southern Australia

39% of producers reported they are likely to have MORE beef cattle next year

Q17. You've indicated that you are likely to have a **larger beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months?
Please select all the factors that are influencing your plans.
Base: All respondents categorised or self-identified as a Southern Australian producer AND who expect an increase in beef cattle herd size in 2024, n = 1,104

Factor	%
Looking to expand our beef operations	46%
Expect cattle prices to be stronger	31%
Expect good conditions over the next 12 months	28%
* Stronger/better calving /fertility	3%
* Restocking / rebuilding	4%
* Pasture improvement	2%
* Expect prices to fall/stabilise	2%
Other	13%

Northern Australia

38% of producers reported they are likely to have MORE beef cattle next year

Q17. You've indicated that you are likely to have a **larger beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months?
Please select all the factors that are influencing your plans.
Base: All respondents categorised or self-identified as a Northern Australian producer AND who expect an increase in beef cattle herd size in 2024, n = 344

Factor	%
Looking to expand our beef operations	37%
Expect cattle prices to be stronger	29%
Expect good conditions over the next 12 months	32%
* Stronger/better calving /fertility	4%
* Restocking / rebuilding	3%
* Expect prices to fall/stabilise	1%
* Pasture improvement	1%
Other	19%

* Coded from "Other (please specify)" answers.

Intended methods to increase in 2024

38% of producers reported they are likely to have MORE beef cattle next year

We asked these producers how they intend to increase the number of beef cattle over the next 12 months…

Q18. How do you intend to increase your beef cattle herd over the next 12 months? Please select all that apply.
Base: All respondents who expect an increase in beef cattle herd size in 2024, n = 1,448

Retain more heifers as replacements than normal	59%
Retain more steers than normal	14%
Purchase more breeding heifers than normal	13%
Retain more older cows than normal	11%
Purchase more breeding cows than normal	11%
* Purchase more steers	7%
* Trade cattle/steers/other	2%
Other	8%
Not sure	4%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	514	332	65	48	366	110	215	128	127	196	151	84	75	151	117	80	124
Retain more heifers as replacements than normal	60%	61%	64%	63%	55%	61%	62%	55%	57%	50%	57%	54%	61%	63%	70%	57%	67%
Retain more steers than normal	12%	15%	16%	19%	13%	13%	12%	16%	14%	12%	14%	18%	11%	12%	15%	14%	13%
Purchase more breeding heifers than normal	14%	14%	6%	14%	13%	14%	16%	9%	14%	12%	15%	9%	10%	15%	9%	17%	12%
Retain more older cows than normal	12%	11%	18%	21%	7%	14%	13%	14%	8%	9%	12%	9%	9%	7%	11%	14%	16%

* Coded from "Other (please specify)" answers. Segment table displays top 4 reasons at the overall level.

Intended methods to increase in 2024
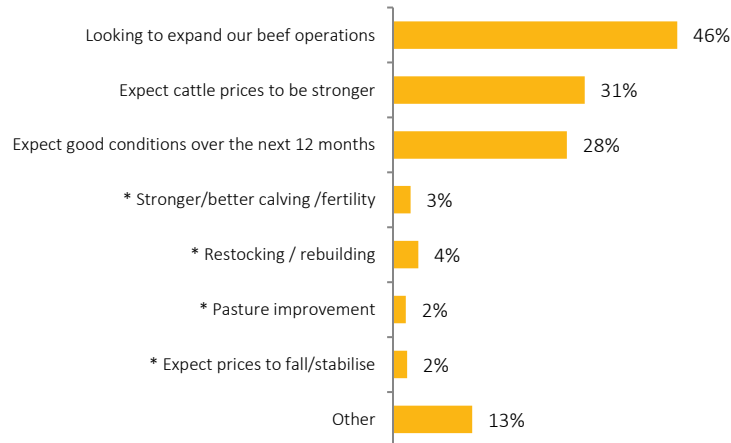
Southern Australia	Northern Australia

39% of producers reported they are likely to have MORE beef cattle next year

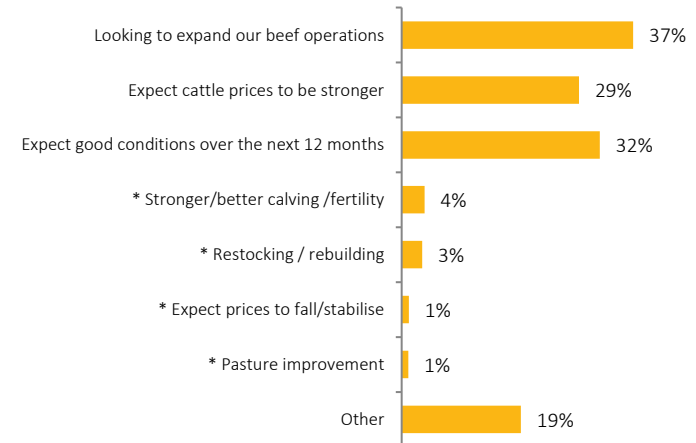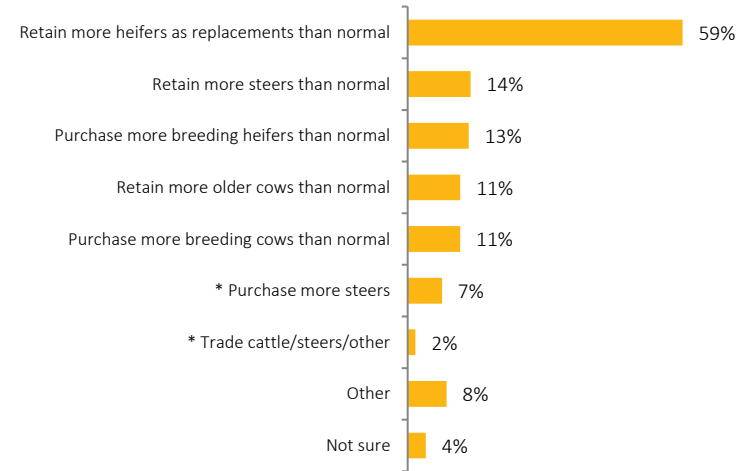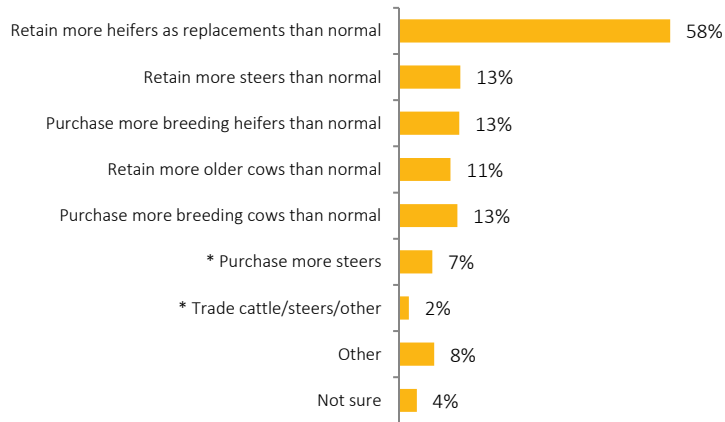**38%** of producers reported they are likely to have MORE beef cattle next year

Q18. How do you intend to increase your beef cattle herd over the next 12 months? Please select all that apply.
Base: All respondents categorised or self-identified as a Southern Australian producer AND who expect an increase in beef cattle herd size in 2024, n = 1,104

Q18. How do you intend to increase your beef cattle herd over the next 12 months? Please select all that apply.
Base: All respondents categorised or self-identified as a Northern Australian producer AND who expect an increase in beef cattle herd size in 2024, n = 344

Southern Australia:
Method	%
Retain more heifers as replacements than normal	58%
Retain more steers than normal	13%
Purchase more breeding heifers than normal	13%
Retain more older cows than normal	11%
Purchase more breeding cows than normal	13%
* Purchase more steers	7%
* Trade cattle/steers/other	2%
Other	8%
Not sure	4%

Northern Australia:
Method	%
Retain more heifers as replacements than normal	62%
Retain more steers than normal	15%
Purchase more breeding heifers than normal	14%
Retain more older cows than normal	12%
Purchase more breeding cows than normal	8%
* Purchase more steers	8%
* Trade cattle/steers/other	<1%
Other	11%
Not sure	4%

* Coded from "Other (please specify)" answers.

Factors influencing the expected reduction in 2024

Q19. You've indicated that you are likely to have a **smaller beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months? Please select all the factors that are influencing your plans.
Base: All respondents who expect a reduction in beef cattle herd size in 2024, n = 1,780

47% of producers reported they are likely to have LESS beef cattle next year

We asked these producers what factors were influencing their plans to decrease the number of beef cattle…

Factor	%
Dry seasons / low rainfall	66%
Volatility in cattle prices	55%
Looking to downsize our beef operations	25%
Increase in input costs	22%
Shifting to more cropping	3%
* Personal factors (health, retirement)	3%
Shifting to other commodities	2%
* Selling cattle	2%
* Culling older cows	1%
* Price related feedback	1%
* Pasture related feedback	1%
Other	9%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	615	415	92	72	423	149	202	176	212	290	211	100	90	206	122	60	111
Dry seasons / low rainfall	78%	75%	58%	69%	42%	52%	62%	70%	69%	68%	65%	73%	69%	61%	63%	62%	59%
Volatility in cattle prices	59%	45%	57%	68%	54%	66%	59%	52%	55%	58%	53%	54%	53%	53%	47%	52%	51%
Looking to downsize our beef operations	25%	22%	29%	25%	27%	28%	24%	23%	23%	26%	33%	22%	29%	27%	21%	23%	20%
Increase in input costs	21%	22%	21%	33%	19%	37%	23%	21%	24%	20%	23%	25%	22%	24%	20%	27%	23%

* Coded from "Other (please specify)" answers. Segment table displays top 4 reasons at the overall level.

Factors influencing the expected reduction in 2024

Southern Australia

Northern Australia

47% of producers reported they are likely to have LESS beef cattle next year

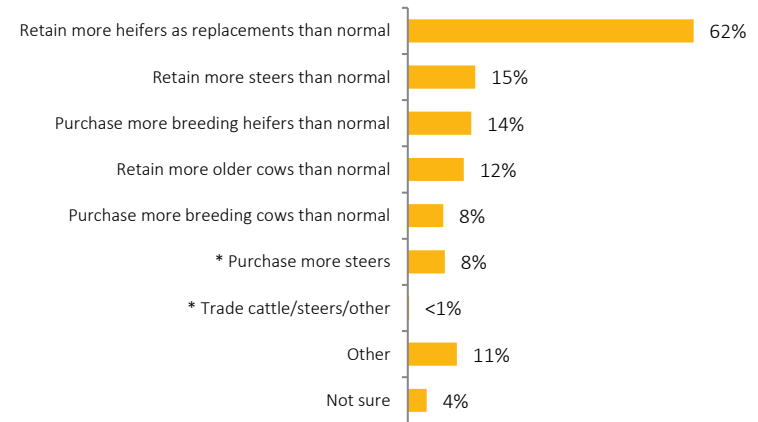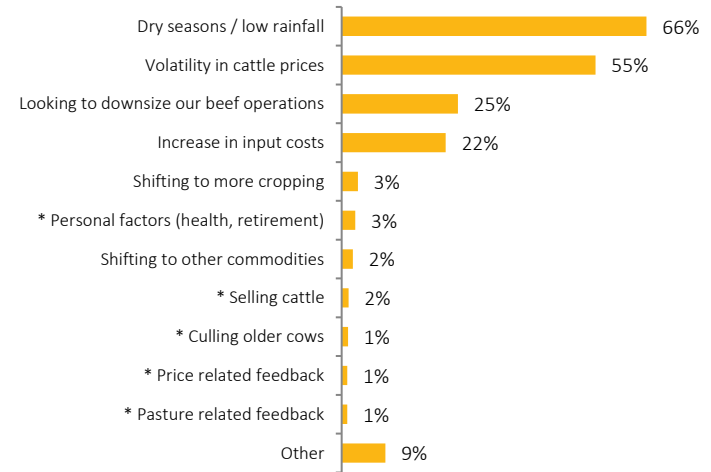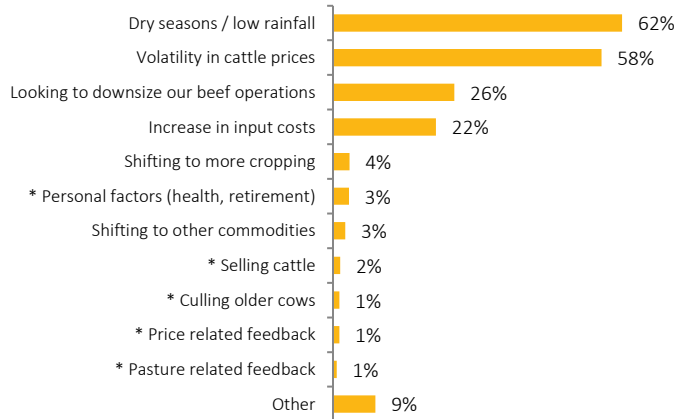**48%** of producers reported they are likely to have LESS beef cattle next year

Q19. You've indicated that you are likely to have a **smaller beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months? Please select all the factors that are influencing your plans.
Base: All respondents categorised or self-identified as a Southern Australian producer AND who expect a reduction in beef cattle herd size in 2024, n = 1,359
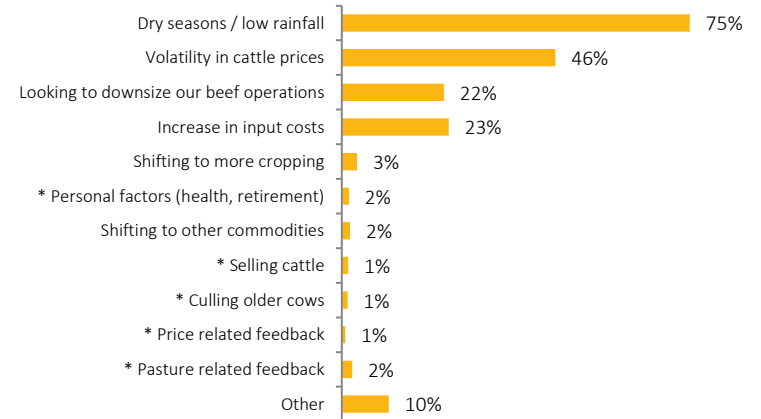
Q19. You've indicated that you are likely to have a **smaller beef cattle herd** next year compared to this year. What factors are influencing your plans for the next 12 months? Please select all the factors that are influencing your plans.
Base: All respondents categorised or self-identified as a Northern Australian producer AND who expect a reduction in beef cattle herd size in 2024, n = 421

Factor (Southern Australia)	%
Dry seasons / low rainfall	62%
Volatility in cattle prices	58%
Looking to downsize our beef operations	26%
Increase in input costs	22%
Shifting to more cropping	4%
* Personal factors (health, retirement)	3%
Shifting to other commodities	3%
* Selling cattle	2%
* Culling older cows	1%
* Price related feedback	1%
* Pasture related feedback	1%
Other	9%

Factor (Northern Australia)	%
Dry seasons / low rainfall	75%
Volatility in cattle prices	46%
Looking to downsize our beef operations	22%
Increase in input costs	23%
Shifting to more cropping	3%
* Personal factors (health, retirement)	2%
Shifting to other commodities	2%
* Selling cattle	1%
* Culling older cows	1%
* Price related feedback	1%
* Pasture related feedback	2%
Other	10%

* Coded from "Other (please specify)" answers.

Intended methods to reduce in 2024

Q20. How do you intend to reduce your beef cattle herd over the next 12 months?
Please select all that apply.
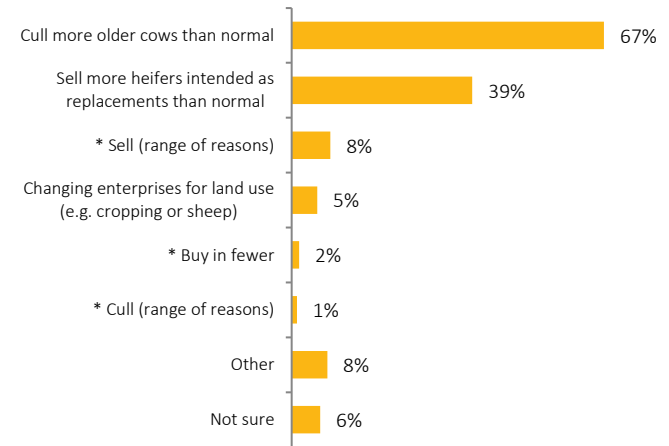Base: All respondents who expect a reduction in beef cattle herd size in 2024, n = 1,780

47% of producers reported they are likely to have LESS beef cattle next year

We asked these producers how they intend to reduce the number of beef cattle over the next 12 months...

Method	%
Cull more older cows than normal	67%
Sell more heifers intended as replacements than normal	39%
* Sell (range of reasons)	8%
Changing enterprises for land use (e.g. cropping or sheep)	5%
* Buy in fewer	2%
* Cull (range of reasons)	1%
Other	8%
Not sure	6%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	615	415	92	72	423	149	202	176	212	290	211	100	90	206	122	60	111
Cull more older cows than normal	69%	69%	59%	63%	62%	78%	55%	61%	69%	68%	74%	75%	76%	73%	70%	73%	68%
Sell more heifers intended as replacements than normal	42%	40%	45%	32%	32%	41%	36%	35%	39%	37%	41%	45%	38%	45%	31%	39%	48%
* Sell (range of reasons)	7%	9%	12%	9%	10%	4%	13%	8%	7%	6%	5%	9%	5%	11%	7%	10%	6%
Changing enterprises for land use (e.g. cropping or sheep)	6%	3%	6%	8%	7%	7%	5%	5%	2%	5%	5%	4%	4%	10%	8%	12%	7%

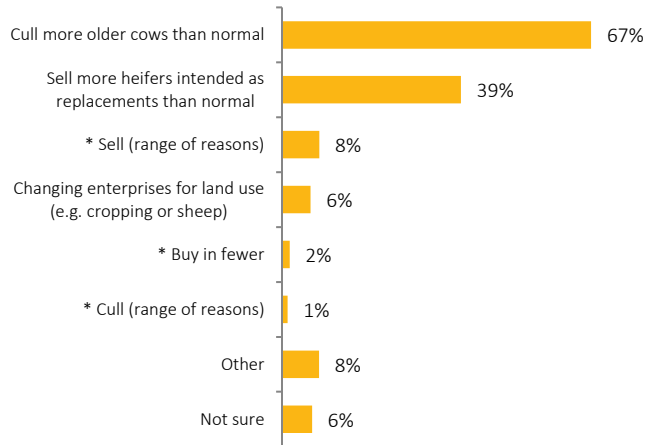* Coded from "Other (please specify)" answers. Segment table displays top 4 reasons at the overall level.

Intended methods to reduce in 2024

Southern Australia

47% of producers reported they are likely to have LESS beef cattle next year

Q20. How do you intend to reduce your beef cattle herd over the next 12 months? Please select all that apply.
Base: All respondents categorised or self-identified as a Southern Australian producer AND who expect a reduction in beef cattle herd size in 2024, n = 1,359

Method	%
Cull more older cows than normal	67%
Sell more heifers intended as replacements than normal	39%
* Sell (range of reasons)	8%
Changing enterprises for land use (e.g. cropping or sheep)	6%
* Buy in fewer	2%
* Cull (range of reasons)	1%
Other	8%
Not sure	6%

Northern Australia

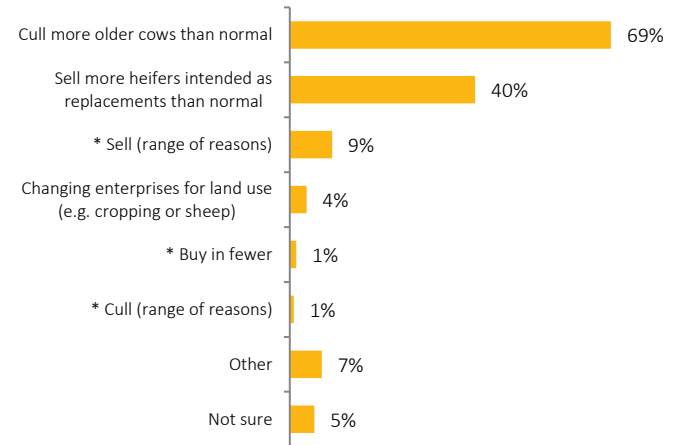**48%** of producers reported they are likely to have LESS beef cattle next year

Q20. How do you intend to reduce your beef cattle herd over the next 12 months? Please select all that apply.
Base: All respondents categorised or self-identified as a Northern Australian producer AND who expect a reduction in beef cattle herd size in 2024, n = 421

Method	%
Cull more older cows than normal	69%
Sell more heifers intended as replacements than normal	40%
* Sell (range of reasons)	9%
Changing enterprises for land use (e.g. cropping or sheep)	4%
* Buy in fewer	1%
* Cull (range of reasons)	1%
Other	7%
Not sure	5%

* Coded from "Other (please specify)" answers.

On-farm grassfed adult beef cattle herd size forecast for 2024

Taking into account the forecast size of the on-farm grassfed adult beef cattle herd for those producers who indicated they would be increasing their herd size as well as those producers who indicated they would be reducing their herd size, an estimation of the forecast beef cattle herd for 2024 is shown below. . .

	2024 ON-FARM GRASSFED ADULT BEEF CATTLE HERD FORECAST		Of those who expect an increase in beef cattle		Of those who expect no change in beef cattle		Of those who expect a decrease in beef cattle
Total estimated herd size for 2023:	24,215,186	=	12,624,911	+	1,811,140	+	9,779,136
Total expected herd size for 2024:	24,442,596	=	14,488,928	+	1,811,140	+	8,142,528
Difference of:	+ 227,410	=	+ 1,864,017	+	0	+	- 1,636,607
% forecast change on 2023:	+ 1%						

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,299	864	189	144	930	311	508	367	398	554	419	201	206	414	269	164	267
Total reported herd size for 2023:	5,865,260	10,775,327	961,815	586,245	3,857,111	1,372,032	1,078,169	878,423	1,023,320	1,422,185	1,219,862	639,649	822,777	2,896,876	2,166,524	2,260,767	9,806,634
Total expected herd size for 2024:	5,904,166	11,176,266	945,744	565,278	3,755,743	1,269,495	1,086,195	824,501	992,186	1,398,340	1,174,221	649,627	787,938	2,808,402	2,202,490	2,356,577	10,162,118
Difference of:	+ 38,907	+ 400,939	- 16,071	- 20,967	- 101,368	- 102,537	+ 8,026	- 53,922	- 31,134	- 23,845	- 45,641	+ 9,978	- 34,840	- 88,474	+ 35,966	+ 95,810	+ 355,485
% forecast change on 2023:	+ 1%	+ 4%	- 2%	- 4%	- 3%	- 7%	+ 1%	- 6%	- 3%	- 2%	- 4%	+ 2%	- 4%	- 3%	+ 2%	+ 4%	+ 4%

On-farm grassfed adult beef cattle herd size forecast for 2024

Southern Australia - **Northern Australia**

2024 ON-FARM GRASSFED ADULT BEEF CATTLE HERD FORECAST

Total estimated herd size for 2023:	12,275,400
Total expected herd size for 2024:	12,147,824
Difference of:	- 127,576
% forecast change on 2023:	- 1%

2024 ON-FARM GRASSFED ADULT BEEF CATTLE HERD FORECAST

Total estimated herd size for 2023:	11,939,786
Total expected herd size for 2024:	12,294,772
Difference of:	+ 354,986
% forecast change on 2023:	+ 3%

The forecasts based on producers' feedback in the BPIS indicates that nationally there is a very modest forecast increase forecast for 2024 (up 1% on 2023).

As shown above, while there is a slightly different forecast between northern and southern producers, the forecasts from producers are suggesting very little change to the size of their beef cattle herd.

The mix of intentions reported earlier suggests the increase and decrease have been similar, resulting in a largely stable herd size forecast.
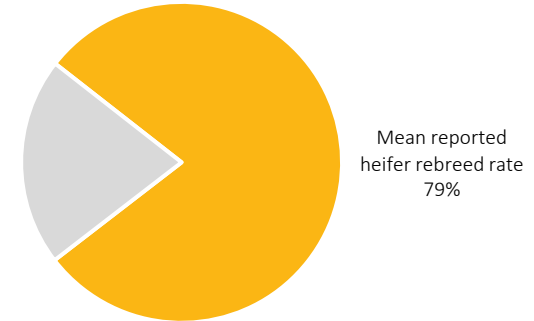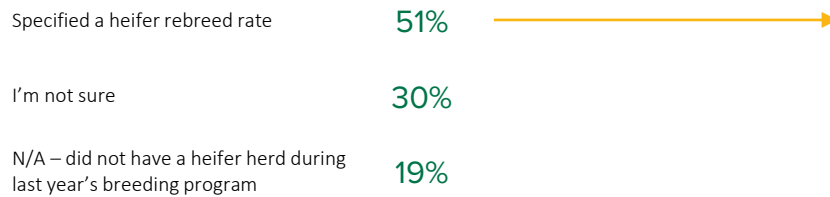
an overview of producer's breeding program

Breeding program – heifer rebreed rate in 2022

Q21. Thinking back to last year's breeding program, what was the rebreed rate for your heifers after their first lactation?
Base: All respondents who reported being a cow / calf producer, n = 3,289

Specified a heifer rebreed rate · 51%

I'm not sure · 30%

N/A – did not have a heifer herd during last year's breeding program · 19%

Mean reported heifer rebreed rate 79%

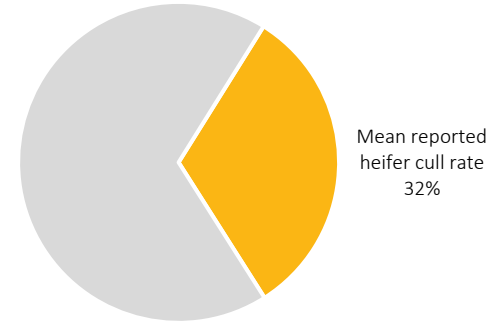|	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,174	736	168	118	774	290	428	309	341	479	365	170	185	382	239	150	241
% specifying a rate	49%	53%	45%	53%	51%	54%	37%	49%	45%	47%	50%	63%	54%	65%	59%	56%	69%
Of those who specified a rate…																	
Mean heifer rebreed rate	79%	76%	83%	85%	80%	80%	78%	78%	81%	74%	80%	82%	84%	78%	81%	82%	79%

Breeding program – heifer cull rate in 2022

Q22. Thinking back to last year's breeding program, what was the percentage of heifers that were culled from last year's calf drop?
Base: All respondents who reported being a cow / calf producer, n = 3,289

Specified a heifer cull rate   **65%**

I'm not sure   **20%**

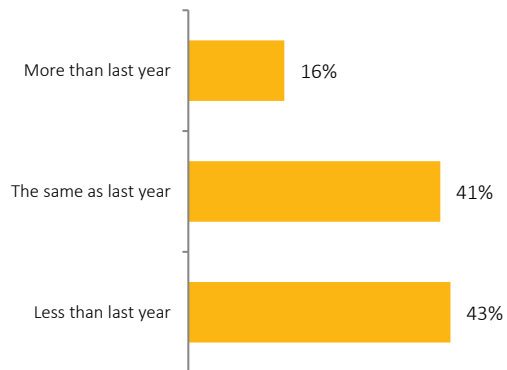N/A – did not have a heifer herd during last year's breeding program   **15%**

Mean reported heifer cull rate 32%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,174	736	168	118	774	290	428	309	341	479	365	170	185	382	239	150	241
% specifying a rate	66%	65%	65%	66%	63%	67%	54%	61%	64%	64%	63%	71%	71%	75%	75%	68%	79%
Of those who specified a rate…																	
Mean heifer cull rate	33%	31%	33%	28%	31%	33%	26%	28%	30%	42%	34%	30%	35%	30%	34%	34%	31%

Breeding program – bulls purchased this year

Q23. Now thinking about this year's breeding program, how many bulls did you purchase this year leading into the current spring breeding season?
Base: All respondents who reported being a cow / calf producer, n = 3,289

	More than last year	16%
The same as last year	41%
Less than last year	43%

		State					Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,174	736	168	118	774	290	428	309	341	479	365	170	185	382	239	150	241
More than last year	17%	18%	8%	17%	14%	15%	11%	12%	11%	14%	16%	19%	20%	24%	21%	24%	20%
The same as last year	38%	37%	49%	39%	48%	44%	46%	42%	39%	39%	40%	43%	39%	38%	39%	36%	48%
Less than last year	45%	46%	43%	45%	38%	41%	43%	46%	49%	46%	44%	39%	42%	39%	39%	40%	32%

Heifers joined and calving rate

Q24. For this year's breeding program, thinking about your heifer herd, how many heifers were joined?
Base: All respondents who reported being a cow / calf producer AND had heifers on hand at October 31, n = 2,803

Q25. How many calves born to heifers have been delivered or are expected across the following two time points?
Base: All respondents who reported being a cow / calf producer AND had heifers on hand at October 31, n = 2,803

Heifers on hand at 31 October 2023	3,796,514
Heifers joined	2,613,575
Heifer join rate	69%

Heifers joined	2,613,575
Calves delivered or expected	2,013,220
Actual calves born to heifers to 31 October 2023	1,450,190
Actual and expected calves to be born to heifers between 1 November - 31 December 2023	563,030
Heifer calving rate	77%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	979	659	141	105	646	245	342	250	279	392	312	155	162	341	209	139	222
Heifers at 31 October 2023	898,450	1,713,478	153,189	97,505	567,994	208,583	169,080	159,162	135,338	197,191	161,492	98,335	109,674	446,274	339,556	401,122	1,579,292
Heifers joined	660,663	1,077,594	133,917	68,610	397,327	141,668	101,050	98,507	87,765	132,085	114,100	57,385	77,284	318,640	240,660	254,686	1,131,413
Heifer join rate	74%	63%	87%	70%	70%	68%	60%	62%	65%	67%	71%	58%	70%	71%	71%	63%	72%
Heifers joined	660,663	1,077,594	133,917	68,610	397,327	141,668	101,050	98,507	87,765	132,085	114,100	57,385	77,284	318,640	240,660	254,686	1,131,413
Calves delivered or expected	578,025	818,128	86,858	54,492	313,615	109,979	85,962	68,165	83,504	106,668	98,051	50,439	64,253	268,375	206,958	205,665	775,180
Heifer calving rate	87%	76%	65%	79%	79%	78%	85%	69%	95%	81%	86%	88%	83%	84%	86%	81%	69%

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.

Breeding cows joined and calving rate

Q26. For this year's breeding program, thinking about your breeding cow herd, how many cows were joined?
Base: All respondents who reported being a cow / calf producer AND had cows on hand at October 31, n = 3,257

Q27. How many calves born to cows have been delivered or are expected across the following two time points?
Base: All respondents who reported being a cow / calf producer AND had cows on hand at October 31, n = 3,257

Cows on hand at 31 October 2023	12,481,669
Cows joined	10,867,400
Cow join rate	87%

Cows joined	10,867,400
Calves delivered or expected	9,419,468
Actual calves born to cows to 31 October 2023	7,498,410
Actual and expected calves to be born to cows between 1 November - 31 December 2023	1,921,058
Cow calving rate	87%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,162	731	166	116	765	288	415	307	338	475	363	169	183	382	239	150	236
Cows at 31 October 2023	3,215,666	5,320,709	538,648	292,287	1,890,370	828,926	558,531	510,505	524,550	765,564	669,952	332,230	463,478	1,568,421	1,160,387	1,201,311	4,726,740
Cows joined	2,810,677	4,546,212	489,975	265,553	1,682,175	726,704	465,383	426,826	451,636	676,714	580,172	298,695	418,302	1,373,143	1,085,958	1,067,074	4,023,497
Cows join rate	87%	85%	91%	91%	89%	88%	83%	84%	86%	88%	87%	90%	90%	88%	94%	89%	85%
Cows joined	2,810,677	4,546,212	489,975	265,553	1,682,175	726,704	465,383	426,826	451,636	676,714	580,172	298,695	418,302	1,373,143	1,085,958	1,067,074	4,023,497
Calves delivered or expected	2,611,656	3,679,390	442,954	239,284	1,511,064	644,536	418,048	388,752	394,137	583,591	499,308	259,827	369,839	1,147,753	971,802	976,572	3,409,840
Cows calving rate	93%	81%	90%	90%	90%	89%	90%	91%	87%	86%	86%	87%	88%	84%	89%	92%	85%

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.

Breeding herd joined and calving rate

	Overall	Southern Australia	Northern Australia
Heifers on hand at 31 October 2023	3,796,514	1,845,312	1,951,202
Heifers joined	2,613,575	1,352,425	1,261,150
Heifer join rate	69%	73%	65%
Heifers joined	2,613,575	1,352,425	1,261,150
Calves delivered or expected	2,013,220	1,115,326	897,894
Actual calves born to heifers to 31 October 2023	1,450,190	965,878	484,312
Actual and expected calves to be born to heifers between 1 November - 31 December 2023	563,030	149,448	413,582
Heifer calving rate	77%	82%	71%
Cows on hand at 31 October 2023	12,481,669	6,549,979	5,931,690
Cows joined	10,867,400	5,794,334	5,073,066
Cow join rate	87%	88%	86%
Cows joined	10,867,400	5,794,334	5,073,066
Calves delivered or expected	9,419,468	5,290,692	4,128,776
Actual calves born to cows to 31 October 2023	7,498,410	4,792,717	2,705,693
Actual and expected calves to be born to cows between 1 November - 31 December 2023	1,921,058	497,975	1,423,083
Cow calving rate	87%	91%	81%

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.

an overview of producer's sales program

Producer sales – actual and expected volumes

Q29, Q31, Q33, Q35, Q36. Earlier, you described yourself as a [PRODUCER TYPE AT Q2]. How many sales have already been made been made to October 31 and how many do you expect to sell for the remainder of this year and into the first half of 2024?
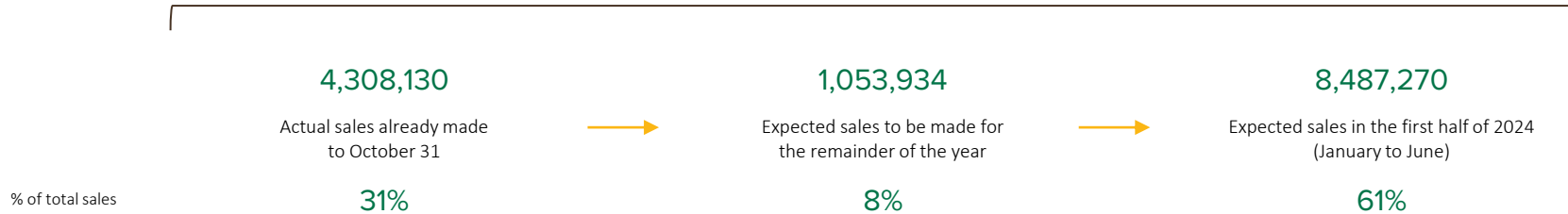Base: All respondents who reported being a cow / calf producer, n = 3,289

It is important to note that these sales estimates are produced from cow/calf producers only.

Sales estimates for backgrounders / traders / growers / fatteners are provided separately.

Total actual and expected sales

13,849,334

4,308,130	1,053,934	8,487,270
Actual sales already made to October 31	Expected sales to be made for the remainder of the year	Expected sales in the first half of 2024 (January to June)

% of total sales

31%	8%	61%

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,174*	*736*	*168*	*118*	*774*	*290*	*428*	*309*	*341*	*479*	*365*	*170*	*185*	*382*	*239*	*150*	*241*
Total actual and expected sales	4,190,953	3,096,280	265,666	165,907	5,439,116	485,702	1,160,430	210,100	344,219	2,503,535	414,664	2,289,183	282,376	2,069,663	1,242,007	650,955	2,682,203
% of total sales																	
Actual sales to October 31	35%	47%	28%	20%	19%	34%	28%	32%	34%	12%	30%	24%	30%	38%	42%	34%	45%
Expected sales for remainder of year	10%	7%	20%	7%	4%	24%	10%	9%	13%	2%	14%	1%	12%	6%	16%	11%	12%
Expected sales in first half of 2024	55%	46%	52%	72%	77%	43%	62%	59%	54%	86%	57%	75%	58%	56%	42%	55%	43%

Producer sales – actual and expected volumes

Southern Australia .... Northern Australia

Q29, Q31, Q33, Q35, Q36. Earlier, you described yourself as a [PRODUCER TYPE AT Q2].
How many sales have already been made been made to October 31 and how many do you
expect to sell for the remainder of this year and into the first half of 2024?
Base: All respondents categorised or self-identified as a Southern Australian producer AND who reported being a
cow / calf producer, n = 2,533

Q29, Q31, Q33, Q35, Q36. Earlier, you described yourself as a [PRODUCER TYPE AT Q2].
How many sales have already been made been made to October 31 and how many do you
expect to sell for the remainder of this year and into the first half of 2024?
Base: All respondents categorised or self-identified as a Northern Australian producer AND who reported being a
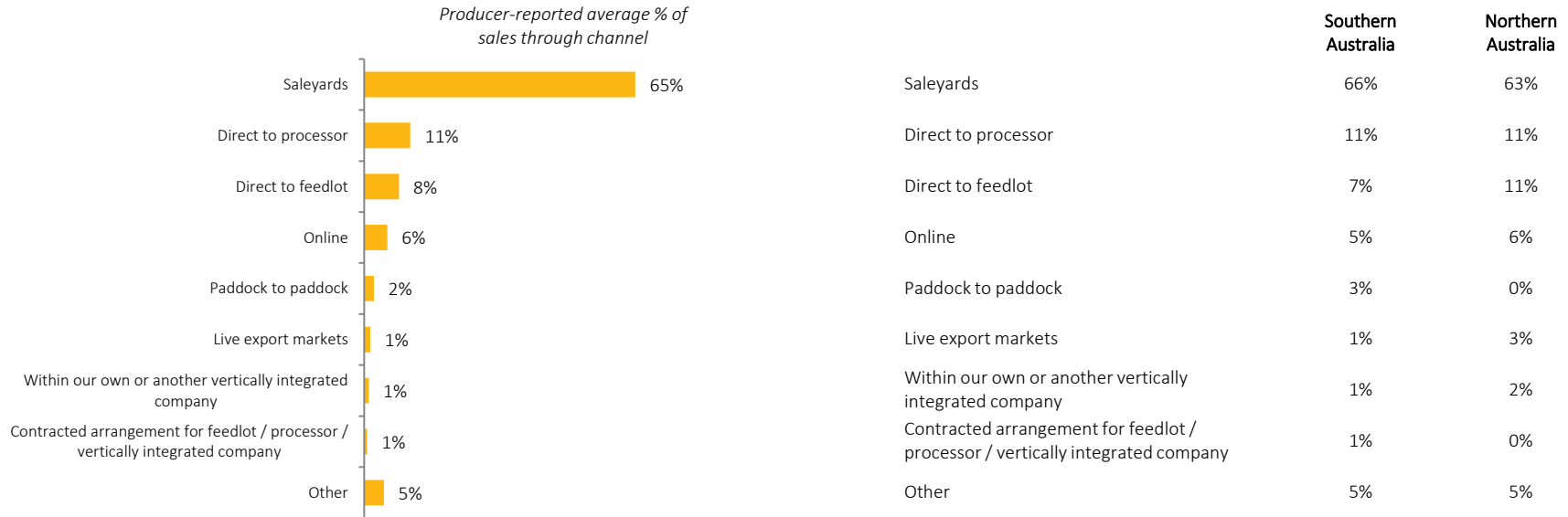cow / calf producer, n = 756

	Southern Australia	% of total sales		Northern Australia	% of total sales
Total actual and expected sales	9,946,430		Total actual and expected sales	3,902,904	
	=			=	
Actual sales already made to October 31	2,395,637	24%	Actual sales already made to October 31	1,912,493	49%
Expected sales to be made for the remainder of the year	717,980	7%	Expected sales to be made for the remainder of the year	335,954	9%
Expected sales in the first half of 2024 (January to June)	6,832,813	69%	Expected sales in the first half of 2024 (January to June)	1,654,456	42%

Producer sales – sales channels

Q30, Q32, Q34, Q35, Q37. Of the expected sales to be made in 2023, 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 2023, n = 2,086

Producer-reported average % of sales through channel

Channel	%
Saleyards	65%
Direct to processor	11%
Direct to feedlot	8%
Online	6%
Paddock to paddock	2%
Live export markets	1%
Within our own or another vertically integrated company	1%
Contracted arrangement for feedlot / processor / vertically integrated company	1%
Other	5%

	Southern Australia	Northern Australia
Saleyards	66%	63%
Direct to processor	11%	11%
Direct to feedlot	7%	11%
Online	5%	6%
Paddock to paddock	3%	0%
Live export markets	1%	3%
Within our own or another vertically integrated company	1%	2%
Contracted arrangement for feedlot / processor / vertically integrated company	1%	0%
Other	5%	5%

Producers responding to the October 2023 BPIS have indicated saleyard auctions will be the primary channel for beef cattle sales this year.

The results are largely consistent across northern and southern producers.

Producer sales – sales channels

Q30, Q32, Q34, Q35, Q37. Of the expected sales to be made in 2023, 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 2023, n = 2,086

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*678*	*574*	*107*	*57*	*449*	*203*	*220*	*180*	*183*	*294*	*240*	*107*	*119*	*290*	*171*	*104*	*178*
Producer-reported average % of sales through channel																	
Saleyards	71%	63%	56%	27%	67%	58%	75%	76%	72%	75%	75%	73%	63%	62%	47%	33%	24%
Direct to processor	7%	11%	15%	38%	14%	12%	9%	9%	10%	9%	8%	13%	12%	13%	14%	19%	14%
Direct to feedlot	10%	11%	6%	5%	5%	5%	2%	2%	4%	3%	5%	5%	9%	9%	17%	25%	30%
Online	6%	6%	6%	6%	5%	3%	6%	5%	2%	4%	5%	3%	6%	7%	10%	7%	9%
Paddock to paddock	2%	<1%	5%	6%	4%	6%	1%	1%	3%	2%	1%	1%	4%	3%	5%	3%	2%
Live export markets	<1%	2%	1%	1%	1%	4%	<1%	<1%	3%	<1%	<1%	0%	2%	1%	2%	4%	7%
Within our own or another vertically integrated company	<1%	2%	3%	3%	1%	1%	1%	1%	1%	0%	1%	0%	1%	1%	1%	1%	4%
Contracted arrangement for feedlot / processor / vertically integrated company	1%	0%	2%	3%	<1%	<1%	0%	0%	1%	1%	<1%	1%	<1%	1%	1%	1%	3%
Other	3%	5%	6%	12%	4%	10%	6%	4%	4%	5%	4%	3%	3%	4%	3%	7%	7%

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

Q38. Earlier, you described yourself as a backgrounder / trader / grower / fattener.
How many cattle were bought in for trading, growing out or fattening before 31
October 2023?
Base: All respondents who reported being a backgrounder / trader / grower / fattener, n = 899

Estimate of cattle bought in for trading
before 31 October 2023:
2,268,232

Q39. 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 to October 31 and how
many do you expect to sell for the remainder of this year and into the first half of 2024?
Base: All respondents who reported being a backgrounder / trader / grower / fattener, n = 899

Total actual and expected sales

12,106,585

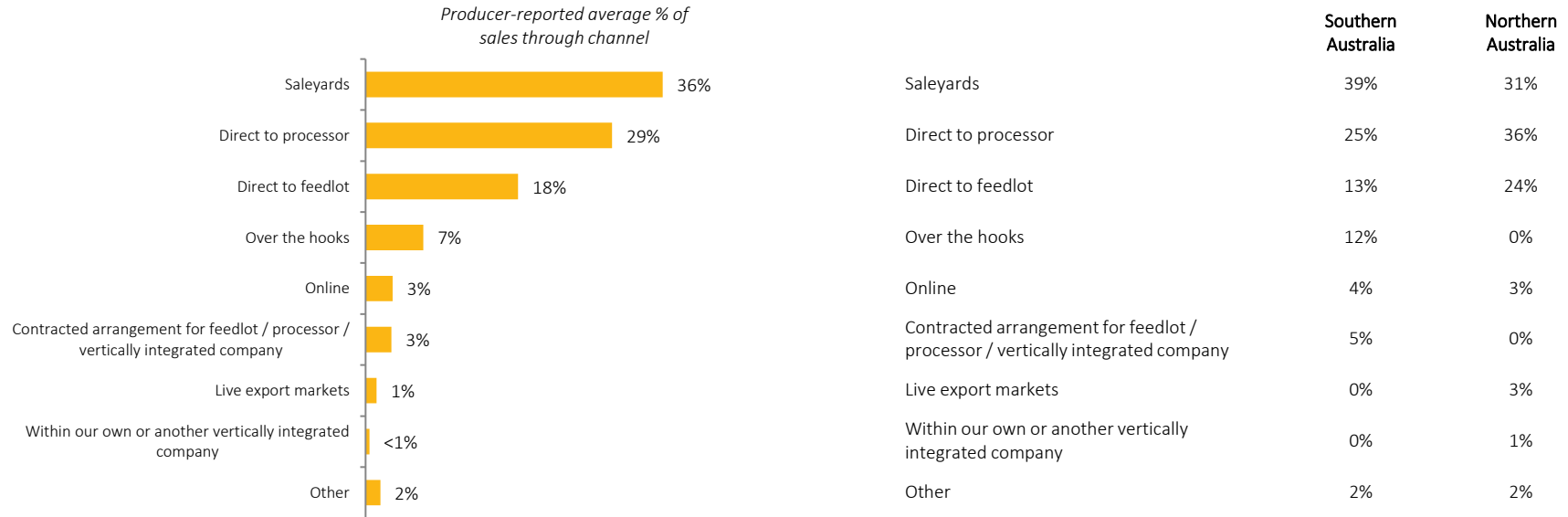| 3,723,399	494,790	7,888,396
Actual sales already made to October 31	Expected sales to be made for the remainder of the year	Expected sales in the first half of 2024 (January to June)

% of total sales

31%	4%	65%

B/T/G/F sales – sales channels

Q40. Of the expected sales to be made in 2023, 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 2023, n = 596

Producer-reported average % of sales through channel

Channel	%
Saleyards	36%
Direct to processor	29%
Direct to feedlot	18%
Over the hooks	7%
Online	3%
Contracted arrangement for feedlot / processor / vertically integrated company	3%
Live export markets	1%
Within our own or another vertically integrated company	<1%
Other	2%

	Southern Australia	Northern Australia
Saleyards	39%	31%
Direct to processor	25%	36%
Direct to feedlot	13%	24%
Over the hooks	12%	0%
Online	4%	3%
Contracted arrangement for feedlot / processor / vertically integrated company	5%	0%
Live export markets	0%	3%
Within our own or another vertically integrated company	0%	1%
Other	2%	2%

For B/T/G/F producer's saleyard auctions and direct to either processors or feedlots will be the primary channels for beef cattle sales this year.
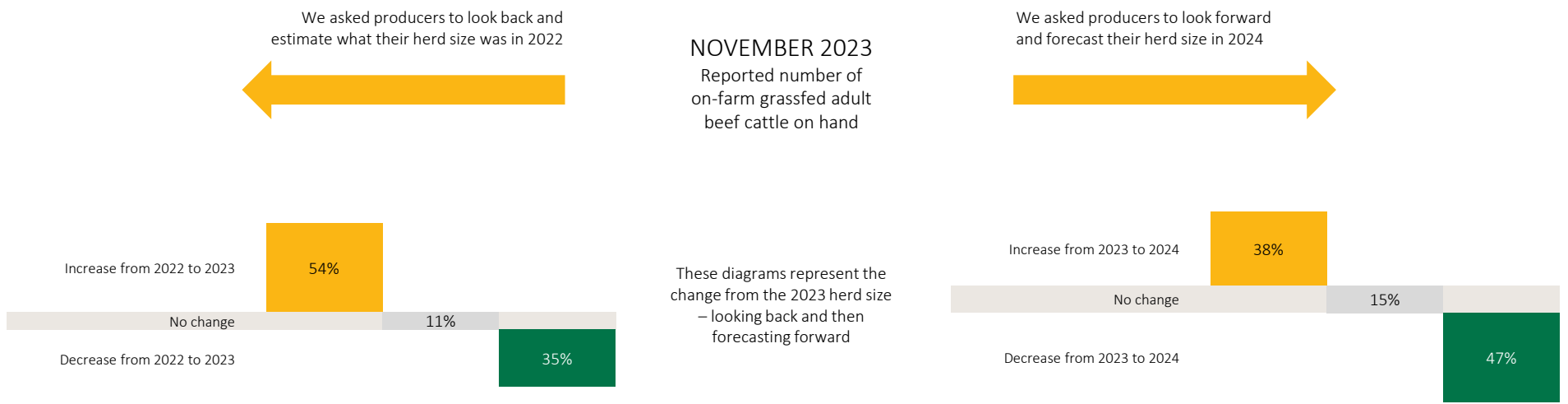
Northern producers (among B/T/G/F) are heavier users of feedlots and direct to processors as preferred sales channel than southern producers.

additional analysis

On-farm grassfed adult beef cattle herd size: a 3-year perspective

As part of the November 2023 Beef Producers Intentions Survey, producers were asked to look back and estimate what their beef cattle herd size was in 2022 as well as to look forward and forecast their beef cattle herd size for 2024. This then provided 3 points in time – the 2022 herd size, the current 2023 herd size and the forecast herd size for 2024. An analysis of this data is shown below.

We asked producers to look back and estimate what their herd size was in 2022

NOVEMBER 2023
Reported number of on-farm grassfed adult beef cattle on hand

We asked producers to look forward and forecast their herd size in 2024

Increase from 2022 to 2023	54%
No change	11%
Decrease from 2022 to 2023	35%

These diagrams represent the change from the 2023 herd size – looking back and then forecasting forward

Increase from 2023 to 2024	38%
No change	15%
Decrease from 2023 to 2024	47%

On-farm grassfed adult beef cattle herd size: a 3-year perspective

	Overall	Southern Australia	Northern Australia
Increase from 2023 to 2024	**38%**	**39%**	**38%**
2022 -> Increase 2023 -> Increase 2024	18%	18%	18%
2022 -> Same 2023 -> Increase 2024	3%	3%	2%
2022 -> Decrease 2023 -> Increase 2024	18%	17%	18%
No change	**15%**	**15%**	**14%**
2022 -> Increase 2023 -> Same 2024	6%	6%	5%
2022 -> Same 2023 -> Same 2024	5%	5%	5%
2022 -> Decrease 2023 -> Same 2024	3%	3%	3%
Decrease from 2023 to 2024	**47%**	**47%**	**48%**
2022 -> Increase 2023 -> Decrease 2024	30%	29%	31%
2022 -> Same 2023 -> Decrease 2024	3%	3%	3%
2022 -> Decrease 2023 -> Decrease 2024	14%	14%	14%

On-farm grassfed adult beef cattle herd size: a 3-year perspective

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,299*	*864*	*189*	*144*	*930*	*311*	*508*	*367*	*398*	*554*	*419*	*201*	*206*	*414*	*269*	*164*	*267*
Increase from 2023 to 2024	**40%**	**38%**	**33%**	**32%**	**40%**	**35%**	**42%**	**35%**	**31%**	**35%**	**36%**	**41%**	**37%**	**37%**	**44%**	**48%**	**46%**
2022 -> Increase 2023 -> Increase 2024	18%	18%	17%	20%	19%	19%	22%	14%	12%	14%	18%	18%	16%	20%	22%	24%	25%
2022 -> Same 2023 -> Increase 2024	2%	2%	3%	1%	3%	4%	5%	3%	3%	2%	1%	4%	1%	1%	2%	3%	1%
2022 -> Decrease 2023 -> Increase 2024	19%	18%	12%	11%	17%	12%	15%	18%	16%	20%	17%	19%	20%	16%	19%	21%	20%
No change	**13%**	**14%**	**17%**	**18%**	**16%**	**17%**	**18%**	**17%**	**16%**	**12%**	**14%**	**9%**	**20%**	**13%**	**11%**	**15%**	**12%**
2022 -> Increase 2023 -> Same 2024	6%	5%	7%	10%	6%	6%	9%	7%	6%	3%	6%	3%	6%	5%	3%	6%	5%
2022 -> Same 2023 -> Same 2024	5%	5%	8%	5%	6%	9%	6%	5%	6%	5%	4%	3%	9%	7%	4%	8%	4%
2022 -> Decrease 2023 -> Same 2024	3%	3%	2%	3%	4%	3%	2%	5%	4%	4%	4%	3%	5%	1%	4%	1%	3%
Decrease from 2023 to 2024	**47%**	**48%**	**50%**	**49%**	**45%**	**48%**	**40%**	**48%**	**53%**	**53%**	**50%**	**50%**	**44%**	**50%**	**45%**	**37%**	**42%**
2022 -> Increase 2023 -> Decrease 2024	29%	31%	33%	30%	29%	35%	27%	32%	37%	32%	30%	26%	26%	31%	27%	27%	28%
2022 -> Same 2023 -> Decrease 2024	2%	3%	4%	3%	4%	3%	4%	3%	2%	3%	2%	4%	1%	2%	3%	1%	2%
2022 -> Decrease 2023 -> Decrease 2024	16%	15%	13%	16%	12%	10%	9%	13%	14%	18%	18%	20%	16%	17%	15%	9%	12%

attachments

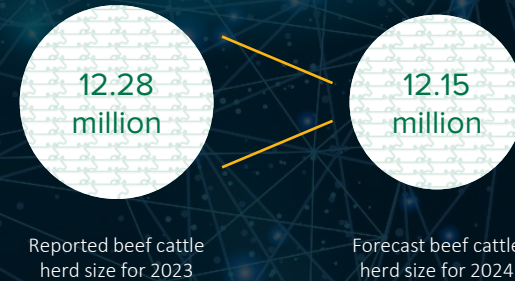# Beef Producers Intentions Survey – Southern Producers   November 2023

We spoke to 2,885 Southern Australian producers about their industry sentiment and the profile and intentions for their on-farm grassfed adult beef cattle herd...
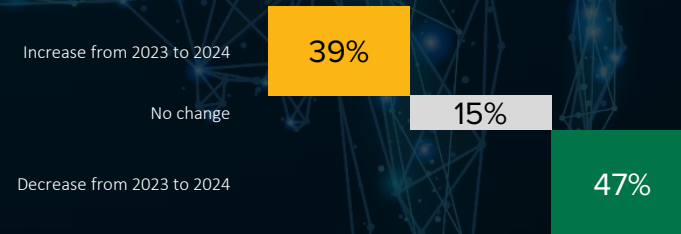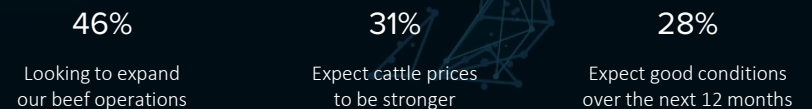
Sentiment of the Beef Cattle Industry

+7   =   36%   ▬   29%

Nett Sentiment   % Positive sentiment   % Negative sentiment

Beef Cattle Herd Profile

🐄 **12.28 million**   Estimate of on-farm grassfed adult beef cattle herd on hand at October 31 2023

6.55 million	Breeding cows
1.85 million	Heifers
3.00 million	Steers (under 2)
0.30 million	Bulls (12m+)
0.58 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made to October 31	Expected sales to be made for the remainder of the year	Expected sales in the first half of 2024 (January to June)
24%	7%	69%

Beef Cattle Herd Intentions

12.28 million → 12.15 million

Reported beef cattle herd size for 2023   Forecast beef cattle herd size for 2024

- 1%   Forecasted change in beef cattle herd

The estimates above indicate the forecast change in on-farm grassfed adult beef cattle herd numbers. Producer-level intentions for increases, decreases or maintaining herd levels (ignoring the size of the herd) were:

Increase from 2023 to 2024	39%
No change	15%
Decrease from 2023 to 2024	47%

Producers who forecast an increase in their on-farm grassfed adult beef cattle herd report three major factors influencing their plans for the next 12 months:

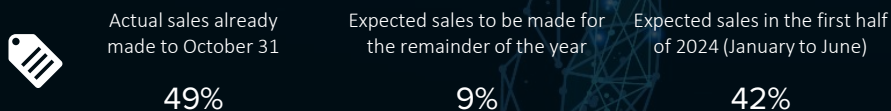| 46%	31%	28%
Looking to expand our beef operations	Expect cattle prices to be stronger	Expect good conditions over the next 12 months

Beef Producers Intentions Survey – Northern Producers — November 2023

We spoke to 882 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

+26 = **45%** − **19%**

Nett Sentiment | % Positive sentiment | % Negative sentiment
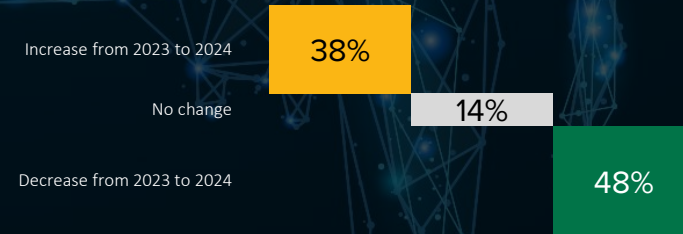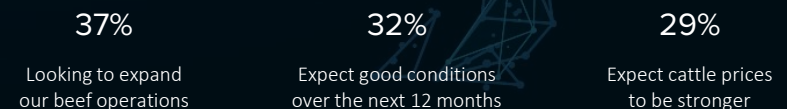
Beef Cattle Herd Profile

11.94 million — Estimate of on-farm grassfed adult beef cattle herd on hand at October 31 2023

5.93 million	Breeding cows
1.95 million	Heifers
3.12 million	Steers (under 2)
0.22 million	Bulls (12m+)
0.72 million	Castrated males (2+)

Actual / Expected sales from cow / calf producers:

Actual sales already made to October 31	Expected sales to be made for the remainder of the year	Expected sales in the first half of 2024 (January to June)
49%	9%	42%

Beef Cattle Herd Intentions

11.94 million — Reported beef cattle herd size for 2023

12.29 million — Forecast beef cattle herd size for 2024

+ 3% Forecasted change in beef cattle herd

The estimates above indicate the forecast change in on-farm grassfed adult beef cattle herd numbers. Producer-level intentions for increases, decreases or maintaining herd levels (ignoring the size of the herd) were:

Increase from 2023 to 2024	38%
No change	14%
Decrease from 2023 to 2024	48%

Producers who forecast an increase in their on-farm grassfed adult beef cattle herd report three major factors influencing their plans for the next 12 months:

37%	32%	29%
Looking to expand our beef operations	Expect good conditions over the next 12 months	Expect cattle prices to be stronger

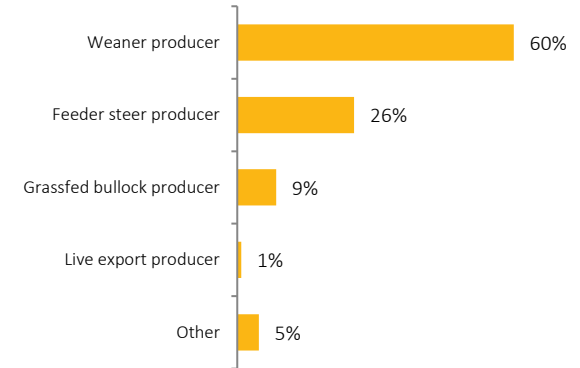# Description of business and end market

Q1. Which of the following would describe your grassfed beef cattle business? Please select all that apply.
Base: All respondents, n = 3,767
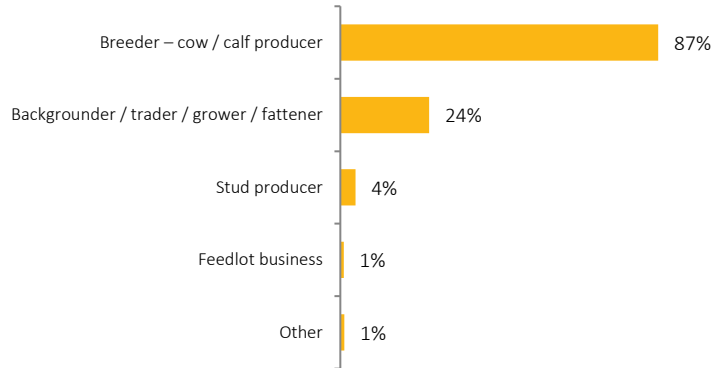
Q2. You said you were a breeder or cow/calf producer. What do you consider best describes your end market as a breeder of cattle / your cattle production focus?
Base: All respondents who reported being a cow / calf producer, n = 3,289

Breeder – cow / calf producer	87%
Backgrounder / trader / grower / fattener	24%
Stud producer	4%
Feedlot business	1%
Other	1%

Weaner producer	60%
Feeder steer producer	26%
Grassfed bullock producer	9%
Live export producer	1%
Other	5%

Breeder ONLY	76%
Backgrounder / trader / grower / fattener ONLY	13%
Both a breeder AND a backgrounder / trader / grower / fattener	11%

(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 = 2,533

Q4. (Southern Australia only) Thinking about the calf drop across a typical year, what proportion of your calf drop is from the spring calving?
Base: All respondents who reported joining cows and heifers to deliver in both spring and autumn, n = 945

Both spring and autumn calving	38%
Spring calving only	38%
Autumn calving only	24%
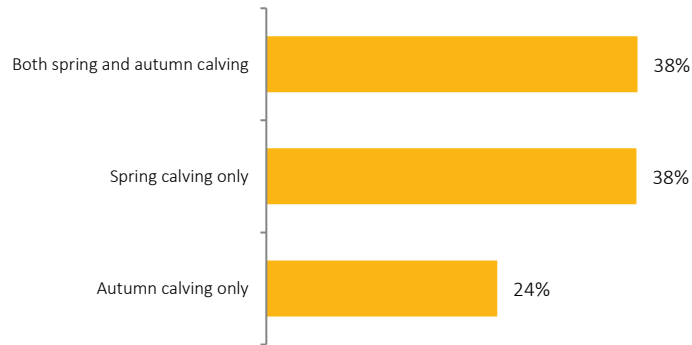
Of those who reported joining cows and heifers to deliver calves in both spring and autumn…

Mean proportion of calf drop in spring **57%**

Median proportion of calf drop in spring **50%**

|	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	*1,172*	*7*	*167*	*118*	*774*	*280*	*292*	*222*	*278*	*374*	*275*	*132*	*153*	*308*	*194*	*116*	*189*
Both spring and autumn calving	44%	27%	41%	30%	35%	16%	39%	38%	35%	43%	41%	35%	39%	44%	33%	34%	27%
Spring calving only	47%	73%	15%	57%	33%	10%	40%	43%	38%	34%	36%	42%	32%	31%	42%	41%	47%
Autumn calving only	9%	0%	44%	13%	32%	75%	22%	20%	27%	23%	23%	23%	29%	24%	25%	25%	26%

(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 = 756

Q4. (Northern Australia only) And what proportion of your cattle sales goes to domestic process facilities or feedlots?
Base: All respondents who described their end market as both domestic and live export, n = 27

Both domestic process facilities or feedlots and live export market	3%
Domestic process facilities or feedlots only	95%
Live export market only	2%
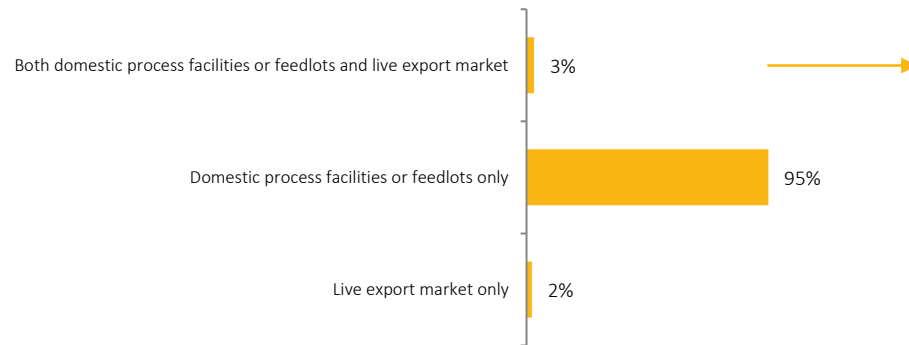
Of those who described their end market as both domestic and live export…

Mean proportion of cattle sales to domestic **53%**

Median proportion of cattle sales to domestic **50%**

Breeding herd aged 2-6 years old

Q8. And what proportion of these [TOTAL BREEDING FEMALE HERD] breeding cows and heifers are aged 2-6 years old?
Base: All respondents with at least one breeding female (breeding cow or heifer), n = 3,438

Of those who reported having at least one breeding female (breeding cow or heifer)…

Mean proportion aged 2-6 years old	**67%**
Median proportion aged 2-6 years old	**70%**

	State						Levy Band										
	NSW	QLD	SA	TAS	VIC	WA	Category 1 (lowest band)	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
Base:	1,215	786	175	127	810	296	445	328	357	494	380	182	192	395	251	159	255
Mean proportion aged 2-6 years old	69%	65%	65%	63%	67%	67%	67%	67%	65%	64%	68%	65%	67%	68%	71%	65%	71%
Median proportion aged 2-6 years old	75%	70%	70%	70%	70%	70%	75%	70%	70%	70%	70%	70%	70%	75%	75%	70%	70%

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 November 2023 survey used a mixed-method approach. Producers with email contact details were provided with the opportunity to respond to an online survey invitation. After 3 reminders, phone surveys were used as the method to 'top up' the final sample of respondents.

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:

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

Sample size

A total of n = 3,767 responses were provided by producers as follows:

	Overall	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
# of surveys	n = 3,767	n = 15	n = 1,299	n = 15	n = 864	n = 189	n = 144	n = 930	n = 311

Timing

The interviewing was undertaken between 13th November 2023 – 18th December 2023.

Weighting

The survey results were weighted. A description of the weighting process used for the November 2023 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:

o 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.

o Coverage across farm businesses of different sizes – obviously, the 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.

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 Levy Payer Register 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 November 2023 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	Category 7	Category 8	Category 9	Category 10	Category 11 (highest band)
AUSTRALIA	77,407	15,557	7,674	8,389	11,097	7,899	3,479	3,510	7,492	4,329	3,188	4,793
NSW	26,677	5,331	2,753	3,014	3,809	2,711	1,170	1,155	2,466	1,419	1,125	1,723
QLD	20,072	4,622	2,102	2,306	2,880	1,999	826	817	1,732	979	736	1,072
VIC	19,513	3,697	1,894	2,034	2,890	2,046	966	1,000	2,099	1,169	761	957
WA	4,331	746	391	404	614	468	195	241	427	298	210	338
SA	3,742	584	271	342	473	344	181	154	445	283	216	450
TAS	2,660	498	221	250	372	292	126	129	294	160	119	199
NT	247	35	18	20	29	23	7	11	21	15	19	50
ACT	165	44	25	20	30	15	8	4	8	7	2	4

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, p̂ 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
	3,767 (total surveys completed)
10%	± 0.96%
20%	± 1.28%
30%	± 1.46%
40%	± 1.56%
50%	± 1.60%
60%	± 1.56%
70%	± 1.46%
80%	± 1.28%
90%	± 0.96%

(Survey Estimate)

	Estimated Population	Sample Size	Margin of Error (assuming max survey estimate of 50%)
Australia	77,407	3,767	± 1.60%
NSW	26,677	1,299	± 2.72%
QLD	20,072	864	± 3.33%
VIC	19,513	930	± 3.21%
WA	4,331	311	± 5.35%
SA	3,742	189	± 6.95%
TAS	2,660	144	± 7.94%
NT	247	15	n/a
ACT	165	15	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 (np̂ < 10 or n(1-p̂) < 10).

Beef Producer Intentions Survey
[BPIS: November 2023]

This research was conducted by Intuitive Solutions on behalf of MLA. For more information, please contact:

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