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Live export statistics

Feeder and slaughter cattle exports in March increased 63% from the previous month, totalling almost 63,000 head , however remained well below the historical average. Through the first quarter of 2017 feeder and slaughter cattle exports were back 45% compared with 2016 levels, underpinned by lower availability of Australian cattle, high cattle prices and a range of in-market challenges. A wetter first quarter in WA and the NT also further tightened supplies, while greater numbers shifted through ports in Queensland – which, with the exception of cyclone Debbie, had a drier-to-average start to the year.

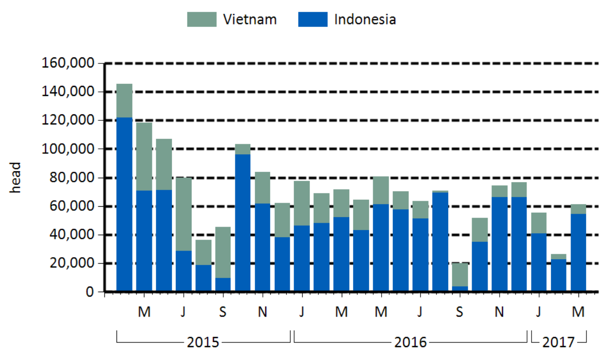
This edition of LiveLink includes the latest trends in Australian live export trade statistics and prices. Please note that all export data over the past nine months may later be revised.

Exports of feeder and slaughter cattle to Vietnam and Indonesia both edged higher in March, albeit off a low base in February. Exports to Vietnam totalled 6,558 head, where importer demand continues to be challenged by high cattle prices and the market settles from strong feedlot sector growth in 2014 and 2015 – for the year ending March 2017 exports to Vietnam were back 192,000 head on the previous 12-month period.

Exports to Indonesia paint a similar picture, tracking 14% lower for the 12-months ending March 2017, influenced by supply constraints out of Australia but enhanced by the presence of Indian buffalo meat (IBM) across the market. Indonesian State Logistics Agency (BULOG) looks set to bring in additional 50,000 tonnes of IBM over coming months, with an estimated 39,000 tonnes already in cold storage. The Indonesian Government is looking to ensure there is a sufficient supply of beef for Ramadan, which falls earlier this year, commencing 26th May. Historically, there has been a spike in exports in the lead up to Ramadan, peaking in April in 2014 and 2015 but impacted by permit allocation last year.

Current wet market prices for IBM in the Greater Jakarta area vary widely and range from IDR 75,000-105,000/kg, while fresh beef trades at a premium from IDR 110,000-120,000/kg.

Figure 1 Feeder and slaughter cattle exports



Source: ABS, DAWR

Table 1 Feeder and slaughter cattle exports by destination

Unit: head Destination market	2017 Mar	2017 Feb	2017 Jan	12 months ending 2017 March	12 months ending 2016 March	% change	head change
Brunei			739	4,712	4,770	-1%	-58
Cambodia				2,800			2,800
China		1,200		1,538	150	925%	1,388
Egypt					18,500	-100%	-18,500
Indonesia	54,683	22,850	40,747	572,261	663,715	-14%	-91,454
Israel		11,000		65,733	81,254	-19%	-15,521
Japan	120		1,077	7,434	9,082	-18%	-1,648
Jordan					2,233	-100%	-2,233
Kuwait	50	50	49	399	200	100%	199
Malaysia	1,166		900	25,283	46,106	-45%	-20,823
Mexico				6,677			6,677
Philippines			1,542	17,236	23,634	-27%	-6,398
Qatar	200		150	1,450	200	625%	1,250
Russian Federation					51,023	-100%	-51,023
Thailand				1,461	3,849	-62%	-2,388
Turkey				50,900	7,000	627%	43,900
UAE					705	-100%	-705
Vietnam	6,558	3,513	14,451	143,563	336,423	-57%	-192,860
Total volume	**62,777**	**38,613**	**59,655**	**901,447**	**1,248,844**	**-28%**	**-347,397**

Table 2 Feeder and slaughter cattle exports by port

Unit: head Year		Total	Darwin	Unknown*	Townsville	Fremantle	Broome	Port Adelaide	Wyndham	Other
2015	Oct	**122,902**		122,902						
	Nov	**106,488**	32,332		29,227	16,750	4,105		2,085	21,989
	Dec	**68,387**	39,850		10,294	11,482				6,761
2016	Jan	**106,257**	19,902		21,280	49,300				15,775
	Feb	**81,156**	20,033		35,114	13,131		6,397		6,481
	Mar	**91,917**	43,892		17,146	6,643			5,209	19,027
	Apr	**98,095**	14,656		33,340	8,878	24,494	5,020	3,741	7,966
	May	**86,659**	33,519		21,290	3,000	17,427		8,012	3,411
	Jun	**99,096**	45,283		12,014	12,728	17,599	6,631	2,733	2,108
	Jul	**81,052**	46,016		6,528	12,420	13,327		2,761	
	Aug	**83,307**	33,917		19,797	7,990	9,463		5,363	6,777
	Sep	**29,931**	9,743		12,983	5,016				2,189
	Oct	**71,368**	20,104		19,141	17,225	8,277			6,621
	Nov	**89,499**	36,350		3,646	36,117	2,830	3,500		7,056
	Dec	**102,634**	43,722		13,388	40,536		2,000		2,988
2017	Jan	**59,655**	12,332		31,995	8,822				6,506
	Feb	**38,613**	17,941			19,472				1,200
	Mar **	**62,777**								

Data specifications

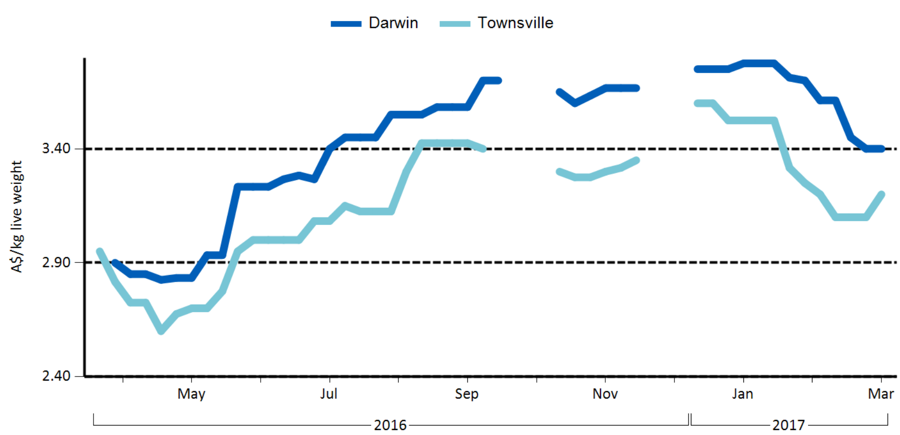
Due to the timing of live export trade data being released, both Australian Bureau of Statistics (ABS) and Department of Agriculture and Water Resources (DAWR) data is used in this report. The most recent month and, at times, second most recent month trade data comes from DAWR. This data is then updated when ABS data is released.

* In October 2015, the ABS did not disclose feeder and slaughter cattle trade data to Vietnam, China and Japan. For this month, individual country shipments have been estimated by MLA. In addition, trade data by individual port was also not disclosed in October 2015 – this data is aggregated under "Unknown" port.

** DAWR does not report on individual ports. Port data is updated when released by the ABS.

All pricing data is collected by Meat and Livestock Australia from a range of sources.

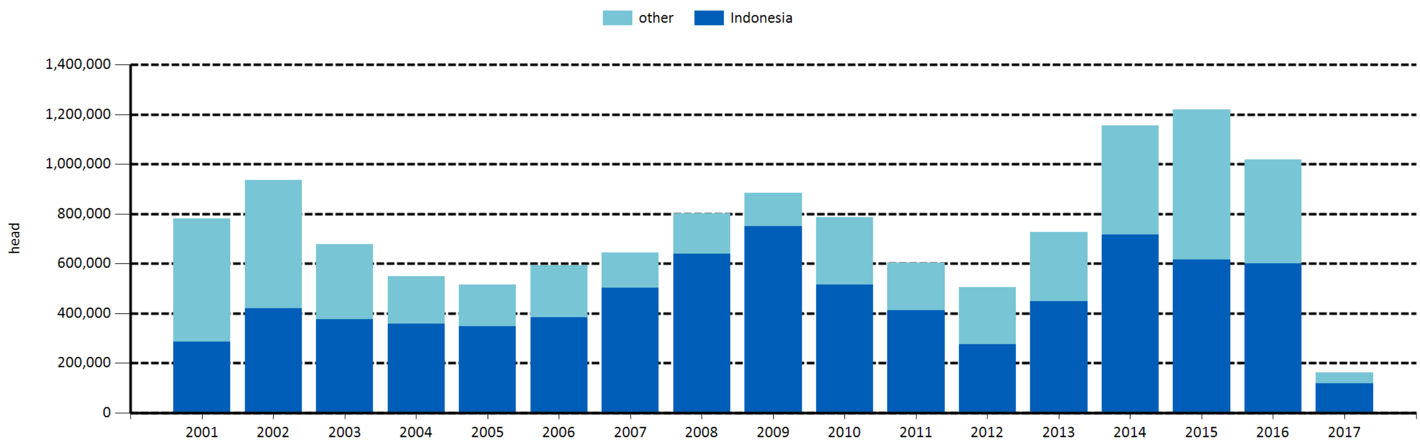
Figure 2 Live export feeder cattle prices



Source: MLA live exporter survey
Please note, prices include up to the end of the previous month and may not include the latest trends

For more detailed live export price information, in addition to other northern cattle markets, click here to access the latest edition of the North of the Tropic Beef Report.

Figure 3 Feeder and slaughter cattle exports***



Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

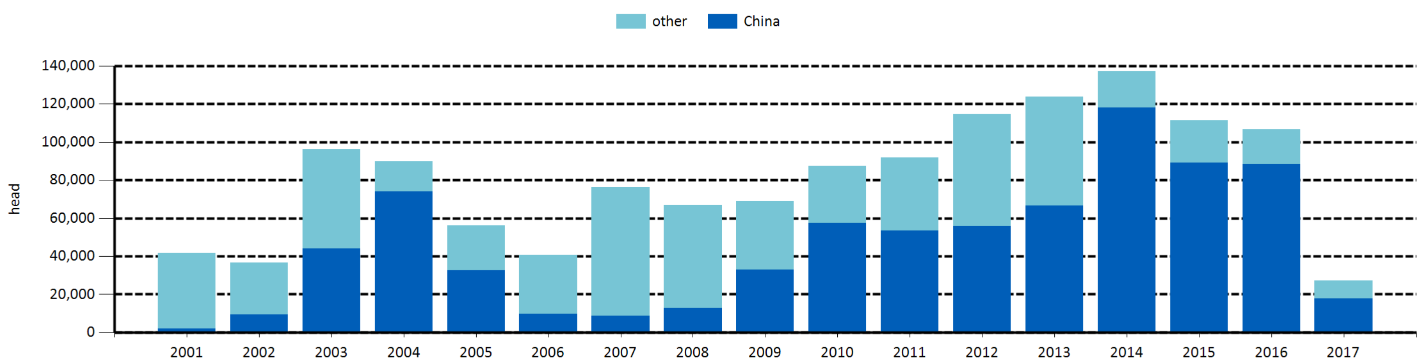
Table 3 Beef and dairy breeder cattle exports by destination

Unit: head Destination market	2017 Mar	2017 Feb	2017 Jan	12 months ending 2017 March	12 months ending 2016 March	% change	head change
Bangladesh				4	70	-94%	-66
China	8,371	3,274	6,125	87,033	97,587	-11%	-10,554
Indonesia	1,250		19	3,719	1,977	88%	1,742
Japan	1,301			1,604	12	13267%	1,592
Kuwait				255	3,204	-92%	-2,949
Laos					930	-100%	-930
Malaysia	56	75	63	1,510	2,528	-40%	-1,018
Pakistan	1,650	2,415	1,799	8,301	3,507	137%	4,794
Philippines				240			240
Qatar					360	-100%	-360
Russian Federation					2,354	-100%	-2,354
Samoa					46	-100%	-46
Sri Lanka					2,498	-100%	-2,498
Taiwan	220	215	351	1,584	628	152%	956
Thailand		4		237			237
Turkey				3,475			3,475
UAE		11		292	379	-23%	-87
Vietnam				2,454	3,711	-34%	-1,257
Total volume	**12,848**	**5,994**	**6,558**	**108,939**	**119,791**	**-9%**	**-10,852**

Table 4 Beef and dairy breeder cattle exports by port

Unit: head Year		Total	Portland	Geelong	Sydney	Melbourne	Port Adelaide	Fremantle	Darwin	Other
2016	Apr	**8,877**	8,434		260	183				
	May	**12,272**	7,917	3,828	90	435				2
	Jun	**12,696**	8,721		30	470	3,475			
	Jul	**9,479**	3,904	4,020	40	71			930	514
	Aug	**8,486**	8,267		219					
	Sep	**10,461**	9,924		48				489	
	Oct	**4,422**	4,000			222				200
	Nov	**1,111**			230	460				421
	Dec	**15,735**	9,887	2,000	202	789		2,651		206
2017	Jan	**6,558**	6,125		82	351				
	Feb	**5,994**	5,689		79	226				
	Mar **	**12,848**								

Figure 4 Beef and dairy breeder cattle exports***

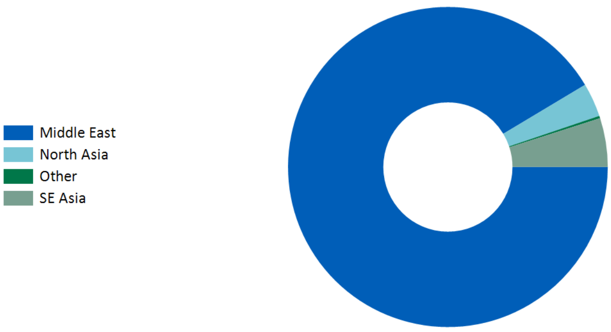


Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

Table 5 Sheep exports by destination

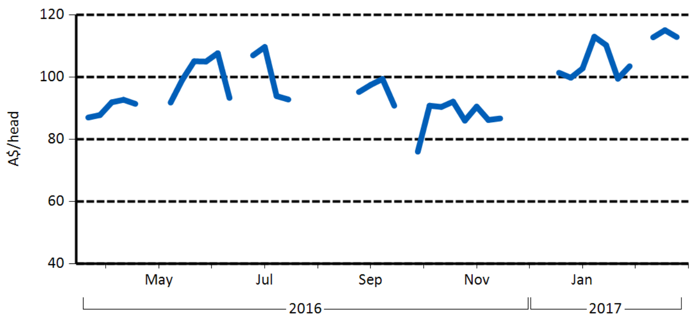
Unit: head Destination market	2017 Mar	2017 Feb	2017 Jan	12 months ending 2017 March	12 months ending 2016 March	% change	head change
Argentina	19	8		38	45	-16%	-7
Bahrain					235,000	-100%	-235,000
Bangladesh					50	-100%	-50
Brunei				300	831	-64%	-531
Chile	6			6	20	-70%	-14
China				6,456	11,990	-46%	-5,534
Egypt					9,500	-100%	-9,500
Fiji				77			77
Indonesia			24	24			24
Israel		25,000		117,651	105,548	11%	12,103
Japan			81	81			81
Jordan		43,500		205,700	106,000	94%	99,700
Kazakhstan					7	-100%	-7
Kuwait	49,909	58,959	20,595	571,036	748,084	-24%	-177,048
Lebanon				12,000			12,000
Malaysia	3,127	2,664	2,909	57,928	56,556	2%	1,372
New Zealand			2	11	5	120%	6
Oman	5,000	12,935		94,675	88,804	7%	5,871
Philippines				116	243	-52%	-127
Qatar	60,000	45,000	37,000	573,000	407,148	41%	165,852
Samoa					14	-100%	-14
Singapore				2,100	1,980	6%	120
UAE	14,000	9,451	4,000	156,120	261,928	-40%	-105,808
Uruguay		5		5	70	-93%	-65
Total volume	**132,061**	**197,552**	**64,611**	**1,797,354**	**2,033,823**	**-12%**	**-236,469**

Figure 5 Sheep exports by region - past 12 months



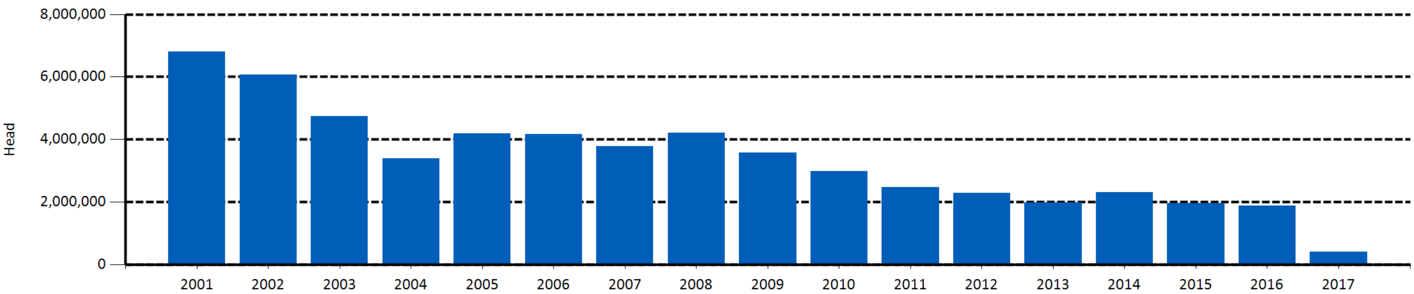
Source: ABS, DAWR

Figure 6 WA live export wether price



Source: MLA Muchea saleyard market report
Please note, prices include up to the end of the previous month and may not include the latest trends

Figure 7 Sheep exports***



Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

First quarter sheep exports declined 16% year-on-year, heavily influenced by limited supply and near-record sheep prices. Exports to Qatar totalled 60,000 head, a 33% increase month-on-month and placing it ahead of Kuwait as the largest export destination for Australian sheep over the past year. Export wethers through WA saleyards averaged about $107/head over the first quarter, up from $93/head recorded last year and comparable with the market witnessed in 2011.

Figure 8 Sheep exports by state - past 12 months

Source: ABS, DAWR

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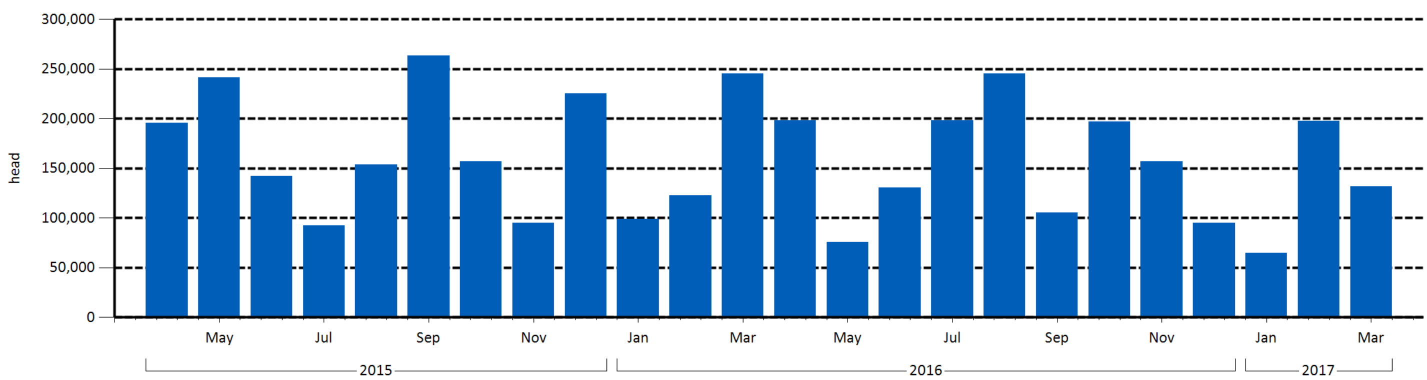
Table 6 Sheep exports by port

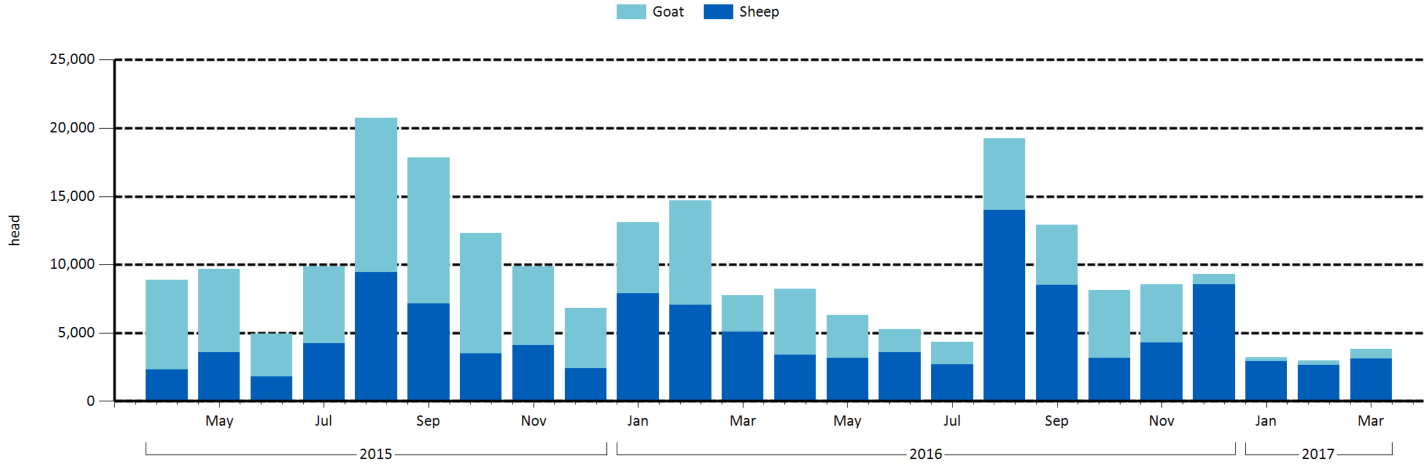
Unit: head Year		Total	Fremantle	Port Adelaide	Perth	Portland	Sydney	Melbourne	Adelaide	Other
2015	Oct	**156,968**	153,425		1,095		711	30	1,707	
	Nov	**95,143**	90,842		1,437		183	627	1,869	185
	Dec	**225,657**	179,628	42,790	734		1,668		837	
2016	Jan	**98,815**	89,262	5,000	2,036		24		2,493	
	Feb	**123,087**	79,887	38,484	2,237		171	32	1,628	648
	Mar	**245,280**	241,403		2,922		108	98	749	
	Apr	**198,033**	193,166		2,536		100	657	1,574	
	May	**75,806**	52,293	20,245	1,066		116	692	1,394	
	Jun	**130,883**	124,028	2,972	1,567			275	2,041	
	Jul	**198,147**	194,300		2,164		250	1,433		
	Aug	**245,339**	202,509	33,000	3,835			1,017	2,529	2,449
	Sep	**105,417**	96,894		6,867		350	132	1,174	
	Oct	**197,093**	193,949		2,297		54		793	
	Nov	**157,204**	151,438		2,077			2,168	1,521	
	Dec	**95,208**	89,639		2,561		67		2,941	
2017	Jan	**64,611**	61,595		2,245		24	83	664	
	Feb	**197,552**	161,735	33,110	2,602		13		62	30
	Mar **	**132,061**								

Figure 9 Sheep exports



Source: ABS, DAWR

Figure 10 Goat and sheep exports to Malaysia & Singapore



Source: ABS, DAWR

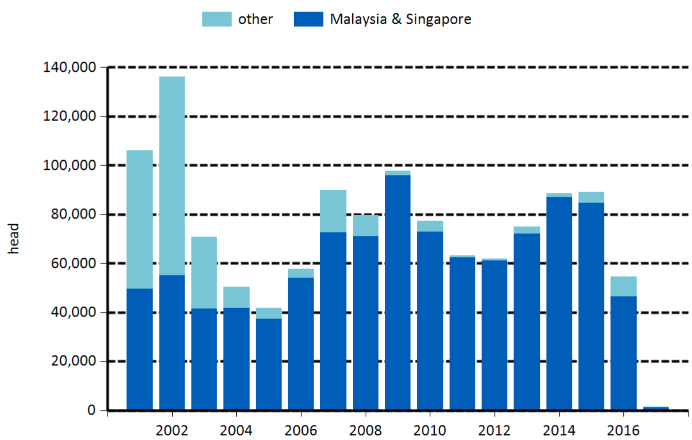
Table 7 Goat exports by destination

Unit: head Destination market	2017 Mar	2017 Feb	2017 Jan	12 months ending 2017 March	12 months ending 2016 March	% change	head change
Brunei				216	1,431	-85%	-1,215
Fiji				75			75
Indonesia			7	7	211	-97%	-204
Malaysia	710	306	305	32,235	77,968	-59%	-45,733
Nepal				70	96	-27%	-26
New Zealand	8			15	1	1400%	14
Philippines		25		447	483	-7%	-36
UAE		128		3,421	5,029	-32%	-1,608
Vietnam				779			779
Total volume	**718**	**459**	**312**	**37,265**	**85,219**	**-56%**	**-47,954**

Goat exports have remained limited through the first quarter of 2017, as increased competition from smallstock processors for the limited pool of supply continues. The eastern states over-the-hook goat indicators remain close to record levels; as of the 6th April the 12-16kg cwt goat indicator averaged 643¢/kg cwt. Growing demand for goatmeat on the international market was reflected in first quarter exports, totalling 10,004 tonnes swt and 15% higher year-on-year.

Goat exports to Malaysia are down significantly to 1,321 head for three months to March due to high prices and reduced supply. Importers are sourcing increasing numbers of cheaper goats from Myanmar and Thailand and importing more Australian sheep as an alternative.

Figure 11 Goat exports***



Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

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