LiveLink

Live export statistics

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. To subscribe to this report or if you have any queries, please email marketinfo@mla.com.au. Historical live export data can be downloaded from MLA's public database - http://statistics.mla.com.au/.

Please note, this edition of LiveLink also includes some MLA analysis on the supply of cattle inside and outside the Blue Tongue Zone in Australia – this is summarised on the back page of this report.

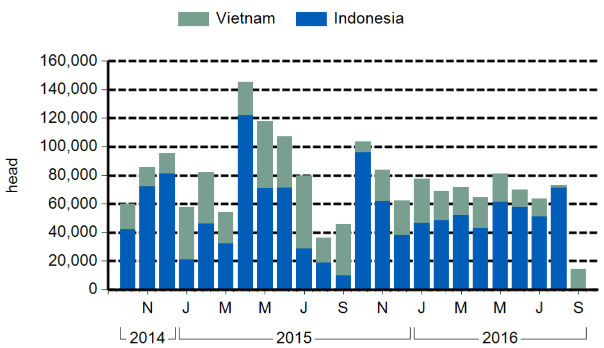
Cattle export commentary

There were no cattle exported to Indonesia in September. This was due to delays in the issue of T3 permits and Indonesian industry-government negotiations relating to a proposed mandatory 1:5 ratio of breeder to feeder cattle imports. Neither the proposed 1:5 ratio nor the implementation timeframe have been confirmed. Import permits have been issued to three importers that have agreed with the breeder requirement. Delays in further permits and reduced volumes to Indonesia are expected until the issue is resolved.

Year-to-September feeder and slaughter cattle exports were close to 754,000 head, back 18% year-on-year. Despite the recent slowdown in trade to Indonesia, exports to the market so far this year are up 3%, with close to 432,000 head exported in the first nine months of the year. Vietnam has registered the most significant decline amongst the larger markets – halving year-on-year to 153,000 head but still above 2014 levels. Much of the decline to markets, particularly those in South East Asia, has been in response to the supply-driven record high prices for Australian cattle. While quotes are lightly reported at the moment, feeder steers delivered to Darwin have been 370¢/kg in recent weeks, about 15% (or 50¢/kg) above this time last year.

Breeder cattle (beef and dairy) exports, primarily out of Victoria and destined for China, were almost 74,000 head in the first nine months of 2016, up 21% year-on-year but still below 2014 levels.

Figure 1 Feeder and slaughter cattle exports



Source: ABS, DAWR

Table 1 Feeder and slaughter cattle exports by destination

Unit = head Destination market	2016 Sep	Aug	Jul	12 months ending 2016 September	12 months ending 2015 September	% change	head change
Brunei		1,080	300	5,029	5,211	-3%	-182
Cambodia				2,800			2,800
China				488			488
Egypt					18,500	-100%	-18,500
Indonesia		71,458	51,255	627,239	616,363	2%	10,876
Israel	4,934	6,730	11,050	80,885	89,987	-10%	-9,102
Japan	2,159			8,909	8,877	0%	32
Jordan					2,233	-100%	-2,233
Kuwait				350			350
Malaysia		4,314	6,143	29,088	52,244	-44%	-23,156
Mauritius					4,040	-100%	-4,040
Mexico				6,677			6,677
Philippines	2,634			21,611	23,333	-7%	-1,722
Qatar		200		950	200	375%	750
Russian Federation				43,812	37,063	18%	6,749
Thailand				1,461	9,205	-84%	-7,744
Turkey				14,734	2,400	514%	12,334
UAE				305	1,900	-84%	-1,595
Vietnam	14,452	1,400	12,304	207,032	351,586	-41%	-144,554
Total volume	**24,179**	**85,182**	**81,052**	**1,051,370**	**1,223,142**	**-14%**	**-171,772**

Table 2 Feeder and slaughter cattle exports by port

Year		Total	Darwin	Unknown*	Townsville	Fremantle	Broome	Port Adelaide	Wyndham	Other
2015	Apr	**167,249**	76,891		47,221	7,810	17,400	7,476	5,941	4,510
	May	**136,220**	47,455		39,055	4,950	22,178		18,810	3,772
	Jun	**129,662**	69,877		28,389	12,000	11,561		4,745	3,090
	Jul	**115,019**	41,110		30,605	7,500	24,198	6,110	3,069	2,427
	Aug	**59,005**	33,955			9,000	15,063			987
	Sep	**64,582**	26,386		19,073	12,033	3,107			3,983
	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	**85,182**	33,921		21,331	7,990	9,798		5,365	6,777
	Sep **	**24,179**								

Data specifications

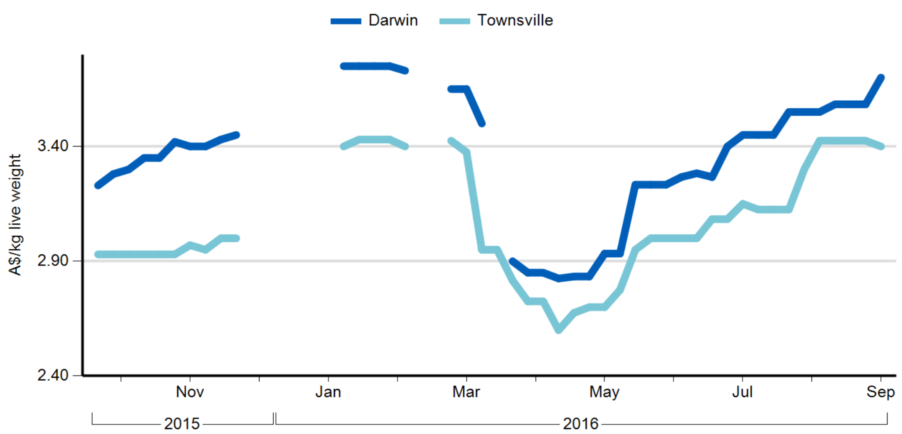
Due to the timing of live export trade data being released, both Australian Bureau of Statistics (ABS) and Department of Agriculture and Water Resources (DAWR) data is used in this report. The most recent month and, at times, second most recent month trade data comes from DAWR. This data is then updated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

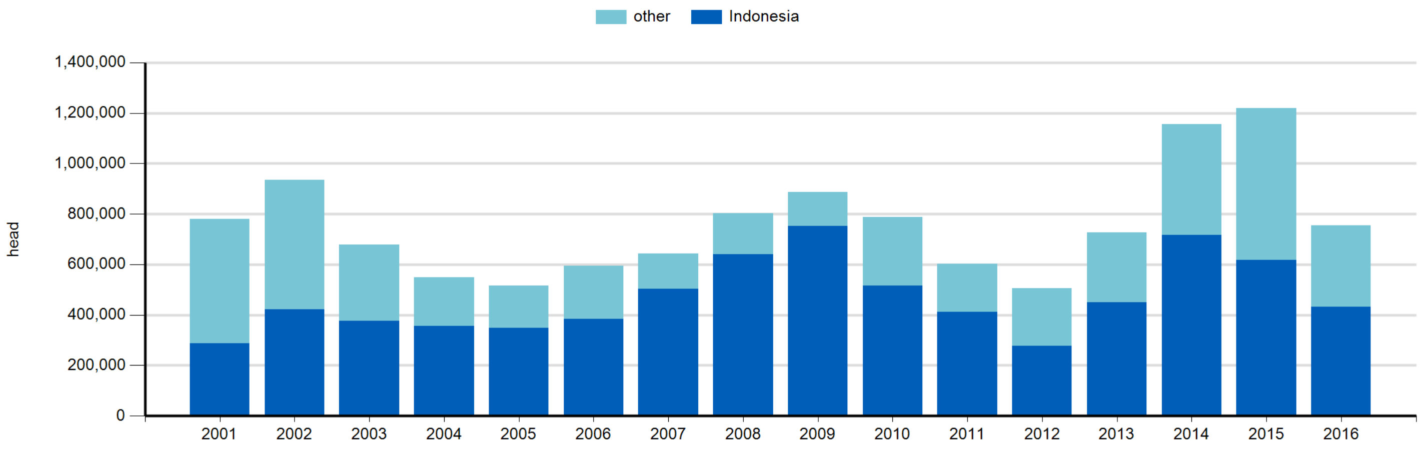
Figure 2 Live export feeder cattle prices



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

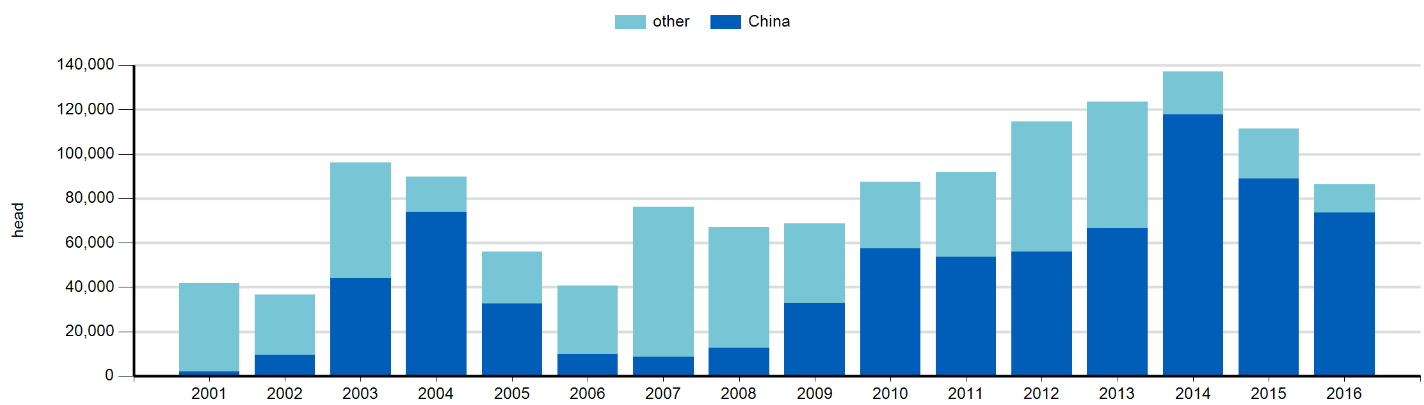
Table 3 Beef and dairy breeder cattle exports by destination

Unit = head / **Destination market**	**2016** Sep	Aug	Jul	**12 months ending 2016 September**	**12 months ending 2015 September**	**% change**	**head change**
Bangladesh				70			70
China	6,922	6,568	7,924	101,612	92,516	10%	9,096
Indonesia			1,444	2,351	1,914	23%	437
Japan				303	24	1163%	279
Kuwait				3,170	294	978%	2,876
Laos				930			930
Malaysia	48	190	81	2,051	2,393	-14%	-342
New Caledonia					5	-100%	-5
Pakistan				3,507	1,989	76%	1,518
Philippines				240			240
Qatar				360			360
Russian Federation				1,152	2,279	-49%	-1,127
Samoa					46	-100%	-46
Singapore					30	-100%	-30
Sri Lanka					2,498	-100%	-2,498
Taiwan				628	3	20833%	625
Thailand		29		31	122	-75%	-91
Turkey				3,475			3,475
UAE			24	378	94	302%	284
Vietnam	489	1,699	6	2,941	6,151	-52%	-3,210
Total volume	**7,459**	**8,486**	**9,479**	**123,199**	**110,358**	**12%**	**12,841**

Table 4 Beef and dairy breeder cattle exports by port

Year		**Total**	**Portland**	**Geelong**	**Sydney**	**Melbourne**	**Port Adelaide**	**Fremantle**	**Darwin**	**Other**
2015	Oct	**5,345**	3,685		338	962		360		
	Nov	**13,064**	11,777		379	722				186
	Dec	**18,494**	11,835	4,245	1,245	256	230	683		
2016	Jan	**99**			99					
	Feb	**11,044**	8,639		5	64	2,300			36
	Mar	**11,914**	10,077		45	220		1,572		
	Apr	**12,877**	8,434		260	183	2,957	1,043		
	May	**12,272**	7,917	3,828	90	435				2
	Jun	**12,666**	8,721			470	3,475			
	Jul	**9,479**	3,904	4,020	40	71			930	514
	Aug	**8,486**	8,267		219					
	Sep **	**7,459**								

Figure 4 Beef and dairy breeder cattle exports***

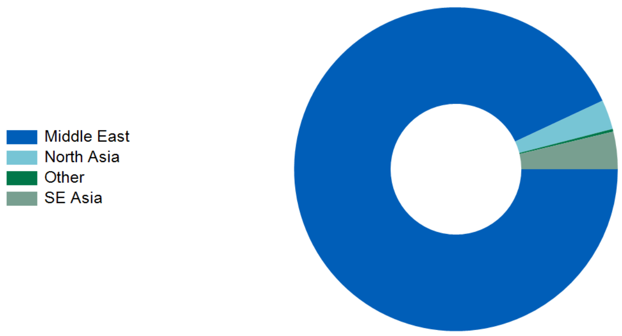


Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

Table 5 Sheep exports by destination

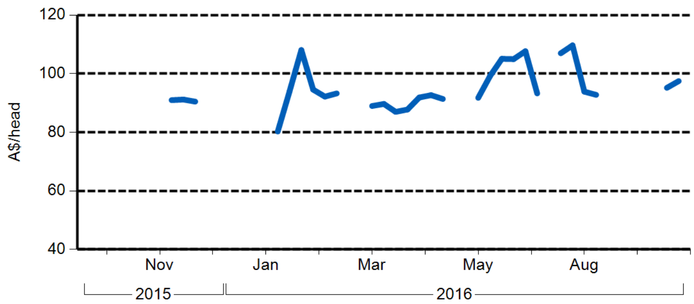
Unit = head Destination market	2016 Sep	2016 Aug	2016 Jul	12 months ending 2016 September	12 months ending 2015 September	% change	head change
Argentina				41	24	71%	17
Bahrain					385,000	-100%	-385,000
Bangladesh				50			50
Brunei				1,131			1,131
Chile					20	-100%	-20
China		2,449	1,133	4,982	16,540	-70%	-11,558
Egypt					9,500	-100%	-9,500
Fiji				77			77
Israel	26,479	15,000	22,200	139,699	101,000	38%	38,699
Jordan		35,000	38,000	182,700	228,500	-20%	-45,800
Kazakhstan				7	12	-42%	-5
Kuwait	27,415	53,500	50,600	693,134	573,743	21%	119,391
Lebanon				12,000			12,000
Malaysia	6,312	13,976	2,714	63,119	46,764	35%	16,355
New Zealand		5		10	2	400%	8
Oman	5,000	29,240	5,000	84,740	79,804	6%	4,936
Philippines				116	284	-59%	-168
Qatar	30,000	60,000	65,000	541,000	374,162	45%	166,838
Samoa					14	-100%	-14
Singapore	2,100			2,100	4,180	-50%	-2,080
UAE	8,000	36,169	13,500	173,488	268,134	-35%	-94,646
Uruguay				70			70
Total volume	**105,306**	**245,339**	**198,147**	**1,898,464**	**2,087,683**	**-9%**	**-189,219**

Figure 5 Sheep exports by region - past 12 months



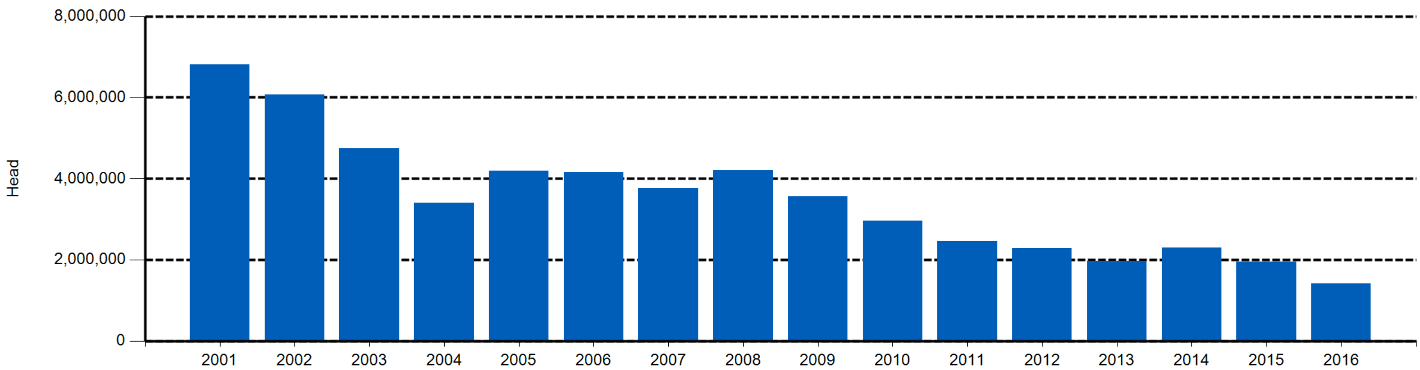
Source: ABS, DAWR

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***

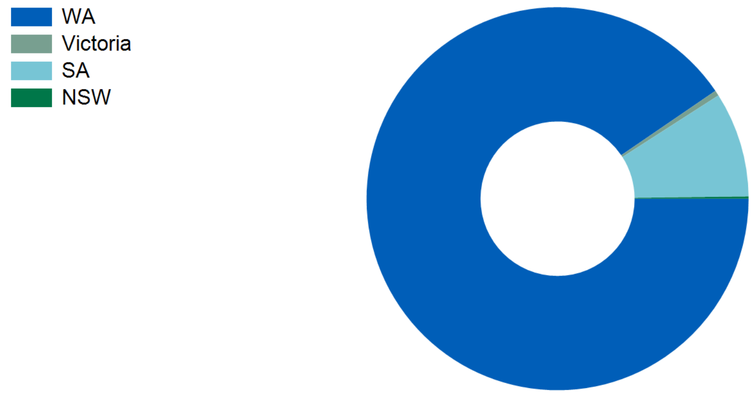


Source: ABS, DAWR ***the current year total is up to and including the most recently reported month

Sheep export commentary

While some Middle Eastern sheep markets have recorded growth this year (namely Israel, Kuwait, Oman and Qatar) overall exports to the region are back so far in 2016, largely underpinned by the exit of Bahrain from the market and reduced shipments to the UAE. With goats becoming increasingly scarce, following a wet winter across much of eastern Australia, year-to-September sheep exports to the traditional goat market of Malaysia have increased 39% year-on-year, to just over 53,000 head.

Figure 8 Sheep exports by state - past 12 months



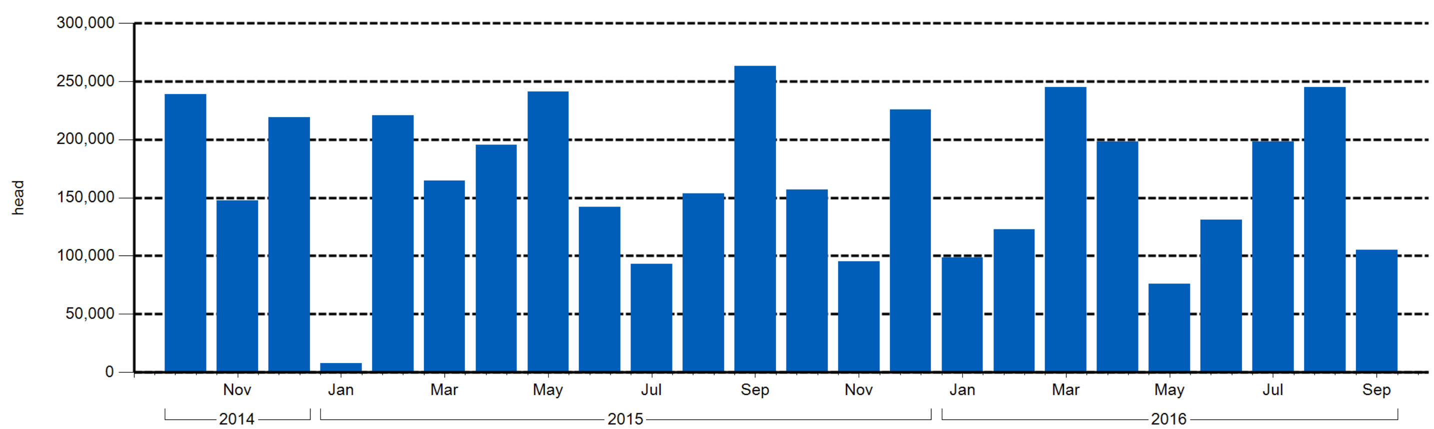
Want to subscribe to the monthly LiveLink report? Email marketinfo@mla.com.au to receive any of MLA's regular reports free of charge.

[Click here to find the full list of MLA market information publications.]()

Table 6 Sheep exports by port

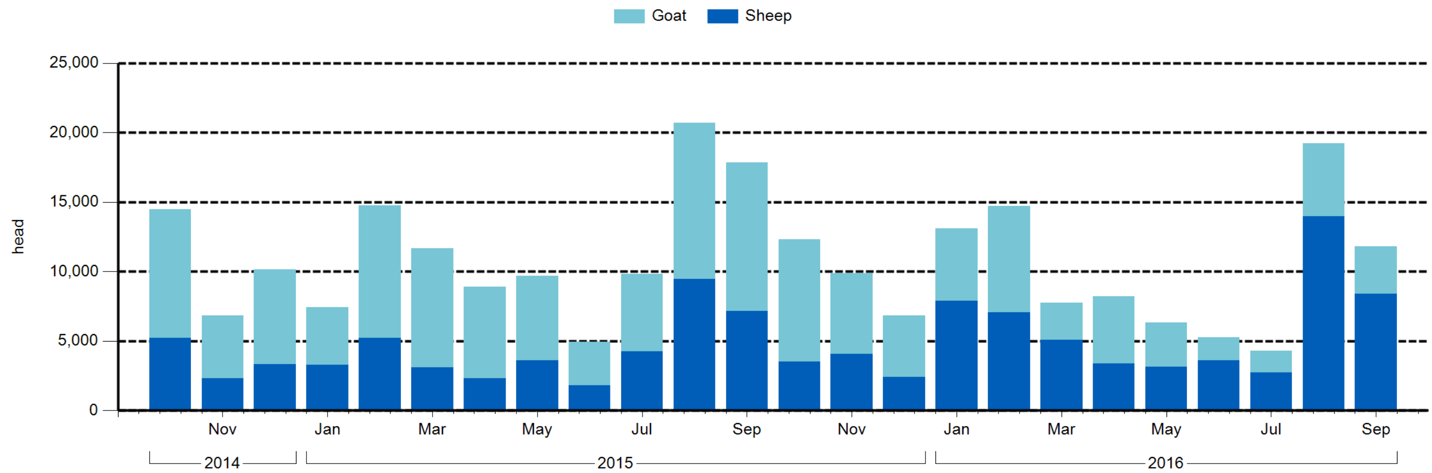
Year		Total	Fremantle	Port Adelaide	Perth	Portland	Sydney	Melbourne	Adelaide	Other
2015	Apr	**195,589**	131,648	61,600	500		658	24	1,159	
	May	**241,376**	198,470	38,000	936		296	1,300	2,374	
	Jun	**142,121**	91,592		2,087	41,946	245	5,408	843	
	Jul	**92,816**	84,690	3,900	1,020				3,206	
	Aug	**153,713**	149,709		1,515		1,293		1,196	
	Sep	**263,258**	207,156	45,000	6,182		606	2,955	1,359	
	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 **	**105,306**								

Figure 9 Sheep exports



Source: ABS, DAWR

Figure 10 Goat and sheep exports to Malaysia & Singapore



Source: ABS, DAWR

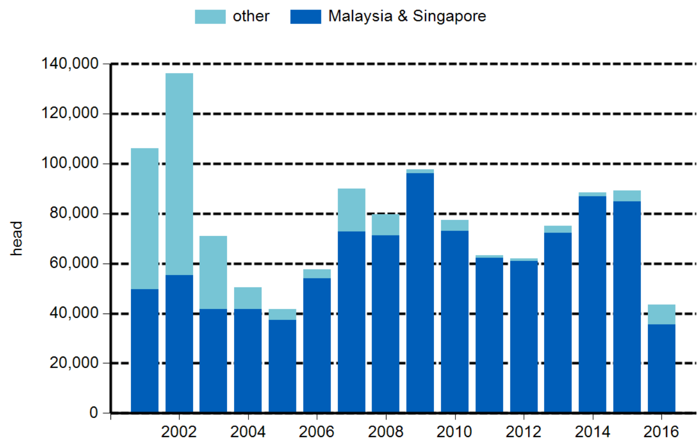
Table 7 Goat exports by destination

Unit = head Destination market	2016 Sep	Aug	Jul	12 months ending 2016 September	12 months ending 2015 September	% change	head change
Brunei				647	1,000	-35%	-353
Fiji				75			75
Indonesia				211			211
Malaysia	3,374	5,258	1,601	54,451	86,023	-37%	-31,572
Nepal			50	166	79	110%	87
New Zealand				7	1	600%	6
Philippines				550	508	8%	42
Singapore					345	-100%	-345
UAE		630	1,230	6,460	2,383	171%	4,077
Vietnam				679	50	1258%	629
Total volume	**3,374**	**5,888**	**2,881**	**63,246**	**90,389**	**-30%**	**-27,143**

Goat export commentary

Goat supplies throughout eastern Australia have been very tight over the past six months. Weekly goat slaughter has tracked, on average, 20% below 2015 levels and the over-the-hook goat price indicators have continued to approach 600¢/kg carcase weight. Goat exports, primarily to Malaysia, have declined 37% to 43,000 head – albeit partly offset by increased sheep exports.

Figure 11 Goat exports***



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

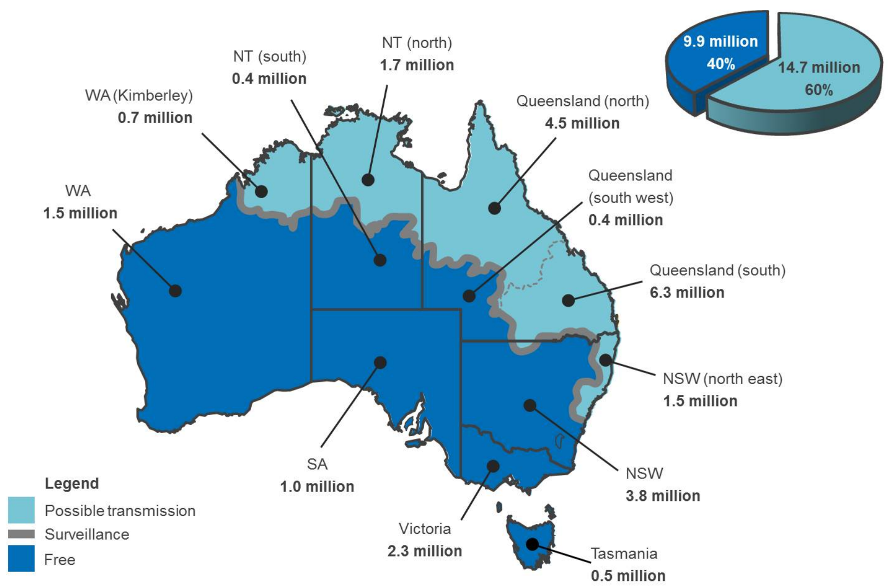
LIVECORP

mla MEAT & LIVESTOCK AUSTRALIA

LiveLink

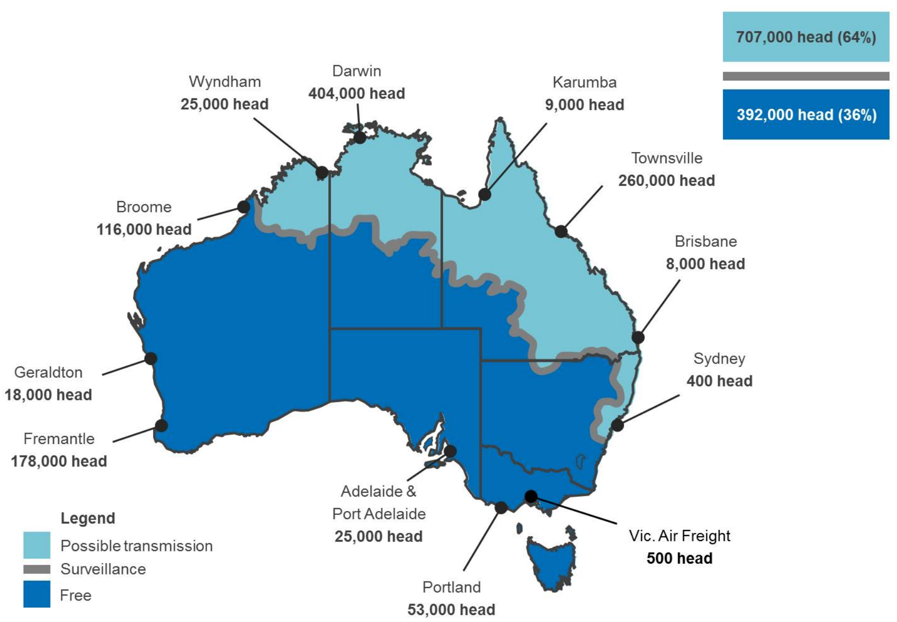
Live export statistics

Map 1 Beef Cattle Herd and Blue Tongue Virus Zone



Herd based off June 2015 ABS estimate. Excludes dairy cattle.
Regional herd numbers are MLA estimates. Blue Tongue line as of 29 August 2016.

Map 2 Feeder & Slaughter cattle exports by port



ABS 2015-16 financial year feeder/slaughter cattle exports. Totals have been rounded. ABS did not report port of loading in October 2015 – port exports were estimated from state totals for this month.

This special edition of LiveLink includes some MLA analysis on the supply of cattle within and outside the blue tongue zone.

Bluetongue is an insect-borne, viral disease that can affect sheep, goats, deer and cattle. A number of bluetongue serotypes are present in Australia, but the severe clinical disease seen in some other countries has not occurred in Australia. People are not affected by the virus. More information can be accessed by the virus. More information can be accessed here and the latest map can be found here.

With respect to Australian feeder and slaughter cattle exports destined for China, different regulations exist on stock drawn from either side of the blue tongue line. While not ruling out live cattle exports from within the Australian blue tongue zone, China's import regulations do favour cattle sourced from outside the blue tongue zone (predominantly southern Australia).

Using June 2015 herd estimates and the 29 August 2016 (latest available) blue tongue line, MLA estimate that approximately **60% of the herd is situated within the blue tongue zone**. Of these cattle, the vast majority are located in **Queensland**, with the remainder located in the **Kimberley**, **Top End**, and **coastal NSW**.

Using average farm level turnoff data from the ABARES annual Australian Agricultural and Grazing Industries Survey (AAGIS), MLA estimate approximately **54% (or 4.9 million head) of national farm level turnoff* occurs within the blue tongue zone**, with the remaining **46% (or 4.2 million head) coming from outside the zone** (turnoff estimated from the June 2015 herd estimate). High fertility and lower paddock deaths mean southern Australia has higher branding and turnoff rates.

Map 2 illustrates live feeder and slaughter cattle exports by port last financial year. While not illustrating cattle point of origin, the majority (64%) of cattle left ports from within the blue tongue zone last financial year. However, a large number (391,000 head) left ports from south of the blue tongue line, many of which would be eligible for blue tongue free zone status.

**Beef farm turnoff is defined as cattle leaving properties and could include transfers to restockers, feedlots, slaughter or live export. Hence, it does not necessarily represent cattle leaving the supply chain.*