

the PASTORAL INDUSTRY SNAPSHOT 2025

Welcome from Chairperson Tim Shackleton



I am pleased to present the latest annual pastoral industry snapshot – a summary of the issues, trends and challenges affecting the pastoral industry, based on direct feedback from those involved in it.

Each year, pastoral lessees submit an annual return to the Pastoral Lands Board (Board) covering a range of issues relating to the management of their lease(s). At the same time, lessees are asked to complete an optional survey covering a broader range of issues relating to market conditions and the impact of these on the current and future viability of their pastoral operation. The data presented here summarises feedback received from the 2024 annual return and optional survey.

In all, 74% of lessees responded to the optional survey - up from 22% in 2023. The high rate of return in 2024 provides confidence to the Board that the information received is valid and I would like to thank everyone who took the time to provide the data. I hope you find the document interesting and that you are able to draw some insights into the current and potential future state of pastoralism in Western Australia.

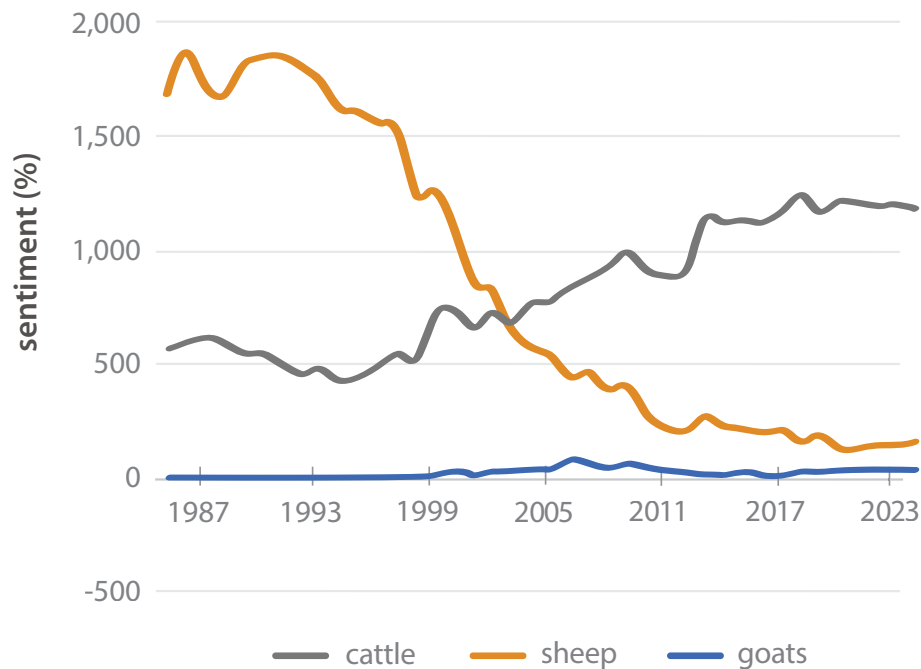


Tim Shackleton
Chair
WA Pastoral Lands Board
January 2026

Stocking Trends 1985 – 2024

Since the early 1990s, the population of sheep on Western Australian stations has experienced a marked decline. Conversely, cattle numbers rose considerably from the 1990s until approximately 2018, after which they have plateaued. Goat numbers exhibited modest growth starting in 1998, peaking at about 75,000 head in 2006; however, their overall population has remained comparatively low.

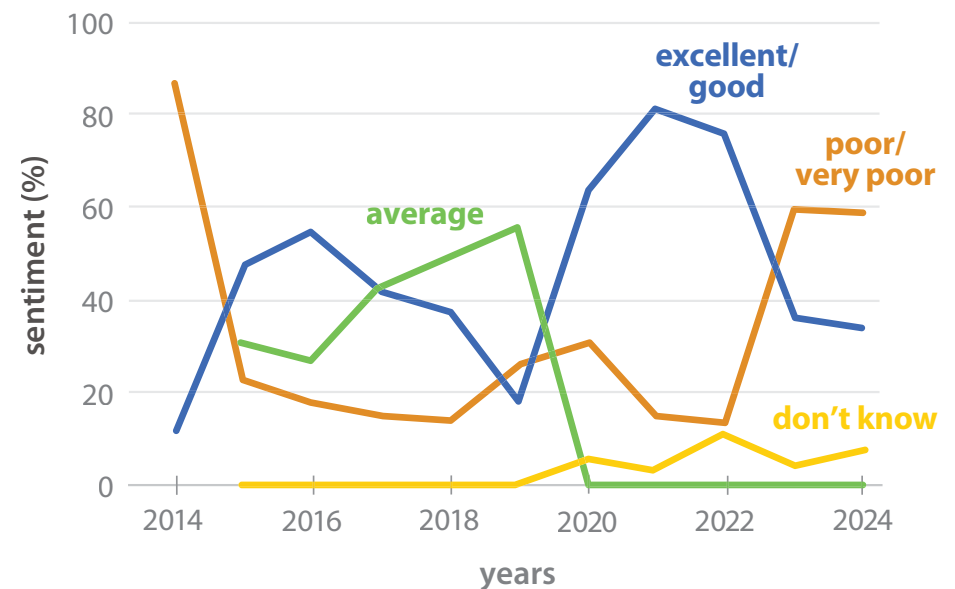
Stock numbers (head) by Class: WA 1985 to 2024



Economic state of the pastoral industry in Western Australia

Survey responses in 2023 reflected a notable shift in sentiment across the regions, with only 36% of participants expressing a positive outlook. This figure declined further in 2024, with just 34% of respondents rating the pastoral industry as being in very good or excellent shape. Across all regions, increased living costs coupled with declining livestock prices have exerted considerable pressure on the industry, likely influencing the outcomes for 2024. Additionally, poor winter rainfall in the southern rangelands during 2023 adversely affected the Gascoyne, Goldfields-Nullarbor, and Murchison regions and hindered the growth of palatable perennial shrubs in these areas. In contrast, 2024 witnessed record rainfall in many regions which is anticipated to positively influence sentiment and industry results when data for 2025 and beyond become available.

Question: “Overall, how would you rate the economic state of the pastoral industry in WA?”



Pastoral Lease Management and Compliance

The graphs in the following demonstrate how the information obtained from the Annual Returns and the Addendum assists the Board to gauge the perceptions of the pastoral industry and align its strategy with industry developments:

- Annual Return Data Collection and Trends
- Optional Addendum Survey

Economic/business viability

The Board acknowledges the challenges confronting the pastoral industry, including the escalating impacts of climate change, which threaten the long-term viability of some pastoral leases and their ability to deliver positive economic and environmental outcomes. In response to these challenges, the Board remains committed to engaging collaboratively with government, industry and pastoral lessees on innovative approaches to land management and livestock management practices. The Board is also dedicated to reducing administrative burdens and streamlining regulatory processes for pastoral lessees.

Question: “What actions do you think the Board and/or the State Government could take to assist and support the pastoral industry?”

