SHEEP SUSTAINABILITY FRAMEWORK

ANNUAL REPORT 2026



SHEEP PRODUCERS AUSTRALIA

WOOLPRODUCERS AUSTRALIA

This report covers progress measurements on sustainability priorities of the Australian sheep industry for financial year 2025-26.

The Sheep Sustainability Framework (SSF) is a Sheep Producers Australia (SPA) and WoolProducers Australia (WPA) led initiative, supported by Meat & Livestock Australia (MLA) and Australian Wool Innovation (AWI).

Unless otherwise stated, this report presents information for the period 1 July 2025 to 30 June 2026, referred to as 2025-26.

The SSF Board reviewed and approved the report for publication on 29 October 2026.

This is the sixth Annual Report of the SSF. Current and previous reports are available on the *SSF website*.

Prepared with reference to the Global Reporting Initiative (GRI) Standards 2021, the report includes an index of disclosure references at Appendix 1.

Independent assurance of the application of the materiality principle was undertaken this year. Further details on the scope of this work are provided in the independent assurance statement in Appendix 2.

For Annual Report enquiries, please contact *SSF@mla.com.au*

Source: AWI

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The Board

The 2025-26 year has delivered positive outcomes for Australian sheepmeat and wool producers. Lamb and mutton prices reached record highs, while wool prices recovered to levels ranking within the top three deciles across micron categories. Seasonal conditions across many sheep-producing regions were also favourable or at least exceeded expectations.

While these outcomes are encouraging, it should be recognised that stronger prices have been driven in part by lower sheep and lamb numbers across the industry. This presents the next major challenge and opportunity for the sector: rebuilding capacity and positioning the industry for sustainable growth.

A particular area of focus for the SSF during the year has been the development of metrics that better reflect the financial resilience of sheep enterprises. While we acknowledge there is more work to be done in this area, we remain committed to developing measures that provide meaningful insights into the industry's economic sustainability.

Sustainability continues to be an important feature of the Australian agricultural landscape, and the SSF plays a key role in monitoring, measuring, and reporting industry performance against key sustainability priorities.

This Annual Report is the sixth published report since the SSF was established in 2021. While there is now a degree of familiarity with the reporting process, we continue to challenge ourselves to ensure the SSF remains relevant, responsive, and valuable to industry participants and stakeholders. Consultation remains central to that effort. We encourage everyone with an interest in the Australian sheep industry to view this Framework as their own and to share feedback that can help strengthen its value and impact.

The Board has enjoyed another productive year. We farewelled Angus Hobson and welcomed Ed Brand to the Board. I thank all Board members for their commitment, expertise and the considerable time they dedicate to this important initiative.

The Steering Group also experienced several changes, including the appointment of Renata Paliskis as Chair following Scott Williams' tenure. On behalf of the Board, and personally, I extend my sincere gratitude to Scott for his leadership and significant contribution to the Framework. I would also like to acknowledge Alister Hawksford, Mark Scott, Harrison Dunning, and Emma Gittoes-Bunting from MLA and AWI for their ongoing support, along with Madie Hamilton and Sarah Castine for their tireless work in coordinating the Framework's activities.

This report, like those before it, brings together the key indicators that reflect the sustainability of the Australian sheep industry. The SSF's role is not to judge performance, but to provide transparent, credible information that supports informed discussion and decision-making. As a snapshot of the industry's sustainability performance, this report highlights both our strengths and the opportunities that lie ahead. By understanding where we are today, we can better position the industry to build resilience, strengthen community trust, and support the long-term growth and prosperity of Australian sheep production.





Angus Gidley-Baird

CHAIR
SSF Board

SENIOR ANIMAL PROTEIN ANALYST
Rabobank

For more information on the Board and Steering Group see Appendix 3.

Letter from the Steering Group Chair

The 2025-26 financial year was another period of significant change for Australia's sheep industry. Sheepmeat markets tightened as flock numbers declined, slaughter rates eased and seasonal conditions continued to challenge producers across many key regions.

At the same time, the wool sector showed encouraging signs of recovery, with stronger prices, improving demand and renewed market confidence supporting the industry's outlook.

With the planned phase-out of live sheep exports by sea drawing closer, industry attention has remained firmly focused on strengthening domestic and international supply chains, identifying alternative market opportunities and maintaining confidence across the sheepmeat and wool sectors. Despite this positive news, the long-term sustainability of both sectors remains a significant concern.

Against this backdrop, the SSF continues to play an important role in providing credible, industry-level data that supports transparency, market access and confidence in Australian sheepmeat and wool. The 2026 Annual Report reflects both the progress being made and the areas where continued focus and collaboration are required.

The SSF Steering Group has also undergone significant renewal during the year. Since April, new and continuing members have worked closely with the Board to refine the Strategic Plan, confirm priority stakeholder audiences, identify opportunities to strengthen the SSF, and endorse a more targeted communications approach to support industry engagement.

I thank all Steering Group members for their contribution, expertise and commitment during the year. I also acknowledge the leadership of the SSF Board, the ongoing support of MLA and AWI, and the many industry stakeholders who continue to contribute to the Framework's development and relevance.

Together, these efforts ensure the SSF remains practical, credible and useful in supporting a sustainable and resilient future for Australia's sheep industry.



Renata Paliskis

CHAIR
SSF Steering Group

Wheatbelt NRM
Joined April 2026



Dr Scott Williams

IMMEDIATE PAST CHAIR
SSF Steering Group

Forest Hill Consulting
Retired April 2026

Snapshot of 2026

Highlights



Increasing proportion of non-mulesed wool.

The proportion of Merino wool declared as non-mulesed or ceased mulesing increased from **18.6% to 21.0%**, while non-Merino wool remained broadly steady at **46.6%**. This reflects continued movement towards non-mulesed wool and responsiveness to animal welfare and market expectations.



Improvements in industry safety outcomes.

On-farm safety outcomes improved, with recorded fatalities reducing from **23 to 21** and the farming lost-time injury frequency rate falling from **12.6 to 10.4 claims per million hours worked**. Processing safety remains a concern, with the processing injury rate broadly unchanged at **23.0**.



Increased value of sheepmeat production.

The gross value of sheepmeat production increased substantially, rising **37.5% to $5.617 billion**. However, this should not be presented as an increase across both commodities, as the gross value of wool production declined **13.3% to $2.405b**.



Maintaining Australia's disease-free status.

Australia remains **free from 12 major sheep diseases**, protecting animal health and welfare while supporting market access and international confidence in Australian sheepmeat and wool. Continued investment in biosecurity and emergency animal disease preparedness remains critical.

Source: Gundagai Lamb

Challenges



Declining total factor productivity.

Total factor productivity, which measures how efficiently the industry converts inputs into outputs, **declined by an average 0.2% per year** since 1999-2000, while climate-adjusted productivity **declined by 0.3% per year** over the same period. This indicates a broader underlying productivity challenge, with issues such as rising input costs, climate variability, and stronger returns from competing commodities, encouraging producers to redirect land, labour, and capital away from sheepmeat and wool.



Long-term financial resilience.

Industry returns remain heavily reliant on land appreciation. The five-year average **return on capital was 7.6% including capital appreciation but only 0.2% excluding it**, limiting the capacity of businesses to reinvest and raising concerns about long-term viability.



Declining ground cover.

There has been a **12.5 percentage-point decline** since the 2023 reporting year in the proportion of natural resource management regions achieving healthy ground cover thresholds, from 80.0% to 67.5%. Ground cover is an important indicator of soil health, land condition and resilience to drought and erosion. While recent seasonal conditions have contributed to this trend, maintaining adequate ground cover across grazing landscapes remains an ongoing challenge requiring continued focus on sustainable land management practices.



Declining wool supply.

Australian greasy wool production is forecast to fall to approximately **243.9 million kilograms in 2026-27, down 1.8% from the 2025-26 forecast and down 9.4% on 2024-25**, reflecting lower sheep numbers and seasonal pressures. Reduced production threatens supply-chain scale, investment confidence and the longer-term resilience of the wool industry.

Summary of 2026 indicators and metrics

The SSF is underpinned by data from reputable sources to support evidence-based updates on the progress of the Australian sheep industry. By tracking performance across key sustainability indicators, the SSF helps industry identify areas of progress, focus improvement efforts, and provide transparent information that strengthens confidence among markets, customers, and governments.

A summary of the status of sustainability metrics for the 2025-26 Annual Report is given in Table 1.

Table 1. The status of sustainability metrics for the 2025-26 Annual Report.

PROGRESS MEASURE	PROGRESS[1]	METRICS IN THIS REPORT
Improvement	●	**30** (37%)
Holding steady	◐	**17** (21%)
Decline	○	**18** (22%)
Baseline data point*	★	**16** (20%)
Indicator, metric or data to be identified	🔍	**1** (1%)
	TOTAL	**82**
No new data in the 2026 report**	∅	**44** (54%)

**Only one year of data available, so progress has not yet been calculated.*

*** Some SSF data sources, such as the National Sheep Producer Survey, the Australian Census and others, are only available every three to five years (see Appendix 4 for more details) so no new data is available for this report.*

Table 2. The number of metrics that were improving, holding steady and declining, sorted by theme.

THEME	IMPROVING	HOLDING STEADY	DECLINING
Caring for our sheep	14	6	4
Enhancing the environment and climate	6	4	5
Looking after our people our customers and the community	6	4	1
Ensuring a financially resilient industry	4	3	8

These totals do not include metrics with baseline data or those without a data source identified so will not add up to 82.

[1] *Progress indicators (improvement, holding steady and decline) are determined using a simple calculation based on whether the metric has improved or declined by more than 2% from the previous data point. This is the same method that was used in previous reporting. Given the simplicity of this approach, it is important that the broader context and narrative is read together with the progress indicators. As more data becomes available, the SSF may adopt an improved trend calculation to analyse data changes across multiple years.*



Source: Trust In Australian Wool



Caring for our sheep

		Reporting Year				Progress (see footnote 1)
		2023	2024	2025	2026	
Incidence of mulesing in the Australian flock						
1.1.1a Producers who mules their flock	Merino	52%	57.7%	-	-	∅ ◐
	Non-Merino	8.0%	3.9%	-	-	∅ ●
1.1.1b Wool declared as non-mulesed/ceased mulesing	Merino	15.8%	17.9%	18.6%	21.0%	●
	Non-Merino	40.1%	43.7%	47.1%	46.6%	◐
Use of appropriate pain management associated with mulesing, castration, and tail docking						
1.1.2a Producers who use appropriate pain management at mulesing	Merino	88.0%	89.7%	-	-	∅ ◐
	Non-Merino	83.0%	96.2%	-	-	∅ ●
1.1.2b Producers who use appropriate pain management at castration	Merino	12.0%	22.3%	-	-	∅ ●
	Non-Merino	11.0%	14.7%	-		∅ ●
1.1.2c Producers who use appropriate pain management at tail docking	Merino - Hot knife	78.0%	78.8%	-	-	∅ ◐
	Merino - Rings	11.0%	24.2%	-	-	∅ ●
	Non-Merino - Hot knife	39.0%	32.3%	-	-	∅ ○
	Non-Merino - Rings	10.0%	14.4%	-	-	∅ ●
Lamb survival						
1.2.1a Producers pregnancy scanning ewes for litter size (LS)		29.0%	31.4%	-	-	∅ ●
1.2.1b Industry average Australian Sheep Breeding Value (ASBV) for weaning rate (WR)		-	-	0.1	0.2	●
Adoption of best practice management						
1.2.2a Producers who have completed Lifetime Ewe Management (LTEM) training		11.4%	6.4%	6.1%	6.4%	●
Shearing welfare						
1.2.3a Total number of days per year spent by shearing trainers in woolsheds nationally		1,112	925	840	533	○
Wild predator management						
1.2.4a Producers with a documented wild predator management strategy		-	18.5%	-	-	∅ ★



Caring for our sheep

		Reporting Year				Progress *(see footnote 1)*
		2023	2024	2025	2026	
Transport of sheep within Australia to ensure welfare of sheep						
1.2.5a Sheep transported in line with animal welfare standards (fit to load)		-	-	-		
Sheep welfare in saleyards						
1.2.6a Sheep transacted through National Saleyard Quality Assurance (NSQA) program saleyards		50.0%	35.6%	38.2%	37.4%	
Wellbeing of live sheep during export						
1.2.7a Mortality on ships		0.14%	0.17%	0.17%	0.12%	
Humane on-farm euthanasia						
1.3.1a Producers aware of humane killing requirements in the *Australian Animal Welfare Standards & Guidelines* (AAWSG) for sheep.		78.0%	76.8%	-	-	
Humane processing						
1.3.2a Lambs and sheep slaughtered through an establishment accredited *by the Australian Animal Welfare Certification System* (AAWCS).		81.5%	88.3%	92.0%	89.0%	
Australia maintaining freedom from disease						
2.1.1a Australia continues to be declared free from 12 major diseases		YES	YES	YES	YES	
On-farm activity to prevent and treat disease						
2.1.2a Producers who vaccinate for clostridial diseases		-	87.6%	-	-	
2.1.2b Industry average ASBV	Worm Egg Count Breeding Value	-	-	-12.1	-13.4	
	Early Breech Wrinkle Breeding Value	-	-	-0.3	-0.3	
Producers adhering to biosecurity requirements						
2.1.3a Sheep producers compliant with Livestock Production Assurance (LPA) biosecurity requirements		80.1%	78.1%	76.7%	85.3%	



Enhancing the environment and climate

	Reporting Year				Progress
	2023	2024	2025	2026	
Protecting soil resource					
3.1.1a Natural resource management regions achieving healthy groundcover thresholds	80.0%	78.0%	73.0%	68.0%	○
Conservation practices					
3.1.2a Extent of primary forest ('000 ha)	19.5	19.4	19.6	19.6	◐
3.1.2b Extent of secondary forest ('000 ha)	10.0	10.3	10.7	10.9	◐
3.1.2c Extent of primary woodland ('000 ha)	3.4	3.3	3.1	2.9	○
3.1.2d Extent of secondary woodland ('000 ha)	22.4	23.5	24.7	26.3	●
Responsible chemical stewardship					
3.2.1a Producers who have attended a ChemCert course or similar	82.0%	81.1%	-	-	∅ ◐
Efficient water use in processing					
3.2.2a Kilolitres water used per tonne hot standard carcase weight (HSCW) when processing sheepmeat	7.2kL	-	6.7kL	-	∅ ●
Minimise waste in processing					
3.2.3a Kilograms of solid waste per tonne HSCW when processing sheepmeat	29.8kg	-	68.1kg	-	∅ ○
Maintaining and increasing biodiversity					
3.3.1a Producers undertaking deliberate activities to maintain or enhance biodiversity	-	72.6%	-	-	∅ ★
Contribution of sheep production to Greenhouse gas (GHG) emissions					
4.1.1a Net emissions: Mt of CO_2e generated by sheep industry (farm and sheepmeat processing)	6.76Mt*	9.16Mt*	13.60Mt*	13.70Mt	◐
4.1.1b Emission intensity: kg of CO_2e emitted per kg liveweight (LW) when raising sheep	7.3kg	-	6.8kg	-	∅ ●
4.1.1c Emission intensity: kg of CO_2e emitted per kg greasy wool shorn	26.3kg	-	24.4kg	-	∅ ●
4.1.1d Emission intensity: kg of CO_2e emitted per tonne HSCW when processing sheepmeat	364kg	-	308kg	-	∅ ●
4.1.1e Sheep producers who have measured GHG emissions for their enterprise using carbon accounting or another process	3.0%	9.9%	-	-	∅ ●

Enhancing the environment and climate

	Reporting Year				Progress
	2023	2024	2025	2026	
Renewable energy					
4.1.2a Sheep producers who generate and use renewable energy	50.0%	46.9%	-	-	∅ ○
Response to a changing and variable climate					
4.2.1a Climate-adjusted Total Factor Productivity (TFP) growth	0.0%	-0.1%	-0.2%	-0.3%	○

**Historical data is updated retrospectively if/when source data from the Commonwealth Government's National Greenhouse Gas Inventory becomes available or is revised (see Appendix 5 for more information).*



Source: AWEX



Looking after our people, our customers, and the community

		Reporting Year				Progress
		2023	2024	2025	2026	
Health and safety prevention and training						
5.1.1a Producers who have undertaken a Workplace Health and Safety (WHS) risk assessment		-	54.6%	-	-	∅ ★
Number of deaths and serious injuries						
5.1.2a Fatalities in the sheep industry		34.0	26.0	23.0	21.0	●
5.1.2b Lost time injury frequency rate (number of claims per million hours worked)	Farming	-	10.9	12.6	10.4	●
	Processing	-	19.7	23.1	23.0	◐
Status of physical and mental health						
5.2.1a Global Life Satisfaction Index score of Australian sheep graziers		-	76.1	70.2	72.2	●
Connectedness to community						
5.2.1b Getting Involved in the Community Index of Australian sheep graziers (out of a potential perfect score of 7)		-	-	3.6	3.7	●
Capacity of workforce						
6.1.1a On-farm industry participants who have completed further education		45.0%	-	-	-	∅ ★
Appropriate working conditions						
6.1.2a Federal award rate ratio		1.23:1	1.14:1	1.20:1	1.20:1	◐
Availability of workforce						
6.1.3a Producers who find labour availability to be a major issue in their operation	General labour	35.0%	42.0%	-	-	∅ ○
	Shearing labour	38.0%	35.3%	-	-	∅ ●
6.1.3b Average labour shortage in key meat processing occupations (meat boner and slicers, slaughterers and meat inspectors)		-	-	-	61.0%	★
Extent of succession planning in the industry						
6.1.4a Producers with a formal succession plan in place		21.0%	19.9%	-	-	∅ ◐
Extent of workforce diversity						
6.2.1a Age distribution of those who are employed in sheep farming and shearing services	15-34	-	20.0%	-	-	∅ ★
	35-54	-	32.0%	-	-	∅ ★
	55-74	-	40.0%	-	-	∅ ★
	75-100	-	7.0%	-	-	∅ ★

Looking after our people, our customers, and the community

		Reporting Year				Progress
		2023	2024	2025	2026	
Extent of workforce diversity						
6.2.1b Gender breakdown of those who are employed in sheep farming and shearing services	Men	-	72.0%	-	-	∅ ★
	Women	-	28.0%	-	-	∅ ★
6.2.1c Indigenous and Torres Strait Islanders who are employed in sheep farming and shearing services		-	1.5%	-	-	∅ ★
6.2.1d Speaking a Language Other Than English (LOTE) in those who are employed in sheep farming and shearing services		-	2.0%	-	-	∅ ★
Community perceptions of the sheep industry						
7.1.1a Australians who believe that Australian lambs are farmed and raised in a humane manner		54.0%	55.0%	56.0%	56.0%	◐
7.1.1b Respondents who believe wool is more environmentally friendly than other fibres		-	-	40.0%	-	∅ ★
Consumer perceptions of product quality						
7.2.1a Australians who believe that Australian lamb is worth paying a bit more for		25.0%	27.0%	27.0%	28.0%	●
7.2.1b Willingness to consider wool for apparel		-	-	62.0%	-	∅ ★



Source: AWEX



Ensuring a financially resilient industry

		Reporting Year				Progress
		2023	2024	2025	2026	
Rate of return						
8.1.1a Rate of return on capital, including and excluding capital appreciation, using a 5-year rolling average	Including	-	9.7%	8.1%	7.6%	○
	Excluding	-	0.8%	0.5%	0.2%	○
Maintain or increase contribution to the Australian economy						
8.2.1a Gross value (AUD) of agricultural production for sheepmeat		$4.425b	$4.553b	$4.086b	$5.617b	●
8.2.1b Gross value (AUD) of agricultural production for wool		$2.645b	$3.145b	$2.774b	$2.405b	○
Productivity						
8.3.1a Total factor productivity average annual growth rate		0.1%	-0.1%	0.0%	-0.2%	○
8.3.1b Sustainable Merino (SM) index		-	132.4	135.23	138.7	●
Investment in research, development and adoption (RDA)						
8.4.1a AUD invested in Research, Development and Adoption (RDA) per annum	Sheepmeat	$21.8m	$20.5m	$23.7m	$23.4m	◐
	Wool	$33.2m	$28.8m	$26.5m	$27.2m	●
Value of product						
9.1.1a Australian value share (%) of sheepmeat exports		45.0%	46.0%	48.2%	45.9%	○
9.1.1b Australian value share (%) of greasy wool exports		81.7%	79.0%	76.9%	71.7%	○
Access to markets						
9.1.2a Cumulative alleviation (from 2020) of red meat non-tariff barriers		$474m	$535m	$664m	$862m	●
9.1.2b Value share of Australian sheepmeat, sheep offal and live sheep exports covered by one or more preferential trade agreements (PTA)		71.7%	66.0%	74.0%	74.0%	◐
9.1.2c Value share of Australian greasy wool exports covered by one or more PTAs		90.0%	91.7%	93.5%	93.0%	○
Compliance with product integrity and safety standards						
9.2.1a Wool clip that is produced with a voluntary product integrity scheme		13.9%	14.7%	14.9%	14.0%	○
9.2.1b Compliance rates for chemical residues in sheepmeat		99.5%	99.9%	99.8%	-	∅ ◐

Our audience and purpose

The SSF is the overarching governance framework for the sustainability of Australia's sheepmeat and wool industries. It is an industry-wide, data-driven reporting framework that is led by SPA and WPA, which are the peak bodies representing Australian producers (see Appendix 3 for details). The SSF focuses on reporting only and does not deliver on-ground, research or industry programs.

This is the sixth year of reporting on the priorities that matter most to the industry's value chain. The SSF is a trusted, central information source for industry sustainability reporting, with evidence-based, apolitical communications.

This reporting helps to demonstrate to our customers how Australian sheepmeat and wool are produced. By highlighting both areas of strong performance and opportunities for improvement, the report helps build confidence in Australian sheep products and supports continuous improvement across the industry.

The SSF primary audiences are:

- Government and policy stakeholders, including Australian Government representatives who support and advocate for the sheep industry
- Certification and assurance organisations that may use or align with SSF sustainability themes, metrics, and reporting approaches when developing producer-facing standards and market-assurance programs
- Market participants, including domestic and international brands, retailers, and supply chain businesses that influence procurement requirements, sustainability expectations, and market access across the sheep meat and wool industries

With these audiences in mind, this Annual Report is intended to:

- Support access to markets and trading opportunities
- Demonstrate how the Australian sheep industry is responding to evolving sustainability expectations from customers, brands, retailers, and supply chain partners
- Help protect and strengthen access to investment, finance, customers, and markets by providing credible evidence of industry performance and progress
- Provide a reference point for certification and assurance organisations developing standards and market assurance programs
- Help guide investment by Research and Development Corporations (RDCs) and governments for on-ground and industry programs[2] which address priority sustainability challenges where industry action can deliver the greatest benefit
- Assist industry bodies to develop policies to address current and emerging issues

The SSF is not intended to create additional requirements for producers or individual businesses. Its role is to bring together industry information that supports market access, informs the development of certification and assurance programs in the Australian context, and helps direct industry and government investment towards areas where improvements can deliver the greatest on-farm and value chain benefits.

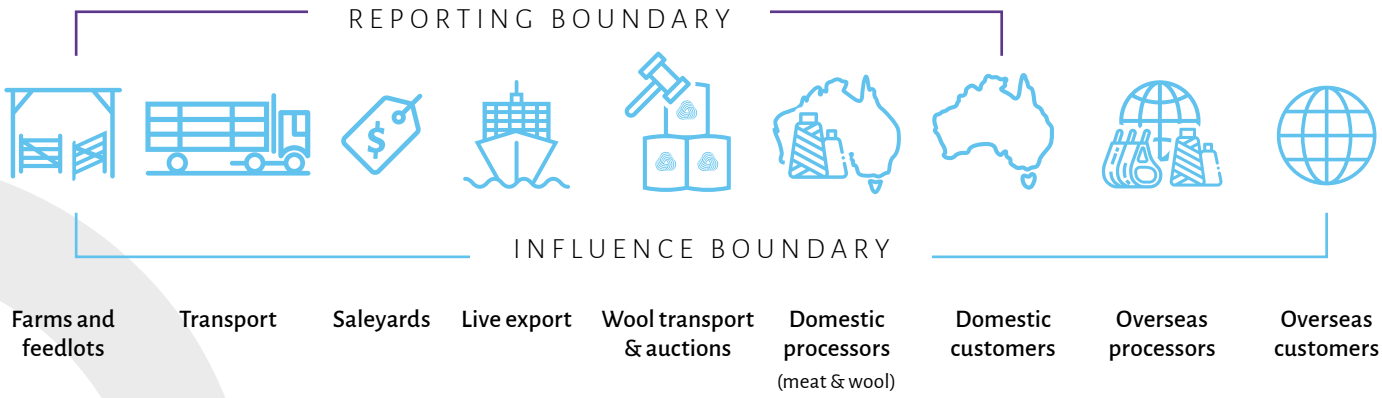
Producer perspectives are represented through peak industry bodies, which engage with the SSF through the Steering Group and Board. Individual producers can also stay informed about SSF through newsletters, social media updates, and the annual reports.

The SSF does not:

- Establish or endorse measurement systems at an individual business level
- Set targets or determine industry policies
- Provide an accreditation or certification system
- Endorse prescriptive management practices
- Create additional work for individual businesses

[2] *The Green Sheep Project and the Woolmark + Project are examples of programs which help to progress sustainability outcomes aligned with the SSF reporting.*

REPORTING SCOPE



Due to the complexity and multiple participants in the value chain, and limited data availability, the SSF Board and SSG have determined that limiting the SSF's reporting to Australian domestic production was most appropriate. The Board and SSG continue to re-evaluate this position.

Figure 1. The reporting scope and influence boundary of the SSF.



Source: AWEX

Industry at a glance

In 2025, Australia was the leading exporter of sheepmeat worldwide, exporting approximately 560,000t, or 50% of the world's exports, followed by New Zealand which exported just under 333,000t (from *Trade Data Monitor*, used by MLA for market reporting). China, the United States of America, and the Middle East are the primary destinations for Australian sheepmeat exports (from *Trade Data Monitor*, used by MLA for market reporting).

Australia exports the majority of its wool clip, with 96% by weight exported in its greasy (unprocessed) state for offshore processing in 2025. China is the primary destination, receiving 88% of Australia's raw and semi-processed wool exports. Australia accounted for 19% of the world's clean-wool production in 2025 (estimated). Australia also accounted for an estimated 34% of global apparel-wool production in 2024-25 (apparel wool defined as 0–26.5 microns) [1].

FLOCK SIZE

65.8m ↙

head of sheep in 2024-25 [2]; down from 71.5m in 2023-24

ENTERPRISES

22,474 ↗

businesses involved in the sheep and lamb industry [3]; up from 20,147

BREEDING EWES

36.5m

breeding ewes in 2025 [1]

63% Merino

(no change from 2023-24)

37% non-Merino ↙

down from 39%

SHEEPMEAT

A$5.4b ↗

gross value of sheepmeat and live sheep production forecast for 2025-26 [4]; up from $5.0b

853,000t cwt ↙

in sheepmeat produced in 2025 [3]; up from 927,230t in 2024

559,162t swt ↗

lamb and mutton exported in 2025 [3]; up from 614,388t swt in 2024

WOOL

A$2.61b ↗

value of greasy wool production forecast for 2025-26; up from A$2.6b

243.9m kg ↙

greasy wool production forecast for 2026/27 season [5]; down from 253.9m kg in 2025/26

$16.07 ↗

the average price per kilogram of wool in 2026 [6]; up from $11.67/kg for 2024-2025

SHEEPMEAT PROCESSING

21.6m ↙

head lamb slaughter forecast for 2026 (MLA internal forecast); down from 24.6m head slaughtered in 2024-25

6.3m ↙

head sheep slaughter forecast for 2026 (MLA internal forecast); down from 10.2m head

25.9kg ↗

25.9kg average national lamb carcase weight forecast for 2026 (MLA internal forecast); up from 24.3kg

LIVE EXPORT

330,445 sheep ↙

sheep exported from Australia in 2025 [7]; down from 424,913 sheep

A$49.6m ↗

value of live sheep exports in 2025 [8]; up from A$43m

Our operating environment

Sheep producers manage an estimated 65.8m hectares of land, representing approximately 15.4% of Australia's agricultural land. Across this area, producers play an important role in managing natural resources, biodiversity, and ecosystem health.

Australia's sheep industry is a predominantly pasture-based production system operating across a diverse range of climatic zones, from high-rainfall grazing regions to arid landscapes. The national flock size is estimated at 65.8 m head of sheep in 2024-25, down from 71.5 m head in 2023-24[2]. This reflects the cumulative impact of three years of below-average rainfall across key southern production regions and elevated flock turn-off. Despite a smaller flock, ongoing gains in genetics, nutrition, and management have supported strong production, with lamb production forecast to remain among the highest on record. Sheep production remains concentrated in New South Wales, Victoria, Western Australia and South Australia, which together account for 85% of the national wool and sheepmeat production[9].

Australia's Merino industry continues to be a major supplier of fine wool to international textile markets, although shorn wool production is forecast to decline to 243.9m kg greasy in 2026-27, down from 253.9m kg in 2025-26, as lower sheep numbers and seasonal pressures constrain supply[5]. Wool and sheepmeat enterprises remain closely integrated across much of the national flock, supporting enterprise diversification and resilience in a variable production environment.

INVESTMENT IN RESEARCH, DEVELOPMENT, AND INNOVATION

Australia's sheep industry continues to invest in research, development and adoption (RDA) to improve productivity, sustainability, and resilience. Producer levies, matched Australian Government funding and industry partnerships support this work across the wool, red meat, live export, and processing sectors.

Find out more: Explore current RDA priorities and funding opportunities through:

- *Australian Wool Innovation (AWI)*
- *Meat & Livestock Australia (MLA)*
- *LiveCorp*
- *Australian Meat Processor Corporation (AMPC)*

During 2025-26, key areas of investment in RDA included reducing enteric methane emissions, improving soil and pasture condition, strengthening animal health and welfare outcomes, enhancing genetics and productivity, and supporting producers to adapt to increasingly variable seasonal conditions. These investments help ensure the industry remains competitive, resilient, and responsive to evolving market, environmental, and community expectations.



Source: Gundagai Lamb



Source: Trust In Australian Wool

Sustainability, compliance, and regulation

Using wool as an example, alongside the EU's Ecodesign for Sustainable Products Regulation and Digital Product Passport initiatives, key Asian markets are strengthening requirements for climate disclosure, circular design, energy efficiency, and assurance against greenwashing. In response, the Australian wool industry is strengthening practical, market-facing systems that help growers demonstrate credible credentials. Australian Wool Traceability Hub, WoolClip, eBale, Australian Wool Sustainability Scheme (AWSS), and National Wool Declaration are all examples of data support and stronger information flows from farm through early-stage processing. Fourteen percent of Australia's wool clip is now produced under a voluntary product integrity scheme (see indicator 9.2.1a) demonstrating the readiness within segments of the industry to invest time and resources into providing verified data on animal welfare and responsible production.

Market and regulatory forces

LIVE EXPORTS AND ROAD TRANSPORT

The Australian Government has announced the phase-out of live sheep exports by sea by 1 May 2028. This decision presents challenges for exporters, producers, and supply chain businesses, particularly in Western Australia. The phasing out of live exports has shifted the historic balance in mixed farming operations more heavily toward grain production. The Livesheep Transition Package was established to address some of these challenges and to maintain industry participation.

Many of the successful submissions to access funding through the Package were focussed on containment feeding. This involves keeping sheep in a single paddock for a period of time and supplying their full feed, water and nutritional requirements, rather than relying on pasture grazing. This allows pastures to recover more effectively, increasing water infiltration, soil health, and long-term feed availability. It also allows flexibility for producers to finish and hold sheep until they can access domestic markets, and provides greater control over nutrition, animal health and welfare, especially in periods of drought. Containment feeding can be a long-term strategy in red meat production but more often it is a short-term strategy in sheep enterprises.

Containment feeding, however, introduces the challenges of diseases such as acidosis and pneumonia. Training and extension relating to containment feeding is taking place to ensure producers are aligned with best practices.

During 2025-26, industry investment in livestock transport welfare continued through MLA's Transport Sustainability Taskforce, which brings together producers, transporters, saleyards, processors, and retailers to develop nationally consistent animal welfare indicators and improve the monitoring of sheep welfare outcomes during road transport. The initiative is focused on strengthening welfare performance through better data collection, supply chain collaboration, and targeted education and training, supporting continuous improvement and greater transparency across the sheep transport sector.

Source: Trust In Australian Wool



Overseas, international market conditions continue to evolve, with several developments potentially influencing Australian lamb trade. In the US, a safeguard investigation into imported lamb has been initiated with the potential to implement higher tariffs or new quotas. The existing tariff of 12.5% remains in place on Australian lamb exports to that market. Separately, the conclusion of negotiations on the Australia-European Union Free Trade Agreement may create new opportunities for Australian lamb exporters. Together, these developments highlight the dynamic nature of global market access and the importance of monitoring changes that could affect trade conditions for the Australian sheepmeat industry.

CLIMATE REPORTING

During 2025-26, Australia's mandatory climate-related financial disclosure regime moved from policy to implementation. The first reporting cohort were required to report for financial years commencing on or after 1 January 2025 and the second cohort commencing from 1 July 2026[3]. While only a relatively small proportion of Australian sheep enterprises are directly captured by mandatory climate reporting requirements, a substantially larger proportion of the national flock is likely to be affected through supply chain reporting obligations, customer requirements, and data requests from processors, retailers, financiers, and exporters. The Department of Agriculture, Fisheries and Forestry (DAFF) notes that the vast majority of Australian farmers will not have direct obligations under the new rules. Reporting entities may use industry averages or secondary data to estimate Scope 3 emissions. However, some may request farm-level data from producers in their supply chains. This means climate reporting is increasingly interfacing with the sheep industry through customers, supply chains, financiers, and sustainability programs seeking more emissions information.

In parallel, the Australian Government progressed the voluntary Greenhouse Gas Emissions Estimation and Reporting Guidelines for Agriculture, Fisheries and Forestry. The Guidelines aim to improve the consistency and quality of farm-level emissions accounting and address industry concerns that existing calculators and methodologies can produce inconsistent results. The Guidelines include a Common Requirements Framework and commodity-level Methodological Guidance, with sheep emissions estimates included in the first tranche of materials. These materials are intended to be incorporated into farm emissions calculators, giving producers access to trusted, consistent tools to understand their emissions, respond to supply chain data requests, and support market access.

Producers, supply chain participants, financial institutions, government agencies, calculator providers, and industry organisations have been engaged through the development of the voluntary emissions reporting guidelines. The consultation process has ensured that greenhouse gas estimation methods are practical, scientifically robust, and fit-for-purpose for Australian production systems.



[3] *Must meet two of three thresholds.* ***Group 1 2024-25:*** *more than 500 employees, consolidated group assets of $1b or more at financial year end, consolidated revenue of $500m or more for the financial year.* ***Group 2 2026-27:*** *more than 250 employees, consolidated group assets of $500m or more at financial year end, consolidated revenue of $200m or more for the financial year.* ***Group 3 2027-28:*** *more than 100 employees, consolidated group assets of $25m or more at financial year end, consolidated revenue of $50m or more for the financial year.*

Supporting plans and processes

The SSF is supported by a suite of plans and processes designed to ensure it remains industry-led, well structured, and relevant to target audiences.

THE STRATEGIC PLAN

In 2025, the Board and SSG revised the SSF's Strategic Plan to ensure that it is a living, working industry document used as part of 'business as usual' in the sheepmeat and wool industries.

Three pillars, each with supporting activities and key performance indicators, were identified to move the SSF toward its objectives:

1. Stakeholder engagement
2. Data collection and reporting
3. Responsiveness to industry needs

THE MATERIALITY ASSESSMENT

Materiality is the process of identifying sustainability topics critical to the continued success of the Australian sheep industry. The SSF's second *materiality assessment* was completed in 2024 and underpins the indicators within the SSF.

The SSF materiality assessment involved a desktop review and testing topics with industry stakeholders[4]. Further testing occurred to confirm topics, scopes and rankings, which were subsequently validated by the SSG.

The assessment was designed to reflect the priorities of stakeholders across the sheep industry value chain. It considered both the industry's impact on people, animals and the environment, and the external issues and trends that could affect the long-term success and sustainability of the industry (known as 'double materiality').

The materiality assessment identified 25 material topics, the top 14 of which are 'highly material' to the industry and its key stakeholders (Figure 2).

Overall, the assessment highlighted a more mature understanding of sustainability topics among stakeholders. It underscores the greater connections between the topics' drivers, emphasising the need for collaboration to effectively address complex cross-industry challenges.

Regular gap analyses against key sustainability reporting frameworks complement the materiality assessment, which is conducted every three to four years. The next gap analysis is planned for 2027 *(see Global Reporting Alignment for more information).*

Caring for our sheep	Enhancing the environment and climate	Looking after our people, our customers and the community	Ensuring a financially resilient industry
1. Animal wellbeing and welfare	3. Greenhouse gas emissions and carbon management	4. Access to labour and capacity building	6. Responsible value chain and traceability
2. Animal husbandry and handling	5. Climate change resilience	10. Safety	7. Economic resilience and market access
14. Biosecurity	8. Biodiversity	11. Labour standards, human rights, and employment	12. Food safety and quality
	9. Water security	13. Occupational health	

Figure 2: The highly material topics for the Australian sheep and wool industry.



The stakeholder engagement process

The SSF is guided by a communications plan which identifies the key stakeholders, objectives of engagement and engagement pathways to ensure the SSF is high impact and drives industry improvement and market access.

The SSF regularly consults with its stakeholders to understand the most material sustainability risks and impacts, and to ensure the SSF is meeting their needs. The SSF employs two key forums to engage with its broad range of stakeholders.

INDUSTRY FORUM

The annual SSF Industry Forum brings together stakeholders from across the sheep and wool value chain to share updates on the SSF, explore emerging sustainability and market expectations, and discuss how SSF data is being applied in practice. The 2026 Industry Forum was held on 21 May 2026 and attracted over 40 industry members from across the supply chain. The event involved internal industry stakeholders including RDCs, peak industry councils (PICs), state farming organisations (SFOs), industry representative groups, and service providers.

Topics for discussion were the mulesing data sources, financial sustainability metrics, and the SSF strategic plan. An open discussion was held on strengthening the relevance and practical value of its metrics and responding to evolving market and stakeholder expectations. The two-hour forum encouraged active discussion, and the SSG and Board are grateful for the attendance and participation from industry and key stakeholders.

SSF ANNUAL REPORT LAUNCH

The Annual Report launch, formerly called the Consultative Committee Forum, provides an opportunity to gather feedback, create awareness of the SSF, review progress, and discuss how industry will address its findings over the next 12-18 months. The November 2025 virtual forum included an overview of the 2025 Annual Report and the SSF Strategic Plan, along with presentations demonstrating how the SSF is informing industry priorities and activities.

Following a review of the event's format and purpose, the 2026 Consultative Committee Forum has been refreshed and rebranded as the SSF Annual Report Launch held as a face-to-face event in Canberra in November 2026.

[4] *The stakeholder groups were sheepmeat producers, wool producers, wool processors/mills, ESG bank/investors, government, customer/retailer, and NGOs.*

Global reporting alignment

Globally, sustainability reporting has become business as usual for most major corporations. Nearly 98% of the world's largest 250 companies now publish Environmental Social and Governance (ESG) or sustainability reports. Of these, 95% set carbon reduction targets, while ~75% use the Global Reporting Initiative (GRI) Standards, demonstrating their widespread adoption. For this reason, the SSF aligns, where feasible, with the GRI (see Appendix 1). The sustainability reporting space is evolving rapidly. The SSF is continuing to adapt its reporting with a focus on aligning with changing sustainability reporting requirements.

In 2026, a comparative analysis was conducted of the SSF against leading sustainability frameworks and disclosure standards as identified by the SSF Steering Group. The frameworks and standards that the SSF was mapped against were:

- UN Sustainable Development Goals (SDGs)
- Global Reporting Initiative (GRI)
- Sustainability Accounting Standards Board (SASB)
- Science-Based Targets initiative (SBTi)
- Taskforce for Nature-related Financial Disclosures (TNFD)
- Taskforce for Climate-Related Financial Disclosures (TCFD)
- International Financial Reporting Standards (IFRS)
- Corporate Sustainability Reporting Directive for the European Union (CSRD)

The analysis found that the SSF is comprehensive, covering the majority of the critical themes and priorities from the GRI and other globally significant sustainability frameworks.

Source: MLA



Reporting

THE FRAMEWORK'S STRUCTURE[5]

The SSF structure comprises

4 Themes **9** Focus areas **21** Priorities

THEME	FOCUS AREA	PRIORITY
Caring for our sheep		
	1. Animal care and handling	1.1 Reduce, refine and replace painful husbandry practices
		1.2 Implement best practice sheep management
		1.3 Ensure humane processing and on-farm euthanasia
	2. Animal health	2.1 Prevent and manage disease
Enhancing the environment and climate		
	3. Environment	3.1 Improve natural resource management
		3.2 Responsible environmental practices
		3.3 Encourage biodiversity
	4. Climate change	4.1 Reduce net greenhouse gas emissions
		4.2 Adapt to a changing climate, including extreme weather events
Looking after our people, our customers and the community		
	5. Health and safety	5.1 Improve industry safety culture
		5.2 Improve our people's health
	6. Capacity building	6.1 Support and grow our workforce
		6.2 Encourage workforce diversity
	7. Contribution to community	7.1 Enhance community trust
		7.2 Deliver products that customers demand
Ensuring a financially resilient industry		
	8. Profitability, productivity and investment	8.1 Maintain or increase industry profitability
		8.2 Maintain or increase contribution to the Australian economy
		8.3 Increase productivity
		8.4 Encourage innovation
	9. Market access	9.1 Ensure positive market positioning and access
		9.2 Guarantee product integrity and safety

[5] *See Appendix 3 for more information on reporting principles*

Caring for our sheep

ABOUT THE MATERIAL TOPICS

Material topics	
Animal wellbeing and welfare	Animal husbandry and handling
Feed sourcing	Biosecurity

Animal welfare is protected by legislation in each of the states and territories of Australia. This legislation is harmonised through the Australian Animal Welfare Standards and Guidelines; national guidelines that specify the legal standards of management and husbandry required to protect and maintain the welfare of sheep.[10]

Substantial investment has been made into both sheepmeat and wool production to ensure the wellbeing of sheep.

In 2025-26 MLA delivered adoption programs to 17,755 red meat producers, who manage a total of 27m sheep and 188m ha hectares of land. Sheep producers participated in awareness raising activities (e.g. MeatUp forums, Producer Demonstration Site webinars), training workshops (e.g. BredWell FedWell, Carbon EDGE) and practice change programs (e.g. Producer Demonstration Sites, Profitable Grazing Systems; Grass to Dollars). Livestock advisors were also supported through the Livestock Advisor Updates, Livestock Advisor Essentials and partnerships with AgNVet and RMA Network. As a result of these investments there has been a 29% increase in the number of livestock advisors delivering MLA adoption programs from the 2024-25 baseline.

On the wool side, flystrike is a critical issue for Australian woolgrowers, impacting both animal welfare and farm profitability[11].

Flystrike is a condition where blowflies lay eggs on sheep, particularly around the hindquarters (the breech area) and tail, although it can occur in other parts of the body. The hatched larvae (maggots) bury themselves in and under the sheep's wool and feed on the sheep's flesh, causing pain, distress, infection, and potentially death. Australia's climate, with warm temperatures and rainfall, creates ideal conditions for the blowfly. Historically many woolgrowers have used a combination of mulesing, crutching and chemical pesticide treatments to reduce the risk of flystrike in their sheep. Mulesing is a once-for-life surgical procedure that protects the lifetime welfare and health of sheep from breech strike by removing the excess skin from the breech. Woolgrowers operate in a diverse range of climate and business environments across Australia, each presenting unique challenges in managing flystrike. It is estimated to cost the Australian sheep industry in excess of $320m per annum in prevention, treatment, and productivity losses[11]. Over the last two decades, AWI has dedicated substantial resources to improving flystrike prevention and treatment methods, aimed at reducing reliance on practices like mulesing, crutching, and chemical pesticide treatments.

Recent project outcomes demonstrated that selecting for lower breech wrinkle and other flystrike-resistance traits can substantially reduce flystrike risk while maintaining productivity, thereby helping producers reduce their reliance on mulesing in some circumstances. In parallel, industry has invested significantly in pain management best practice to improve animal welfare outcomes, with widespread use of registered pain-relief products during mulesing and other husbandry procedures. Both SPA and WPA support the use of pain management to reduce the adverse impact of husbandry procedures on sheep.

A range of certification and assurance programs are available to support transparency across the supply chain, giving retailers confidence in the non-mulesing status of wool and the use of pain relief where mulesing is undertaken.

From 1 September 2025, a transition phase commenced as changes to the LPA Program were implemented. Livestock producers accredited under the LPA will be required to have an Animal Welfare Management Plan to demonstrate how they meet the AAWSG. Since that date, 13% of sheep producers have an animal welfare management plan in place, with all producers expected to have a plan in place by 1 September 2027.

The LPA National Vendor Declaration (NVD) identifies the food safety and treatment status of every animal every time it moves between properties, to saleyards or to processors. NVDs are key to Australian red meat traceability and market access, and act as a legal document of livestock movement throughout the supply chain. All declarations must be supported by accurate farm records declared through the LPA program. This is a pledge that Australian meat has been produced safely and ethically on-farm and meets biosecurity requirements.

Federal and State agriculture Ministers agreed to implement a nationally consistent individual electronic identification (eID) system for sheep and goats. Together, NVDs and eID form the foundation of Australia's livestock traceability system, combining movement declarations with individual animal identification to support biosecurity, market access, and supply chain integrity. Industry is working through the national implementation of eIDs,

and by 1 January 2027 all sheep and goats leaving a property are required to have an eID.

The threat of biosecurity incursions remains an ongoing risk to animal health, welfare, and trade, however, this is being carefully managed within the Australian sheep industry. SPA and WPA have been working closely to strengthen biosecurity and emergency animal disease (EAD) preparedness across both sectors, with the release of two new industry strategies in 2025. The National Sheep Industry Biosecurity Strategy 2025-2030 and the Wool Industry Post-farmgate EAD Preparedness and Response RD&E Strategy 2025-2030 offer a coordinated approach to managing biosecurity risks on-farm and throughout the supply chain [12, 13]. Australia remains free from the major infectious diseases affecting sheep, while on-farm biosecurity measures continually improve.

Once H5 HPAI (bird flu) reached Australia, a rapid risk appraisal for sheep estimated the risk of HPAI to be negligible to sheep production [14]. Complementing these initiatives, the Australian Wool Traceability Hub has been developed to strengthen traceability and information sharing across the wool supply chain, supporting preparedness, transparency, and rapid response capability.

Investment into genetic improvements in sheep to enhance disease resilience are also ongoing. For example, a project by Neogen Australia in partnership with CSIRO, aims to advance the ability to select for immune competence (disease resilience) in Australian Merino sheep. The project has resulted in seedstock Merino ram breeders now being able to select for more immune competent animals within their own flocks. This will result in the Australian Merino sheep population becoming more disease resilient over time, as more seedstock producers start to use this new selection criteria.

FOCUS AREA 1: ANIMAL CARE AND HANDLING

PRIORITY 1.1 Reduce, refine and replace painful husbandry procedures

Efforts are continually being made to reduce, refine or replace the need for painful husbandry procedures.

INDICATOR		VALUE	STATUS	SOURCE
1.1.1 Incidence of mulesing in the Australian flock				
1.1.1a Producers who mules their flock*	Merino	57.7% ∅	◐	National Sheep Producer Survey 2024
	Non-Merino	3.9% ∅	●	

These figures are taken from the National Sheep Producer Survey conducted in 2024 assessing management activities in 2023. The figures reported are for ewe lambs only, with n=1,268 sheep producers.

In comparison, the previous survey in 2022 (on management activities in 2021) found that 52.0% of producers mulesed Merino lambs and 8.0% of producers mulesed non-Merinos.

The slight increase in mulesing reported in the 2024 National Sheep Producer Survey is not statistically different from the previous survey undertaken in 2022, and the trend for producers in mulesing their ewe lambs continues to decrease since data was reported in 2021 (67%).

A producer's decision to mules their sheep is often influenced by anticipated flystrike risk, which is affected by weather conditions. Therefore, variability is expected from year to year.

1.1.1b Wool declared as non-mulesed/ceased mulesing	Merino	21.0%	●	AWEX 2025-26
	Non-Merino	46.6%	◐	

These figures represent the percentage of Australian wool bales of first-hand auction (excluding reoffers) with the National Wool Declaration (NWD) status of either 'non-mulesed' or 'ceased mulesing'.

Wool declared as non-mulesed or ceased mulesing increased for Merino wool and held steady for non-Merino wool since the last report.

The NWD is a voluntary scheme where not all wool is declared. For 2025-26 season:

- 82.6 % of all Merino wool was declared
- 70.8% all non-Merino wool was declared

**Some data relating to mulesing and pain management is collected via the National Sheep Producer Survey which is conducted every three years. The next update is in 2027. AWI and MLA are investigating complimentary data sources which could provide more regular updates on mulesing and pain management. These sources will be presented to SSF governance groups for consideration.*

INDICATOR		VALUE	STATUS	SOURCE
1.1.2 Use of appropriate pain management associated with mulesing, castration, and tail docking				
1.1.2a Producers who use appropriate pain management at mulesing	Merino	89.7% ∅	◐	National Sheep Producer Survey 2024
	Non-Merino	96.2% ∅	●	

It is good husbandry practice for mulesing to be accompanied by appropriate pain management. The local anaesthetic Tri-Solfen® was registered for use in mulesing in 2007. Several products which contain the non-steroidal anti-inflammatory drug meloxicam are also registered for pain management for mulesing. The use of Tri-Solfen®, and products containing meloxicam, is recognised as appropriate pain management for mulesing (see Table 3).

Compared to the last survey, the percentage of producers using appropriate pain management for mulesing of Merinos held steady (88% in 2023) and significantly increased for non-Merinos from 83%.

1.1.2b Producers who use appropriate pain management at castration	Merino	22.3% ∅	●	National Sheep Producer Survey 2024
	Non-Merino	14.7% ∅	●	

It is good husbandry practice for castration to be accompanied by appropriate pain management. Appropriate pain management for castration is dependent on the method used. The use of Tri-Solfen® and/or a registered product containing meloxicam is considered appropriate for the knife method while NumOcaine® and/or a registered product containing meloxicam is considered appropriate for the ring method (see Table 3).

The figures are reported from the sample of producers who reported that they castrated their sheep using the ring method in the National Sheep Producer Survey 2024.

Of the producers who castrate male lambs, 98.2% of Merino producers and 98.9% of non-Merino producers use rings.

1.1.2c Producers who use appropriate pain management at tail docking	Merino – Rings	24.2% ∅	●	National Sheep Producer Survey 2024
	Non-Merino - Rings	14.4% ∅	●	
	Merino – Hot Knife	78.8% ∅	◐	
	Non-Merino – Hot knife	32.3% ∅	○	

It is good husbandry practice for tail docking to be accompanied by appropriate pain management. Appropriate pain management for tail docking is dependent on the method used. The use of Tri-Solfen® and/or a registered product containing meloxicam is appropriate for the knife method, while NumOcaine® and/or a registered product containing meloxicam is appropriate for the ring method.

These figures are reported from the samples of producers who tail docked their male lambs in 2023 using the ring method, and producers who tail docked their male lambs in 2023 using the knife method.

Since the previous National Sheep Producers Survey the percentage of producers using appropriate pain management for tail docking using the hot knife method held steady for Merinos (78% in 2023) and declined for non-Merinos (39%). For the ring method, the percentage of producers using appropriate pain management increased from the last report for both Merinos (11% in 2023) and non-Merinos (10% in 2023).

The percentage of producers who tail dock male lambs was 96.6% for Merino producers and 82.0% for non-Merino producers. The prevalence of hot-knife and ring use for tail docking also differed between Merino and non-Merino producers.

	HOT KNIFE	RING
Merino	65.6%	30.8%
Non-merino	24.4%	76.7%

Appropriate pain management

The following table summarises the types of pain management that have been acknowledged as appropriate for the various husbandry procedures (mulesing, castration and, tail docking) within the SSF. These products are approved by the Australian Pesticides and Veterinary Medicines Authority (APVMA) for pain relief use in Australia.

Table 3. Matrix of appropriate pain management methods.

	MULESING	CASTRATION		TAIL DOCKING	
		Ring	Knife	Knife	Ring
Anaesthetic and antiseptic spray at the surgery site (e.g. Tri-Solfen®)	✓	✗	✓	✓	✗
Analgesic/pain killing oral gels; veterinary and nonveterinary prescribed - (e.g. Butec®, Buccalgesic®)	✓	✓	✓	✓	✓
Analgesic/pain killing injection (e.g. meloxicam)	✓	✓	✓	✓	✓
Anaesthetic injection at the surgery site (e.g. NumOcaine®)	✗	✓	✗	✗	✓

PRIORITY 1.2 Implement best practice sheep management

Implementing best-practice sheep management will support the health and wellbeing of animals and ensure industry meets customer and community expectations regarding animal welfare.

INDICATOR*	VALUE	STATUS	SOURCE
1.2.1 Lamb survival			
1.2.1a Producers pregnancy scanning ewes for LS	31.4% ∅	●	National Sheep Producer Survey 2024
The information gained from pregnancy scanning for LS allows producers to manage each group of ewes more strategically. Managing ewes based on their LS (single or multiples) through changes in feeding or paddock allocations at lambing time can lead to increased lamb survival. It is for this reason that scanning for LS is a good proxy for lamb survival.			
1.2.1b Industry average ASBV for weaning rate (WR)	0.16	●	MERINOSELECT Database MLA June 2026 Analysis
Weaning rate refers to the number of lambs weaned per ewe joined and is a key indicator of reproductive efficiency and maternal ability. In this instance, the WR index combines the traits of Conception (CON), LS and Ewe Rearing Ability (ERA) into a single ASBV for selection of animals. The industry average ASBV for WR was 0.16 in the 2024 born lambs. This is an increase from 0.14 in the 2023 lambs. This means that ewes with a higher value will rear a greater number of lambs, improving lamb survival, productivity and profitability.			
1.2.2. Adoption of best practice management			
1.2.2a Producers who have completed LTEM training	6.4%	●	AWI 2025-26

**See Appendix 5 for more information on indicator 1.2.5a Sheep transported in line with animal welfare standards. There have been delays in sourcing data for this indicator.*

LTEM is a course designed to increase woolgrowers' knowledge and understanding of the influence of ewe nutrition and management on overall reproduction rates and lamb and ewe survival. Participation in the six-day LTEM training program indicates a strong likelihood of best practice adoption. There were 194 producers who completed LTEM within the financial year.

The percentage of producers who had completed LTEM training was assessed at 30 June 2026. It is calculated as the cumulative number of producers who had completed LTEM training (5,190) divided by the number of AWI-eligible wool levy payers (81,543).

The completion rate increased from 6.1% in 2024-25 to 6.4% in 2025-26. This report includes two years of updated data. Refer to the Metric Updates section for further detail.

1.2.3 Shearing welfare			
1.2.3a Total number of days per year spent by shearing trainers in woolsheds nationally	533	○	AWI 2025-26

Targeted training reinforces best practice with new shearers and upskills existing shearers. Practical coaching is a key strategy to develop highly skilled shearers and optimise sheep welfare during shearing. AWI offers training on a demand basis, with fluctuations in training days dependent on contractors and woolgrowers seeking shearer training.

Since the 2024-25 report this figure has declined with a decrease in wool production leading to lower levies to support training days.

1.2.4 Wild predator management			
1.2.4a Producers with a documented wild predator management strategy	18.5% ∅	★	National Sheep Producer Survey 2024

Producer adoption of wild predator management strategies is considered a good indicator of effective predator control.

75% of producers surveyed in 2023 said they face challenges with wild predators.

1.2.6 Sheep welfare in saleyards			
1.2.6a Sheep transacted through NSQA saleyards	37.4%	○	MLA 2024-25

The National Saleyards Quality Assurance (NSQA) program was developed in 1996-97 to provide the saleyard sector of the livestock industry with a QA program linking the sectors of industry from the 'paddock to the plate'. NSQA is audited by a third party (currently AUS-MEAT).

In 2024-25, the number of sheep transacted through an NSQA facility decreased 0.8 percentage points compared to the previous financial year (38.2%).

1.2.7 Wellbeing of sheep during live export			
1.2.7a Mortality rate on ships	0.12%	●	DAFF 2025

DAFF reports livestock mortalities on every sea voyage. During the 2025 calendar year, a total of 372,753 sheep were exported by sea, with 447 sheep deaths (0.12%).

This is a decrease from 0.17% in the last reporting period (2024 calendar year). There were no live sheep voyages in 2025 that exceeded the notifiable mortality limit within this period.

PRIORITY 1.3 Ensure humane processing and on-farm euthanasia

On-farm euthanasia and processing are an integral part of sheep production. It is important these procedures are done competently.

INDICATOR	VALUE	STATUS	SOURCE
1.3.1 Humane on-farm euthanasia			
1.3.1a Producers aware of humane killing requirements in the AAWSG for sheep.	76.8% ∅	◐	National Sheep Producer Survey 2024

This figure is reported as a percentage of producers surveyed in the National Sheep Producer Survey 2024 (n=1,268) that were aware of the AAWSG for Sheep.

The survey showed that the majority of producers were aware of the AAWSG and the specific standards for the humane killing of sheep. This result was slightly less (-1.6 percentage points) than reported in 2022 when the last survey was undertaken.

The next survey will be conducted in 2027 when updated data will be provided.

1.3.2 Humane processing			
1.3.2a Lambs and sheep slaughtered through an establishment accredited by the AAWCS.	89.0%	○	MLA NLRS 2024-2025

The AAWCS is an independently audited certification program. It is used by livestock processors to demonstrate compliance with Australian industry standards from receival of livestock to the point of humane processing.

According to MLA NLRS slaughter collection, this figure decreased since 2024-25.

FOCUS AREA 2: ANIMAL HEALTH

PRIORITY 2.1 Prevent and manage disease

The outbreak or spread of pests and diseases would have a severe impact on the sheep industry, including individual businesses and access to markets. Vaccination is a key prevention mechanism for endemic diseases. Appropriate treatment of disease reduces impact on individual animals. Biosecurity measures, including effective traceability, also mitigate risk of disease.

INDICATOR	VALUE	STATUS	SOURCE
2.1.1 Australia maintaining freedom from disease			
2.1.1a Australia continues to be declared free from 12 major diseases	YES	◐	Animal Health Australia 2025

Due to ongoing investment, Australia continues to be free of the world's worst sheep diseases being foot and mouth disease (FMD), classical scrapie, brucellosis *(Brucella melitenisis)*, enzootic abortion of ewes or ovine chlamydiosis *(Chlamydophila abortus)*, Nairobi sheep disease, peste des petits ruminants (PPR), sheep scab *(Psoroptes ovis)*, salmonellosis *(Salmonella abortus-ovis)*, sheep pox, Wesselbron disease, maedi-visna, and pulmonary adenomatosis (Jaagsiekte).

This is a significant achievement in keeping trade access open. The importance of maintaining this status is highlighted by ABARES modelling, which estimates that a widespread outbreak of Foot-and-Mouth Disease alone could cost Australia's livestock industries around A$80b over 10 years, including more than A$12b in losses to the sheep industry [15].

This metric is derived from the *Animal Health in Australia Annual Report 2025* that draws together information provided by DAFF, State and Territory government agencies and Animal Health Australia's members [14].

INDICATOR	VALUE	STATUS	SOURCE
2.1.2 On-farm activity to prevent and treat disease			
2.1.2a Producers who vaccinate for clostridial diseases	87.6% ∅	★	National Sheep Producer Survey 2024

Vaccination is a highly effective method to protect sheep from disease. A sound vaccination program improves animal health and welfare and enhances enterprise productivity. The prevalence of vaccine use is a strong indicator of the Australian sheep industry's commitment to disease prevention.

This metric was changed in 2024 to improve alignment between the SSF and the Australian Beef Sustainability Framework (ABSF), to enable more effective reporting across livestock species. Previously, the SSF has reported the percentage of producers using any vaccine on their flock.

Clostridial vaccines are by far the most used vaccines across the industry, for diseases such as tetanus and blackleg, regardless of production region. Other vaccines tend to be region or issue-specific, which led to the decision to narrow this metric to clostridial vaccines only.

The National Sheep Producer Survey 2024 found that 91.9% of producers vaccinated their sheep with at least one type of vaccine. Of these, 95.2% vaccinated for clostridial diseases.

The next survey will be conducted in 2027, when updated data will be provided.

2.1.2b Industry average ASBV	Worm Egg Count (WEC)	-13.36	●	MERINOSELECT Database MLA June 2026 Analysis
	Early breech wrinkle (EBWR)	-0.32	●	MERINOSELECT Database MLA June 2026 Analysis

Internal parasites and flystrike remain among the most significant health challenges facing the Australian sheep industry. Genetic improvement can reduce disease risk by breeding sheep with greater resistance. For example, reducing breech wrinkle reduces susceptibility to breech fly attack. Trends in ASBVs provide an indication of genetic progress.

This metric has been modified to present the *actual* ASBV value for each trait, as opposed to the *percentage change* year on year.

The ASBV for both WEC and EBWR breeding values both reduced, meaning that the flock's resistance to worms and breech flystrike is improving.

Last year, the SSF reported that the ASBV for WEC was -12.13% in the 2023 lamb drop. This improved further to -13.36% for the 2024 drop lambs.

Additionally, the industry average ASBV for EBWR was reported as -0.30 in the 2023 lamb drop. This year it improved further to -0.32 for the average of the 2024 drop lambs.

2.1.3 Producers adhering to biosecurity requirements

2.1.3a Sheep producers compliant with LPA biosecurity requirements	85.3%	●	Integrity Systems Company 2025

To meet the requirements of the LPA program, each enterprise must have a documented biosecurity plan. In the 2025 calendar year, there were 1,276 sheep producers audited, of which 85.3% had a biosecurity plan in place. This number increased by 8.6% from the 2024 calendar year.

The LPA Program conducts both random and risk-based auditing, to monitor conformity across the industry. The 14.7% who did not have a biosecurity plan when audited have since either put a biosecurity plan in place or have been removed from the LPA program. Removal from the program means that sheep from that enterprise may not be transacted as LPA accredited.

From 1 September 2024, the Integrity Systems Company (ISC) implemented improvements to the LPA accreditation process to prompt producers to provide or complete a biosecurity plan during accreditation. From 1 September 2026, all LPA accredited producers will be required to provide a copy of their biosecurity plan during accreditation if they have not already done so.

Enhancing the environment and climate

ABOUT THE MATERIAL TOPICS

Material topics		
GHG emissions and carbon management	Climate change resilience	Biodiversity
Water security	Soil health and pasture management	Chemicals
Energy	Water quality	Waste

The Australian sheep industry, covering nearly 50% of the country's land mass, holds a unique position to contribute to biodiversity, and influence GHG emissions and sequestration.

The Kunming-Montreal Global Biodiversity Framework (GBF)[6] continues to influence Australia's environmental policy and investment priorities, with the release of Australia's Strategy for Nature 2024-2030 implementation plan providing a coordinated pathway to halt and reverse biodiversity loss by 2030 [16]. As one of the world's 17 megadiverse countries, Australia is progressing commitments to protect and conserve 30% of its land and marine areas by 2030, while strengthening efforts to prevent species decline and improve ecosystem resilience.

Across the Australian sheep industry, producers, researchers and industry organisations are undertaking a range of regenerative activities to improve environmental outcomes. The extent of this work is often greater than public perceptions might suggest. At the same time, it is widely recognised that while many valuable projects and initiatives are underway, a significant gap remains between current efforts and the scale of change required to address long-term environmental and climate challenges. Looking ahead, continued progress will depend not only on supportive policy and regulatory frameworks, but also on stronger collaboration between governments, industry, and the private sector to ensure that producers are recognised and appropriately rewarded for the environmental stewardship and natural capital outcomes.

Throughout the last 12 months, several significant projects focused on biodiversity and natural capital have been generating valuable insights and practical actions for graziers. For example, the Commonwealth funded Forage for Nature project is assessing the impact of grazed perennial pastures on biodiversity from adjacent remnant vegetation in WA's Wheatbelt. Similarly, the Green Sheep Project will enable sheep producers across the country to document their environmental sustainability credentials for market access and growth.

Rabobank launched the inaugural Rabobank Land Stewardship Award in 2026. This award recognises Australian farmers who are implementing practical land stewardship initiatives that support both environmental outcomes and long-term business resilience.

Over the long term, Australia will be subject to an increasingly variable and extreme climate [17], however, the 2025-26 year saw more favourable conditions than previous years. Drought conditions subsided in southern Australian and producers enjoyed good rainfall and significant recovery of pastures. Despite the reprieve this year, water security remains a perennial consideration for sheep farming systems across Southern Australia, where seasonal rainfall variability and extended dry periods can affect pasture production and livestock management. Industry and producer investments in water infrastructure, monitoring and improved grazing management continue to support the resilience and productivity of sheep enterprises under changing climatic conditions.

SPA and WPA advocate for reducing GHG emissions and the carbon footprint within the agricultural sector. Consequently, industry has made substantial investments in technologies and products aimed at reducing GHG emissions intensity. These investments include identifying anti-methanogenic pasture species for Australia with promising species including lucerne, brassicas, plantain, Leucaena, Stylosanthes, Desmanthus and biserrula. The project identified that there will be a trade-off between reducing emissions intensity and increased net emissions, which result from the increased stocking rates used on improved pastures.

To complement this research, industry investment is increasingly addressing the measurement and commercial mechanisms required to accelerate adoption. Development of livestock-sector carbon accounting methodologies and initiatives such as the Woolmark+ Australian Wool Insetting Program are exploring pathways to quantify, finance, and connect on-farm emissions reductions and removals with downstream supply-chain climate commitments.

[6] *The Kunming-Montreal Global Biodiversity Framework (GBF) is a global agreement adopted in 2022 that establishes targets for conserving biodiversity, restoring ecosystems, and reducing threats to nature by 2030.*

The Australian sheep industry is increasingly adopting improved and circular management practices for solid and liquid waste streams to enhance sustainability. A partnership between End Food Waste Cooperative Research Centre (CRC), RMIT University, MLA and Foodbank was formed to examine meat recovery for food relief, identifying barriers and enablers to recovery. To increase access to red meat for food relief, the project found that more collaboration between food relief agencies and the meat industry is required to improve industry education on the donation process, food safety guidance to enable confidence to donate, and leveraging existing supply chains to strengthen access in regional communities [18].

Significant investment is being directed into on-ground projects to address climate and environmental challenges. However, the scale and pace of change still fall short of what is needed to protect the natural ecosystems that underpin long-term productivity and profitability. The opportunity for future investment is to drive biodiversity and climate outcomes across sheep production systems, while ensuring farmers are compensated for these efforts and benefits are provided not only before the farm gate but also to the broader public.

FOCUS AREA 3: ENVIRONMENT

PRIORITY 3.1 Improve natural resource management

Maintaining natural resources, including water, soil and vegetation, is fundamental to the success of the industry.

INDICATOR	VALUE	STATUS	SOURCE
3.1.1 Protecting soil resource			
3.1.1a Natural resource management regions achieving healthy groundcover thresholds	68.0%	○	MLA 2025

Fractional groundcover is a key indicator of land condition and refers to all groundcover, including weeds, that can protect the soil surface from erosion. Groundcover is a useful indicator of land condition and is generally associated with higher levels of biodiversity, greater vegetation biomass, and increased carbon capture and storage in vegetation and soils [19].

The SSF *VegTrends dashboard* allows discernment and evaluation of seasonal measures from 40 sheep grazing natural resource management (NRM) regions. The groundcover tracking for the SSF is reported annually based on the late dry season (September) data. Of the 40 NRM regions with targets where sheep graze, 27 of them were meeting their cover targets in September 2025 (68%), which is down from 29 regions meeting their targets in September 2024.

Many sheep production regions had received significantly below-average rainfall during this period, which may have contributed to the reduced groundcover.

The data source for this indicator and all indicators under 3.1.2 has recently changed. See Appendix 5 for more information.

3.1.2 Conservation practices			
3.1.2a Extent of primary forest (M ha)	19.6	◐	MLA 2025
3.1.2b Extent of secondary forest (M ha)	10.9	◐	
3.1.2c Extent of primary woodland (M ha)	2.9	○	
3.1.2d Extent of secondary woodland (M ha)	26.3	●	

The SSF reports on changes in vegetation types associated with sheep or feed production. Based on the SSF *VegTrends dashboard*, these indicators represent the extent of national primary and secondary forest and woodland across 40 sheep producing NRM regions during 2025.

Total woody vegetation area across the selected region is reported by vegetation class. Primary vegetation was mapped in 1988, the first year of the dataset, and has experienced no observed loss since. Secondary vegetation was first detected after 1988 or has regrown in an area where vegetation loss was previously observed. "Woody vegetation" includes all mapped forest and woodland taller than 2m. The primary and secondary classifications are based on satellite observations and do not indicate vegetation age, condition, or origin.

PRIORITY 3.2 Responsible environmental practices

Responsible on-farm environmental practices include use of chemicals, and pest management including pest plants and animals. In processing, water use and waste minimisation are important issues. All of these elements are actively managed to minimise harm to the environment.

INDICATOR	VALUE	STATUS	SOURCE
3.2.1 Responsible chemical stewardship			
3.2.1a Producers who have attended a ChemCert course or similar	81.1% ∅		National Sheep Producer Survey 2024

Independent training of producers on the safe and effective use of agricultural chemicals (e.g., ChemCert) is part of responsible chemical use.

The National Sheep Producer Survey reports that 81.1% of producers attended a chemical training course in 2023. This was 0.9% less than the result reported from the previous survey, which represented on-farm practices for the year 2021.

Of the producers who had completed a chemical training course, 77% have ChemCert accreditation or hold a current ChemCert card.

The next survey will be conducted in 2027, when updated data will be provided.

3.2.2 Efficient water use in processing			
3.2.2a Kilolitres water used per tonne HSCW when processing sheepmeat	6.7kL ∅		AMPC Environmental Performance Review 2024

This metric provides a measure of water usage by the Australian sheepmeat processing sector.

AMPC reports water use and waste production from processing in its Environmental Performance Review (EPR). AMPC engages CSIRO to conduct the EPR biennially.

Compared to 2022, when the EPR was last conducted, water use by sheep and lamb processors has decreased by 6.9%.

NB: Some processors included in this calculation also processed goats.

3.2.3 Minimise waste in processing			
3.2.3a Kilograms of solid waste per tonne HSCW when processing sheepmeat	68.1kg ∅		AMPC EPR 2024

This metric provides a measure of solid waste (organic and inorganic) produced by the Australian sheepmeat processing sector.

AMPC reports water use and waste production from processing in its EPR. AMPC engages CSIRO to conduct the EPR biennially.

Compared to 2022, when the EPR was last conducted, solid waste produced by sheep and lamb processors increased by 128.5%.

Most waste generated by red meat processors is organic, comprised mainly of paunch stomach solids, manure and yard wastes, as well as sludge and pond crusts from wastewater treatment plants. Organic waste is almost entirely processed into other beneficial products, such as compost. In rare cases, often related to scale and location and where rendering is not possible, organic waste can also include non-commercial animal parts. Scrap metals and waste oil are also typically recycled.

Solid waste sent to landfill typically includes miscellaneous mixed waste for which local recycling pathways have not been found.

These results are largely explained by some processors disposing of large quantities of organic waste to landfill, comprising non-commercial value skins and hides, due to a lack of local composting options. In a few cases, some processors also reported an increase in solid waste due to demolition and construction waste, and an increase in single-use PPE.

NB: Some processors included in this calculation also processed goats.

PRIORITY 3.3 Encourage biodiversity

Biodiversity is increasingly highlighted by stakeholders as an important consideration in appropriate environmental management.

INDICATOR	VALUE	STATUS	SOURCE
3.3.1 Maintaining and increasing biodiversity			
3.3.1a Producers undertaking deliberate activities to maintain or enhance biodiversity	72.6% ∅	★	National Sheep Producer Survey 2024

This figure represents the percentage of producers who take steps to measure, maintain or enhance biodiversity on their property. The inclusion of this metric is a first step for the SSF in reporting on biodiversity management practices on-farm.

The results indicate that 72.6% of producers surveyed through the National Sheep Producer Survey 2024 (n=1,268) undertake deliberate activities to measure, maintain or enhance biodiversity on their property. Examples of these activities include groundcover management, minimum tillage and multi-species planting.

Furthermore, 6% of producers said they used remote sensing technologies or external assessment to track biodiversity indicators on their property.

The next survey will be conducted in 2027, when updated data will be provided.

FOCUS AREA 4: CLIMATE CHANGE

PRIORITY 4.1 Reduce net greenhouse gas emissions

Greenhouse gas emissions (GHGs) contribute to climate change and climate variability, including extreme weather events. The sheep industry is actively transitioning to net zero emissions. Using renewable energy sources, sequestering carbon into soils and vegetation, and improving productivity will all help to reduce GHG emissions and improve emissions intensity.

INDICATOR	VALUE	STATUS	SOURCE
4.1.1 Contribution of sheep production to greenhouse gas (GHG) emissions			
4.1.1a Net emissions: $MtCO_2e$ generated by sheep industry (farm and sheepmeat processing)	13.7 $MtCO_2e$	◐	MLA 2024

The reported figure is calculated using data from Australia's National Greenhouse Gas Inventory (NGGI) of national emissions and the CSIRO *2026 Red Meat Greenhouse Gas Emissions Update*. Emissions are grouped under a standardised unit of measurement known as carbon dioxide equivalents (CO_2e). Wool processing has not been included as most Australian wool is processed overseas.

Since the last report, emissions figures have become available for 2023 and 2024, and ongoing refinements to emissions from land use, land use change and forestry (LULUCF), and agricultural soils have caused modest revisions to historical emissions (see Appendix 5).

According to the latest figures, net emissions have increased marginally (+0.1 Mt CO_2e) between 2023 and 2024. Since the baseline year in 2005, net emissions from on-farm production (sheepmeat and wool) and sheepmeat processing have fallen 66% largely due to a decline in flock size and reduced emissions associated with land conversion in the LULUCF category.

Emissions from on-farm (sheepmeat and wool) production and sheepmeat processing represented approximately 21% of total net GHGs attributable to the Australian red meat industry in 2024.

INDICATOR	VALUE	STATUS	SOURCE
4.1.1 Contribution of sheep production to greenhouse gas (GHG) emissions			
4.1.1b Emission intensity: kg of CO_2e emitted per kg liveweight (LW) when raising sheep	6.8kg ∅	●	Integrity Ag 2020
A Life Cycle Assessment report estimated the emissions intensity of the Australian flock used for wool, sheepmeat production or live export for the year 2020.			
4.1.1c Emission intensity: kg of CO_2e emitted per kg greasy wool shorn	24.4kg ∅	●	Integrity Ag 2020
A Life Cycle Assessment report estimated the emissions intensity of the Australian flock used for wool, sheepmeat production or live export for the year 2020.			
4.1.1d Emission intensity: kg of CO_2e emitted per tonne HSCW when processing sheepmeat	308kg ∅	●	AMPC EPR CSIRO 2022
This figure reports the emissions intensity of the Australian sheepmeat processing sector. AMPC reports water use and waste production from processing in its EPR. AMPC engages CSIRO to conduct the EPR biennially. Compared to 2022, when the EPR was last conducted, emissions intensity for processing sheepmeat has decreased by 15.4%. *NB: Some processors included in this calculation also processed goats.*			
4.1.1e Sheep producers who have measured GHG emissions for their enterprise using carbon accounting or another process	9.9% ∅	●	National Sheep Producer Survey 2024
Calculating baseline carbon emissions and stored carbon is a foundational step for producers who are considering opportunities arising from low or zero carbon branded products. A carbon account can be used in on-farm decision making and sets a benchmark to show progress over time. Just as financial accounting assists in financial decision making and reporting, carbon accounting aids decision making and reporting on how carbon is, or is not, used on-farm. The National Sheep Producer Survey found that 9.9% of producers have estimated their GHGs for their enterprise in 2023, which is a 6.9 percentage point increase on the previous report (3%). Furthermore, 13.4% of producers had undertaken carbon neutral or carbon accounting training which was also an increase on previous figures (9%). The next survey will be conducted in 2027, when updated data will be provided.			
4.1.2 Renewable energy			
4.1.2a Producers who generate and use renewable energy	46.9% ∅	○	National Sheep Producer Survey 2024
The National Sheep Producer Survey found that 46.9% of producers generate and use renewable energy. This is 3.1% less than the previous report. Of the producers who generated and used renewable energy, 82% used solar energy without a battery, and 5.5% used wind energy. The next survey will be conducted in 2027, when updated data will be provided.			

PRIORITY 4.2 Adapt to a changing climate, including extreme weather events

Climate change is increasing the incidence of extreme weather events such as droughts, heatwaves, floods, and fires. Extreme weather events have significant implications for animal welfare (e.g. mortality, transport), environmental impact, and profitability.

INDICATOR	VALUE	STATUS	SOURCE
4.2.1 Response to a changing and variable climate			
4.2.1a Climate-adjusted total factor productivity growth	-0.3%	○	ABARES 1999-00 (base year) to 2024-25

Total Factor Productivity (TFP) is expressed as average annual percentage (%) growth over a given period and is relative to change from the base year. It is a measure of the ratio of outputs to inputs (see also 8.3.1a).

Climate-adjusted productivity aims to remove climate change effects from TFP by modelling the effect of climate conditions (such as rainfall and temperature) on TFP and then removing them.

Climate-adjusted productivity has declined by an estimated 0.3% per year since 1999-2000. As this indicator accounts for the effects of climatic variability, the decline cannot be attributed to climate conditions and therefore is attributable to declining TFP in the sheep industry. This is a major concern for long term industry viability and is reflected in indicator 8.3.1a which presents data on total factor productivity growth and demonstrates a decrease to -0.2% (see indicator 8.3.1a).

Source: MLA



Looking after our people, our customers and the community

ABOUT THE MATERIAL TOPICS

Material topics		
Access to labour and capacity building	Safety	Labour standards, human rights and employment
Occupational health	Human health and nutrition	Community engagement
Industry engagement and collaboration		

The Australian sheep industry is reliant on individuals equipped with the appropriate skills, knowledge, training, and experience to effectively manage farming operations and activities along the supply chain.

People, whether they be farmers, workers, customers or community members, are agriculture's most important asset.

As sustainability and sourcing requirements continue to be adopted by an increasing number of global brands and retailers, transparent information flows across the wool value chain are critical. However, meeting these requirements can create additional administrative demands, duplicative processes and costs for growers and other supply chain participants; this is exacerbated where the return on those investments is unclear.

There are varying perceptions across the supply chain of the implications and outcomes of rising wool prices. While wool prices have recovered following several difficult years, the relationship between market prices, producer returns and the cost of meeting sustainability and traceability expectations is complex. International Wool Textile Organisation analysis notes that the supply of certified wool depends on premiums being sufficient to compensate farmers for the additional cost of compliance.

Despite some real advances by the Australian wool industry, with programs like Australian Wool Traceability Hub, the complexity and length of the global wool supply chain can make it difficult for retailers and buyers to verify claims about origin, availability, and production practices, potentially contributing to information asymmetries between end markets and farm-gate outcomes. By bringing together credible industry data and fostering engagement across the value chain, the SSF supports more informed decision-making and helps strengthen transparency between growers, processors, brands, and retailers. This is particularly important as wool supply remains constrained, and market participants increasingly seek trusted information on production systems, sustainability performance, and supply chain resilience.

During 2025-26, industry investment in nutrition research, consumer education and domestic marketing continued to strengthen community understanding of lamb's role as a nutrient-dense food, while sustained production levels ensured Australian sheepmeat remained a significant contributor to food security both domestically and globally. The *Healthy Meals* program provided consumers and health professionals with evidence-based information about the role of lamb in healthy diets. The initiative highlighted lamb's contribution as a source of high-quality protein and essential micronutrients, helping Australians make informed choices in line with national dietary guidelines.

MLA's 2025 Community Sentiment Research, which informed industry engagement activities throughout 2025-26, found that health and nutrition were the leading reasons consumers increased their red meat consumption, with 87% of respondents citing benefits such as protein, iron, and overall wellbeing. This research helps the industry better understand community perceptions of lamb's nutritional value and informs future communication strategies.

FOCUS AREA 5: HEALTH AND SAFETY

PRIORITY 5.1 Improve industry safety culture

People, whether they be farmers, workers, customers or community members, are agriculture's most important asset. Agriculture is one of the most dangerous industries to work in due to exposure to a wide range of hazards. Safe and healthy workplaces and work processes protect people from injury and illness. Proactive focus and investment in safety is a foundation for cultural change.

INDICATOR		VALUE	STATUS	SOURCE
5.1.1 Health and safety prevention and training				
5.1.1a Producers who have undertaken a WHS risk assessment		54.6% ∅	★	National Sheep Producer Survey 2024

Serious injuries can be significantly reduced by ensuring that all on-farm workforce participants understand and commit to formal on-farm risk assessments, safety planning and training, induction obligations and legislative requirements in their State or Territory.

The National Sheep Producer Survey 2024 found that 54.6% of producers have undertaken a WHS risk assessment on-farm.

5.1.2 Number of deaths and serious injuries				
5.1.2a Number of fatalities in the sheep industry		21.0	●	SafeWork Australia 2020-24

Safe Work Australia (SWA) captures information on all work-related traumatic injury fatalities in Australia. Fatality data includes all persons who were traumatically fatally injured, and whose injuries resulted from work activity or exposures, and whose injuries occurred in an incident that took place in Australian territories or territorial waters.

Fatalities data is derived from the Work-related Traumatic Injury Fatalities (TIF) database. This database collates information sourced from workers' compensation data, fatality notifications from Australia's various WHS authorities and information in the National Coronial Information System.

The on-farm figure combines fatalities attributable to specialised sheep farming and sheep-beef cattle farming and is broken down as follows:

- Sheep farming (specialised): nine worker fatalities
- Sheep-beef cattle farming: 11 worker fatalities
- Meat processing: one worker fatality.

This number has reduced from 23 since 2024-25.

5.1.2b Lost time injury frequency rate (number of claims per million hours worked)	Farming	10.4	●	SafeWork Australia 2019-2020 to 2023-24'p'
	Processing	23.0	◐	SafeWork Australia 2019-2020 to 2023-24'p'

The Lost Time Injury Frequency Rate (LTIFR) measures the number of workplace injuries that prevent an employee from working their next full scheduled shift, per one million hours worked during the reporting period. The LTIFR is calculated across all livestock farms and meat processing facilities (irrespective of the species they produce or process). The calculator uses data from the National Data Set for Compensation-based Statistics to determine the number of lost time injuries in each industry, and data from the Australian Bureau of Statistics Labour Force Survey to determine the number of hours worked.

In 2023-24, the LTIFR for farming decreases and for processing it remained stable. The 2023-24 data is preliminary (denoted by 'p'). Revisions in preliminary results are likely over future years as open claims are finalised.

PRIORITY 5.2 Improve our people's health

It is critical that the industry supports our people to look after their physical and mental health.

INDICATOR	VALUE	STATUS	SOURCE
5.2.1 Status of physical and mental health			
5.2.1a Global Life Satisfaction Index score of Australian sheep producers	72.2	●	Regional Wellbeing Survey 2024-25

Good physical and mental health are essential for sheep producers and farm employees to manage their businesses, support their families, and contribute to their communities. Overall life satisfaction is therefore an indicator of industry wellbeing. The Global Life Satisfaction Index score is calculated based on respondents rating their satisfaction with their 'life as a whole' on a scale from 'completely dissatisfied' (0) to 'completely satisfied' (10). Scores are multiplied by 10 to give an index of 0 to 100.

It encapsulates people's satisfaction with their standard of living, health, what they are achieving in life, personal relationships, safety, feeling part of their community, and future security.

Measuring feelings can be very subjective but provides a useful complement to more objective data when comparing quality of life across countries. This aligns with accepted Organisation for Economic Cooperation and Development (OECD) metrics and reporting.

This year, Australian sheep graziers scored 72.2, which was 2.8% higher than 2023-24. The score is also relatively good in comparison to the score from the broader Australian community which was 64.8.

5.2.2 Connectedness to community			
5.2.1b Getting Involved in the Community Index of Australian sheep graziers	3.7	●	Regional Wellbeing Survey 2024-25

Connectedness to community is a widely accepted as a component of overall physical and mental wellbeing. This index evaluates the extent of a person's involvement in local community activities, as an average score from (1) "never or almost never" to (7) "all the time" taking part in community events, such as clubs or sporting groups/teams.

FOCUS AREA 6: CAPACITY BUILDING

PRIORITY 6.1 Support and grow our workforce

To be sustainable, the sheep industry needs access to people with the right skills to manage and operate businesses, and to look after those people. Access to training and continuous improvement is required to upskill the workforce. Succession planning supports the future workforce.

INDICATOR	VALUE	STATUS	SOURCE
6.1.1 Capacity of workforce			
6.1.1a On-farm industry participants who have completed further education	45.0% ∅	★	ABS 2021 Census

This data is taken from the Australian Census conducted in 2021 for those who are employed in sheep farming and shearing services across the 40 sheep-grazing NRM regions of Australia.

Further education is defined as training designed for skilled work outside secondary school. It includes Certificate III, IV, Diploma and Advanced Diploma, Bachelor's degree, Graduate Certificate, Graduate Diploma, and postgraduate degrees.

INDICATOR		VALUE	STATUS	SOURCE
6.1.2 Appropriate working conditions				
6.1.2a Federal award rate ratio		1.20:1	◐	Fair Work Ombudsman Pastoral Award Casual National Minimum Wage 2024-25

This ratio compares the shed hand hourly casual rate with more than 65 days' work experience ($37.35) from the Federal Pastoral award, with the national minimum hourly casual rate ($31.19 minimum wage) per hour.

The shed hand rate is as per the Federal Pastoral Award and is considered the most utilised on-farm payment rate. This ratio held steady over the reporting period.

6.1.3 Availability of workforce				
6.1.3a Producers who find labour availability to be a major issue in their operation	General labour	42.0% ∅	○	National Sheep Producer Survey 2024
	Shearing labour	35.3% ∅	●	

The National Sheep Producer Survey asks producers to rate the extent to which availability of general labour or shearing labour is an issue for their sheep operation.

In 2023, 42.0% of sheep producers reported major issues with finding general labour and 35.3% with shearing labour. This was a 7% increase for general labour and a 3.5% decrease for shearing labour since the last survey.

The next survey will be conducted in 2027, when updated data will be provided.

6.1.3b Average labour shortage in key meat processing occupations: Meat Boners and Slicers, Slaughterers, and Meat Inspectors	61.0% ∅	★	AMPC, Jobs and Skills Australia, ABS 2026

Jobs and Skills Australia (JSA) ratings indicate that shortages of meat boners and slicers, and slaughterers are present in two of Australia's nine States and Territories: New South Wales and Western Australia. Shortages of meat inspectors are recorded in every State and Territory. Under JSA's methodology, an occupation is considered likely to be in shortage when the job fill rate falls below 67%.

When these shortage ratings are weighted by State and Territory sheepmeat production volumes, 41% of Australian sheepmeat is processed in jurisdictions with shortages of meat boners and slicers, and slaughterers, while 100% of sheepmeat production occurs in jurisdictions with shortages of meat inspectors. Across the three indicator occupations, the average shortage exposure for Australian sheepmeat production is 61%.

6.1.4 Extent of succession planning in the industry			
6.1.4a Producers with a formal succession plan in place	19.9% ∅	◐	National Sheep Producer Survey 2024

The National Sheep Producer Survey found that succession preparedness varied among respondents. Nationally, 33.2% are yet to commence any discussion or planning while 28.2% have begun discussions with the family but have not reached an agreed outcome. Only 19.9% report having a formal succession plan in place. This figure has declined 1.1% from the last report.

Succession planning is often a complex issue for farm businesses. Family situations are unique and meeting the expectations of all members can be difficult. Furthermore, the decisions to be made about assets and liabilities can be triggered by unexpected and traumatic events outside the owner's control, such as divorce or death.

PRIORITY 6.2 Encourage workforce diversity

A diverse workforce brings a range of skills and perspectives to the industry and assists in attraction and retention of workers.

INDICATOR		VALUE	STATUS	SOURCE
6.2.1 Extent of workforce diversity				
6.2.1a Age distribution of those who are employed in sheep farming and shearing services	Aged 15-34 ∅	20.0%	★	ABS 2021 Census
	Aged 35-54 ∅	32.0%		
	Aged 55-74 ∅	40.0%		
	Aged 75-100 ∅	7.0%		

This data is taken from the Australian Census conducted in 2021 for those who are employed in sheep farming and shearing services across the 40 sheep grazing NRM regions of Australia.

The sheep industry has an older age profile than the broader Australian population. People aged 55-74 account for 40% of the industry, compared with 25% nationally, while those aged 15-34 account for 20%, compared with 32% nationally.

NB. The percentages do not add up to 100%, due to a rounding error.

6.2.1b Gender breakdown of those who are employed in sheep farming and shearing services	Men	72.0% ∅	★	ABS 2021 Census
	Women	28.0% ∅		

This data is taken from the Australian Census conducted in 2021 for those who are employed in sheep farming and shearing services across the 40 sheep-grazing NRM regions of Australia.

The sheep industry is mostly male, with fewer than three in 10 women.

These results will be updated following the release of data from the 2026 Census.

6.2.1c Aboriginal and Torres Strait Islanders who are employed in sheep farming and shearing services	1.5% ∅	★	ABS 2021 Census

This data is taken from the Australian Census conducted in 2021 for those who are employed in sheep farming and shearing services across Australia.

Aboriginal and Torres Strait Islanders represent only 1.5% of those employed in sheep farming and shearing services, while they represent 3.2% of the broader population [20].

6.2.1d Speaking a LOTE in those who are employed in sheep farming and shearing services	2.0% ∅	★	ABS 2021 Census

This data is taken from the Australian Census conducted in 2021 for those who are employed in sheep farming and shearing services across Australia.

Two percent of people employed in sheep farming and shearing services speak a LOTE.



Source: Gundagai Lamb

FOCUS AREA 7: CONTRIBUTION TO COMMUNITY

PRIORITY 7.1 Enhance community trust

Community trust in farmers is high, and maintaining it is critical to the sheep industry's social licence. The industry contributes to Australian society well beyond its economic value, and the SSF helps demonstrate this broader contribution.

INDICATOR	VALUE	STATUS	SOURCE
7.1.1 Community perceptions of the sheep industry			
7.1.1a Australians who believe that Australian lambs are farmed and raised in a humane manner	56.0%	◐	MLA Consumer Sentiment Study 2025

MLA's Consumer Sentiment Research has been conducted annually since 2010 and is currently managed by Pollinate. It tracks community sentiment, trust, and perceptions towards the red meat industry.

Fieldwork is typically undertaken in May each year, with the 15-minute online survey engaging approximately 1,500 primary household grocery buyers and meal-preppers aged 18-64, living in metropolitan Australia.

While 56% of Australians believe that Australian lambs are farmed and raised in a humane manner, among the remaining 44% who don't agree with the statement, the majority are neutral (they sit on the fence or say they don't know).

INDICATOR	VALUE	STATUS	SOURCE
7.1.1 Community perceptions of the sheep industry			
7.1.1b Respondents who believe wool is more environmentally friendly than other fibres	40.0% ∅	★	AWI 2024 Global Brand Tracking Study

The AWI 2024 Global Brand Tracking Study found that 40% of respondents considered wool more environmentally friendly than other fibres. While this reflects positive perceptions of wool's environmental credentials, it also suggests there is scope to improve awareness of its sustainability attributes. Consumer perceptions of wool's environmental performance are shaped by comparative data, sustainability claims from other fibre categories, and fibre assessment methodologies that may not fully account for wool's renewability, biodegradability, recyclability, and durability. Improving understanding of wool's environmental credentials remains a strategic priority for the industry, making this an important metric to track over time.

The AWI Global Brand Tracking design was modified in 2024 to accommodate changes in global market dynamics. The South Korean market was added to the study, meaning the study was conducted across nine influential exporting countries: USA, UK, Germany, France, Italy, Japan, China, South Korea, and Australia.

In addition, the survey was split into two categories: 'clothing/apparel' and 'sportswear'. The figure reported here is for clothing/apparel.

Changes to the survey design mean the results above provide a new benchmark and are not comparable with previously reported figures.

PRIORITY 7.2 Deliver products that customers demand

Lean red meat is recommended in a healthy diet because it is an excellent source of protein, iron and zinc, which are essential nutrients for good health. Wool is a natural, renewable and biodegradable fibre with numerous human health benefits. These qualities are integral in providing a sustainable fibre choice to consumers. Strong consumer demand for Australian sheepmeat and wool is a key success factor for the industry.

INDICATOR	VALUE	STATUS	SOURCE
7.2.1 Consumer perceptions of product quality			
7.2.1a Australians who believe that Australian lamb is worth paying a bit more for	28.0%	●	MLA Domestic Consumer Tracker 2025

The MLA Domestic Tracker is conducted by Kantar. The reported figure is for the 2025 calendar year. The figure is the Moving Annual Total (MAT) for about 100 nationally representative respondents surveyed each week, equating to 5,000 over 12 months among main grocery buyers aged 18-64 years old across metropolitan Australia. The latest result moved in a positive direction, increasing from 27%.

7.2.1b Willingness to consider wool for apparel	62.0% ∅	★	AWI 2024 Global Consumer Survey

This metric was amended in 2024, to utilise an alternative data source, the AWI Global Consumer survey, which evaluates community perceptions around wool and its quality. This change means that previous figures are not comparable, however, it provides a forward-looking indicator of wool's relevance in consumer decision-making.

The global apparel market presents significant opportunities for wool, with both high levels of penetration and consideration when consumers are looking to purchase apparel. 62% of the consumers surveyed indicated that when looking to purchase apparel, they would consider buying products made from wool.

Ensuring a financially resilient industry

ABOUT THE MATERIAL TOPICS

Material topics		
Economic contribution	Economic resilience and market access	Food safety and quality
Product innovation and stewardship	Responsible value chain and traceability	

The Australian sheep industry makes a valuable contribution to the national and regional economies through export income, employment, and business activity.

Total return for the five-year period was 7.6%, the majority of which was from rising land values. However, cost increases and reductions in the sheep flock have placed pressure on the industry with low operating returns.

The continued decline in Australian wool production and total value reflects the consequences of an extended period of subdued market conditions, during which auction returns were often insufficient to support the long-term financial sustainability of wool-growing enterprises.

Although wool prices strengthened significantly during 2025-26, this recovery has not offset the substantial contraction in volumes offered. Poor productivity gains, strong sheepmeat prices, and comparatively attractive returns from other commodities have encouraged some producers to redirect land, labour and capital towards more profitable enterprises, or sell sheep rather than retain them for wool production.

Reduced participation in voluntary product integrity schemes is a lagging indicator of this uncertainty, with some growers viewing certification as an additional cost while the future viability of their wool enterprise remains unclear.

Looking ahead, with supply constraints potentially driving competition in the near term, it may be difficult for growers to determine the extent to which stronger prices reflect demand for preferred attributes, such as non-mulesed or certified wool, or broader supply-and-demand dynamics as buyers look to fill orders in a supply-constrained market.

Over the past financial year, producers have continued to invest in and build their understanding of strategies to improve productivity, profitability, and sustainability. In the 2025-26, MLA investments in producer adoption delivered an annual net benefit to participating producers totalling $87.2 million.

Access to diverse domestic and international markets remained central to the industry's financial resilience. During 2025-26, Australian sheepmeat exports to the US faced increased trade costs, with a temporary 10% import surcharge replaced by a 12.5% tariff from 24 July 2026. A separate US safeguard investigation into global lamb imports also created uncertainty about future access conditions for this important market.

Despite smaller flock numbers and lower sheepmeat production, global demand for Australian sheepmeat remained strong, supported by the industry's reputation for safe, high-quality products and robust production systems. Continued investment in market access, trade relationships, and industry integrity systems helped position Australian producers to respond to evolving customer expectations around sustainability, provenance, and animal health.

2025-26 also saw ongoing progress in traceability and value chain assurance, with the national rollout of eID for sheep and goats strengthening Australia's biosecurity preparedness and supporting sophisticated livestock tracking capabilities.

Well-designed sustainability initiatives can support environmental outcomes while strengthening long-term commercial resilience. For example, improved grazing and pasture management can support groundcover, soil condition and feed availability, while reducing exposure to seasonal feed shortages. Animal health, welfare, and genetic improvements can lift reproductive performance and livestock productivity, while efficient use of water, energy, and other inputs can reduce costs and improve preparedness for periods of seasonal or market pressure.

The SSF Steering Group and Board recognise that, while the current suite of SSF financial indicators provides valuable insights into profitability, productivity and market access, it does not adequately reflect the emerging risks associated with a declining Australian sheep flock and the potential impacts on long-term supply chain resilience. To ensure the Financially Resilient Industry theme continues to provide an accurate assessment of the health and sustainability of the sector, the SSF will review indicators and associated metrics that capture both financial performance and underlying industry supply trends.

FOCUS AREA 8: PROFITABILITY, PRODUCTIVITY AND INVESTMENT

PRIORITY 8.1 Maintain or increase industry profitability

Profitability underpins the success of the sheep industry — as well as individual businesses.

INDICATOR		VALUE	STATUS	SOURCE
8.1.1 Rate of return				
8.1.1a Rate of return on capital, including and excluding capital appreciation, using a five-year rolling average from 2020-21 to 2024-25.	Including	7.6%	○	ABARES June 2026
	Excluding	0.2%	○	

The rate of return on capital (ROC) has been calculated using data obtained from the annual Australian Agricultural and Grazing Industries Survey (AAGIS). The figures provided represent the average per farm and are calculated after an owner operator allowance.

Total return on capital of 7.6% over the five-year period shows an industry that allows participants to accumulate wealth. The bias to capital appreciation reflects a very strong period of land appreciation, which when profits are flat (in absolute dollars), will decrease ROC.

Over time, productivity improvements will be needed to lift ROC to longer-term averages, assuming land values are at least maintained.

Low average ROC can require businesses to maintain high equity levels while limiting their capacity to generate profits for reinvestment. Over time, this can constrain industry viability.

This data represents industry averages, and performance varies widely across the industry. Larger producers, who produce most of the meat and wool, tend to have a higher ROC.

PRIORITY 8.2 Maintain or increase contribution to the Australian economy

The industry continues to demonstrate its value to stakeholders, contributing to Australian agriculture's achievement of the National Farmers' Federation's $100b farm gate output target four years ahead of schedule. The scope of contributions extends beyond production value to the broader sustainability, productivity, natural capital, and farmer wellbeing goals outlined in the NFF's 2030 Roadmap [21].

INDICATOR	VALUE	STATUS	SOURCE
8.2.1 Contribution to the Australian economy			
8.2.1a Gross value (AUD) of agricultural production for sheepmeat	$5.617b	●	ABARES 2024-25

This includes the production value of sheep and lamb meat. It does not include value derived from live sheep exports.

Since the publication of the last report, the gross value of production for sheepmeat for 2023-24 was revised from $4.250b to $4.086b. Therefore, the value has increased by 37.5% over the past financial year (from $4.086b to $5.617b).

8.2.1b Gross value (AUD) of agricultural production for wool	$2.405b	○	ABARES 2024-25

This includes shorn, fellmongered and wool on skins. Furthermore, the wording of this metric has changed in line with the ABARES definitions of commodities and the available data.

Since the publication of the last report, the gross value of production for wool for 2023-24 was revised from $2.822b to $2.774b. Therefore, the value has decreased by 13.3% over the past financial year (from $2.774b to $2.405b).

PRIORITY 8.3 Increase productivity

Improving farm productivity contributes to profitability by allowing farmers to produce more outputs using fewer inputs.

INDICATOR		VALUE	STATUS	SOURCE
8.3.1 Productivity				
8.3.1a Total factor productivity average annual growth rate		-0.2%	○	ABARES 1999-00 (base year) to 2024-25

Total factor productivity (TFP) is the amount of product produced compared to the amount of inputs used for production. It can be improved by increasing outputs while maintaining inputs constant. Alternatively, inputs can be reduced while outputs are maintained. In reality, most agricultural businesses improve productivity through a combination of increasing and decreasing inputs.

TFP does not consider changes in the value (quality) of product produced, therefore it does not capture the financial gains from the reduction of fibre diameter of the Australian clip.

Improving TFP is critical for long-term competitiveness of the sheep industry. Low or declining TFP will mean the sector will face increasing difficulty competing with more productive sectors, e.g. cropping, for land use, labour, and for attracting capital.

The TFP rate has decreased to -0.2% which indicates that industry productivity has gone slightly backwards. Climate-adjusted TFP has also decreased to -0.3% so the decline cannot be attributed to climate condition (see indicator 4.2.1a).

8.3.1b Industry average Sustainable Merino (SM) index	138.7	●	MERINOSELECT Database MLA June 2026 Analysis

Selection indexes incorporate economically important traits into a single value so that genetic progress across a range of important traits can be made in balance. Tracking changes in industry indexes over time provides insights on the genetic progress of the Merino flock.

The new Sustainable Merino index focuses on genetic improvement of fleece weight, growth, lean meat yield, and reproduction in combination with reducing breech wrinkle, dag and WEC.

The Sustainable Merino index increased from 135.41 for the average of the 2023 drop, to 138.7 for the average of the 2024 drop animals.

PRIORITY 8.4 Encourage innovation

Innovation supports sheep businesses' ability to respond to challenges and opportunities. It can preserve or increase margins and foster competitive advantage.

INDICATOR		VALUE	STATUS	SOURCE
8.4.1 Investment in research, development and adoption (RDA)				
8.4.1a AUD invested in research, development and adoption (RDA) per annum	Sheepmeat	$23.4m	◐	MLA 2024-25
	Wool	$27.2m	●	AWI 2025-26

The investment in RDA is calculated as the sum of levies and government matching funds directed to Australian sheepmeat and wool RDCs.

Since 2023-24, investment in sheepmeat RDA has remained relatively stable and investment in wool RDA has increased. The primary driver for this was the higher sheep sale income, which increased modestly in Merino enterprises.

FOCUS AREA 9: MARKET ACCESS

PRIORITY 9.1 Ensure positive market positioning and access

Market position underpins demand for Australian sheepmeat and wool. It is shaped by Australia's reputation as a reliable supplier of high-quality, responsibly produced products, which can strengthen market access and support price premiums.

INDICATOR	VALUE	STATUS	SOURCE
9.1.1 Value of product			
9.1.1a Australian value share (%) of sheepmeat exports	45.9%	○	MLA 2025

This indicator is a value-based expression of Australia's share of global sheepmeat exports. In 2025, Australia exported more than 559,000t of sheepmeat (swt).

In comparison to other producer countries, New Zealand exported 370,000t and the United Kingdom exported 87,000t.

Australia's value share for sheepmeat exports decreased by 9%.

9.1.1b Australian value share (%) of greasy wool exports	71.7%	○	AWI 2025

This indicator is a value-based expression of Australia's share of global greasy wool exports. In 2025, Australia exported 280,489t of wool. In comparison to other producer countries over the same period, South Africa exported 47,515t and New Zealand 31,886t.

Australia's value share of greasy wool exports decreased by 6.8%, from 76.9% in 2024 to 71.7% in 2025.

9.1.2 Access to markets			
9.1.2a Cumulative alleviation (from 2020) of red meat non-tariff barriers (NTBs)	$862m	●	MLA 2025-26

The cumulative alleviation (from 2020) of red meat (both sheepmeat and beef) NTBs increased to $862m in 2025-2026.

NTBs, such as the use of import restrictions, accreditation of export establishments, labelling, or unnecessary sanitary rules, can impose significant delays and additional costs on Australian sheepmeat exports. Alleviation of NTBs is therefore critical in improving international competitiveness.

An example of recent benefits of removing an NTB impact is the approval by China of numerous Australian sheepmeat processing establishments, which facilitated access to that market for both chilled and frozen product.

9.1.2a reflects the Red Meat 2030 success indicator requiring a reduction in NTBs compared to the 2020 baseline.

9.1.2b Value share of Australian sheepmeat, sheep offal and live sheep exports covered by one or more PTAs	74.0%	◐	MLA 2025-26
9.1.2c Value share of Australian greasy wool exports covered by one or more PTAs	93.0%	◐	AWI 2025-26

PTAs or free trade agreements (FTAs) provide access to a market beyond what has been granted multilaterally via the World Trade Organization (WTO). FTAs have significantly reduced the tariff and quota barriers Australia faces in export markets. The percentage of preferential coverage fluctuates according to export destination volume/value in any particular year.

9.1.2b reflects the Red Meat 2030 success indicator of pursuing preferential access into new and existing markets.

Australia has recently concluded negotiations with the European Union, with the agreement likely to come into force in 2027. Once effective, the percentage of exports covered by an FTA will increase, albeit marginally, given a seven-year phase-in of the additional 25,000t (cw) quota.

The value share of Australian greasy wool exports covered by one or more PTA increased by 1.3% over the reporting period to 93.0%, up from 91.7% (AWI, 2025-26). Under the China–Australia Free Trade Agreement (ChAFTA), Australia has access to a duty-free, Australia-specific tariff-rate quota in addition to China's WTO quota. The ChAFTA quota commenced at 30,000t clean wool in 2016, increased to 33,075t in 2018, and reached 44,324t clean wool in 2024 (approximately 63,500t greasy wool). [22]

PRIORITY 9.2 Guarantee product integrity and safety

Product integrity and safety are critical to meeting customers' expectations. These are underpinned by Australia's integrity systems for sheepmeat and wool.

INDICATOR	VALUE	STATUS	SOURCE
9.2.1 Compliance with product integrity and safety standards			
9.2.1a Wool clip that is produced with a voluntary product integrity scheme	14.0%	○	AWEX 2024-25
Voluntary product integrity schemes include Authentico, ZQ Merino, Better Choices, Responsible Wool Standard, EU-Ecolabel, SustainaWOOL, ResponsiWOOL and others. The figure is calculated using first-hand offered bales with Preparation (P) and Declaration (D) Certificates only. It excludes rehandled wool such as bulk-class and interlots. Figures from the 2023-24 season were recalculated with the final value being 14.9%. As such, the percentage of the clip associated with one of these schemes for this season, has slightly declined slightly.			
9.2.1b Compliance rates for chemical residues in sheepmeat	99.81% ∅	◐	DAFF National Residue Survey 2023-24
The National Residue Survey (NRS) for DAFF monitors residues in animal products through various random and targeted testing programs. In 2022-23, a total of 2,113 samples were collected for analysis. The results highlight excellent compliance with Australian standards and demonstrate the strong commitment of the industry to good agricultural practice. The consistently high compliance rates help maintain the reputation and integrity of Australian sheep in domestic and international markets.			



Source: Gundagai Lamb

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Appendices

APPENDIX 1: STANDARDS CONTENT INDEX

This Index provides a navigation of the content of the Australian Sheep Sustainability Framework (SSF) Annual Report 2026 to selected disclosures in common standards including the Global Reporting Initiative (GRI), the Taskforce on Nature-related Financial Disclosures and the ISSB (International Sustainability Standards Board) 2026, *Exposure Draft: Proposed Amendments to the SASB Standards and the IFRS S2 Industry-based Guidance*, IFRS Foundation. The SSF Annual Report has not been prepared in accordance with these standards. Many disclosures are addressed only partially.

GRI Content Index

Statement of use	Meat & Livestock Australia and Australian Wool Innovation have prepared the information cited in this GRI content index, on behalf of Sheep Producers Australia and Wool Producers Australia (as the parties responsible for the Sheep Sustainability Framework), for the period 1 July 2025 to 30 June 2026 with reference to the GRI Standards.
GRI 1 used	GRI 1: Foundation 2021
Applicable GRI Sector Standard(s)	GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
General disclosures				
GRI 2: General Disclosures 2021	2-1: Organisational details		*Sheep Producers Australia* *WoolProducers Australia* *Meat & Livestock Australia* *Australian Wool Innovation*	
	2-3: Reporting period, frequency and contact point	Page 2		
	2-4: Restatements of information	Appendix 5: Page 65		
	2-5 b (i), (ii): External assurance	Page 2		
	2-6 a, b (i): Activities, value chain and other business relationships	Pages 18-20		
	2-7 b (iv): Employees	Pages 14-15 and 45		
	2-9 a,b,c (i), (ii), (iv), (v): Governance structure and composition	Appendix 3: Pages 59-60	*Sheep Producers Australia* *WoolProducers Australia* *Terms of Reference – Board* *Terms of Reference – Steering Group*	
	2-10 a, b (iii), (iv): Nomination and selection of the highest governance body	Appendix 3: Page 59	*Terms of Reference – Board* *Terms of Reference – Steering Group*	
	2-11: Chair of the highest governance body	Page 59	*Terms of Reference – Board* *Terms of Reference – Steering Group*	
	2-14: Role of the highest governance body in sustainability reporting	Pages 2, 24 and 59	*Terms of Reference – Board* *Terms of Reference – Steering Group* *Materiality Assessment 2024*	

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
	2-15 a: Conflicts of interest	Page 59	*Terms of Reference – Board* *Terms of Reference – Steering Group*	
	2-17: Collective knowledge of the highest governance body	Pages 60	*Terms of Reference – Board* *Terms of Reference – Steering Group*	
	2-22: Statement on sustainable development strategy	Page 24	*SSF Strategic Plan 2025 - 2030*	
	2-29 a (i), (ii): Approach to stakeholder engagement	Pages 24-25		
Material topics				
GRI 3: Material Topics 2021	3-1: Process to determine material topics	Page 24	*Materiality Assessment 2024*	
	3-2 a: List of material topics	Page 24	*Materiality Assessment 2024*	
Emissions				
GRI 3: Material Topics 2021	3-3 c, d, e Management of material topics	Pages 35 and 38		13.1.1
GRI 305: Emissions 2016	305-4 a,b GHG emissions intensity	Page 38-39	CSIRO 2026 Red Meat Greenhouse Gas Emissions Update *(link not available at the time of publication).* *AMPC Environmental Performance Report 2024* *AMPC Sustainability Uplift Report 2025*	13.1.5
Biodiversity				
GRI 3: Material Topics 2021	3-3: c,d,e Management of material topics	Pages 35-36	*Biodiversity and vegetation*	13.3.1
Soil health				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 35 and 36	*Healthy fertile soils*	13.5.1
Pesticides use				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 28 and 52	*National Residue Survey*	13.6.1
Water and effluents				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 35 and 37	*AMPC Environmental Performance Report 2024*	13.7.1
Food safety				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 28 and 52	*Integrity and compliance*	13.10.1
GRI 416: Customer Health and Safety 2016	416-2 a: Incidents of non-compliance concerning the health & safety impacts of products and services	Page 52	*National Residue Survey*	13.10.3
Animal health and welfare				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 28-34	*National Sheep Producer Survey 2024* *Animal health & welfare*	13.11.1

GRI STANDARD	DISCLOSURE	LOCATION		SECTOR STANDARD
GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022	13.11.2 Report the percentage of production volume certified to third-party animal health and welfare standards and list these standards.	Pages 6, 21 and 32-33	*NSQA (note: at the time of publication, saleyards were transitioning to being audited based on LPA requirements, the NSQA web link will become outdated)* *ESCAS* *AAWCS*	3.11.2
Occupational health and safety				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 41-42		13.19.1
GRI 403: Occupational Health and Safety 2018	403-9 a(i), (iii), e: Work-related injuries	Page 42		13.19.10
Climate adaptation and resilience				
GRI 3: Material Topics 2021	3-3 c,d,e: Management of material topics	Pages 23 and 35-36		13.2.1
GRI 201: Economic Performance 2016	201-2 a. (i) Financial implications and other risks and opportunities due to climate change	Pages 7, 13, 40, and 50	*Australian Bureau of Agricultural and Resource Economics*	13.2.2

TNFD Content Index

CORE GLOBAL METRIC	DISCLOSURE METRIC	LOCATION
C1.0: Total spatial footprint (km²)	Total surface area controlled/ managed by the organisation, where the organisation has control (km²)	Page 20
C1.1 Extent of land/ freshwater/ ocean-use change	Extent of land/freshwater/ ocean ecosystem use change (km²) by: · Type of ecosystem; and · Type of business activity	Page 36
C4.0 Measures against unintentional introduction of invasive alien species (IAS)	Proportion of high-risk activities operated under appropriate measures to prevent unintentional introduction of IAS, or low-risk designed activities	Pages 6, 29, 33-34 and 37

ISSB (International Sustainability Standards Board) 2026, *Exposure Draft: Proposed Amendments to the SASB Standards and the IFRS S2 Industry-based Guidance*, IFRS Foundation Content Index

CODE	METRIC	LOCATION
FB-MP-160a.5 Land Use & Ecological Impacts	(1) Total spatial footprint of operations, (2) area disturbed and (3) area restored	Pages 20 and 36
FB-MP-250a.6 Food Safety	Processes, controls and procedures to ensure food safety throughout the value chain	Pages 28 and 52
FB-MP-320a.1 Workforce Health & Safety	(1) Number of fatalities and (2) total recordable incident rate for (a) employees and (b) non-employee workers; (3) average hours of health, safety and emergency response training	Pages 6 and 42
FB-MP-410a.3 Animal Health & Welfare	Percentage of production certified to a third-party animal welfare standard	Pages 6, 21 and 32-33
	Description of animal welfare strategy, including targets, procedures and value chain integration	Page 28-34
	Description of risks and opportunities related to biosecurity, including strategies for disease management	Pages 6, 29 and 33-34

APPENDIX 2: INDEPENDENT ASSURANCE STATEMENT

INDEPENDENT ASSURANCE STATEMENT

To the Stakeholders of Meat & Livestock Australia Limited ("MLA")

Limited Assurance Conclusion
Based on the procedures we have performed and the evidence we have obtained, nothing has come to our attention that causes us to believe the materiality assessment ("Subject Matter Information"), including the underlying methodology within the scope of our limited assurance engagement, as disclosed in MLA's Sheep Sustainability Framework (SSF) Annual Report 2026 ("the Report") for the period of 1st July 2025 to 30th June 2026, is not fairly presented and prepared, in all material respects, in accordance with the Reporting Criteria.

Scope of the Assurance Engagement
Our assurance engagement did not extend to any other information included in the Report, nor to information relating to prior reporting periods. We have not performed any procedures on such information and, accordingly, do not express a conclusion thereon.

Reporting Criteria
The Subject Matter Information was prepared and reported in accordance with AA1000 Accountability Principles 2018 – *Materiality Principles* - issued by AccountAbility.

MLA's Responsibilities
Management of MLA was responsible for:
- Selecting and establishing suitable Reporting Criteria for preparing the Subject Matter Information subject to assurance.
- Preparing and presenting the Subject Matter Information in accordance with the Reporting Criteria.
- Designing, implementing, and maintaining internal controls relevant to the preparation of the Subject Matter Information that are free from material misstatement whether due to fraud or error.
- Advising us of any known or suspected issues related to the Subject Matter Information.

Our Responsibilities
Bureau Veritas Australia Pty Ltd ("Bureau Veritas") was responsible for:
- Planning and performing the engagement to obtain the intended level of assurance about whether the Subject Matter Information is free from material misstatement, whether due to fraud or error.
- Forming an independent conclusion based on the procedures performed and evidence obtained.
- Reporting our conclusion to the Directors of MLA.

Bureau Veritas was not involved in the preparation of the Report. We have maintained our independence and performed the engagement in accordance with the relevant ethical requirements applicable to assurance engagements.

Summary of Work Performed
Our limited assurance engagement on the Subject Matter Information was conducted in accordance with ISSA 5000 *International Standard on Sustainability Assurance, General Requirements for Sustainability Assurance Engagements* issued by the International Auditing and Assurance Standards Board (IAASB) and informed by Bureau Veritas' standard procedures and guidelines for external verification and assurance of ESG Information and Sustainability Reports.

Our work was planned and executed in a manner designed to produce the intended level of assurance and to provide a sound basis for our conclusions.

The procedures we performed were based on our professional judgement and included enquiries, observation of processes performed, inspection of documents, analytical procedures, evaluating the appropriateness of quantification methods and reporting policies, and agreeing or reconciling with underlying records. In undertaking our assurance engagement, our procedures comprised:
- Review of the suitability and application of the Reporting Criteria used as the basis for preparing the Subject Matter Information subject to assurance;
- Enquiries of MLA representatives to obtain an understanding of, and evaluate the design and implementation of, the processes, systems and internal controls used to identify, collect, analyse, score and report material topics, including stakeholder engagement, desktop review inputs and materiality scoring methodologies;
- Review of documentary evidence including stakeholder engagement records, workshop outputs, benchmarking analysis, literature reviews and scoring methodologies; and
- Review of overall presentation of the materiality assessment results within the Report, including the materiality matrix, topic prioritisation and disclosures.



Inherent Limitations and Exclusions

The procedures performed in a limited assurance engagement vary in nature and timing from, and are less extensive than, those performed in a reasonable assurance engagement. In particular, a limited assurance engagement involves less detailed testing and does not require the practitioner to obtain the same level of understanding of internal controls as a reasonable assurance engagement. Consequently, the level of assurance obtained in a limited assurance engagement is substantially lower than that which would have been obtained had a reasonable assurance engagement been performed. Even a reasonable assurance engagement, while providing a high level of assurance, does not guarantee that all material misstatements will be detected.

Excluded from the scope of our work is any assurance of information relating to:

- Activities outside the defined reporting period.
- Statements of commitment to, or intention to undertake future actions by MLA
- Statements of position, opinion, belief and/or aspiration by MLA.
- Financial data audited by an external third party.
- Other sites and/or activities not included in the scope.

This independent assurance statement should not be relied upon to detect all errors, omissions or misstatements that may exist within the Report.

Statement of Independence, Impartiality, Competence

Bureau Veritas is a leading provider of Testing, Inspection and Certification (TIC) services. Bureau Veritas operates a quality management system and applies a Code of Ethics that includes requirements relating to integrity, objectivity, professional competence, confidentiality and the management of conflicts of interest.

Bureau Veritas maintains policies and procedures designed to safeguard its independence and impartiality in the conduct of assurance engagements. Throughout this engagement, Bureau Veritas remained independent of MLA and complied with the applicable ethical requirements relevant to assurance engagements.

No member of the assurance team has any business relationship with MLA, its Directors or Management beyond that required for the performance of this engagement. We confirm that there were no conflicts of interest that could impair our independence or objectivity

The assurance team was selected based on its qualifications, experience and industry expertise, including experience in the independent verification and assurance of environmental, social and governance (ESG) information, greenhouse gas emissions data, and associated management systems and reporting processes.

Bureau Veritas Australia Pty Ltd
19 October 2026

Bureau Veritas

Jeremy Leu
Executive General Manager, Perth, Australia



APPENDIX 3: GOVERNANCE

The Sheep Sustainability Framework (SSF) is governed by a Board that oversees its strategic direction and reporting. The Sustainability Steering Group (SSG) supports the Board by providing expert advice to continuously strengthen the Framework and its reporting. The Terms of Reference for the Board and the SSG are made available on the *SSF website.*

The SSF is led by Sheep Producers Australia (SPA) and WoolProducers Australia (WPA), with funding, project management, and secretariat support provided by *Australian Wool Innovation* (AWI) and *Meat & Livestock Australia* (MLA). As the sheep industry RDCs, AWI and MLA attend governance meetings but do not hold voting rights or engage in agri-political activities. Policy and advocacy remain the responsibility of the relevant peak industry bodies.

The Board

The Board represents the Australian sheepmeat and wool industries through the peak national policy and advocacy bodies SPA and WPA. It is responsible for overseeing the SSF governance and strategic direction and approving the release of the Annual Report.



Bonnie Skinner

CEO
Sheep Producers Australia



Jo Hall

CEO
WoolProducers Australia



Steven Harrison

PRESIDENT
WoolProducers Australia



Edward Brand

DIRECTOR
WoolProducers Australia



Elizabeth Jackson

DIRECTOR
Sheep Producers Australia



Ben Thomas

DIRECTOR
Sheep Producers Australia



Angus Hobson

DIRECTOR
WoolProducers Australia
Retired 2025

The Steering Group

The SSG supports the Board to continuously strengthen the SSF and its reporting through material topic examination and by improving the Framework's integration and impact across the Australian value chain.

In April 2026, sitting periods expired for several members, providing the opportunity for new members to join the SSG, including a new chair. The SSG contains representatives from all parts of the sheep value chain, including production (both corporate and family operations), meat and wool processors, finance, certification bodies, and retailers. This representation helps ensure the SSF remains practical, relevant and useful for stakeholders across the value chain.



Emma Foster-Geering

R.M. Williams



David Sackett

Corporate producer



Tanisha Shields

Rabobank



Maria Crawford

Coles



Molly Greentree

Gundagai Meat Processors



Brett Smith

Elders



Brydie Creagh

AWEX



Lachlan Monsbourgh

Rabobank
Retired April 2026

Reporting principles

A set of key reporting principles were developed by the governance groups and guide the implementation of the Framework.

Transparency

The industry will provide an open and honest picture of practice and performance (including improvement, no change or decline), using the most appropriate and robust data available.

Accountability

The industry is accountable for its practices and performance as demonstrated via the Framework and is committed to continuous improvement.

Inclusivity

The constructive views and feedback from industry (including producers, processors and other value chain participants), customers, retailers, special interest groups, government and investors as to how industry can improve practice and performance are valued and considered.

Credibility

Decisions on Framework design will be made with consideration of topics identified as material by the industry and its stakeholders. Reporting against Framework priorities and indicators is based on robust evidence.

Practicality

The Framework works within the industry's scope of influence to make changes that encourage improvement and adoption of best practice. The indicators can, or have the potential to be, monitored and managed. The Framework should harmonise with other relevant industry strategies to avoid duplication or contradiction.

Relevance

The Framework's priorities and indicators are aligned with topics identified as material to the industry and its stakeholders and are within the industry's scope of influence. The Framework will adapt over time to remain relevant. It will be useful and highlight areas for improvement.

APPENDIX 4. THE CADENCE AT WHICH NEW DATA IS AVAILABLE.

INDICATOR	DATA SOURCE	FREQUENCY OF UPDATE	NEXT UPDATE
1.1.1a percentage of producers who mules their flock	National Producer Survey	Every 2-3 years	2026-2027
1.1.1b percentage of wool declared as non-mulesed / ceased mulesing	AWEX	Annual	2026-2027
1.1.2a percentage of producers who use appropriate pain management at mulesing	National Producer Survey	Every 2-3 years	2026-2027
1.1.2b percentage of producers who use appropriate pain management at castration	National Producer Survey	Every 2-3 years	2026-2027
1.1.2c percentage of producers who use appropriate pain management at tail docking	National Producer Survey	Every 2-3 years	2026-2027
1.2.1a percentage of producers pregnancy scanning ewes for LS	National Producer Survey	Every 2-3 years	2026-2027
1.2.1b change in Australian Sheep Breeding Value for weaning rate	MERINOSELECT Database	Annual	2026-2027
1.2.2a percentage of producers who have completed lifetime ewe management training	AWI	Annual	2026-2027
1.2.3a total number of days per year spent by shearing trainers in woolsheds nationally	AWI	Annual	2026-2027
1.2.4a percentage of producers with a documented wild predator management strategy	National Producer Survey	Every 2-3 years	2026-2027
1.2.5a percentage of sheep transported in line with animal welfare standards (fit to load)	MLA		TBC
1.2.6a percentage of sheep transacted through NSQA program saleyards	MLA	Annual	2026-2027
1.2.7a percentage of mortality on ships	DAFF	Twice a year	2026-2027
1.3.1a percentage of producers aware of humane killing requirements in the AAWSG for sheep	National Producer Survey	Every 2-3 years	2026-2027
1.3.2a percentage of lambs and sheep slaughtered through an establishment accredited by the AAWCS	MLA	Annual	2026-2027
2.1.1a Australia continues to be declared free from 12 major diseases	Animal Health in Australia Annual Report	Annual	2026-2027
2.1.2a Percentage of producers who vaccinate for clostridial diseases	National Producer Survey	Every 2-3 years	2026-2027
2.1.2b Change in ASBV	MLA	Annual	2026-2027
2.1.3a Percentage of sheep producers compliant with LPA biosecurity requirements	MLA	Annual	2026-2027

INDICATOR	DATA SOURCE	FREQUENCY OF UPDATE	NEXT UPDATE
3.1.1a Percentage of natural resource management regions achieving healthy groundcover thresholds	Haizea Analytics	Annual	2026-2027
3.1.2a Extent of primary forest ('000 ha)	Haizea Analytics	Annual	2026-2027
3.1.2b Extent of secondary forestry ('000 ha)	Haizea Analytics	Annual	2026-2027
3.1.2c Extent of primary woodland ('000 ha)	Haizea Analytics	Annual	2026-2027
3.1.2d Extent of secondary woodland ('000 ha)	Haizea Analytics	Annual	2026-2027
3.2.1a Percentage of producers who have attended a ChemCert course or similar	National Producer Survey	Every 2-3 years	2026-2027
3.2.2a Kilolitres water used per tonne HSCW when processing sheepmeat	AMPC	Biennial	2026-2027
3.2.3a Kilograms of solid waste per tonne HSCW when processing sheepmeat	AMPC	Biennial	2026-2027
3.3.1a percentage of producers undertaking deliberate activities to maintain or enhance biodiversity	National Producer Survey	Every 2-3 years	2026-2027
4.1.1a Net emissions: Mt CO_2e generated by sheep industry (farm and sheepmeat processing)	CSIRO	Annual	2026-2027
4.1.1b Emission intensity: kg of CO_2e emitted per kg liveweight (LW) when raising sheep	AMPC	Averaged over 5 financial year period and expressed using the fifth year	2026-2027
4.1.1c Emission intensity: kg of CO_2e emitted per kg greasy wool shorn	AMPC	Averaged over 5 financial year period and expressed using the fifth year	2026-2027
4.1.1d Emission intensity: kg of CO_2e emitted per tonne HSCW when processing sheepmeat	AMPC	Biennial	2026-2027
4.1.1e Percentage of sheep producers who have measured GHG emissions for their enterprise using carbon accounting or another process	National Producer Survey	Every 2-3 years	2026-2027
4.1.2a Percentage of producers who generate and use renewable energy	National Producer Survey	Every 2-3 years	2026-2027
4.2.1a Climate adjusted Total Factor Productivity growth	ABARES	Annual, with base back to 1999-2000	2026-2027
5.1.1a percentage of producers who have undertaken a WHS risk assessment	National Producer Survey	Every 2-3 years	2026-2027
5.1.2a Number of fatalities in the sheep industry	The Traumatic Injury Fatalities database (TIF)	Annual	2026-2027
5.1.2b Lost time injury frequency rate (number of claims per million hours worked)	National Data Set for Compensation-based Statistics (NDS)	Annual	2026-2027

INDICATOR	DATA SOURCE	FREQUENCY OF UPDATE	NEXT UPDATE
5.2.1a Global life satisfaction index score of Australian sheep graziers	Regional Wellbeing Survey	Annual	2026-2027
5.2.1b Getting involved in the community index of Australian sheep graziers (out of potential perfect score of 7)	Regional Wellbeing Survey		2026-2027
6.1.1a percentage of on-farm industry participants who have completed further education	ABS Census	Updated every five years	2026-2027
6.1.2a Federal award rate ratio	Fair Work Ombudsman website	Annual	2026-2027
6.1.3a percentage of producers who find labour availability to be a major issue in their operation	National Producer Survey	Every 2-3 years	2026-2027
6.1.3b level of availability of workforce among processors	AMPC	Annual	2026-2027
6.1.4a percentage of producers with a formal succession plan in place	National Producer Survey	Every 2-3 years	2026-2027
6.2.1a Age distribution of those who are employed in sheep farming and shearing services	ABS Census	Updated every five years	2026-2027
6.2.1b Gender breakdown of those who are employed in sheep farming and shearing services	ABS Census	Updated every five years	2026-2027
6.2.1c percentage of Indigenous and Torres Strait Islanders who are employed in sheep farming and shearing services	ABS Census	Updated every five years	2026-2027
6.2.1d percentage who speak a language other than English in those who are employed in sheep farming and shearing services	ABS Census	Updated every five years	2026-2027
7.1.1a percentage of Australians who believe that Australian lambs are farmed and raised in a humane manner	MLA Consumer Sentiment Study	Annual	2026-2027
7.1.1b percentage of respondents who believe wool is more environmentally friendly than other fibres	AWI Global Brand Tracking Survey	Biennial	2026-2027
7.2.1a Percentage of Australians who believe that Australian lamb is worth paying a bit more for	MLA Consumer Sentiment Study	Annual	2026-2027
7.2.1b willingness to consider wool for apparel	AWI Global Brand Tracking Survey	Biennial	2026-2027
8.1.1a Rate of return on capital, including and excluding capital appreciation, using a 5-year rolling average	ABARES	Annual	2026-2027
8.2.1a gross value (AUD) of agricultural production for sheepmeat	ABS	Annual	2026-2027
8.2.1b gross value (AUD) of agricultural production for wool	ABS	Annual	2026-2027
8.3.1a total factor productivity average annual growth rate	ABARES	Annual, with base back to 1999-2000	2026-2027

INDICATOR	DATA SOURCE	FREQUENCY OF UPDATE	NEXT UPDATE
8.3.1b Change in the sustainable merino (SM) index	MLA	Annual	2026-2027
8.4.1a AUD invested in research, development and adoption per annum	MLA	Annual	2026-2027
9.1.1a Australian value share (%) of sheepmeat exports	AWI	Annual	2026-2027
9.1.1b Australian value share (%) of greasy wool exports	MLA	Annual	2026-2027
9.1.2a Cumulative alleviation (from 2020) of red meat non-tariff barriers	AWI	Annual	2026-2027
9.1.2b Percentage value share of Australian sheepmeat, sheep offal and live sheep exports covered by one or more PTAs	MLA	Annual	2026-2027
9.1.2c Percentage value share of Australian greasy wool exports covered by one or more PTAs	MLA	Annual	2026-2027
9.2.1a proportion (%) of the wool clip that is produced with a voluntary product integrity scheme	AWI	Annual	2026-2027
9.2.1b compliance rates (%) for chemical residues in sheepmeat	AWEX	Annual	2026-2027
	National Residue Survey	Annual	2026-2027

APPENDIX 5: RESTATEMENTS OF INFORMATION, METRIC UPDATES, OR ADDITIONS

While the SSF reports are produced annually for the most recent financial year, the data for some metrics are not updated this regularly. Reporting periods vary from metric to metric and may be biennial, every three years or every five years depending on the metric.

RESTATEMENTS OF INFORMATION

1.2.1a Producers pregnancy scanning ewes for litter size

The trend indicator given for this metric in the 2025 report was holding steady. This was despite it improving by 8.3% between the 2023 and 2024 reporting year. The progress indicator has been updated from 'holding steady' to 'improving' as it is above the 2% threshold.

The data source has changed for metrics relating to the environment including: 3.1.1a Natural resource management regions achieving healthy groundcover thresholds, 3.1.2a Extent of primary forest, 3.1.2b Extent of secondary forest, 3.1.2c Extent of primary woodland, 3.1.2d Extent of secondary woodland

The new AWCC dataset provides a significant improvement over the previous National Forest and Sparse Woody Vegetation (NFSWV) dataset because it more accurately detects woody vegetation, particularly sparse woodland that dominates many Australian grazing landscapes. Against an independent airborne LiDAR benchmark, AWCC-Filtered achieved substantially higher agreement and mapped 97% of the reference woody area compared with only 70% for NFSWV. The new methodology also removes year-to-year classification "flicker" through temporal filtering, applies a consistent national definition of woody cover, and introduces a primary versus secondary vegetation attribution that allows users to distinguish long-undisturbed vegetation from regrowth and re-clearing.

7.1.1a Australians who believe that Australian lambs are farmed and raised in a humane manner

An error or lag in reporting was identified in the historical data relating to this indicator. The historical data has now been updated. The change is outlined below. This update has not changed the progress status.

	Reporting year				Progress
	2023	2024	2025	2026	
Community perceptions of the sheep industry					
Updated in 2026: 7.1.1a Percentage of Australians who believe that Australian lambs are farmed and raised in a humane manner	54%	55%	56%	56%	◐
Reported in 2025: 7.1.1a Percentage of Australians who believe that Australian lambs are farmed and raised in a humane manner	55%	54%	55%		◐

8.2.1a Gross value (AUD) of agricultural production for sheepmeat and 8.2.1b Gross value (A$) of agricultural production for wool

Since the publication of the last report, ABARES revised the gross value of production for sheepmeat for 2023-24. It was revised from $4.250b to $4.086b.

The gross value of wool was also revised. Since the publication of the last report, the gross value of production for wool for 2023-24 was revised from $2.822b to $2.774b.

1.2.2a Producers who have completed Lifetime Ewe Management (LTEM) training

Errors were identified in the LTEM data over historical years. These have now been updated and a comparison given below to demonstrate what has changed.

	Reporting year				Progress
	2023	2024	2025	2026	
Community perceptions of the sheep industry					
Updated in 2026: 1.2.2a Percentage of producers who have completed LTEM training	11.4%	6.4%	6.1%	6.4%	◐
Reported in 2025: 1.2.2a Percentage of producers who have completed LTEM training	9.4%	11.4%	12.3%		◐

4.1.1a Net emissions: Mt of CO_2e generated by sheep industry (farm and sheepmeat processing)

Annual emissions reports by MLA continue to be informed by the best available science and nationally maintained data. GHGs attributed to the red meat industry (including sheep) are updated retrospectively if/when source data from the Commonwealth Government's National Greenhouse Gas Inventory becomes available or is revised.

Refinements have been made by the Commonwealth to emissions from land use (LU) and land use change and forestry (LUCF), and agricultural soils, which have resulted in modest revisions to historical emissions as presented below. Previously reported figures have been included for ease of reference; however, the calculation method is different so comparisons should be made with caution.

The Australian Government Department of Climate Change, Energy, the Environment and Water (DCCEEW) review and update activity data and the inventory methodology on an annual basis, and changes are applied retrospectively to previous years. *Thus, the 2024 National Inventory and this report both supersede previous iterations.*

METRIC UPDATES

On recommendation from the SSG and subsequent approval from the Board, the following metric changes have been made.

Caring for our sheep

1.2.1b Industry average Australian Sheep Breeding Value (ASBV) for weaning rate (WR)

This metric has been modified from presenting the *change* in ASBV for weaning rate to presenting the industry *average* ASBV value for weaning rate. This modification in reporting style will provide greater transparency by providing data that is more familiar to industry and easier to determine the progress status or in future years, the trend over time.

2.1.2a Producers who have completed LTEM training

As data collection processes have become more efficient, two years of new data have been included in this 2026 report which brings the report up to date. In the data summary table at the start of the report, we have shifted historical data into the previous reporting period to make space for two years of data this year. The historical data remains the same.

2.1.2b Industry average ASBV

This metric has been modified from presenting the *change* in ASBV to presenting the industry *average* ASBV. This modification in reporting style will provide greater transparency by providing data that is more familiar to industry and easier to determine the progress status or in future years, the trend over time.

3.1.1a Natural resource management regions achieving healthy groundcover thresholds

New remote sensing technology has been employed to provide a clearer historical view of groundcover within sheep production zones. Data for 2023 has now been included, and results for 2024 and 2025 updated from 64.1% to 78.0%, and 51.3% to 73.0% respectively. More information is available from *VegTrends – Ground Cover & Woody Vegetation Monitoring*.

Ensuring a financially resilient industry

8.3.1b Sustainable Merino (SM) index

The title of this metric has been modified to clearly articulate that the metric presents the index value, as opposed to the percentage change year on year. In last year's report it was called "8.3.1b Change in the Sustainable Merino (SM) index". The data remains the same.

8.4.1a AUD invested in Research, Development and Adoption (RDA) per annum (for wool only)

Two years of new data have been included in this 2026 report for wool (not for sheepmeat) as a result of data collection processes becoming more efficient. In the data summary table at the start of the report, we have shifted historical data into the previous reporting period to make space for two years of data this year. The historical data remains the same.

9.1.2a Cumulative alleviation (from 2020) of red meat non-tariff barriers

Two years of new data have been included in this 2026 report as a result of data collection processes becoming more efficient. In the data summary table at the start of the report, we have shifted historical data into the previous reporting period to make space for two years of data this year. The historical data remains the same.

9.1.2b Value share of Australian sheepmeat exports covered by one or more PTAs

Two years of new data have been included in this 2026 report as a result of data collection processes becoming more efficient. In the data summary table at the start of the report, we have shifted historical data into the previous reporting period to make space for two years of data this year. The historical data remains the same.

9.1.2c Value share of Australian greasy wool exports covered by one or more PTAs

Two years of new data have been included in this 2026 report as a result of data collection processes becoming more efficient. In the data summary table at the start of the report, we have shifted historical data into the previous reporting period to make space for two years of data this year. The numbers remain the same.

METRIC ADDITION

Looking after our people, our customers and the community

6.1.3b Average labour shortage in three key meat processing occupations: meat boners and slicers, slaughterers, and meat inspectors

This indicator estimates the share of Australian sheepmeat production processed in States or Territories where Jobs and Skills Australia (JSA) identifies occupational shortages in key processing roles: meat boners and slicers, slaughterers, and meat inspectors. It is calculated using ABS Livestock Products sheepmeat volume data, weighted by the shortage status of each State or Territory. The national indicator is based on the average shortage level across these three occupations. Under JSA's methodology, an occupation is considered to be in shortage when the job fill rate falls below 67% (*2025 OSL Methodology.pdf*). [23]

METRIC OR DATA TO BE IDENTIFIED

Caring for our sheep

1.2.5a Sheep transported in line with animal welfare standards

Progress has been made in 2026, through the Federal Sustainability Reporting Uplift Grant and through continual work with the Australian Livestock and Rural Transporters Association, to source data relating to animal movement and performance by animal welfare accredited transport operators. Reporting on this indicator will commence when data becomes available.

APPENDIX 6: GLOSSARY

TERM	EXPLANATION
AAGIS	Australian Agricultural and Grazing Industries Survey. Annual survey undertaken by ABARES.
AAWCS	Australian Livestock Processing Industry Animal Welfare Certification System. An independently audited certification program used by Australian livestock processors to demonstrate compliance with the industry best practice animal welfare standards.
AAWSG	Australian Animal Welfare Standards and Guidelines. The standards are accompanied by voluntary guidelines that set out recommended practice for the care and husbandry of farm animals.
ABARES	Australian Bureau of Agricultural and Resource Economics and Sciences.
ABS	Australian Bureau of Statistics.
ABSF	Australian Beef Sustainability Framework
AMPC	Australian Meat Processor Corporation. The rural Research and Development Corporation that supports the red meat processing industry throughout Australia.
ASBV	Australian Sheep Breeding Value. An estimate of the genetic potential a sheep will pass on to its progeny and available for a range of economically important traits.
AUS-MEAT	A joint venture organisation funded by MLA and AMPC maintaining national industry standards for meat production and processing.
AWEX	Australian Wool Exchange. National body which manages and administers wool marketing arrangements in the Australian wool industry.
AWI	Australian Wool Innovation. The rural Research and Development Corporation responsible for supporting woolgrowers throughout Australia.
Carbon sequestration	A process of capturing and storing atmospheric carbon dioxide, which has the potential to mitigate climate change.
Castration	Removal of the testicles of a male sheep by either surgical or non-surgical methods. This procedure is usually undertaken for reasons such as limiting the animal's breeding abilities and for safer animal handling.
CO_2e	Carbon dioxide equivalent. A standard unit for measuring greenhouse gas emissions.
CON	Conception. An ASBV describing the genetic difference between animals for conception.
CSIRO	Commonwealth Scientific and Industrial Research Organisation. An Australian federal government agency responsible for scientific research.
DAFF	Department of Agriculture, Fisheries and Forestry.
EBWR	Department of Agriculture, Fisheries and Forestry.
eID	Electronic Identification. Approved eID ear tags are required to be fitted to sheep before leaving a property and are linked to the National Livestock Identification System.
EPR	Environmental Performance Review.
ERA	Ewe Rearing Ability. An ASBV describing the genetic difference between animals for rearing ability.
ESG	Environmental, social and governance.
FMD	Foot and mouth disease, a serious and highly contagious animal disease that affects all cloven-hoofed animals.

TERM	EXPLANATION
FTA	Free Trade Agreement. International treaty to reduce or eliminate trade and investment barriers.
GBF	Global Biodiversity Framework. International framework of goals and targets adopted by parties to the Convention on Biological Diversity.
GHG	Greenhouse gas. The gases in the atmosphere which absorb wavelengths of radiation that a planet emits.
GRI	Global Reporting Initiative. An international sustainability reporting standard.
HSCW	Hot Standard Carcase Weight. Used to describe the weight of an animal, particularly when the animal is sold directly from a farm to an abattoir.
IFRS	International Financial Reporting Standards. A global set of accounting rules.
ISC	Integrity Systems Company. ISC manages and delivers the Australian red meat industry's three key on-farm assurance and through-chain traceability programs: LPA program, LPA National Vendor Declarations (LPA NVD) and National Livestock Identification System (NLIS).
IWTO	International Wool Textile Organisation. The global authority for standards in the wool textile industry.
LiveCorp	Australian Livestock Export Corporation (LiveCorp). An RDC which provides research, development and extension (RD&E) and marketing services to licensed exporters of cattle, sheep and goats.
LOTE	Languages Other Than English.
LPA	Livestock Production Assurance. The Australian livestock industry's on-farm assurance program covering food safety, animal welfare and biosecurity. It provides evidence of livestock history and on-farm practices when transferring livestock through the value chain.
LS	Litter size.
LTEM	Lifetime Ewe Management. A course designed to increase woolgrowers' knowledge and understanding of the influence of ewe nutrition and management on overall reproduction rates and lamb and ewe survival.
LULUCF	Land use, land use change and forestry. A category of accounting for GHG emissions and sequestration associated with land management.
Materiality	The principle of reporting against and addressing the industry's most material issues. These are issues with a direct or indirect impact on an organisation's ability to create, preserve or erode economic, environmental and social value for itself, its stakeholders and society at large.
MERINOSELECT	Australia's genetic evaluation system for Merino producers.
MLA	Meat & Livestock Australia. A producer-owned industry service provider that provides marketing and research and development services to cattle, sheep and goat industries.
Mulesing	Mulesing is the removal of wool-bearing skin from around the breech of a sheep to prevent the parasitic infection flystrike. The wool around the buttocks can retain faeces and urine, which attracts flies.
NFF	National Farmers' Federation. Peak national body representing farmers.
NLIS	National Livestock Identification System. Australia's system for identifying and tracing cattle, sheep and goats.
NRM	Natural resource management region. Australia has 54 NRM regions, which are defined by catchments and bioregions. Many activities of organisations and ecosystem services within the NRM regions are vulnerable to impacts of climate change.
NRS	National Residue Survey. Program by DAFF to monitor residues in animal products through various random and targeted testing programs.

TERM	EXPLANATION
NSQA	National Saleyards Quality Assurance. A program to provide the saleyard sector of the livestock industry with a QA program linking sectors of the industry.
NTB	Non-tariff barriers. Any kind of 'red tape' or policy measure other than tariffs that unjustifiably restrict trade.
NVD	National Vendor Declaration. A form that documents the movement of livestock when they are bought, sold or moved off a property. This form accompanies all such movements.
NWD	National Wool Declaration. The NWD is an initiative of the Australian wool industry to assist buyers and their clients gain access to credible information on issues such as mulesing status and dark and medullated fibre risk.
OECD	Organisation for Economic Cooperation and Development.
PEF	Product Environmental Footprint. European Union-backed program for reporting environmental impacts of a product or organisation, covering the full supply chain.
PIC	Peak Industry Council. PICs provide policy direction on behalf of the red meat and livestock industry, and include Australian Lot Feeders' Association, Cattle Australia, Sheep Producers Australia and Goat Industry Council of Australia.
PTA	Preferential Trade Agreement.
RDC	Research and Development Corporation. There are 15 RDCs established in a government-industry partnership model to help drive agricultural innovation by co-investing in strategic, collaborative and targeted research and development.
Red Meat 2030	The industry's shared 10-year plan to create a productive, profitable and sustainable future while creating and capturing value along the supply chain.
SafeWork Australia	An Australian government statutory body established to develop national policy relating to work health and safety and workers' compensation.
SBTi	Science Based Targets initiative. Global organisation that helps companies set emissions reductions targets in line with the Paris Agreement.
SDG	The United Nations Sustainable Development Goals. A set of 17 goals which are an urgent call for action by all countries — developed and developing — in a global partnership.
SFO	State Farming Organisation.
SPA	Sheep Producers Australia. SPA is the peak industry organisation for sheep and lamb producers in Australia.
SSF	Sheep Sustainability Framework.
SSG	Sustainability Steering Group.
Tail docking	Tail docking is a standard practice in the sheep industry to help reduce susceptibility of an animal to flystrike.
TCFD	Taskforce on Climate-related Financial Disclosures.
TFP	Total Factor Productivity. A measure which identifies the growth in output relative to the combined growth in all inputs.
TNFD	Taskforce on Nature-related Financial Disclosures. A global nature-related risk management and disclosure framework.
WEC	Worm Egg Count. A measure of the number of worm eggs in a gram of faeces.

TERM	EXPLANATION
WPA	WoolProducers Australia. WPA is the peak national body for the wool producing industry in Australia, representing farmers who have an interest in growing wool.
WR	Weaning Rate. The number of lambs weaned per ewe joined.
WTO	World Trade Organisation. International body that determines international trade rules.

SHEEP
SUSTAINABILITY
FRAMEWORK

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