Results of the 2024 Dry Season Taskforce Survey

In April/May 2024 a survey was circulated by Sheep Producers Australia to gather information to provide a snapshot of the current situation across the sheep, cattle and dairy regions of Western Australia to the Dry Season Taskforce. This report has been compiled by Sheep Producers Australia on behalf of Cattle Australia and Western Dairy and is an important source of information that can assist the government in better understanding the impact the dry season and low market prices are having on livestock producers and their sheep, cattle and goat management decisions.

A survey of 25 questions was circulated via e-mail, text message and social media; the survey was open for responses 26 April - 8 May 2024. Responses were canvassed from livestock producers in WA only. The sample consisted of 646 responses with one unusable response. As such the final sample size was n=645. Some respondents either did not answer questions or answered questions in multiple ways so the sample size is not consistent for all analyses.

Results were overwhelmingly clear that the dry season is impacting livestock producers in WA with 96.9% of respondents (n=621) saying that they are in an area where feed growth has been impacted by the dry season (Figure 1). The vast majority of responses were from mixed livestock/grains/fodder/hay enterprises (n=388) (Figure 2). The geographic spread of responses was dominated by responses from the state's south-west with very few responses from the pastoral areas (Figures 3 & 4).

Feed: Some 89.1% (n=575) of respondents described their paddock feed supply as either bad or terrible (Figure 5). Similar numbers of respondents said that they can either feed livestock from on-farm feedstocks or access feed from off-farm (n=562, 87.1%) while 13% (n=83) of respondents said they did not have any access to feedstocks (Figure 6). Very few respondents (n=55, 8%) reported that they had a week or less of feed available while the sample was dominated by respondents who more than two weeks of feed left to sustain their livestock (Figure 7). When asked what type of feed is required to manage the dry season (Figure 8), the greatest demand is for roughage in the form of hay/silage/straw (n=278, 31%). Grains were also in demand (n=294, 32%) while 18% of respondents also are needing pellets (n=146). Many respondents are not in need of feed as they have either destocked or have feed on hand (n=111, 12%). Unfortunately, 8% of respondents provided unidentifiable data. The geographic spread of those where access to feed is either bad or terrible is in the south-west and south-coast (Figures 9 & 10).

Water: The situation with access to water is a lot better than the situation with feed. Most respondents are confident that they have sufficient water for their livestock (n=562, 87.1%) with some currently carting water from off-farm (n=149, 23.1%) (Figure 11). Eight respondents declared that they are likely to run out of water within a week. The geographic spread of those where access to water is likely to run out in less than 4 weeks is in the south-west and south-coast (Figures 12 & 13).

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Economics: there was a fairly even split between those with the financial capacity to purchase feed and/or water with slightly more not having reliable financial capacity (n=298:347) (Figure 14). In terms of livestock of no commercial value (NCV), 71.36% (n=461) of the sample stated that 0-500 head of their livestock were of NCV (Figure 15). From a regional perspective, respondents estimated that about 10-30% of livestock in their region were of NCV (Figure 16) however there was clear sentiment that most respondents considered that livestock of NCV were being disposed of in their region (n=398, 61.61%).

Respondents were asked about "disposing" of their livestock due to the dry season. Thematic analysis determined that the term "disposing" yielded four over-arching interpretations: euthanise, send to market, unsure and do not know (n=640 total responses) (Figure 17). Nearly half of the respondents (n=298, 46.6%) specified they would euthanise their livestock with many strongly emphasising that this is an extremely emotive issue and they want to undertake the process in the most humane method possible. Importantly, a large proportion of the sample specified that they do not intend to dispose of their livestock by any means (n=173, 27.1%). Many respondents found the question about disposing of livestock confronting saying: *"Rather not think of that now but will deal with them humanely if it comes to that", "I will carry them through no matter what I need to do"* and *"We are praying we will NOT have to go down this track"*.

Sentiment: Respondents were asked to give a % proportion of each of five answers about producers' current mindset (Figure 18). The bulk of responses were skewed towards the negative answers. On average, most respondents considered that, on average, people in their region were feeling either that they are doing it tougher than previous market downturns or doing it so tough that they are considering leaving the livestock industry. There were about equal of extreme opinions. Of the 604 respondents who provided data about their need to be contacted for assistance, most declined the opportunity (n=508, 84.3%). Just over 100 respondents provided contact details for support. All of these respondents have since been contacted by Sheep Producers Australia via the e-mail or phone number provided.

Support from the Dry Season Task Force: Responses were analysed thematically with six key themes emerging from the data: Feed, Financial support & subsidies, Freight, Live export, Livestock, Markets & market access, Support & assistance (including education/training and mental health support), Water and Other (Figure 19). Financial support & subsidies (n=238, 22.0%) as well as Feed (n=236, 21.8%) featured most prominently in the data with Markets & Market Access (n=164, 15.2%) and Live Export (n=134, 12.4%) also featuring prominently. Digging deeper into financial support & subsidies, this was largely focused on feed, water and freight. The types of financial support & subsidies mentioned were mixed but major themes were around grants and interest free loans. Markets & Market Access were mentioned in terms of the expansion of abattoirs in WA and the government ensuring reasonable competition in the market for sheep meat by 1) maintaining the live export trade and 2) ensuring enough buyers in the market to limit asymmetric pricing and anti-competitive behaviour of processors.

Appendix: Dry Season Taskforce Survey Results

Figure 1: Are you in an area where feed growth has been impacted by the dry season?

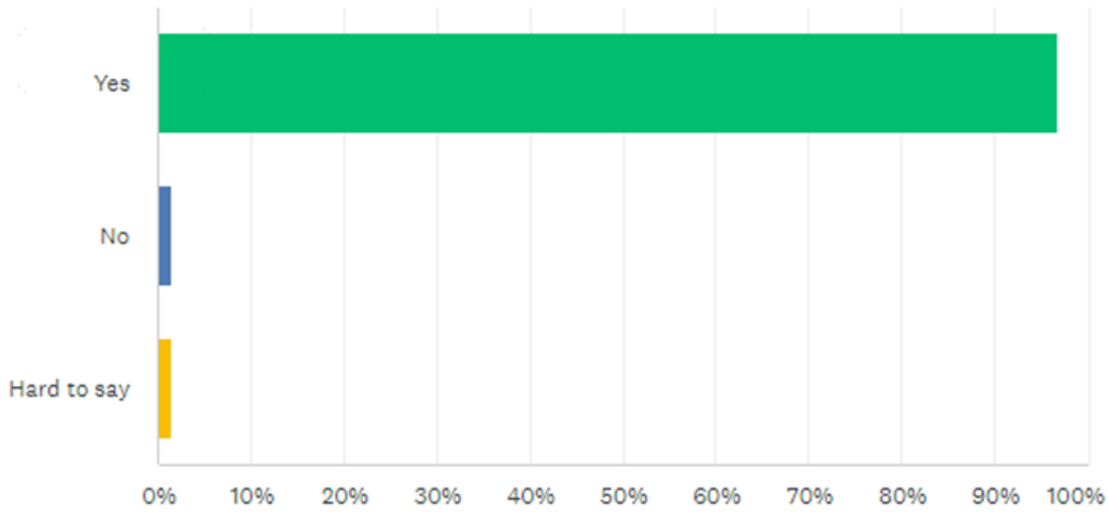


Figure 2: Which of the following are produced on your farm? Sheep, beef cattle, dairy cattle, grains/hay, or other?

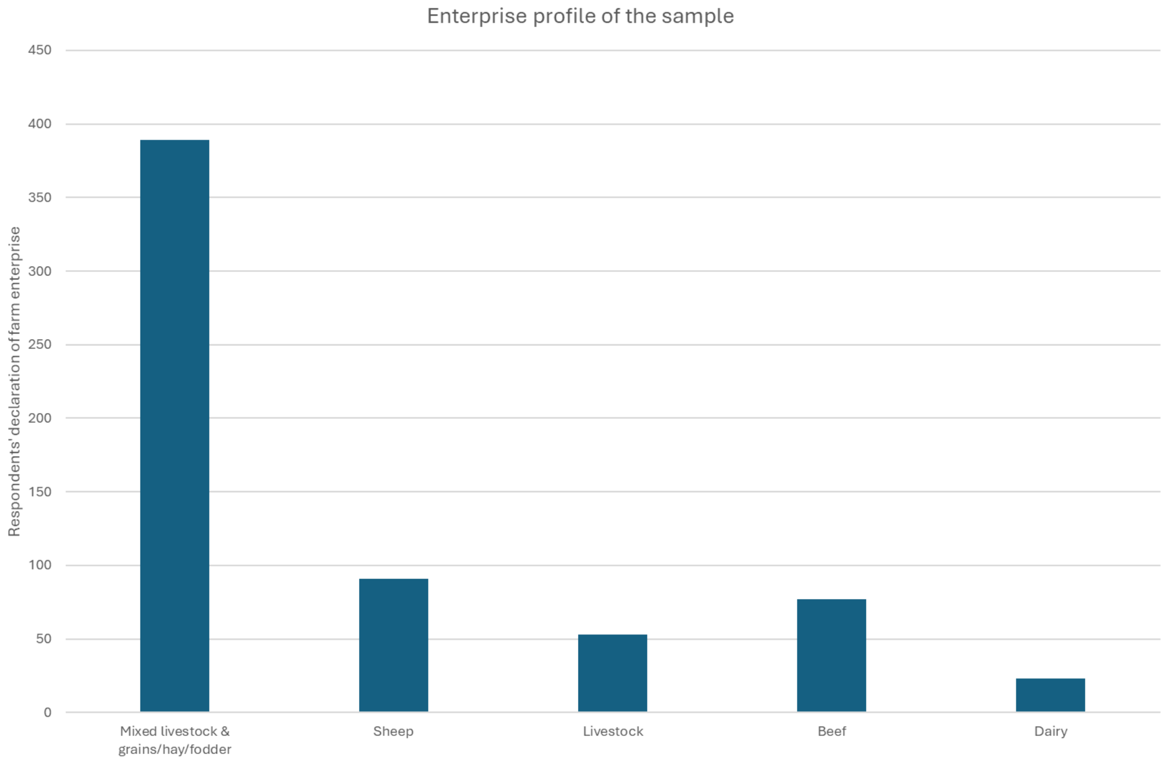
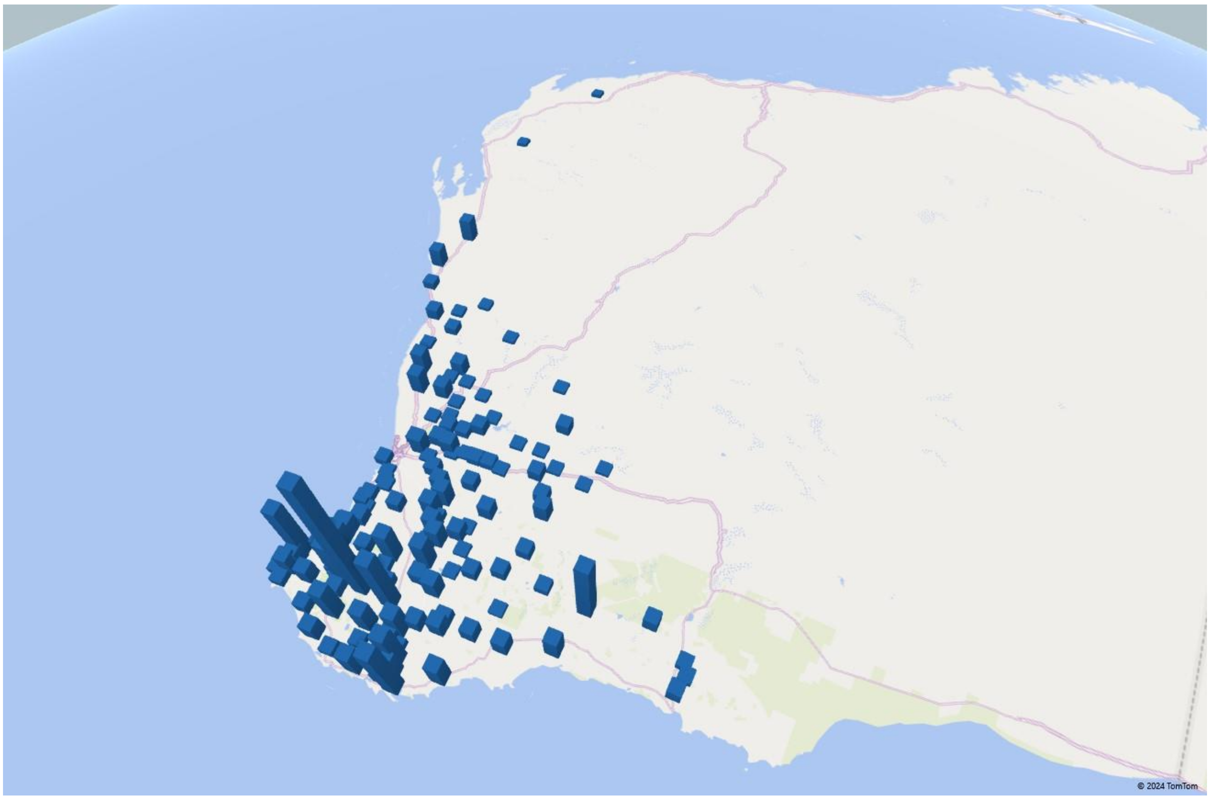
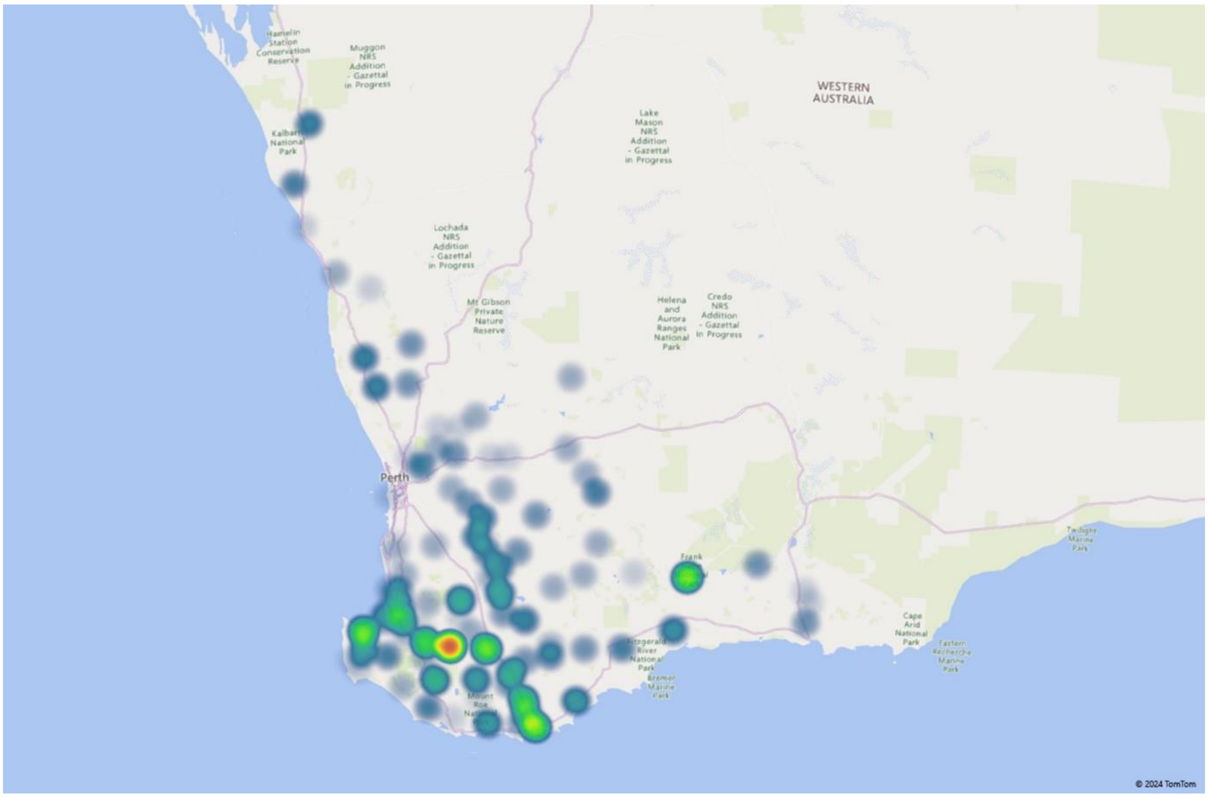


Figure 3: Geography of the sample - Frequency of responses by postcode* (bar chart) (n=559)



*not all survey respondents provided their postcode

Figure 4: Geography of the sample - Frequency of responses by postcode* (heat map) (n=559)



*not all survey respondents provided their postcode

Figure 5: How would you describe the paddock feed supply on your farm?

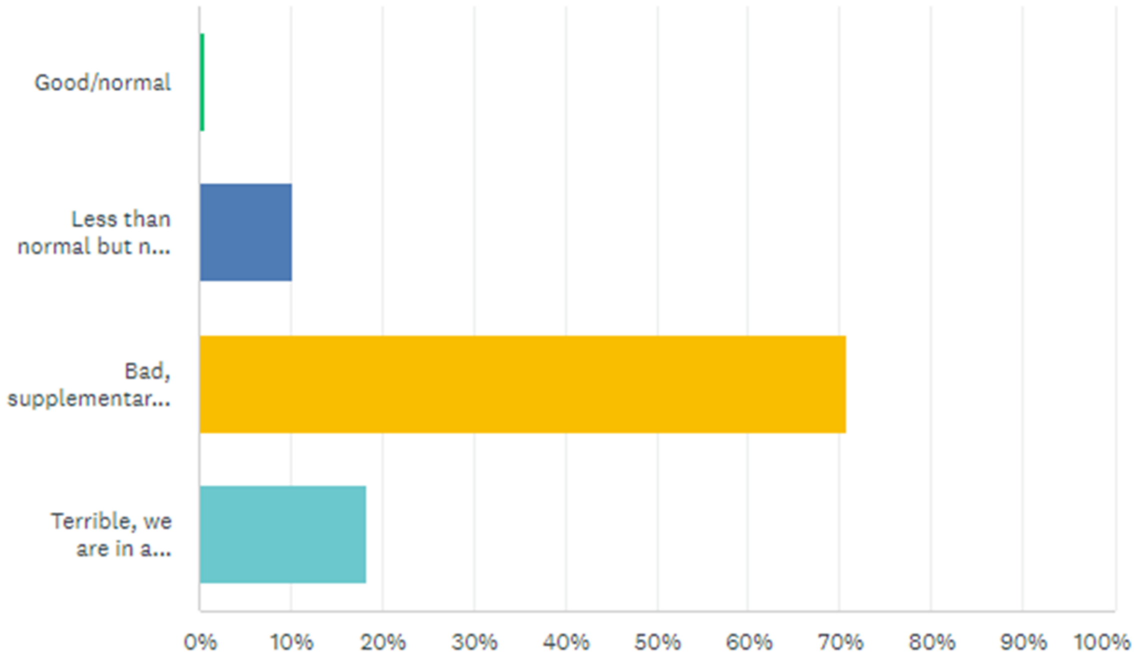


Figure 6: What access do you have to supplementary/hand feeding?

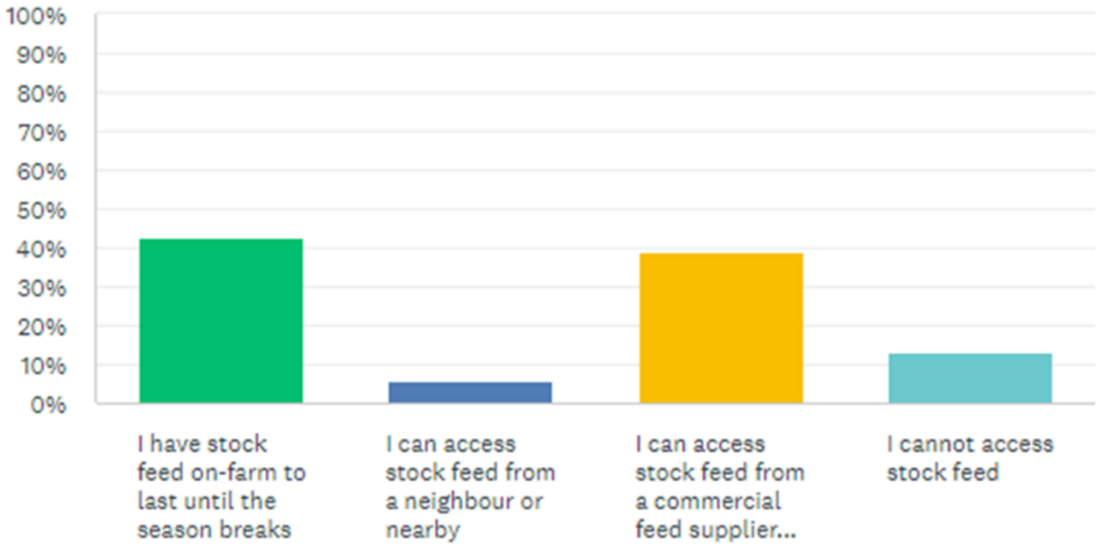


Figure 7: If you have access to feed stocks, how long do you think it will last?

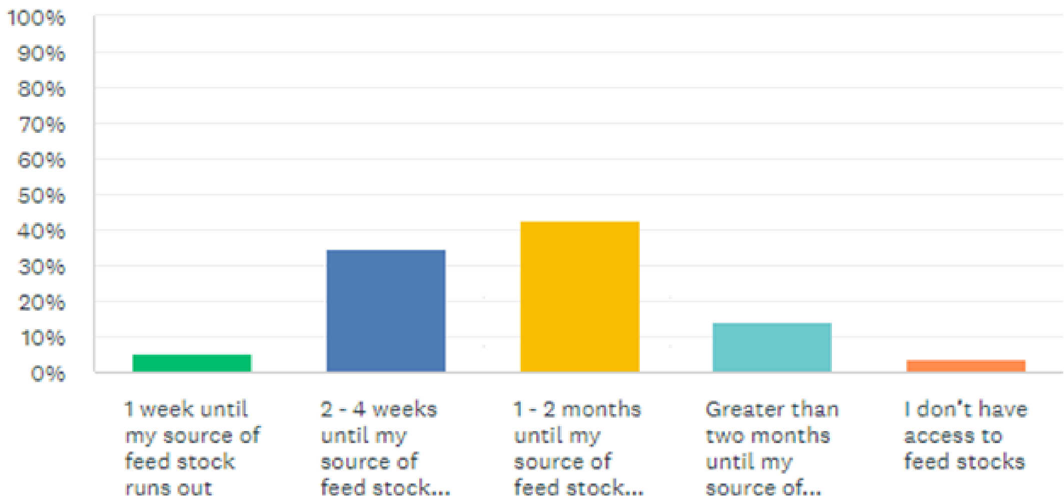


Figure 8: How much feed, sourced from outside your farm, do you need to see you through until the season breaks?

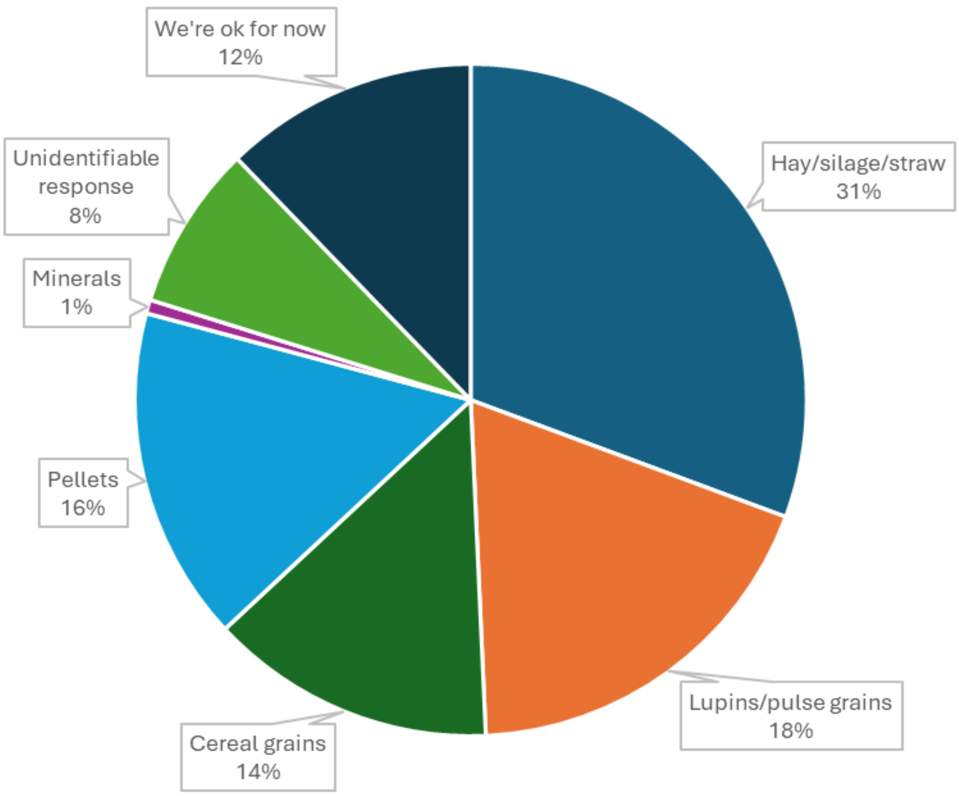
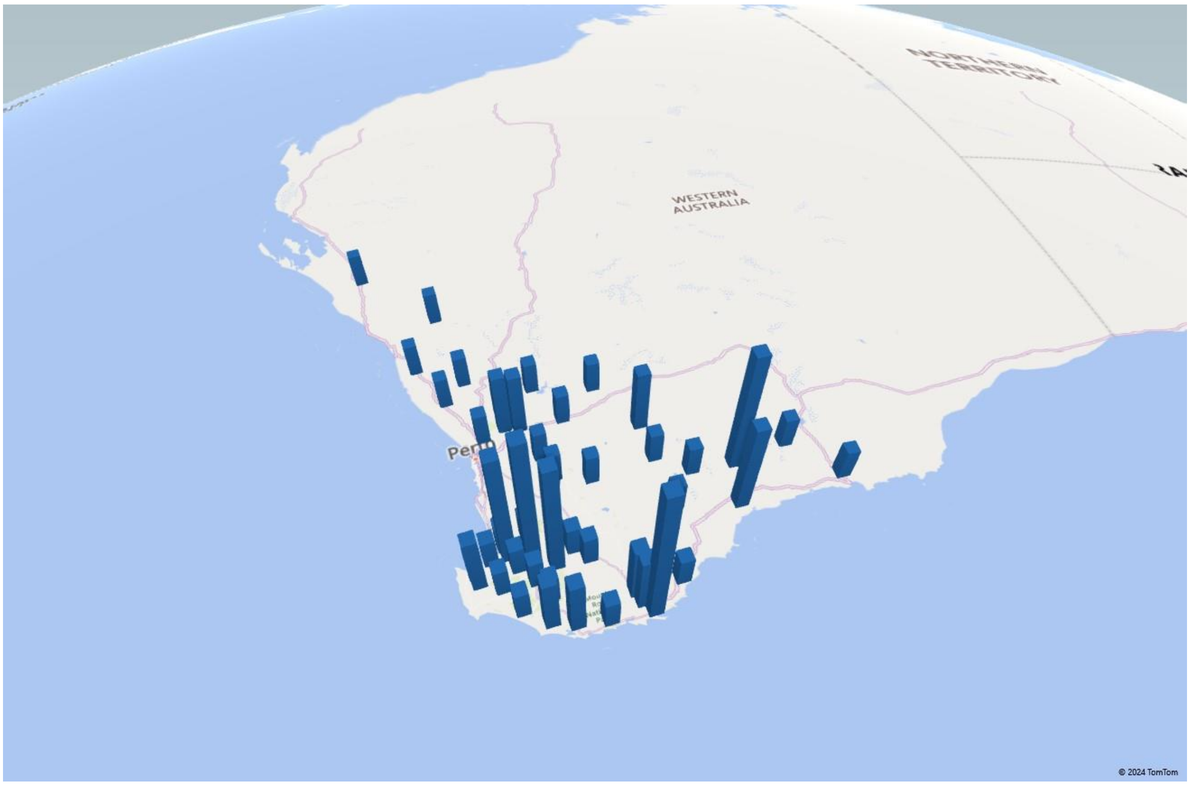
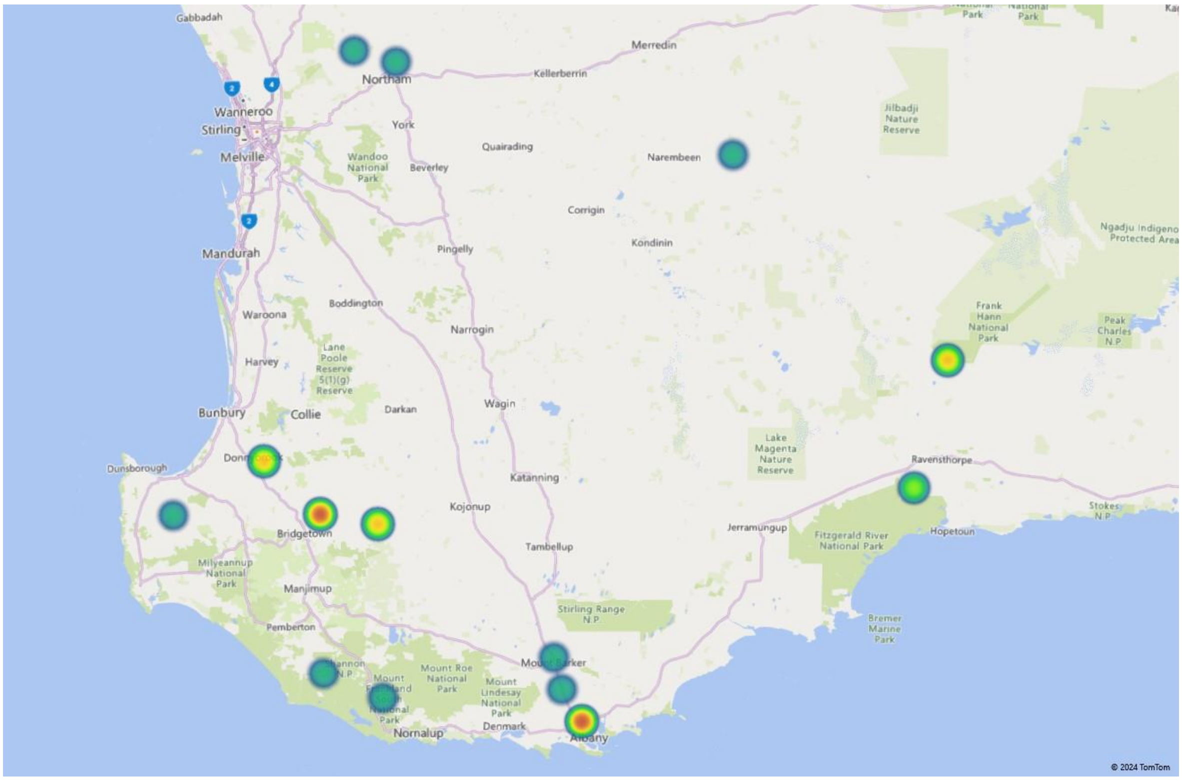


Figure 9: Frequency of postcodes* whereby producers cannot access feed and consider they are in a terrible or bad situation based on feed availability (bar chart)



*not all survey respondents provided their postcode

Figure 10: Frequency of postcodes* whereby producers cannot access feed and consider they are in a terrible or bad situation based on feed availability (heat map)



*not all survey respondents provided their postcode

Figure 11: What access do you have to water for your livestock?

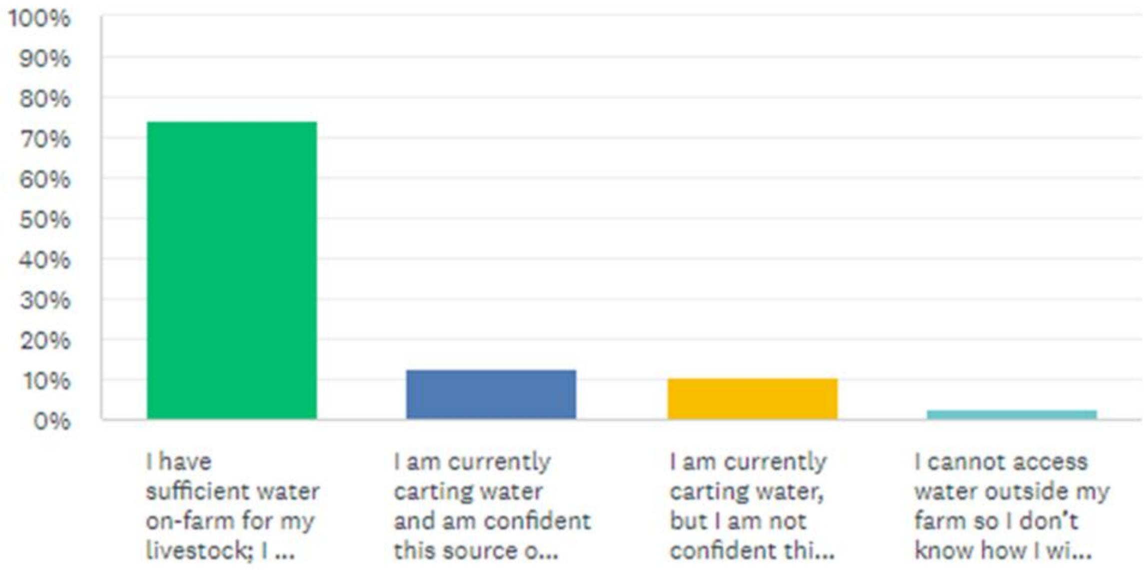
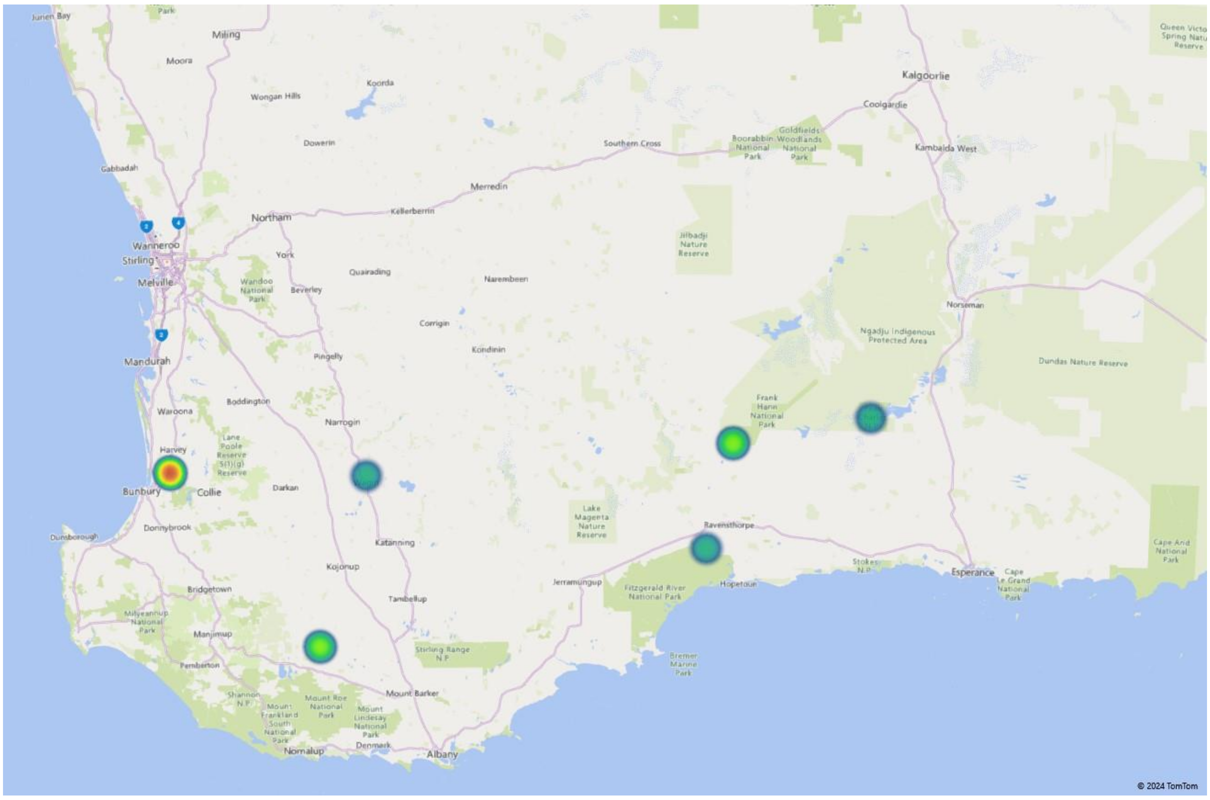


Figure 12: Frequency of postcodes* whereby producers cannot access water or have <4 weeks of water left (bar chart)

*not all survey respondents provided their postcode

Figure 13: Frequency of postcodes* whereby producers cannot access water or have <4 weeks of water left (heat map)



*not all survey respondents provided their postcode

Figure 14: Do you have the capacity financially to purchase feed and/or water?

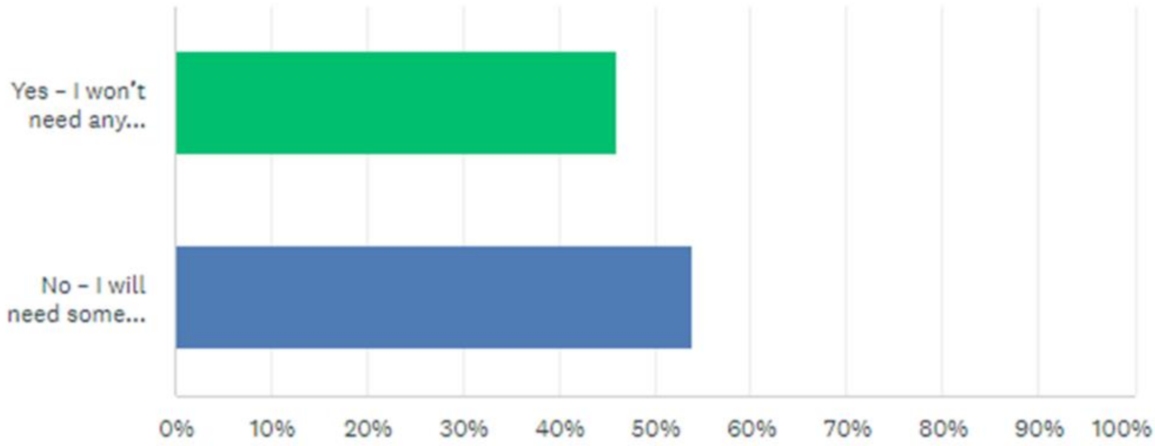


Figure 15: How many of your livestock, in the current market, are worth less than the costs of selling them – have no commercial value (NCV)?

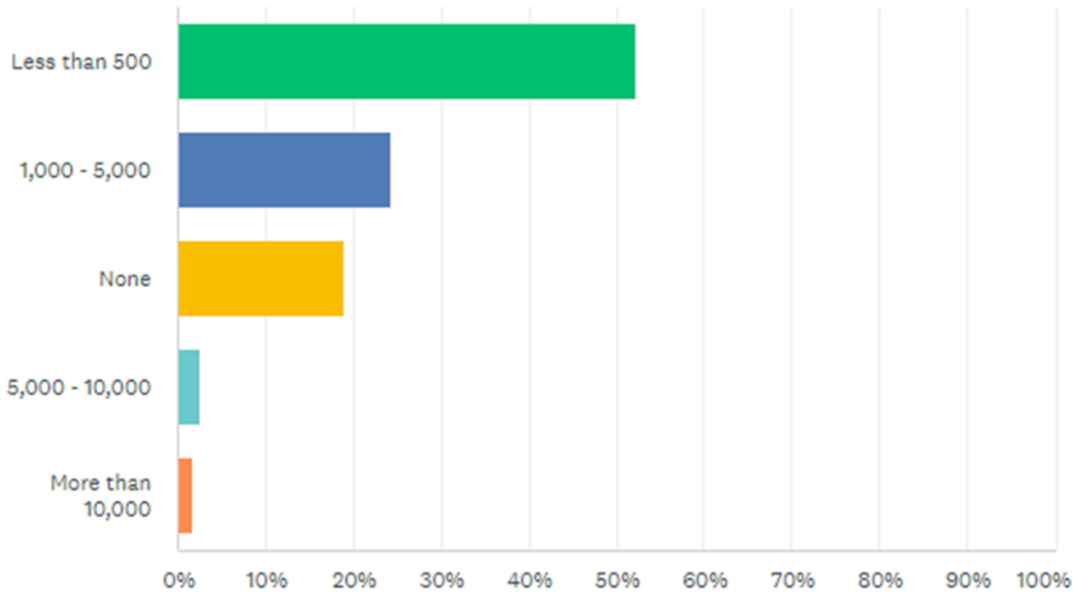


Figure 16: In your mind what percentage of the livestock producers in your region currently have no commercial value (NCV) livestock that need to be removed from the farm?

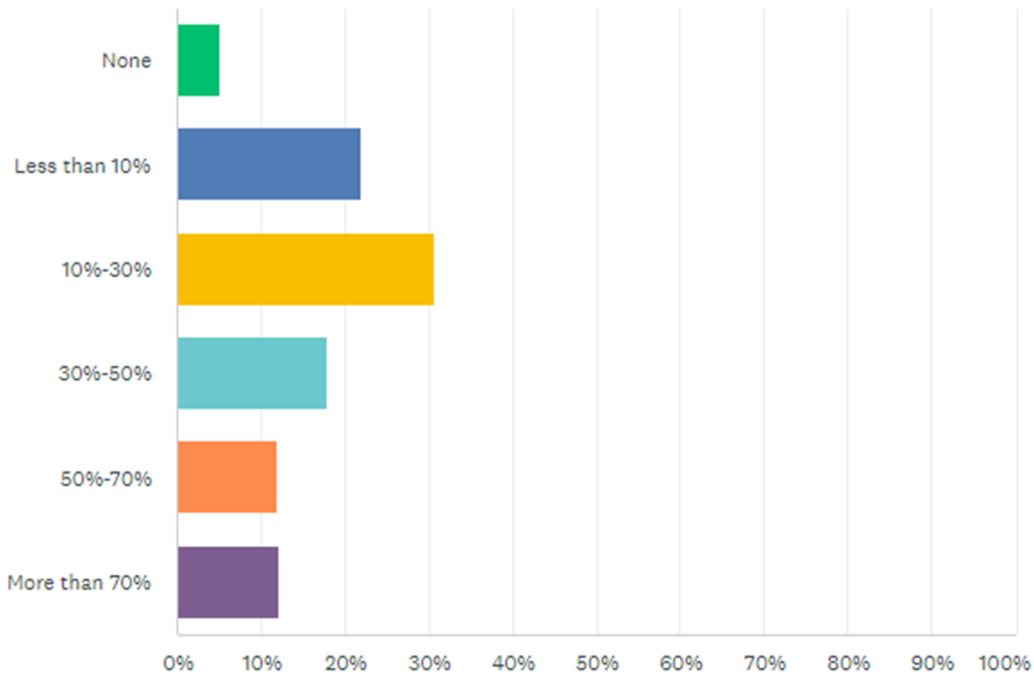


Figure 17: Methods of disposing livestock (frequency of mentions)

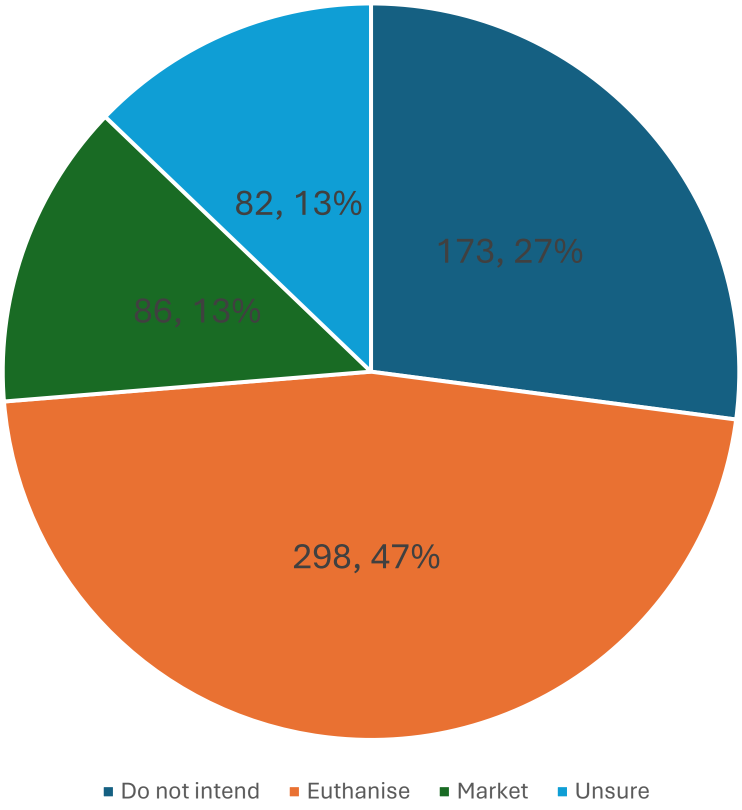


Figure 18: How would you rate livestock producers' mindset in your region?

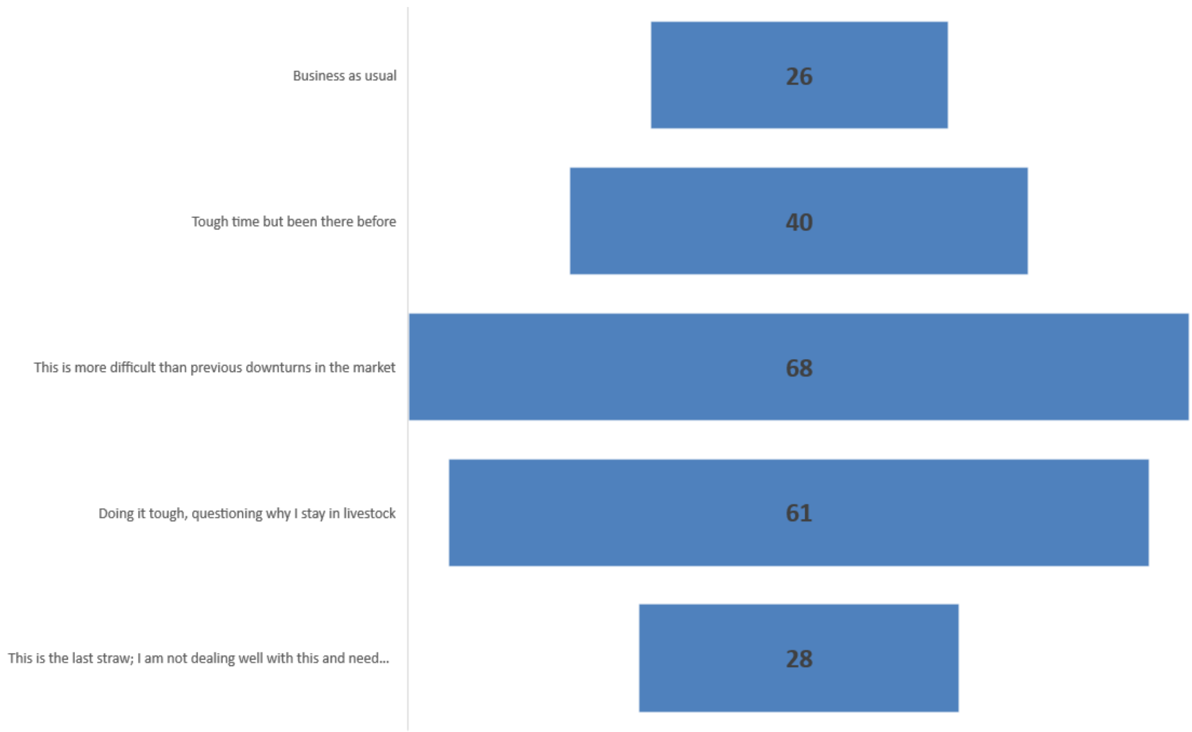
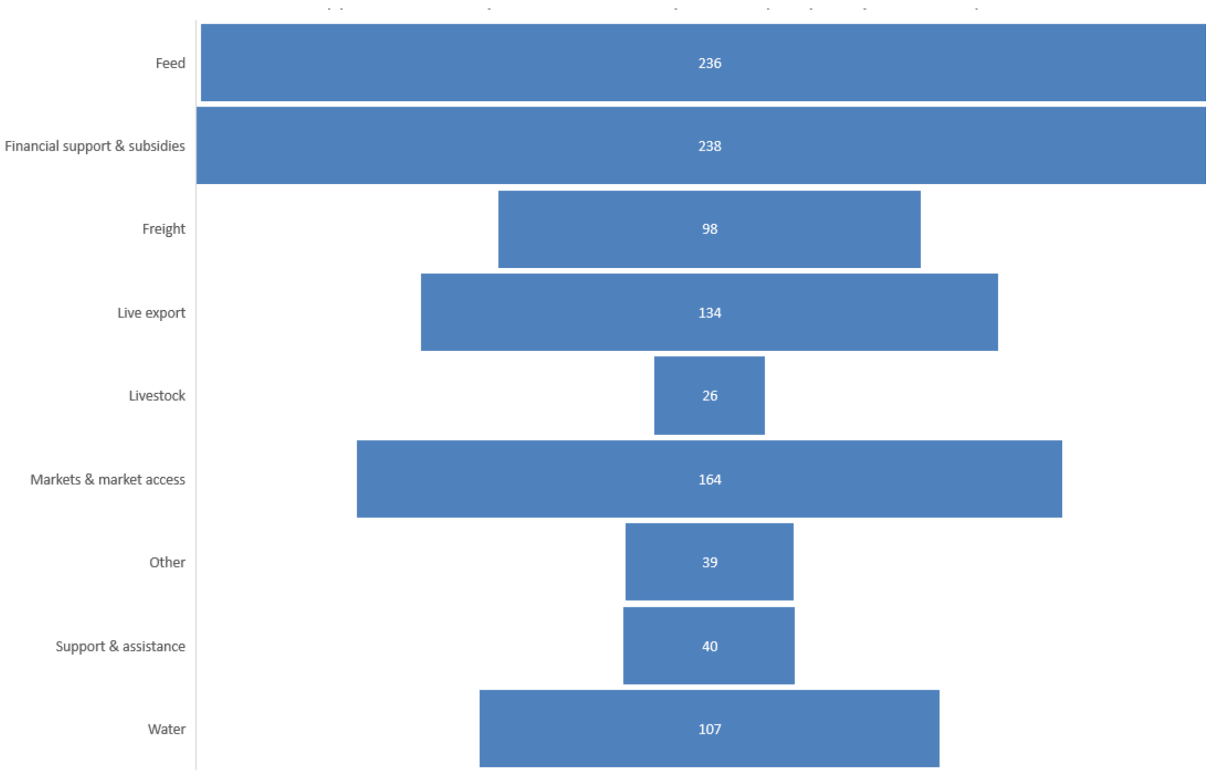


Figure 19: What support can the Dry Season Taskforce provide? (Frequency of themes)



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