

Portfolio Committee 4 – Regional NSW

Inquiry into the impact of the phase-out of Australian live sheep exports by sea on New South Wales

Online questionnaire summary report

As part of its Inquiry into the impact of the phase-out of Australian live sheep exports by sea on New South Wales, Portfolio Committee 4 – Regional NSW provided an online questionnaire to encourage public participation in the inquiry in an efficient and accessible way.

The questionnaire was not intended as a statistically valid, random survey. Respondents self-selected in choosing to participate. This means that respondents are unlikely to be a representative sample of the New South Wales population. Instead, the responses represent a sample of interested members of the public who volunteered their time to have a say.

The questionnaire was complementary to and did not replace the usual submission process. The submissions process was available to individuals and organisations who wished to provide a more detailed response to the inquiry's terms of reference. In this regard, some respondents may have completed the questionnaire and also made a submission.

The online questionnaire was open from 8 August 2024 – 20 September 2024. The committee received 2,018 responses.

This report summarises the responses received by participants to both the quantitative and qualitative questions posed. These responses will inform the committee's views throughout the inquiry.

Questions asked

In this questionnaire, participants were asked 15 questions about their views and experiences regarding the impact of the phase-out of Australian live sheep exports by sea on New South Wales. The questions were divided across three sections and included a combination of multiple-choice questions (controlled input) and open answer questions (free text).

- Section 1 (questions 1 to 4) contained mandatory administrative questions to collect basic details, such as name, contact details and location.
- Section 2 (question 5) asked participants which industry they worked in.
- Section 3 (question 6 to 15) focused on participants' views regarding the phase-out of Australian live sheep exports by sea.

The full list of questions is at Appendix 1.

A summary of responses and a sample of the answers are provided below which represent the variety of views expressed by the participants.

Responses to questions

A summary of the responses and a sample of answers are provided in this report.

Question 4: Are you a resident of NSW?

Question 4 asked participants to select if they are a resident of New South Wales. Of the 2,018 participants, 1,777 indicated that they reside in New South Wales and 241 said they did not.

The graph below provides a visual representation of the responses received for this question.



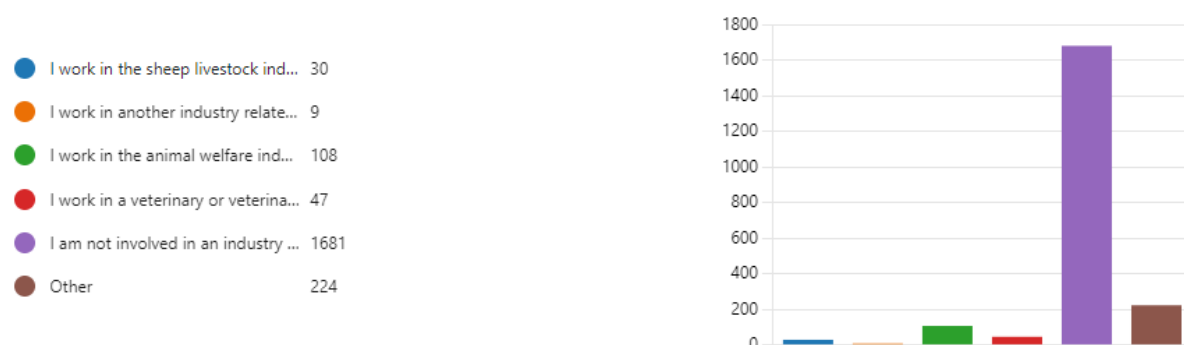
Question 5: Please select all that apply

Question 5 asked participants to select the capacity in which they were responding to the questionnaire, allowing them to choose multiple options. For instance, participants may have chosen both 'I work in the sheep and livestock industry' and 'I work in a veterinary or veterinary-related industry' in which case they would be counted in both categories.

Of the responses:

- 1,681 selected that they are not involved in an industry related to sheep livestock, animal welfare or veterinary services
- 224 were 'other'
- 108 indicated that they work in the animal welfare industry
- 47 selected that they work in a veterinary or veterinary-related services
- 30 indicated that they work in the sheep livestock industry
- nine selected that they worked in another industry related to sheep livestock.

The graph below provides a visual representation of the responses received for this question.



Question 6: Do you support or oppose the phase-out of live sheep exports by sea?

As previously mentioned, the questionnaire received a total of 2,018 responses. Of these responses, approximately 97 per cent of participants (1,964 responses) supported the phase-out of Australian live sheep exports by sea. Fifty-four participants opposed the phase-out of Australian live sheep exports by sea.

The graph below provides a visual representation of the responses received for this question.



Question 7: If you support the phase-out of live sheep exports, please identify why you support the phase out, including any social or economic benefits of a phase-out.

There were 1,912 responses to this free text question regarding participants' support for the phase-out of Australian live sheep exports. A large number of respondents highlighted animal welfare concerns and the potential social and economic benefits of the phase-out. Of these, a sample of comments were reviewed, with common themes emerging from the responses.

Animal welfare concerns

- 'Long sea voyages for sheep cause immense suffering, not limited to heat stroke, stress, dehydration, starvation and death.'
- 'Live export exposes helpless animals to long sea journeys, distressing conditions (heat, over-crowding, stormy weather, living in their own excrement etc).'
- 'Crowding poor animals tightly together in appalling and filthy conditions on a ship's [sic] for many days and, perhaps, many weeks then waiting to be off-loaded in the heat with no food or water is abysmally inhumane.'
- 'The live sheep export trade has lost its social licence to continue. It is well known that the animals suffer appalling conditions, heat, stress, unable to lie down, standing in faeces for weeks at a time only to be slaughtered in cruel conditions at their destination.'
- 'Sheep suffer from heat stress, leading to severe health issues or death. Ships are not cleaned during voyages, creating unsanitary and harmful condition.'
- 'The live export industry has been marred by repeated incidents of cruelty, overcrowding, heat stress, and inadequate veterinary care during long sea voyages. Thousands of sheep have suffered and died in transit, raising serious ethical concerns. Phasing out live exports would alleviate this suffering and reflect Australia's commitment to high standards of animal welfare, aligning with the growing societal expectation for humane treatment of animals.'
- 'Live sheep export is cruel and unnecessary. Sheep exported from Australia endure un-stunned slaughter overseas. Un-stunned slaughter is cruel and painful, and it is illegal in Australia (with a small number of exemptions for Kosher and Halal slaughter).'
- 'Our export laws should reflect the ethical standards of our community. The decision to phase out live sheep exports is based on decades of evidence showing that the

practice is inherently cruel ... sheep continue to suffer prolonged heat stress during voyages to the Middle East. They endure suffering not only at sea but also upon arrival in importing countries, where they often face fully conscious slaughter ... Today, it is evident that live export does not meet contemporary expectations for animal welfare.'

- 'The conditions on these ships are horrific. Thousands of animals are crammed into confined spaces where they are unable to move, often standing in their own waste for weeks at a time. The extreme heat causes immense suffering, with many animals literally boiling alive, gasping for breath in searing temperatures. These creatures, who are sentient beings capable of feeling fear and pain, endure a living nightmare during transport. And if they survive this journey, their suffering is far from over. Upon reaching their destination, they face brutal slaughter methods that would be considered illegal in most developed countries. Many animals have their throats slit while fully conscious, experiencing the agony of death in full awareness, surrounded by the blood and terror of their companions.'

Economic incentives

- 'Economically, local processing is value adding and provides local jobs.'
- 'A phase-out can unlock new opportunities for Australia's meat processing sector. By transitioning from live exports to chilled or frozen meat exports, Australia can add value to its sheep industry domestically. This shift would create more jobs within Australia, particularly in regional and rural areas where meat processing facilities are located. The domestic processing of sheep meat is more economically viable and creates a more sustainable supply chain. Additionally, with modern refrigeration and logistical technology, chilled meat can be exported efficiently, ensuring that market demands are met without compromising animal welfare.'
- 'More jobs for Australians, better prices, and more control over the welfare of the animals.'
- 'Employment can be generated from onshore processing and export of frozen meat products, where Australian law and oversight can be maintained.'
- 'The live export industry is facing ongoing scrutiny and declining public support, which puts its long-term sustainability in question. Phasing it out proactively would allow the industry to transition on its own terms, rather than facing sudden regulatory changes in the future. A phased transition would provide the opportunity to retrain workers and develop alternative economic activities in affected regions, ensuring a more stable and sustainable agricultural sector.'

Global reputation / examples in other international jurisdictions

- 'Australia's reputation on the global stage is increasingly intertwined with ethical business practices and social responsibility. Continuing live sheep exports risks damaging Australia's international standing as a country that prioritises humane practices. Phasing out the industry would demonstrate leadership in ethical trade and align with the values of modern consumers, both at home and abroad, who are becoming more conscious of animal welfare and the ethical sourcing of their food.'
- 'The Live Export industry is outdated, inherently cruel, contrary to most Australians reasonable expectations of animal welfare, damages our international reputation and is long overdue for being phased out.'

- 'The industry must evolve to create a more humane and sustainable future that respects animal welfare and safeguards Australia's international reputation.'
- 'Continuing live animal export tarnishes our global reputation and impedes progress toward a more compassionate, ethical society. It is time we evolve past these cruel practices and demonstrate that we value life and welfare over profit.'
- 'In 2023 New Zealand became the first country to end live animal exports and the Federal Court in Brazil ordered to end live cattle exports. And last month, the UK passed legislation ending exports of livestock for slaughter and fattening. The tide has turned, continuing to defend this trade undermines Australia's international reputation as a compassionate nation along with public trust in Australia's agriculture sector. Animal welfare is an increasingly important factor for industry sustainability and Australia's international trade and reputation.'

Question 8: If you oppose the phase-out of live sheep exports, please identify the key social and economic impacts of the phase-out on regional communities in New South Wales.

There were 731 responses to this free text question that asked those who oppose the phase-out of live sheep exports to identify the key social and economic impacts of the phase-out on regional communities in New South Wales.

Participants who outlined their opposition to the phase-out noted the potential negative impact on the livestock market in terms of oversupply. Respondents also discussed the impact of the phase-out on the price of sheep and potential loss of jobs. In particular, participants highlighted the regional impact of the phase-out (specifically in Western Australia) and its flow on effect to New South Wales.

Additionally, in reviewing some of the sample text, a number of responses stated 'n/a' while several participants responded with reasons for their **support** for the phase-out of live sheep exports. For example, some respondents reiterated their concerns outlined in question 7, while others stated that the economic impact is short term or that there would be no impact in New South Wales given that the live sheep export market is based in Western Australia.

Impact on the livestock market

- 'Loss of a valuable market for sheep which has a flow on effect to other sheep classes and market categories.'
- 'There will be an over-supply of livestock in our markets and the prices we get for our livestock will be eroded.'
- 'If the WA live export market closes, those export sheep will flood the Eastern markets. Some sheep producers will go out of sheep and into another industry not suited to their area.'
- 'WA sheep will need to come to the East placing pressure on our markets and changing the issue from sea transport to land transport of which if both done in within the guidelines ethical and sustainable.'
- 'Removing live export is removing a market for sheep, which in turn will have a negative effect on prices. Removal of live export will decrease the Merino sheep numbers in WA and the numbers in Australia overall. The consequences of this are that not only are the livelihoods of individuals impaired, but the sustainability of the national wool industry is at risk. Wool levies to our RDC (AWI) will be reduced which

means that there will be a lower investment in vital R&D and marketing for the industry. This includes less R&D into animal health and welfare issues.'

- 'The generous financial assistance package provided to farmers affected by the phase-out is a crucial aspect of this policy, ensuring that those impacted by the transition receive the support they need.'

Question 9: Do you believe that there are sufficient support mechanisms for affected communities to transition to the phase-out of live sheep exports by sea?

Around 60 per cent of participants (1,203) believed that there are sufficient support mechanisms for affected communities. On the other hand, approximately six per cent of respondents (117) did not believe that there are sufficient support mechanisms. About 30 per cent of participants (698) indicated that they did not know.

The graph below provides a visual representation of the responses received for this question.



Question 10: Please provide any detail on why there are or are not sufficient support mechanisms for affected communities in the transition to the phase-out of live sheep exports by sea (max 200 words).

A total of 1,050 participants engaged with this free text question. Of these, a sample of comments were reviewed, with common themes emerging. Respondents who argued that there are sufficient support mechanisms in place noted that the Australian Government has developed a transition package for those affected by the phase-out. Additionally, it was noted that there are government programs and training for the meat processing industry that have the potential to enhance the industry. Respondents also suggested considering international examples as best practice for the transition to the phase-out.

Australian Government transition package

- 'The Federal Government has announced a \$107m transition support package to those affected by the phase out.'
- 'There are sufficient support mechanisms. The Australian government has committed \$107 million over 5 years from 2024-2025 for the transition. As outlined above, there are also programs and support lines specific to rural communities such as the Farm Business Resilience Program, the Farmer Assistance Hotline, the Rural Financial Counselling Service etc.'
- 'This phase out has been earmarked for a very long time. The industry has been supported by government and given insane amounts of money to transition.'
- 'There are sufficient support mechanisms in place to help communities affected by the phase-out of live sheep exports by sea. The Australian government has committed to working closely with impacted stakeholders, including farmers, transporters, and regional communities, to ensure a smooth transition. A key element is the

establishment of transition funds, which will provide financial assistance to businesses and workers directly affected by the phase-out.'

Training and expanding the domestic market

- 'In addition, the expansion of the domestic meat processing industry is a critical support mechanism. By investing in modernising processing facilities, regional jobs can be safeguarded and new employment opportunities created, particularly in rural areas. The government has also signalled plans for retraining and upskilling programs, allowing workers in the live export supply chain to adapt to new roles in the domestic market.'
- 'The phase out time is lengthy. Lengthy enough for farmers and other industries / workers to seek other employment or training.'
- 'The Government has given ample warning. The [government] has offered subsidies. The [government] can make new other employment or training.'

International examples:

- 'Ne[w] Zealand has a successful phas[e]-out program which encouraged citizens to explore other markets as well as more sustainable practices.'
- 'Several regions have successfully phased out live exports by investing in local processing and other humane alternatives. For instance, New Zealand's move to end live exports by sea has been met with positive outcomes for animal welfare and the industry alike. We can learn from these examples and develop strategies that both protect animal welfare and support our farmers.'
- 'New Zealand's move to end live exports by sea has been met with positive outcomes for animal welfare and the industry alike. We can learn from these examples and develop strategies that both protect animal welfare and support our farmers.'

Participants who stated that there are insufficient support mechanisms for affected communities argued that the market would not cope with the transition. It was also suggested that the support provided by the government does not address the impact of the phase-out on the livestock industry's wider supply chain.

Negative impact on the market

- 'Markets wont [sic] cope and farmers will end up having to shoot their livestock as the cost of raising them and getting them to the markets won't match the return that will be achieved in the marketplace.'
- 'This effects the whole country you stop it in WA and you will put a large number of sheep into the domestic market especially if it turns dry forcing farmers to sell below cost of production effecting sheep welfare by not being sold via export farmers.'
- 'Farming is a notoriously challenging industry. If one opportunity is removed another should be put in its place, including re-skilling, infrastructure and financial support.'
- 'Sheep farmers have usually generations of experience and purpose built farms and to destroy their livelihood will' impact the entire communities around them such as farm machinery sales, fodder sales, local employment, local towns. You kill agriculture, you kill the backbone of Australia.'
- 'Wool growers are faced with reduced income and a greater volatility in income and this flows through to related industries including transport, shearer's, vets, and then

dependent community services such as schools, community clubs, post offices, banks etc ...'

- 'The availability of alternative markets for sheep meat and wool, as well as domestic processing capacities, also raises concerns about whether local industries can absorb the surplus animals.'

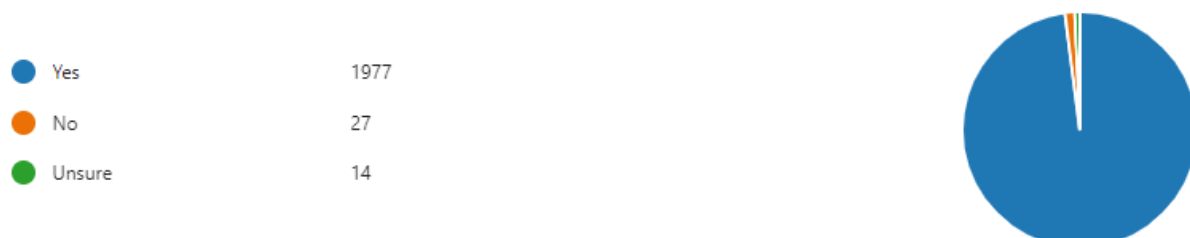
Lack of government support

- 'The government support appears to be more in doing reviews and consultation rather than on-the-ground support.'
- 'Support mechanisms, while present, may be insufficient in addressing the full scope of economic impact. The government has allocated funds to assist affected farmers and businesses in diversifying into other agricultural sectors or value-added processing. However, critics argue that this support may fall short in terms of timing, funding, and tailored assistance, particularly for smaller farms and regional economies deeply intertwined with live export.'
- 'Training programs and infrastructure investment could aid in long-term transitions, but these initiatives take time to show results. In some cases, community-specific plans are lacking, meaning that local job losses may not be effectively mitigated in the short term.'
- 'While the government is working to ensure support mechanisms are in place, the complexity of transitioning an entire sector may leave gaps, particularly in rural communities where live sheep exports are a primary source of income. More targeted and long-term planning may be required to ensure these communities are adequately supported.'
- 'Governments have become quite poor at implementing industry programs in areas that need them. They generally give money to some private entity, which wastes it. Doesn't have to be this way.'

Question 11: Do you have any animal welfare concerns with live sheep exports?

This question was multiple choice with participants able to choose either 'yes', 'no' or 'unsure'. About 98 per cent of participants (1,977) had animal welfare concerns with live sheep exports. Approximately 1 per cent of participants (27) did not have animal welfare concerns with live sheep exports and around another 1 per cent of participants (14) stated that they were unsure.

The graph below provides a visual representation of the responses received for this question.



Question 12: If you answered yes to Question 11, please explain your concerns (max 200 words).

There were 1,977 responses to this free text question. Of these, a sample of comments were reviewed, with common themes emerging from the responses. Many of these themes are similar to those discussed in response to Question 7.

- 'Long distance transport is inherently stressful for animals. Sheep endure un-stunned slaughter in importing countries which subjects them to a painful and terrifying death.'
- 'Animal welfare concerns of transporting sheep by sea: heat stress, inanition (starvation), injury, ship movement, ship noise (>100db), 24h lighting, unfamiliar social groups, un-stunned slaughter at end destination in countries with no welfare standards, no industry transparency. Animals should be slaughtered as close to production as possible. Basic welfare tenet.'
- 'There are many documented cases of animals perishing at sea due to illness, overheating, overcrowding, injury etc. because the conditions are horrendous. There are not enough vets accompanying the number of animals to assist when necessary. Also, the destinations of the animals have little or no regard for animal welfare and the animals are subjected to cruelty when they arrive and inhumane slaughter. There is no redeeming an industry built on profiting from the suffering of sentient beings.'
- 'Sheep experience highly stressful conditions that are cruel and detrimental to their health, including heat stress, and unhygienic and crowded conditions.'
- 'Live sheep exports raise numerous animal welfare concerns, primarily due to the stressful and often harsh conditions the animals endure during long voyages. These include overcrowding, extreme temperatures, and inadequate ventilation, which can lead to heat stress, dehydration, and a higher risk of disease. Additionally, the animals often suffer from rough handling, lack of proper care, and inadequate access to food and water, resulting in significant physical and psychological distress. The high mortality rates during transport highlight the serious welfare issues inherent in the live export process.'

Question 13: Do you believe that the Australian Government should provide compensation to NSW sheep producers due to the phase-out of live sheep exports by sea?

This question was multiple choice with participants able to choose either 'yes' or 'no'. Approximately 56 per cent of participants (1,132) did not believe that the Australian Government should provide compensation to New South Wales sheep producers due to the phase-out of live sheep exports by sea. While about 44 per cent of participants (886) believe that the Australian Government should provide compensation to New South Wales sheep producers due to the phase-out of live sheep exports by sea.

The graph below provides a visual representation of the responses received for this question.



Question 14: Please outline possible alternative markets and opportunities for NSW sheep producers after the phase-out of live sheep exports by sea (max 200 words).

This free text question received a response from 1,667 participants. Of these, a sample of comments were reviewed, with several common themes emerging from the responses. In particular, it was suggested that existing markets within the current wider supply chain, such as chilled meat exports, could be expanded. Some participants also responded that the New South Wales live sheep export market will not be impacted by the phase-out.

Opportunities in alternative markets

- 'The most obvious one is converting to chilled/frozen production. Value adding to meat products for the chilled/frozen meat market could also be explored. Another possibility is further developing and substituting plant-based meat product.'
- 'Processing the animals in Australia could provide employment.'
- 'Incentives to farmers to farm non animal products.'
- 'Sheep slaughtered here can be exported overseas. There are so many markets that want our quality meat, and that way we can assure standards are maintained and ethical treatment is adhered to.'
- 'Support research into and development of alternative industries that do not rely on animal exploitation. This could include plant-based agriculture, which could offer new economic opportunities for communities. To address animal welfare concerns while transitioning from live exports, we should consider advancing the production of lab-grown meat and other animal products. This method not only circumvents the ethical issues associated with live animal transport but also offers a way to meet demand sustainably.'
- 'Producers can shift focus to domestic meat processing, supplying high-quality lamb and mutton to both the local market and international markets as chilled or frozen meat. This can help capture more value within Australia and potentially expand into premium markets that demand ethically sourced products.'

- 'NSW has a strong wool industry, and producers can further capitalize on this by increasing wool production or developing value-added products, such as woolen textiles, which have high demand in global markets.'
- 'Sheep producers might diversify into other livestock, such as cattle or goats, or into alternative agricultural products like cropping or horticulture, depending on market demand and regional suitability.'
- 'NSW sheep producers can tap into these niche markets by converting their operations to meet organic or free-range certification standards, offering higher premiums for ethically produced lamb and wool.'

No direct impact on the New South Wales live sheep export market

- 'The export meat market is rapidly expanding. It is difficult to see why NSW sheep producers will be affected. They have not exported for some time and the four year phaseout gives ample time to reach equilibrium across states and also access new markets etc.'
- 'According to the NSW [Government] site "NSW is not directly involved in the bulk live export trade - there is no export of live animals through NSW sea ports." so no alternative markets are needed.'
- 'It is my understanding that NSW sheep producers are not even involved in the live sheep export trade; so I'm not sure why the [government] would need to offer support or more "opportunities" for the NSW producers. I don't think anything will or needs to change for these folks, phase-out or not. It shouldn't affect them.'
- 'Alternative markets and opportunities are not necessary for NSW sheep producers after the phase-out because NSW doesn't export live sheep by sea. NSW sheep producers already access the boxed meat export trade which is experiencing record growth due to rising demand for Australian lamb and mutton, including from the Middle East.'
- 'The Terms of Reference of this Inquiry query whether the phase-out in WA could result in either scarcity or over-abundance of WA sheep in NSW. There is no evidence to support this concern. In fact, the latest economic analysis concludes the phase-out of live sheep export from WA will have little to no impact on sheep producers in NSW, including no discernible impact on NSW sheep prices.'

Question 15: Do you have any other comments on the impact of the phase-out of live sheep exports by sea on NSW? (max 200 words)

There were 1,362 responses to this free text question. Of these, a sample of comments were reviewed, with several common themes emerging from the responses which were similar to previous responses. Many participants reiterated their support for the phase-out of live sheep exports by sea and emphasising animal welfare concerns. Again, others mentioned the opportunities of the phase-out to other markets.

- 'We are a better society if we don't inflict upon sheep the cruelty of live export by sea.'
- 'The phase out must happen. Australians want it to. End the abhorrently cruel practise of live export. For the animals, people and planet.'
- 'The phase-out of live sheep exports by sea is likely to have a mixed impact on (NSW). Economically, there could be short-term challenges for producers who have relied heavily on the live export market, as they may face reduced demand and potential financial pressures during the transition period. This could also affect associated

industries, such as transport and logistics, that are involved in the live export supply chain. However, in the long term, the phase-out presents opportunities for the NSW sheep industry to pivot towards more sustainable and potentially lucrative markets. The focus could shift to domestic meat processing and value-added production, which may lead to job creation and increased economic activity within NSW.'

- 'This transition could improve the state's reputation for high animal welfare standards, opening doors to premium international markets that value ethical and sustainable production practices.'
- 'The phase-out is likely to align with the values of a growing number of consumers who prioritize animal welfare, potentially strengthening public support for the local sheep industry. The move may also reduce negative international attention associated with live exports, contributing to a more positive image for NSW agriculture on the global stage. Overall, while there are challenges to address, the phase-out could ultimately lead to a more diversified and resilient sheep industry in NSW.'