



Lamb Crop Report 2024

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Contents

Summary for Lambing 2024	2
Lambing Calculator for farmers	5
New Zealand overview	6
Lamb Processing 2024-25	10
Region Reports	13
Ewe Lambing Dates by region	23
B+LNZ Regional Insights Team	24
Appendix 1: Regional Lamb Crop Table	25

About this report

The Lamb Crop Report estimates total lamb numbers for the current season. B+LNZ's lamb crop survey data is available one year earlier than information on lambing from Statistics New Zealand. The results presented here are used to measure breeding ewe performance (lambing percentage), the number of lambs tailed, and provide an outlook for supply expectations for the season.

Lamb crop estimates in this report are used throughout the sector to inform both farmers and the market, including analysts and commentators, exporters, and farm and processor service organisations.

This report builds on production region estimates and is underpinned by the Sheep and Beef Farm Survey. The Survey covers over 500 commercial sheep and beef farms, which are a statistically representative sample of the commercial sheep and beef farms in New Zealand.

The B+LNZ Insights Team analyses export and statistical data regularly and surveys sheep and beef farmers throughout the year. In March 2025, B+LNZ will release an updated market and farm profitability forecast in the Mid-Season Update publication.

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Summary for Lambing 2024

Fewer lambs in spring 2024 due to a declining ewe flock and moderate decrease in ewe lambing percentage

The lamb crop is forecast to be much smaller than last year. This was predicted by B+LNZ in June in the [Stock Number Survey](#) because of the reduction in breeding ewe numbers and lower lambing percentages due to drought in parts of the country. Results from the latest B+LNZ lamb crop survey confirms previous estimates.

The figures presented in this report are preliminary, as lamb tailing is still underway in parts of the South Island. B+LNZ is releasing its preliminary figure now to inform the start of processing in the North Island and will confirm a final estimate for the South Island close to Christmas. We are doing this because there is heightened interest within the industry for regional numbers due to the sharp fall in the lamb crop overall.

- **The preliminary spring 2024 lamb crop is estimated to decrease 1.1 million head to 19.2 million** – 5.2% fewer lambs were tailed this spring due a smaller breeding ewe flock and a decrease in ewe lambing percentage. Losses and poorer performance in the South Island was offset by a better result in the North Island. Significant drops in lamb numbers were seen in Marlborough-Canterbury (-10.0%) and Otago (-6.1%) due to drought. During lambing, wet weather in Southern South Island and snowstorms for parts of the South Island impacted lamb survival, but so far this seems to have been by less than originally feared.
- **Breeding ewe numbers at 1 July 2024 were 2.9% lower than 2023** – breeding ewe numbers decreased across most regions for several reasons, dry conditions, land-use changes (e.g. forestry) and shifts towards beef cattle or trade hoggets.¹
- **Ewe lambing percentage decreased 2.6 percentage points to 127.4%** – all regions reported lower lambing percentages, often linked to ewe condition at mating. Lamb survivability and growth rates were good in the North Island with favourable weather conditions, especially for the Northern North Island. South Island farmers

Cumulative impact of declining ewe flock seen in reduced lambs this spring

¹ See [Stock Number Survey 30 June 2024](#) for more detail

managed mortality rates with extra effort this lambing through snowstorms and prolonged periods of wet weather which made lamb survival very difficult.

- **Fewer ewe hoggets were mated in most regions** – lambs from ewe hoggets is estimated at 882,000 head, comprising 4.6% of the total lambs tailed.
- **Export lamb numbers are forecast to decrease 6.5% to 17.0 million head for the entire season** – with first quarter processing numbers down significantly in the South Island (-22.2%). Marlborough-Canterbury and the Southern South Island expect significantly fewer lambs ready for processing in the first quarter due to fewer stock on hand in June due to the drought, and slower growth rates of 2024 lambs as a result of the prolonged bad weather. A very slow start to the season for the South Island is expected to pick up as new season lambs come on stream after Christmas.
- **Export adult sheep processing numbers are estimated to decrease 10.6% to 2.8 million head** – B+LNZ estimate greater retention of breeding ewes in Marlborough-Canterbury is likely following drought in summer-autumn 2024, while other regions continue to cull ewes at typical rates from a smaller (overall) ewe flock. Mutton prices are low and farmers may elect to hold onto breeding ewes for another season.

Key 2024-25 Numbers



Lamb Crop

19.2 million head



Lamb processing

17.0 million head



Breeding ewes

14.4 million head



Ewe processing

2.8 million head



Flock

23.3 million head



Lambing percentage

127.4%

Market Implications:

- The forecast 6.5% decrease in export lamb and 10.6% reduction in export adult sheep numbers will likely reduce global supply, Australian lamb production is also expected to be lower further decreasing supply to global markets. This tightening of supply has the potential to increase prices for New Zealand lamb in international markets. However, it may also reduce New Zealand's market share in key markets, creating opportunities for competitors.
- Lower lamb and adult sheep export volumes will reduce New Zealand's overall export revenue from the red meat sector, challenging the country's trade balance.

- Processing companies will be closely monitoring livestock numbers and capacity in regions.

Farmer Implications:

- Despite challenges, farm profitability this season may be better than forecast. Fewer lambs to sell this season will impact farm revenue, for those recovering from drought and/or battling wet weather at lambing even more so. However, lambing has generally seen good survival and growth rates, especially in the North Island. Early-season farmgate prices for lamb were higher than last spring, and recent reductions in interest rates have alleviated some financial pressure. Over the past six months beef cattle prices were strong, which helped to support overall Sheep and Beef Farm profitability.
- Farmers reported being cautiously optimistic about better store and (early-season) processor prices. More strain was felt in the South Island following drought and/or cold spring weather conditions reducing feed which impact on profitability.
- Farmers in Marlborough-Canterbury and Otago, impacted by drought and poor ewe condition, may face higher financial strain due to reduced lambing percentages and fewer lambs available for sale. Much needed cashflow may win when farmers are deciding between rebuilding numbers following drought or selling lambs. Southern South Island farmers have worked hard to reduce lamb mortality in cold, wet lambing conditions.
- Farmers in regions with better feed conditions, such as the Northern North Island, may have opportunities to capitalise on early drafting with better prices for store lambs and early-season processor prices.

Lambing Calculator for farmers

B+LNZ has a range of tools online for farmers, this section details the Lambing Calculator.

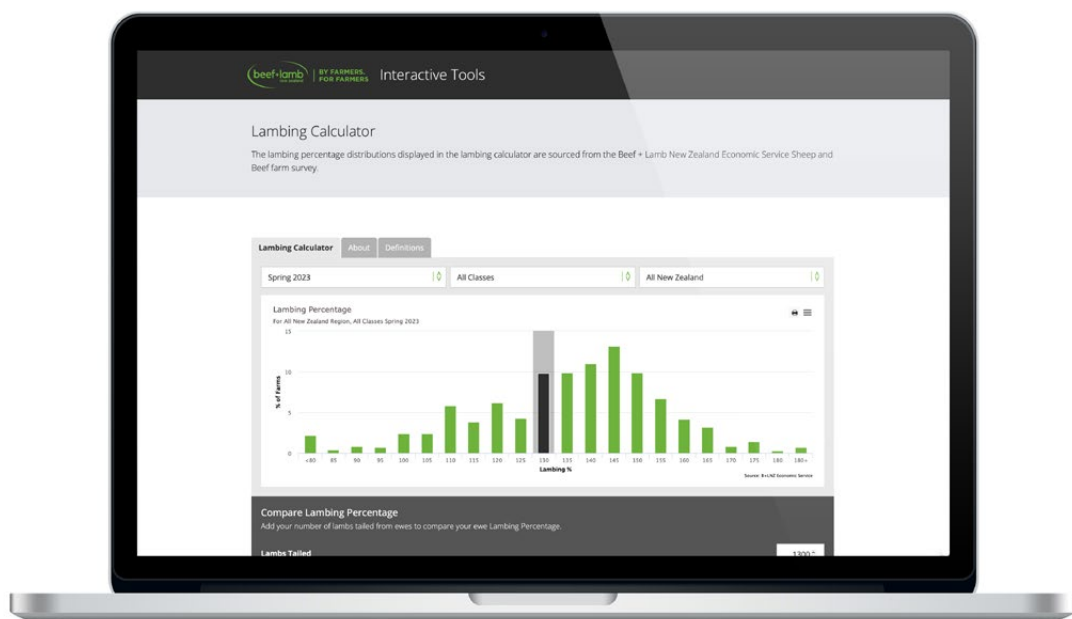
Lambing Calculator

Put your farm performance in context

Data collection and benchmarking are key drivers of improved farm profitability.

The Lambing Calculator puts your farm's performance in context. Use it for a clear understanding of where your farm stands among others within your farm class and region and get an estimate of potential revenue gains from an increased lambing percentage.

Once you know where your farm sits, you will be better placed to take appropriate action if required and desired. Visit <https://tools.beeflambnz.com/lambing-calculator>.



New Zealand overview



This section summarises spring 2024 lambing for New Zealand.

Lamb crop down 5.2% to an estimated 19.2m head

Fewer ewes, lower lambing percentage and cold lambing in the South Island contributed to a smaller crop

The 5.2% decline in the spring 2024 lamb crop reflects a range of challenges. The drought and then wet conditions at lambing in the South Island saw a 2.6 percentage point decline in the final lambing percentage. This compounded with a 2.9% decline in breeding ewe numbers, driven by recent land-use change, will see a marked decrease in lamb supply this season.

The number of lambs tailed in spring 2024 is estimated to decrease 5.2% or 1.1m head to 19.2 million head. This is a slightly larger decrease than in B+LNZ's forecast in June of a decrease of 970,000 head.

The average ewe lambing percentage for spring 2024 is an estimated 127.4%, 2.6 percentage points lower than in 2023. This is very similar to our original forecast in June. Final lambing rates were better than first expected in the North Island due to excellent lambing conditions and high survivability. This improvement, however, was offset by slightly poorer results in the South Island. Marlborough-Canterbury and Otago faced drought through summer and autumn, drastically reducing feed levels for stock on hand (farmers destocked throughout the period to reduce feed demand). Wet weather in Southern South Island and snowstorms for parts of the South Island during lambing impacted lamb survival and reduced this region's final lambing rate, but so far, the impact appears to have been less than originally feared.

Ewe lambing percentage
127.4%, down
2.6 percentage points on 2023

Fewer ewe hoggets were mated in most regions, the exception being Southland. Lambs from ewe hoggets is estimated at 882,000 head, around 4.6% of the total lambs tailed.

The number of breeding ewes at 1 July 2024 decreased 2.9% to 14.4 million head. Numbers in the North and South Islands decreased, by 2.3% and 3.6% respectively. The decline in breeding ewe numbers across several regions was due to dry conditions, land-use changes (e.g. forestry) and shifts toward cattle or trade hoggets.

2024-25 Lamb Crop estimate

	(000)			Percentage change from 2023-24		
	North Island	South Island	New Zealand	North Island	South Island	New Zealand
Ewes to Ram	6,990	7,375	14,365	-2.3%	-3.6%	-2.9%
Lambs from Ewes	9,321	8,982	18,303	-3.8%	-6.0%	-4.9%
Ewe Lambing %	133.4%	121.8%	127.4%	-2.1%	-3.2%	-2.6%
Lambs from Hoggets	423	459	882	-11.5%	-9.5%	-10.5%
Total Lambs Tailed	9,744	9,441	19,185	-4.2%	-6.2%	-5.2%

NB: Ewe Lambing change is percentage points on previous season

There were mild conditions for Northern North Island throughout 2024, especially Waikato, which resulted in favourable mating and lambing conditions for most. Farmers welcomed the influx of lambs for sale.

The East Coast saw fewer lambs tailed in spring 2024 due to fewer breeding ewes, the residual effects from Cyclone Gabrielle and reduced ewe lambing performance.

The Western North Island ewe lambing percentage dropped to 131.0% (6.2 percentage points lower) as lambing percentages declined from exceptional rates in spring 2023.

Farmers in dry and drought-affected areas, Marlborough-Canterbury and Otago, had notable reductions in breeding ewe numbers (6.7% and 3.4% respectively) and also ewe hoggets mated – down 11% in Marlborough-Canterbury. Southland maintained ewe numbers (+0.7%) and pregnancy scanning rates were higher than 2023. Diligent Southern South Island farmers minimised lamb mortality during prolonged wet weather to support overall lambing numbers.

Conditions during lambing

Favourable spring weather for most regions

Favourable spring weather in many regions, particularly in the North Island, supported good lamb survival. While many farmers went into lambing with lower scanning rates, many reported stronger than usual survival rates because of the good spring conditions.

Parts of Marlborough-Canterbury and Southern South Island experienced some localised losses during lambing due to storms, snow and wet conditions. Cold snaps and snowstorms affected high-country flocks in Marlborough-Canterbury. Persistent rain and cold fronts affected lamb survival and morale in the Southern South Island where some individual farms suffered significant losses. Overall, however, lamb losses in the Southern South Island appear to have relatively low despite the terrible weather due to excellent farm management. B+LNZ will update South Island lambing numbers prior to Christmas once tailing in the South Island is complete.

Farmers have reported feed levels to be above average in November in many parts of the country with good pasture covers and quality feed with plenty of clover. Feed quantity and quality appeared to be good throughout the North Island and also in Marlborough and Canterbury.

Otago-Southland farmers reported saturated soils and cool temperatures restricting pasture growth. There is clover in the sward with potential to boost lamb growth rates.

Lamb Growth Rates (aka thrift)

Growth rates generally good for much of the country

Lamb thrift and growth rates were good in the North Island, with good feed conditions being reported in most regions.

South Island lamb growth rates were variable due to feed levels, and persistent wet weather for Southern South Island. In Marlborough-Canterbury poor ewe condition on some farms as a result of earlier drought conditions resulted in lighter ewes with lower milk production than normal for their lambs.

Farmers perspectives during lambing

Key themes were financial pressures and land-use changes

There were several key themes reported by farmers across New Zealand.

Economic Pressures and Farmer Morale

Nationwide Trend: Farmers continue to grapple with economic challenges, including low profitability in sheep farming, high costs of production, and uncertainty about market returns. Beef cattle prices, in both the store and prime markets, were strong and contrasted with sheep prices. Morale was varied, often shaped by local conditions.

- **Northern North Island:** Farmers noted improved morale due to favourable feed and stock conditions, coupled with higher opening published processor prices for lamb at \$7.40/kgCW. The persistent decline in ewe flocks was a concern, driven by high workloads, poor wool prices, and aging farmers transitioning to farming more cattle.
- **Marlborough-Canterbury:** Morale in drought-affected areas remained relatively low despite slight improvements in wool and lamb prices. Spring farm expenditure and uncertainty in sheep returns kept optimism tempered.
- **Southern South Island:** High on-farm inflation over the past three seasons and structural changes, such as farm sales or exits, reflect ongoing financial strain. However, there was cautious optimism tied to anticipated better lamb prices and improving feed conditions.

Land-Use Changes and Declining Ewe Flocks


Nationwide Trend: Across regions, ewe numbers continue to decline, influenced by land-use changes like forestry conversions, urbanisation, within-farm forestry plantings reducing livestock numbers, and shifts to beef cattle farming.

- **Northern North Island:** Ewe flocks have declined, with no clear indication of recovery. Farmers favoured a move to beef cattle farming, reflecting workload considerations and better profitability compared to sheep.
- **Eastern North Island:** Land-use policies and dry autumn conditions contributed to fewer ewes to ram. Farmers in the northern parts of the region and Hawke's Bay were destocking early to mitigate feed pressures.
- **Marlborough-Canterbury:** Ewe flocks declined sharply (-6.7%) due to prolonged drought and land-use changes favouring forestry and dairy grazing. These shifts highlight the economic and environmental pressures faced by farmers in the region.

Shifts in Breeding and Management Practices

Nationwide Trend: Farmers were increasingly adopting practices to reduce workload and adapt to economic realities, including transitioning to shedding breeds and reducing reliance on wool.

- **Northern North Island:** Anecdotally, more farmers opted for or were investigating shedding or hairy breeds to minimize shearing costs, reflecting broader disillusionment with low wool prices.
- **Western North Island:** The region has seen rising numbers of shedding sheep, driven by poor returns from traditional wool production.
- **Marlborough-Canterbury:** A trend away from breeding ewes and toward trading lambs and beef cattle is evident, underlining the economic and management challenges of sheep farming.



Lamb Processing 2024-25

This section provides an estimate of export lamb processing for 2024-25.

Early drafting intentions in First Quarter

North Island first quarter up, South Island first quarter down

North Island farmers intend to market more lambs in the first quarter, October to December, than for the same period last year (+2.4%). There is a distinct island contrast in farmers' plans with most North Island farmers seeing good growth rates, favourable conditions and plans to offload more lambs if possible before Christmas, particularly in regions where it is already starting to get dry.

While in the South Island, processing for the first quarter is expected to be significantly lower (-22%). This is due to fewer trading hoggets on hand at 30 June across parts of the South Island which traditionally constitutes the bulk of first quarter processing, and fewer 2024 spring lambs expected to reach the necessary weights due to slow grass growth. Marlborough-Canterbury first quarter processing is estimated to decrease 14.8% with Otago-Southland down by around one-third. Fewer trading hoggets were on hand at 30 June as farmers processed got their stock away before winter at lighter weights because of the short feed supply caused by drought across many parts of the South Island.

Overall, the number of lambs processed during the first quarter of the 2024-25 season – from October to December – is expected to total 3.9 million head, a decrease of 11.1% on 2023-24. This outlook is based on farmer intentions at the time of the Survey.

It is estimated that 23% of the season's total export lamb processing will occur in the first quarter, fewer than last year and driven by lower South Island intentions and stock availability.

Meat processing capacity will be a constraint to the intentions expressed by farmers during this lamb crop survey. A further constraint or limitation to farmer expectations is lambs meeting appropriate weights.

Export Lamb Processing Intentions for October-December 2024

Export Lambs Processing Intentions October - December				
	(000) Head		Change from 2023-24	
	2022-23	2023-24	2024-25e	%
Northland-Waikato-BoP	362	365	390	6.7%
East Coast	947	824	810	-1.7%
Taranaki-Manawatū	838	803	840	4.7%
North Island	2,147	1,992	2,040	2.4%
Marlborough Canterbury	1,364	1,456	1,240	-14.8%
Otago-Southland	932	961	640	-33.4%
South Island	2,296	2,417	1,880	-22.2%
New Zealand	4,443	4,409	3,920	-11.1%

e = estimate

Source: Beef + Lamb New Zealand Insights Team, Lamb Crop Survey 2024

Early processing prices

Expectations for higher lamb prices than last season

Published processor prices increased markedly as the 2024-25 export season started and farmers were optimistic prices may be better this season than last. In November, published processor prices were \$8.15/kgCW in the North Island (up from \$6.35/kgCW on last year) and prices were \$8.00/kgCW in the South Island (up from \$6.40/kgCW).

In the B+LNZ [New Season Outlook 2024-25](#), the lamb schedule was expected to increase by only 1% on the previous season, after a 10% decline from the previous season. However, due to the strong increases to start the season, prices could be higher. It is too early to tell. Strong early season farmgate prices were likely due to low levels of lambs for processing. A true indication of prices will become evident when the processing season gets properly underway and supply increases.

The start of the season has indicated that exporters are continuing last season's trend of shifting product away from China and more to Europe and North American markets. China is expected to be the largest market for sheepmeat but the shift to these other higher priced markets will have positive uplift to farmgate prices.

The store lamb market was ahead of spring 2023 by around \$1.00/kgLW. This is promising for hill country farmers who offload store lambs before summer.

Full season processing outlook

Export lamb processing down by an estimated 1.2 million head

The number of lambs processed is estimated to decrease (-6.5%) from 18.2m head in 2023-24 to 17.0m head for 2024-25.

Despite a quick start to the season in the North Island with first quarter processing expected to be higher than last year, the full season outlook for the North Island is for export lamb processing to decrease 6.3% to 8.2m head. The South Island is estimated to see a decrease of 6.7% to 8.8m head for the full season after a slow start due to fewer old season lambs

available and slow growth rates for new season lambs curtailing first quarter processing. Expectations for the South Island are for processed numbers to pick up through the remainder of the season as new season lambs come on stream.

Export Lamb Processing forecast 2024-25

	Export lamb processing (forecast)	Change from 2023-24
	million head	%
North Island	8.2	-6.3%
South Island	8.8	-6.7%
New Zealand	17.0	-6.5%

The average carcase weight of lambs processed is expected to remain steady, from 19.20 kg per head in 2023-24 to 19.16 kg per head in 2024-25.

Adult sheep processing is expected to decrease 10.6% to 2.8 million in 2024-25. There is a greater decrease than in our forecast in the New Season Outlook (down 7.1%). Greater retention of breeding ewes in Marlborough-Canterbury is likely following drought in summer-autumn 2024, while other regions continue to cull ewes at typical rates from a smaller (overall) ewe flock. Mutton prices are low and farmers may elect to hold onto breeding ewes for another season.

These estimates are sensitive to feed availability and prices offered by meat processors. If feed supplies tighten or price incentives are offered, the number of lambs processed early will tend to increase.



Region Reports

These sections provide spring 2024 lamb crop estimates by region.

Note that at the time of the release of this report not all of the South Island regions (particularly High and Hill Country farms and Southland) had completed tailing. Survey farms in these late-lambing regions provided an estimate of their final lamb tallies.

The North Island numbers are finalised. The South Island number is provisional and the final lamb crop numbers will be confirmed when available prior to Christmas.

Northland-Waikato-Bay of Plenty

Excellent mating and lambing conditions in 2024

Northland-Waikato-BoP

	2024-25e	
	(000)	% change
Ewes to Ram	1,805	-2.7%
Lambs from Ewes	2,433	-3.5%
Ewe Lambing %	134.8%	-1.1%
Lambs from Hoggets	100	-7.4%
Total Lambs Tailed	2,533	-3.7%

NB: Ewe Lambing change is percentage points on previous season

Farmers reported excellent lamb survival and good thrift this spring with favourable weather conditions and plentiful, quality feed. There was a small decline in ewe lambing performance, from 135.9% to 134.8%. Coupled with the decrease in breeding ewes the lamb crop is estimated to decrease by around 96,000 head to 2.53 million in 2024-25.

- **Breeding ewes decrease 2.7% to 1.81 million** — the decline was driven by farmers shifting towards beef cattle due to higher prices. This included retaining more weaner cattle. The workload with farming sheep and aging farmers also meant that a higher cattle ratio on farm had become more attractive. Also, a flow-on from more afforestation.
- **Ewe lambing percentage decreases 1.1 percentage points to 134.8%** — summer and autumn conditions created an abundance of feed therefore breeding ewes were at ideal weights during mating. Pregnancy scanning results were steady on 2023 levels – which were relatively high. Facial eczema was generally not an issue with the generous

feed covers that were present. Ewe deaths were around average with bearings the main cause of death. Across the Northern North Island, the spread and date of lambing was normal.

- **Total lambs decrease 3.7% to 2.53 million** — which is attributed to the decline in the ewe flock of the region, and a small decrease in lambing percentage. Lambs from ewe hoggets decreased 7.4% to 100,000, compared with 2023. This number represents 3.9% of total lambs for the region. Farmers reported lamb survival was above average, a function of ewes being in good condition with plenty of feed enabling them to milk well.

The number of hoggets to the ram remained steady (+0.8%) compared with last season. Ideal growing conditions meant more ewe lambs were able to reach target tugging weights and farmers took advantage of this. Around 40% of ewe hoggets were put to the ram.

Conditions at Lambing

Mild weather with minimal disruptions resulted in some of the best lambing conditions ever reported by farmers. This supported high lamb survival and better-than-average lamb thrift.

Apart from one weather event during September that caused some issues, weather conditions were benign for lambing.

The feed situation in much of the Northern North Island was rated as better than average by farmers. Farmers reported good clover content in the sward improving feed quality.

Lamb Growth Rates (aka thrift)

Slightly fewer lambs on the ground compared with last year reduced feed demand and enabled ewes to feed their lambs at optimal levels. Lamb thrift tracked with feed supply and was better than average. Plentiful sunshine this spring helped to improve the thrift amongst the regions lamb flock.

Early Drafting Intentions

Present feed conditions and good growth rates in lambs should enable farmers to take advantage of better pricing in early published processor prices. Lambs were growing well, with lamb weights ahead of the same time last year.

Published processor prices for new season lamb were around \$1.00/kgCW higher than 12 months earlier. Farmers will take advantage of these prices if they are able. The store lamb market was also around \$1.00/kgLW ahead of November 2023.

General Comment

There was a lift in farmer morale due to good feed levels, livestock condition, farmgate lamb prices above last year (at this early stage) and falling interest rates. However, there was an element of caution about climate and market prices for the season.

Spring feed and pasture conditions provided farmers with a good degree of flexibility around selling and buying options. November rainfall arrived at the right time to help improve pastures for the early part of the summer.

Of concern for the region is the continual decline of the region's ewe flock. There was no intention from surveyed farmers to increase their ewe flock, mostly due to the age of

farmers, workload and cost of animal health, plus poor wool returns. This led to a competitive store cattle market in the region, with farmers interested in trade cattle.

Anecdotally some farmers opted not to tail some or all their lambs, particularly terminal lambs. More farmers were considering shedding or hairy ram breeds as a means to reduce their shearing bill.

East Coast

Good conditions for survivability and growth at lambing

East Coast

	2024-25e	
	(000)	% change
Ewes to Ram	3,294	-3.7%
Lambs from Ewes	4,411	-4.0%
Ewe Lambing %	133.9%	-0.4%
Lambs from Hoggets	208	-13.3%
Total Lambs Tailed	4,619	-4.4%

NB: Ewe Lambing change is percentage points on previous season

Weather improved lamb survival, but the total lamb crop is lower due to fewer breeding ewes. Ewe lambing was excellent, although decreasing marginally from spring 2023, to 133.9%. The lamb crop is estimated to decrease by around 215,000 head to 4.62 million in 2024-25.

- **Breeding ewes decrease 3.7% to 3.29 million** — the decline was driven by a dry autumn across the lower parts of the region and land use changes impacting farm policies (e.g. retirement of land and afforestation, shift to beef cattle, etc.).
- **Ewe lambing percentage steady at 133.9%** — pregnancy scanning results were lower than the record high levels in 2023 and attributed to tight feed levels in autumn during mating. Lambing date and spread were back to normal after a disruptive 2023 year with the cyclones hitting the East Coast during mating.
- **Total lambs tailed decreases 4.4% to 4.62 million** — excellent lambing conditions (warm dry spring with plenty of sunshine) made a noticeable impact on lamb survival rates from birth through to tailing. In particular, hard hill country farms reported excellent lambing results, contributing a sizeable portion of lambs on the East Coast. Lambs from hoggets account for an estimated 4.5% of all lambs tailed.

The number of hoggets mated decreased from 4.5% to 473,000 in 2024. With a dry autumn and hoggets not at ideal weight, many farmers made the decision to not mate ewe hoggets.

Conditions at Lambing

The region had superb weather during lambing, warm and dry with the absence of cold snaps and wet storms that hit other parts of the country. Ewe deaths during lambing were much lighter than last year. Farmers reported good clover content and feed covers through spring. In late November, dry conditions for the northern part of the region meant early destocking decisions were made.

With fewer multiples on the ground and warm dry weather over lambing, survivability was excellent. Ewes were in good condition through lambing, supporting twins well, and kind weather played a role in the high lamb survival compared to average.

Lamb Growth Rates (aka thrift)

Sunshine supported lamb thrift, but feed tightness in some areas prompted early destocking. Farmers reported lambs were thriving with the abundance of sunshine. Ewes were in good condition and milking well. Lambs were lighter in the northern parts of region due to feed levels. Wet weather and parasite challenges in spring 2023 reduced lamb growth rates, this season farmers were relieved with a more typical spring.

Early Drafting Intentions

With slow spring growth, farmers were making decisions to sell new season lambs store to relieve the pressure on feed. We expect these lambs will move out of region or further south to Wairarapa and Waikato where feed levels are higher. Finishing crops were slow to flourish in northern parts of the region while some farmers waited for rain in order to plant crops.

General Comment

The East Coast was operating in two different modes in spring – in the south, farmers had good levels of rain leading to quality spring growth, whereas further north farmers were tight on feed with dry conditions and the need to make destocking decisions early.

Pockets of the regions received rainfall at the tail-end of November which helped to spark spring growth for some, for other farms the rainfall may have been too late. Hawke’s Bay Regional Council measured below average rainfall for most stations during October and November, with soil moisture and river flow levels also below normal. Water table levels fell below stress points for many stations, indicating dry farms will need regular rain to avoid a drought this summer.

Overall, spirits were high following a kind winter and easy lambing period. With store prices trending upwards, farmers were cautiously optimistic these store prices might translate to improved prime farmgate prices. Many farmers still face a difficult financial year with high farm costs and potentially lower production due to recent dry conditions, while others reported they could see a light at the end of the tunnel.

Taranaki-Manawatū

Ewe lambing percentages aligned with long-term average

Taranaki-Manawatū

	2024-25e	
	(000)	% change
Ewes to Ram	1,891	0.7%
Lambs from Ewes	2,477	-3.9%
Ewe Lambing %	131.0%	-6.2%
Lambs from Hoggets	115	-11.5%
Total Lambs Tailed	2,592	-4.2%

NB: Ewe Lambing change is percentage points on previous season

Lamb thrift benefited from reduced multiples and good feed growth. Ewe lambing percentages decreased from an exceptionally high level (137.2%) in 2023 to 131.0%, nearer the recent long-term average. The lamb crop is estimated to decrease by around 115,000 head to 2.59 million in 2024-25.

The 2024-25 lamb crop reflects Western North Island farms carrying greater numbers of spring 2023 lambs longer into autumn and winter to improve cashflow. Extra lambs on farm in autumn created additional worm challenges and reduced feed availability for ewes pre-mating. Resulting in lower ewe pregnancy scanning and fewer lambs tailed this spring.

- **Breeding ewe numbers remained stable at 1.89 million** — finishing farms held fewer breeding ewes at 30 June, favouring trade hoggets and the winter lamb market. Winter weather was favourable for hard hill country farms allowing breeding ewes to put on condition in preparation for lambing.
- **Ewe lambing percentage decreases to 131.0%** — as ewe lambing performance decreased from a record high 137.2% in 2023. Autumn was challenging for hard hill country and hill country farms impacting mating and pregnancy scanning results. No change in lambing date was reported by farmers. A slightly wider spread during lambing was due to ewes struggling to cycle at key times through the autumn due to a feed pinch.
- **Total lambs tailed decreases by 115,000 to 2.59 million** — a challenging autumn for hill and hard hill country farms resulted in lower pregnancy scanning and subsequent lambing percentages. However, a reduction in triplet-bearing ewes and stable weather led to improved lamb survival. Lamb thrift benefited from reduced competition for feed. Lambs from hoggets account for an estimated 4.4% of all lambs tailed.

Fewer ewe hoggets were mated this season across the Western North Island. This was particularly evident on hard hill country farms as these farms focused on mating ewes. Higher worm burdens owing to carrying trade lambs later into autumn impacted growth rates of ewe hoggets and reduced weights at mating.

Conditions at Lambing

Weather conditions were good in early spring and remained fair as the season progressed with few isolated weather events impacting lambing. Ewe deaths across winter and early spring were average or below average. Warm temperatures and regular rain through November improved feed levels for all farm classes. Soil fertility on hard hill country is likely to be a limiting factor in future pasture production due to significant reductions in fertiliser on this farm class over the past two seasons.

Lower ewe pregnancy scanning results predicted a reduction in multiples. With fewer multiples to feed, in particular a reduction in triplets, and good lambing weather the result overall was improved survival rates.

Lamb Growth Rates (aka thrift)

Lamb thrift was reported by farmers to be at average to slightly above average rates. Fewer multiples and lambs overall coupled with an improving feed situation supported lamb thrift.

Early Drafting Intentions

The number of prime lambs available to market may be higher in the first quarter at an estimated 840,000 head. An increase in hoggets on farm at 30 June resulted in greater hogget numbers processed through to end of October. Excellent pasture growth through November, fewer lambs born this season support farmers' plans to draft more sale lambs in this first quarter.

General Comment

Poor farmgate prices for sheep in 2023-24 created cashflow pressure this spring. Although the short-term outlook for farmgate prices is slightly optimistic the impact of fewer lambs available to market and high farm expenditure tempers the potential for improved profitability.

Sheep stud farmers reported decreased ram sales, a direct implication of lower ewe numbers across the North Island.

Porina was reported this season as an issue across the Upper Manawatū, Rangitikei and Whanganui areas.

Shedding sheep continue to increase in numbers across the region as farmers steer away from wool production.

Farmer sentiment was optimistic given the profitability challenges many face. Strong farmgate prices for beef cattle were a shining light for much of 2024.

Marlborough-Canterbury

Severe drought and poor ewe condition impacted lambing performance

Marlborough-Canterbury

	2024-25e	
	(000)	% change
Ewes to Ram	2,800	-6.7%
Lambs from Ewes	3,461	-9.5%
Ewe Lambing %	123.6%	-3.8%
Lambs from Hoggets	159	-20.1%
Total Lambs Tailed	3,620	-10.0%

NB: Ewe Lambing change is percentage points on previous season

With a decline in breeding ewes and lower body condition on ewes at mating, due to drought, both reproductive performance with a lower ewe lambing percentage and survivability were down this spring. Cold snaps and snowstorms affected high country flocks.

- **Breeding ewes decrease 6.7% to 2.80 million** — reflecting difficult farming conditions and low profit expectations from crossbred wool and sheep meat. Drought forced ewes off farms where the cost of grazing or purchased feed exceeded expected returns from retaining them. Further ewes were lost to land use change, especially to forestry, and farm policy changes toward more beef cattle or dairy grazers.

- **Ewe lambing percentage decreases to 123.6%** — mainly attributable to lower-than-normal ewe body condition at mating. Rates of dry ewes (including those that failed to conceive and those that lost lambs after birth) were higher than normal, while multiple lambs (twins and triplets) were markedly reduced. Grain supplementation prior to and during mating supported nearer normal scanning results for those that could afford the feed. Some severely dry farms without good supplementary feed were down 15 to 25 percentage points, especially in North Canterbury. Most farms repeated 2023 ewe mating dates but many farmers affected by severely dry autumn conditions reported a slow start to lambing and more ewes lambing to the second cycle.
- **Total lambs decrease 10.0% to 3.62 million** — a decrease of around 402,000 head on last season. This is largely due to the impact of the drought which severely impacted the number of stock mated and scanning rates. B+LNZ expect that although farmers will seek to rebuild their flock numbers following drought, most lambs will be marketed for much needed cashflow. Lambs from ewe hoggets decreased 20% to 159,000 compared with 2023. This number represents 4.4% of total lambs for the region.

Ewe hogget mating was heavily reduced compared with previous years due to drought. Many ewe hoggets were sent to off-farm grazing; mating decisions reflected lighter liveweights and lack of confidence in spring feed supplies for lactating young stock.

Conditions at Lambing

Lambing weather was not as favourable as spring 2023 with wet West Coast-style weather through Murchison and frequent cold snaps in southern districts. Northern districts fared best with dry, warm conditions.

Overall, lamb survival was near average for the region but variable between farms and districts. High and hill country farms affected by snow lost newborns and young lambs. Labour weekend snows coincided with the peak of lambing for some farms. Districts north of Christchurch and coastal plains had kinder weather, fewer vulnerable multiples and lower competition for feed and shelter.

Feed supplies were very good to excellent in spring, although some individual farms continued to struggle. Showers, irrigation and warmer weather supported feed growth in northern and coastal parts of the region. Higher inland areas and the Mackenzie basin remained tight on feed due to cold conditions and a slow start to spring. Lower stock numbers and fewer lambs helped feed recovery.

Lamb Growth Rates (aka thrift)

Farmers reported lamb growth as average, however, results varied widely. Farms with destocking and good pasture covers reported excellent lamb growth, while others, particularly in high country areas, have struggled with poor ewe body condition and persistent cold snaps. Farms with light ewes at lambing had reduced colostrum production and lower peak milk output.

Early Drafting Intentions

With fewer lambs born this spring, fewer hoggets on hand to sell, and good feed supplies has encouraged farmers to hold and increase lamb weights. First quarter processing is expected to be well down on last season by around 14.8%.

Reduced lamb numbers pushed farmers to weigh the trade-offs between early revenue and holding lambs to optimise weights. Good feed supplies and more single lambs than usual should ensure relatively fast lamb growth in time for pre-Christmas processing.

Hoggets without tooth eruption would normally form the bulk of first quarter lamb sales. However, trading hoggets on hand at 30 June were down 21%, largely due to drought.

General Comment

Morale was still quite low in the areas that suffered the worst drought, but a kind spring saw high survival rates and good lamb growth which has helped spirits.

Wool price rises remain slow and from a very low base; lamb prices rose on the back of short spring supply, but uncertainty remains about peak season pricing. Spring farm costs will be high, centred on feed conservation and establishing feed crops for later in the season.

Trends away from breeding ewes continued, with increasing preferences for trading beef cattle and/or trading lambs. Interest in shedding or wool-free sheep also continued.

Otago-Southland

Lamb crop declined due to wet spring weather and fewer ewes in Otago

Otago-Southland

	2024-25e	
	(000)	% change
Ewes to Ram	4,575	-1.5%
Lambs from Ewes	5,521	-3.7%
Ewe Lambing %	120.7%	-2.7%
Lambs from Hoggets	300	-2.6%
Total Lambs Tailed	5,821	-3.7%

NB: Ewe Lambing change is percentage points on previous season

Persistent rain and cold fronts has affected lamb survival and farmer morale. Some individual farms suffered more with greater losses. Prolonged wet weather in Southern South Island reduced lamb survivability despite farmers working very hard to manage lamb mortality. The number of lambs tailed could have been lower without the significant extra workload exerted by farmers. Breeding ewes decreased in Otago by 3.4% and were steady in Southland +0.7%. There was a decline in ewe lambing performance across the whole region.

- **Breeding ewes decreased 1.5% to 4.58 million** — as dry summer and autumn conditions in Otago saw farmers reduce ewe flocks. In addition, forest planting, both whole farm forestry conversion and planting trees within farms, contributed to permanently reduced ewe numbers. In contrast, summer 2024 saw excellent pasture growth in Southland encouraging farmers to maintain their ewe numbers.
- **Ewe lambing percentage decreased 2.7 percentage points to 120.7%** — dry conditions impacted ewes during mating in Otago and scanning rates were down in this region. Heading into the lambing season some farmers were impacted by storms during lambing. In general, Southland breeding ewes were in excellent condition and many

farmers had reported record scanning rates. Southland and some South and West Otago farmers faced significant challenges due to prolonged wet conditions during lambing. While tailing is still to be completed, early indications are that overall lambing mortality has been lower than first thought. Some farmers were impacted very severely, but this does not appear to have been as widespread as originally feared due to concerted good management.

- **Total lambs decrease 3.7% to 5.82 million** — an estimated decrease of around 222,000 head fewer lambs born this spring. The lower lamb crop is attributed to the decline in the ewe flock, and a decrease in lambing percentage. Lambs from ewe hoggets decreased 2.6% to 300,000, compared with 2023. This number represents 5.2% of total lambs for the region. Sustained wet spring weather affected the survival of these lambs in Otago. Higher rates of hogget mating in Southland may see an increase in total number of lambs born to hoggets. While tailing is still to be completed in some parts of the region, despite the weather challenges, the reduction in total lambs does not appear to have been as high as feared due to excellent management.

Excellent pasture growth in Southland last autumn encouraged farmers to mate more ewe hoggets as target liveweights were achieved. However, the number of hoggets mated in Otago remained at similar levels to the previous season.

Conditions at Lambing

Persistent rainfall in Otago and Southland caused widespread wet ground conditions, negatively impacting lamb survival and growth.

There were few days without rain for many weeks during lambing. Flood events occurred in some catchments with stock losses reported by farmers. Several cold fronts passed through in September and October with snow to low levels impacting hogget lambing and later-lambing flocks in the high country.

Unrelenting wet weather took its toll on lamb survival and the morale of farmers. Many commented it was the toughest lambing in many years with much more intervention required to ensure lambs survived. Higher than usual rates of watery mouth and other infections were observed in lambs due to wet and muddy conditions. Particularly demoralising for farmers was older lambs succumbing to the weather.

Saturated soils and cool temperatures severely restricted pasture growth. Spring nitrogen applications on pasture were delayed or abandoned on some farms because of low soil temperatures and wet soil conditions. In November, temperatures had improved, and soils began to dry. There was potential for a flush of clover to give lambs a boost.

Lamb Growth Rates (aka thrift)

Most farms in Southland reported that lamb thrift was behind usual at tailing with prolonged wet conditions and a lack of sunshine affecting grass growth and lamb growth rates.

Early Drafting Intentions

Many farmers expected there would be fewer lambs ready for processing in the first quarter due to wet conditions hampering growth rates. A significant proportion of first quarter processing in Southern South Island is old season lamb, often from high country farms and winter lamb finishing specialists. June stock numbers indicated significantly fewer 'other'

hoggets, those usually destined for processing, on farm in Southern South Island. One-third fewer lambs were estimated to be processed in the first quarter, a slow start to the season.

General Comment

High on-farm inflation and structural changes, such as farm sales or exits, reflect ongoing financial strain. However, there was cautious optimism tied to anticipated better lamb prices and improving feed conditions.

Farm profitability remains under pressure and substantial increases in farmgate prices for lamb (and wool) are required to turn this around. There is limited relief with interest rates decreasing - the impact of high on-farm inflation over the last three years remains.

A few farms were undertaking major structural change to remain viable, usually involving selling part of the farm. Some others elected to exit farming and real estate listings were higher than last spring.

Land use change to forestry has a permanent impact on livestock numbers with large property sales for forestry conversion imminent in Southern South Island. This has flow-on impacts for farm staff and service providers, rural towns, and the regional economy.

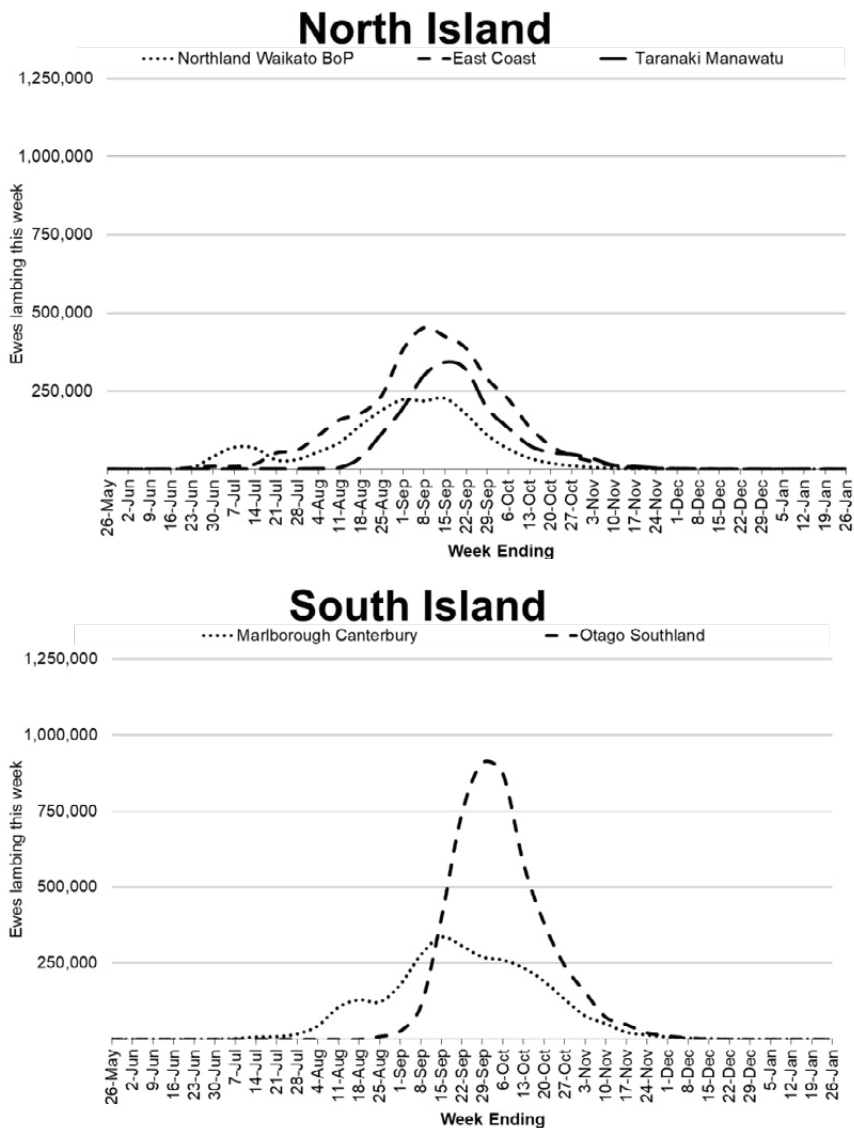


Ewe lambing dates by region

This section provides an estimate of ewe lambing dates by region for 2024.

Pasture availability a key driver in ewe lambing dates

Variation in ewe lambing dates between regions is largely due to differences in pasture availability in response to geographically different climates. This is a management response by farmers to ensure that ewes are lambing when feed availability and weather conditions are typically good to provide lambs with the best possible start.



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Appendix 1: Regional Lamb Crop Table

				Northland- Waikato-BoP	East Coast	Taranaki- Manawatū	North Island	Marlborough- Canterbury	Otago	Southland	South Island	NEW ZEALAND
2022-23	Ewes to Ram	(000)	1	1,861	3,645	1,881	7,387	3,020	2,747	2,218	7,984	15,371
2023-24	Ewes to Ram	(000)	2	1,855	3,421	1,878	7,154	3,001	2,524	2,122	7,648	14,802
2024-25e	Ewes to Ram	(000)	3	1,805	3,294	1,891	6,990	2,800	2,438	2,137	7,375	14,365
2022-23	Lambs from Ewes	(000)	1	2,429	4,672	2,486	9,587	3,925	3,304	2,928	10,157	19,744
2023-24	Lambs from Ewes	(000)	2	2,521	4,594	2,577	9,692	3,823	3,070	2,665	9,558	19,250
2024-25e	Lambs from Ewes	(000)	3	2,433	4,411	2,477	9,321	3,461	2,901	2,620	8,982	18,303
2022-23	Ewe Lambing %	(%)	1	130.5%	128.2%	132.2%	129.8%	130.0%	120.3%	132.0%	127.2%	128.5%
2023-24	Ewe Lambing %	(%)	2	135.9%	134.3%	137.2%	135.5%	127.4%	121.6%	125.6%	125.0%	130.1%
2024-25e	Ewe Lambing %	(%)	3	134.8%	133.9%	131.0%	133.4%	123.6%	119.0%	122.6%	121.8%	127.4%
2022-23	Lambs from Hoggets	(000)	1	201	364	168	732	267	121	176	564	1,296
2023-24	Lambs from Hoggets	(000)	2	108	240	130	478	199	170	138	507	985
2024-25e	Lambs from Hoggets	(000)	3	100	208	115	423	159	140	160	459	882
2022-23	Total Lambs Tailed	(000)	1	2,630	5,036	2,654	10,319	4,192	3,425	3,104	10,721	21,040
2023-24	Total Lambs Tailed	(000)	2	2,629	4,834	2,707	10,170	4,022	3,240	2,803	10,065	20,235
2024-25e	Total Lambs Tailed	(000)	3	2,533	4,619	2,592	9,744	3,620	3,041	2,780	9,441	19,185

1 Statistics New Zealand ewe numbers and lamb numbers

2 Statistics New Zealand ewe numbers, Beef + Lamb New Zealand Insights Team Lamb Crop Survey

3 Beef + Lamb New Zealand Insights Team Livestock Number Survey and Lamb Crop Survey

e Beef + Lamb New Zealand Insights Team Estimate

