Lamb Crop Report 2025

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About this report

This report estimates total lamb numbers for the current season, measuring ewe performance (lambing percentage), lambs tailed, and supply expectations. B+LNZ's lamb crop survey data is available a year ahead of lambing information from Statistics New Zealand.

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 2026, B+LNZ will release an updated forecast in the Mid-Season Update publication.

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Summary for Lambing 2025

National lamb crop rises 1.0% to 19.66 million head, driven by improved ewe lambing performance

The lamb crop is estimated to increase by 188,000 head (+1.0%) to 19.66 million head due to improved ewe lambing performance. In the Stock Number Survey, we estimated a slight decrease in lambs tailed because of fewer breeding ewes (-1.9%). However, results from the latest B+LNZ Lamb Crop Survey show lambing has outperformed expectations with the result being a small increase in lambs tailed.

Ewe lambing percentage increased 3.7 percentage points to 131.1% – all regions reported higher lambing percentages except for the Northern North Island where a dry summer-autumn impacted feed levels and ewe condition.

Export lamb numbers are forecast to be similar to last season, forecast at 17.07 million head for the full 2025-26 season. Farmer intentions for first quarter processing are bullish, with increased lambs forecast to be sent to meat processors between October and December 2025 across all regions except for Northland-Waikato-Bay of Plenty.

Global lamb supply is tight while demand for sheepmeat stays strong, keeping farmgate prices at historically high levels.

Key 2025-26 Numbers

Lamb Crop
19.7 million head

Lamb processing
17.1 million head

Breeding ewes
14.3 million head

Ewe processing
3.2 million head

Flock
23.4 million head

Lambing percentage
131.1%

Market Implications

With New Zealand export lamb processing estimated to be similar to 2024-25, domestic supply will remain tight. This follows the decrease last season of around 1.1 million lambs from New Zealand. Processing companies will continue to face challenges procuring supply.

Australian lamb supply is expected to decline 5.8% to 24.9 million head[1]. Combined, this reduces global lamb supply for 2025-26.

Demand for red meat is strong and with supply constraints, prices are forecast to remain historically high.

The outlook for processing of adult sheep remains as per the forecast in the New Season Outlook 2025-26, with lower volumes (-3.4%) and a slight decrease in mutton prices per head.

Australian retention of breeding ewes and reduced mutton processing may shift market share opportunities for New Zealand exporters[2].

Farmer Implications

More saleable lambs this season than estimated in the New Season Outlook 2025-26 in September, means sheep and beef farmers' revenue is expected to be higher than earlier forecasts.

Farmers can expect slightly more lambs nationally into the pipeline than last year. Feed availability will be weighed against farmgate price signals.

A focus on performance, lamb survival and growth rates, is the best lever for profit margins – particularly where ewe numbers are flat or continuing downwards.

Ewe performance drives farm revenue. A lift in ewe lambing from 120% to 125%, could add a potential $14,000 for a North Island Hill Country farm or $20,000 for a South Island Finishing-Breeding farm[3]. Use B+LNZ's Lambing calculator to see how your results compare and estimate potential gains (see short overview below).

NIWA's outlook signals a moderate La Niña with risk of dry spells late December-January. Farmers should prepare feed and water strategies for both rapid drying and potential heavy rain events. A useful tool to monitor is NIWA's 35-day outlook and drought indices, to help with early decisions on stocking, feed and water plans.

Land-use change and regulatory uncertainty remain structural challenges. Farmers will likely maintain flexibility in stocking policies and consider diversification strategies to manage risk.

Farmer sentiment was positive overall with improved farmgate prices compensating for feed and weather challenges.

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[1] MLA (Meat & Livestock Australia) Sheep Projections 1 October 2025
[2] MLA (Meat & Livestock Australia) Sheep Projections 1 October 2025
[3] Calculations based on 'average' farm class breeding ewes in 2025-26

Lambing Calculator for farmers

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

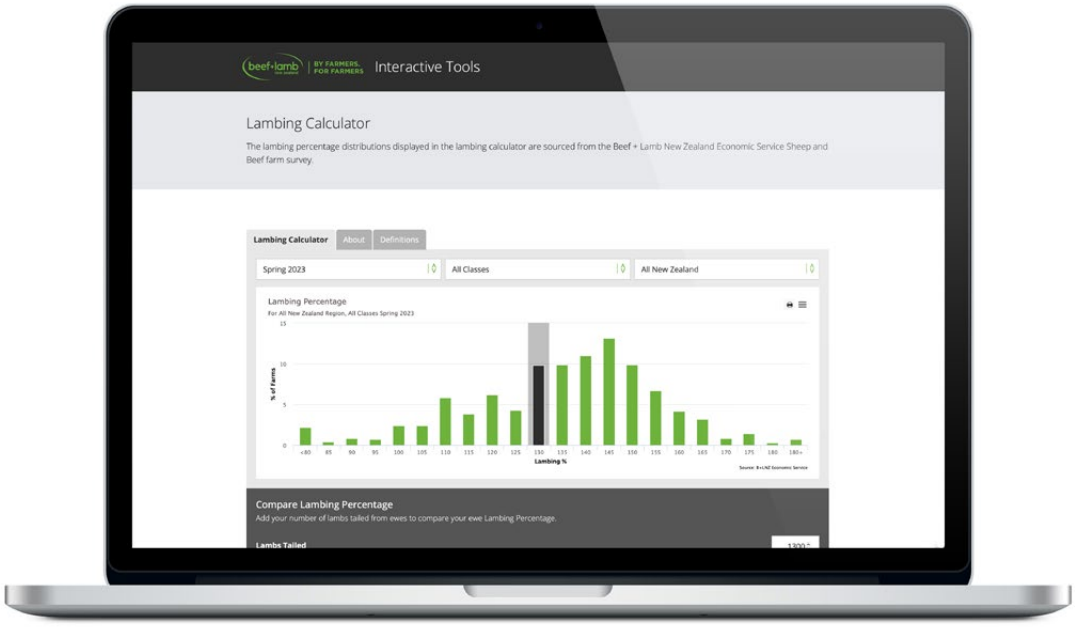
Lambing Calculator

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.](https://tools.beeflambnz.com/lambing-calculator)



New Zealand overview

This section summarises spring 2025 lambing for New Zealand.

Lamb crop up 1.0% to an estimated 19.66m head

Improved lambing percentage offsets fewer breeding ewes

The number of lambs tailed in spring 2025 is estimated to increase 1.0% or 188,000 head to 19.66 million head. This is a small reversal on the slight decrease forecast in B+LNZ's June Stock Number Survey due to improved ewe lambing performance.

Feed was a key factor in regional success this year with East Coast farmers reporting great autumn conditions and feed levels, mirrored by Marlborough-Canterbury with excellent summer-autumn conditions in most districts. Feed levels supported ewe body condition at mating, lamb survival and ewe lactation.

Results were variable for the rest of the country, with Northland-Waikato-Bay of Plenty, Taranaki-Manawatū, and Southland counting fewer lambs tailed this spring due to fewer breeding ewes and, for Northland-Waikato-Bay of Plenty, a lower ewe lambing percentage.

The average ewe lambing percentage for spring 2025 is an estimated 131.1%, 3.7 percentage points higher than in 2024. This is higher than the modest increase in ewe lambing forecast in the June Stock Number Survey.

Ewe lambing percentage increases to 131.1%

Farmers across most regions reported higher lamb survival and improved ewe performance despite ongoing structural declines in ewe numbers. The common drivers were better ewe body condition at mating due to improved late summer-autumn feed, and kinder lambing weather for most districts.

2025-26 Lamb Crop estimate

	(000)			Percentage change from 2024-25		
	North Island	South Island	New Zealand	North Island	South Island	New Zealand
Ewes to Ram	6,977	7,304	14,281	-1.3%	-2.5%	-1.9%
Lambs from Ewes	9,459	9,259	18,718	+0.4%	+1.5%	+0.9%
Ewe Lambing %	135.6%	126.8%	131.1%	2.2%	5.0%	3.7%
Lambs from Hoggets	469	472	941	-3.5%	+8.3%	+2.1%
Total Lambs Tailed	9,928	9,731	19,659	+0.2%	+1.8%	+1.0%

NB: Ewe Lambing change is percentage points on previous season
Source: Beef + Lamb New Zealand Insights Team, Lamb Crop Survey

Another factor in improved results was fewer triplets/multiples in some areas, which, combined with good ewe lactation, produced larger, more robust singles and twins that survived better than in 2024.

Northland-Waikato-Bay of Plenty was an outlier, with ewe lambing percentage down due to a hard summer-autumn period that was confirmed by lower pregnancy scanning results. Survival was generally described as good.

Southland lambing improved on last year although weather through September and October was unsettled (especially Labour weekend rain, snow and wind events). Storms capped gains for some late-lambing Hill and High Country flocks.

Fewer ewe hoggets were mated in most regions. Lambs from ewe hoggets is estimated at 941,000 head, around 4.8% of the total lambs tailed.

The number of breeding ewes at 1 July 2025 decreased 1.9% to 14.28 million head. Numbers in the North and South Islands decreased – by 1.3% and 2.5% 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.

Conditions during lambing

Mild, wet and cloudy conditions for spring 2025

Weather during lambing in spring 2025 was generally mild, wet and often cloudy with relatively few cold snaps compared with past seasons. Some farmers reported one or two disruptive rain or wind events that affected later lambing but the overall pattern was a slow start to spring rather than harsh conditions.

Parts of the northern North Island were hit by heavy rain events, which set back later-lambing flocks. Southern South Island had unsettled weather from September onwards, with October-November storms, wind and snow that impacted exposed Hill and High Country flocks.

The slow start to spring meant that cool, cloudy, wet conditions delayed spring flush of pasture and pushed key operations such as silage and crop establishment two-three weeks behind normal. Feed quality issues such as Porina damage and flowering pastures were noted in several regions.

Feed levels at lambing were below average in Northland-Waikato-Bay of Plenty, with slower drought recovery on Hard Hill Country farms and spring growth three-four weeks behind the usual pattern. East Coast and Taranaki- Manawatū regions had average to above-average feed by November, however the cool, wet start to spring had compromised pasture quality for some.

Lamb Growth Rates (aka thrift)

Growth rates generally slower than ideal

Lamb growth rates were widely described as slower than ideal early in spring due to cool, cloudy, wet conditions that held back pasture quality and quantity.

More sunshine and warmth was needed for lamb growth in early spring, with farmers reporting pasture growth two-three weeks behind ‘typical’ patterns.

By mid to late November, however, many areas (for example Bay of Plenty, parts of Eastern North Island and some South Island Finishing country) reported a lift to average or above-average lamb growth rates once temperatures and sunshine improved. Drought-affected or colder regions (such as King Country Hard Hill or higher altitude South Island country) remained behind the rest of the country.

Farmers’ perspectives during lambing

Easing financial and regulatory pressure

Farmer morale lifted thanks to strong farmgate prices and positive signals from global markets for red meat. Better lambing results than expected also boosted spirits.

Easing interest rates and strong farmgate prices reduced financial pressure and allowed farmers to invest in fertiliser, address deferred repairs and maintenance and plan for the future with more confidence.

A pause or slowing of regulatory pressures was noted by many farmers as a positive note to the year. In mid-October, the Government announcement of revisions to the methane targets for New Zealand and no pricing of agricultural emissions was welcomed by farmers.

Land-use change, the declining breeding ewe flock and a shift to cattle on farms were ongoing concerns for many farmers as to the future of the sheep sector. Regarding sheep, farmers noted the workload or management requirements, shearing costs, poor wool returns and long-term uncertainty for sheepmeat as dampeners on confidence.

Livestock processing data suggests more non-replacement dairy calves were retained, with more calves likely to be reared on sheep and beef farms. Almost half the cattle offtake from sheep and beef farms in 2024-25 were estimated to be dairy-born[4].

Western North Island farmers reported more non-replacement dairy calves on sheep and beef farms this spring. There has been a substitution of sheep for cattle in the region, and a larger-than-usual influx of weaner calves may be likely this year. These calves will flow through to processors in 18-24 months.

At the time of writing, there was little evidence of the same occurring in the South Island, however this could change when weaner markets commence in December (although most transactions tend to occur privately or through stock agents).

Confidence in the Northern North Island region was tempered by the cumulative impact of drought and flock decline.

[4] Estimated for the 2024-25 meat production season 1 October 2024 to 30 September 2025

Lamb Processing 2025-26

This section provides an estimate of export lamb processing for 2025-26.

Early drafting intentions in First Quarter

South Island first quarter up, North Island first quarter down

South Island farmers intend to market more lambs in the first quarter, October to December 2025, than for the same period last season (+12%). Processing plans stem from favourable conditions across the whole of the South Island and good lamb growth rates at the time of the survey.

In 2024, South Island farmers in the Marlborough-Canterbury region had fewer trading hoggets (winter lambs) available for selling in the first quarter of 2024-25 and the spring 2024 lamb crop was low due to drought impacting reproductive performance and a desire to retain more ewe hoggets (if feed and cashflow allowed). Further south, Southland farmers had faced persistent, cold, wet rain conditions throughout spring reducing pasture and lamb growth meaning new season lambs were not ready for sale prior to Christmas.

North Island farmers were more variable in their ability and plans for the first quarter. East Coast and Taranaki-Manawatū farmers plan to send more lambs to market during the first quarter, while Northland-Waikato-Bay of Plenty farmers were hampered by a lower lamb crop and slower lamb growth rates in early spring.

Overall, the number of lambs processed during the first quarter of the 2025-26 season is expected to total 4.55 million head, an increase of 5.6% on 2024-25. This outlook is based on farmer intentions at the time of the Survey.

It is estimated that around one-quarter of the season’s total export lamb processing will occur from October to December, more than last year and driven by higher South Island 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 2025

	Export Lambs Processing Intentions October - December			
	(000) Head		% of Total	
	2024-25	2025-26e	2024-25	2025-26e
Northland-Waikato-BoP	400	365	27.4%	24.6%
East Coast	971	980	26.6%	26.9%
Taranaki-Manawatū	913	925	27.2%	28.7%
North Island	**2,284**	**2,270**	**27.0%**	**27.2%**
Marlborough Canterbury	1,236	1,350	28.7%	30.0%
Otago-Southland	788	925	18.2%	21.9%
South Island	**2,024**	**2,275**	**23.4%**	**26.1%**
New Zealand	**4,308**	**4,545**	**25.2%**	**26.6%**

e = estimate

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

Early processing prices

Expectations for strong farmgate lamb prices

Early published processor prices for lambs were significantly higher than last season, boosting farmer confidence and encouraging efforts to optimise carcass weights before drafting. In November, published processor prices were around $11.00/kgCW compared to $8.00/kgCW in 2024.

Full season processing outlook

Export lamb processing steady at an estimated 17.07 million head

The number of lambs processed is estimated to remain steady on last season, down -0.2% from 17.10 million head in 2024-25 to 17.07 million head for 2025-26.

The full season outlook for the North Island is for a small decrease in lambs processed for export, while the South Island is forecast to lift slightly.

Export Lamb Processing forecast 2025-26

	Export lamb processing (forecast)	Change from 2024-25
	million head	%
North Island	8.35	-1.3%
South Island	8.72	0.9%
New Zealand	**17.07**	**-0.2%**

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

A small decrease in average carcass weight of lambs processed is forecast from 19.57 kg per head in 2024-25 to 19.29 kg per head in 2025-26.

Adult sheep processing is expected to decrease 3.4% to 3.25 million in 2025-26. Adult sheep processing in 2024-25 was higher than forecast in last year's Lamb Crop Report due to drier conditions for some regions, forestry plantings and improved mutton prices.

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 change.

Region Reports

These sections provide spring 2025 lamb crop estimates by region.

Northland-Waikato-Bay of Plenty

Drought and low feed levels impact spring lambing

Northland-Waikato-BoP

	2025-26	
	(000)	% change
Ewes to Ram	1,737	-2.8%
Lambs from Ewes	2,272	-5.6%
Ewe Lambing %	130.8%	-4.0ppt
Lambs from Hoggets	113	-22.1%
Total Lambs Tailed	2,385	-6.6%

NB: Ewe Lambing change is percentage points on previous season

Ewes and hoggets were heavily impacted by the late summer-autumn drought leading to a difficult mating season. With fewer breeding ewes and hoggets mated, lower pregnancy scanning results and more singles; ewe lambing percentage fell, but survival was still reasonably good where weather cooperated.

Farmer morale was high due to farmgate prices, including bull sales reaching record levels this year. Lower interest rates and a pause on environmental regulations added to the positivity. The region continues to see a gradual shift towards cattle for a variety of reasons including the view that sheep come with a heftier workload, increased shearing costs, poor wool returns, and less confidence in the medium to long-term outlook for sheepmeat.

- **Total lambs decrease 6.6% to 2.39 million** —attributed to a lower lambing percentage and the decline in the ewe flock. Lambs from ewe hoggets decreased 22% to 113,000 head, compared with an estimated 145,000 head in 2024. This number represents 4.7% of total lambs for the region. Fewer multiples were lambed in most districts, with King Country Hard Hill farms particularly hard hit.
- **Ewe lambing percentage decreases 4.0 percentage points to 130.8%** — dry conditions in summer and autumn reduced feed and livestock condition. A higher proportion of breeding ewes carried singles this season. Northland breeding ewes were in good condition during mating with better feed supply. Ewe deaths were similar or

slightly less than last winter and farmers reported fewer bearings, lambing difficulties and less mastitis. Across the Northern North Island, the spread and date of lambing was normal. However, poorer-than-normal ewe condition during mating led to ewes cycling later (particularly for Hard Hill farms), which led to an extended lambing period.

- **Breeding ewes decrease 2.8% to 1.74 million** — as a result of continued decline in the region's sheep flock, more culling in response to drought and better farmgate prices for mutton.

The number of hoggets mated decreased 4.6% compared with last season as ewe hoggets were not able to reach ideal weights at tupping. Around 37% of ewe hoggets were put to the ram.

Conditions at Lambing

Spring was slow to warm and feed quality was hampered due to cooler, wet weather. Two heavy rain events impacted survival in later-born lambs. Some farmers used Nitrogen-based fertiliser to drive feed production. Porina damage was noted in some areas.

Rain through October and November set farms in good stead for early summer feed. Although, the same rains hindered silage-making and planting of summer crops including maize. Maize crops were behind schedule as soils were saturated in October.

Lamb Growth Rates (aka thrift)

Lamb growth rates were generally slower than usual with the prolonged cool, cloudy, wet spring conditions. By mid-November, Bay of Plenty farmers reported above average lamb growth with sunshine hours extending and better pasture growth. Overall, farmers stated lambs needed more sunshine and warmth to improve growth rates which were generally described as average by November.

Larger single lambs born rather than multiple smaller lambs helped with survival and ewes were able to meet lactation demand. King Country and Bay of Plenty survival was poorer due to various factors including lower birthweights, tight feed levels and/or heavy rain events in late spring.

Early Drafting Intentions

Farmers expect to market fewer lambs in the first quarter of the season with fewer lambs produced and slower growth rates in early spring. Good rain in October and November has boosted confidence regarding pasture production and the flexibility to hold lambs until optimum weights are achieved.

East Coast

Positive lambing season boosts spirits

East Coast

	2025-26	
	(000)	% change
Ewes to Ram	3,520	+0.7%
Lambs from Ewes	4,889	+4.5%
Ewe Lambing %	138.9%	5.0ppt
Lambs from Hoggets	245	+17.8%
Total Lambs Tailed	5,134	+5.0%

NB: Ewe Lambing change is percentage points on previous season

One of the strongest seasons on record for the region, with more ewes mated, a 5 percentage point lift in ewe lambing percentage, excellent lamb survival, and more lambs despite tight feed by November. Farmers were focussed on improving sheep flock genetics to ensure quality twin lamb production.

The East Coast region has been in recovery-mode from prior-season weather impacts. Seasonal conditions in 2024-25 were favourable, allowing for breeding ewes and ewe hoggets to be in good condition at mating and plentiful feed through to lambing and for lactation. By November, however, rainfall levels were below average year-to-date. Water storage levels on farm were low, feed was tight, and the prospect of a dry summer drove destocking and supplement-making decisions.

The Tararua district experienced significant impacts from severe weather events in late October, involving powerful winds and heavy rain that caused power outages and damage to trees and infrastructure.

- **Total lambs tailed increases 5.0% to 5.13 million** — farmers reported satisfaction with the number of twin lambs born. Drier weather over lambing improved survivability. Lambs from hoggets account for an estimated 4.8% of all lambs tailed and improved condition of hoggets at mating and at lambing improved survival rates.
- **Ewe lambing percentage increases to 138.9%** — reflecting stellar conditions through summer and autumn, plentiful feed and fewer parasite challenges. Lambing date and spread were similar to 2024.
- **Breeding ewes increase slightly (+0.7%) to 3.52 million** — the increase was driven by farmers' desire to increase stocking rates back to normal levels that prevailed prior to Cyclone Gabrielle in February 2023 and more feed available through autumn than in previous years.

Conditions at Lambing

Overall, early spring conditions were favourable for lambing across most of the region. Parts of Tararua District had consistent rain, however farmers noted ground conditions did not hamper lamb survival. With dry weather over lambing for most parts of the region, survivability was excellent.

Severe wind and rain events in late October hit as hogget-lambing was underway in Tararua, the impact of storms being some mis-mothering by ewe hoggets. Winds from

mid-September to early November across the district made it difficult to check ewes during lambing (minimising disturbing new lambs and mothers).

Feed levels in November were lower than desirable as consistent north-westerly winds, cold soil temperatures and low rainfall hampered the usual spring pasture growth. Porina damage was noted across many farms, and some areas saw damage for the first time.

Lamb Growth Rates (aka thrift)

Lamb growth rates were slightly better than in 2024 with warm sunshine keeping lambs in good health and fewer animal health challenges. Pasture growth constraints in November were a challenge to maintaining lamb growth rates. Some farmers chose to market lambs earlier than normal on the store market to ease feed demand and most of these lambs would have been purchased for finishing by buyers from out of the region.

Early Drafting Intentions

The number of prime lambs marketed in the first quarter lambs is estimated to increase slightly (+0.9%) to 980,000 head. With dry conditions similar to 2024, farmers made early destocking decisions to relieve pressure on feed. Strong winds and a lack of rain impacted crop plantings. With strong farmgate prices, those able to send prime lambs for processing before Christmas will do so possibly at lighter carcass weights than preferred.

Taranaki-Manawatū

Excellent lamb survival this spring

Taranaki-Manawatū

	2025-26	
	(000)	% change
Ewes to Ram	1,720	-3.6%
Lambs from Ewes	2,298	-1.7%
Ewe Lambing %	133.6%	2.6ppt
Lambs from Hoggets	111	-16.5%
Total Lambs Tailed	2,409	-2.5%

NB: Ewe Lambing change is percentage points on previous season

Ewe lambing percentage increased this spring with excellent survival, even when autumn feed pinches had reduced ewe condition at mating. Fewer breeding ewes reduced total lambs tailed.

With both prime lamb and beef cattle farmgate prices at record levels, farmers will benefit from increased revenue this season. Western North Island farmers have increased fertiliser applications to rebuild soil nutrients and productivity. Farmer sentiment has improved this spring with increased red meat returns and decreased regulatory pressure.

Farmers reported more non-replacement dairy calves on sheep and beef farms this spring. There has been a substitution of sheep for cattle in the region and a larger-than-usual influx may be likely this year. These spring 2025 calves will flow through to processors in 18-24 months.

- **Total lambs tailed decreases by 62,000 to 2.41 million** — the decline in the number of breeding ewes and fewer ewe hoggets mated drove the decrease. Better survivability in spring softened the decline in total lambs born and twinning rates were reported to be lower across all farm classes. Lambs from hoggets account for an estimated 4.6% of all lambs tailed.
- **Ewe lambing percentage increases to 133.6%** — with weather conditions through lambing supporting better-than-average survival. This was despite feed levels in autumn being less than desirable and ewe condition compromised for some (particularly Hard Hill country farms). No change in lambing date was reported by farmers. Many farms now split lambing dates with “B” mob and older ewes joining the ram between February and March and the main line of ewes joining the ram between March and April. Ewe hoggets are mated between April and May. Lambing spread was reported to be normal.
- **Breeding ewe numbers decrease 3.6% to 1.72 million** —Hard Hill and Hill Country farms favoured breeding cattle over breeding sheep, and there was some retirement of grazeable land or shift into tree plantings. Finishing farms also reduced breeding ewes in favour of trading cattle.

Fewer ewe hoggets were mated this season across the Western North Island. Ewe hoggets were not at acceptable weights during the mating period. Farmers also took advantage of higher farmgate prices and culled slightly more ewe hoggets.

Conditions at Lambing

Winter weather this season was highly variable with increased frosts on higher altitude farms slowing pasture growth through July and August. Rainfall was normal to below normal for most parts of the region. Lower altitude and coastal areas received less than normal rainfall across winter.

Isolated storms occurred through September and October, which made lambing conditions challenging; however, these storms had minimal impact on lamb survivability. October rain was helpful to restore water tables but also disruptive during docking (tailing) and cropping for coastal and lower altitude farms across the region.

Lamb Growth Rates (aka thrift)

Lamb growth rates were directly related to the feed situation. A lack of sunshine in October and early November held back growth rates. As temperatures rose late in November, lamb growth rates improved. There were few reports from farmers of animal health incidences.

Early Drafting Intentions

The number of prime lambs available to market is expected to be higher in the first quarter at an estimated 925,000 head. With strong farmgate prime lamb prices, farmers expect to market lambs (at lower weights) to destock prior to January. Western North Island farmers observed East Coast conditions and an anticipated flow of store lambs into the region as the East Coast gets drier into summer. East Coast lambs may increase the Western North Island processed lamb numbers.

Marlborough-Canterbury

Excellent summer-autumn conditions lift lambing

Marlborough-Canterbury

	2025-26	
	(000)	% change
Ewes to Ram	2,733	-2.3%
Lambs from Ewes	3,567	+3.7%
Ewe Lambing %	130.6%	7.5ppt
Lambs from Hoggets	220	+38.4%
Total Lambs Tailed	3,789	+5.2%

NB: Ewe Lambing change is percentage points on previous season

Ewe lambing percentage rebounded this spring after an unusually low 2024 result, which was the result of drought conditions throughout 2023-24, with good ewe condition and lamb survival driving gains. Unfortunately, cold, rain, wind and snow events in late October knocked later-lambing High and Hill Country farms.

Farmer morale has improved markedly due to strong farmgate prices for red meat. Challenges such as succession, facial eczema losses, resource consent costs and regulations remain.

- **Total lambs increase 5.2% to 3.79 million** — an increase of around 187,000 head on last season. The increase in lambs tailed is due to improved ewe lambing percentage as favourable conditions for ewes and ewe hoggets were prevalent in summer-autumn with plentiful feed. Lambs from ewe hoggets account for 5.8% of total lambs for the region.
- **Ewe lambing percentage increases to 130.6%** — a 7.5 percentage point increase from a very low result in spring 2024 (following drought). Ewes were in good body condition at mating this year in most districts. Good lamb survival for those lambing earlier or midway through the lambing season meant more lambs at tailing. Later-lambing flocks in High and Hill Country were the exception, hit by icy rain and snow at Labour Weekend. These farms estimate lamb numbers in November as tailing is not yet complete. Lambing dates and spread were similar to 2024 as few farmers made policy changes.
- **Breeding ewes decrease 2.3% to 2.73 million** — as ewe numbers were not rebuilt following the 2023-24 season drought. Reasons for the continuing decline in the sheep flock include land use change, especially to forestry, and farm policy changes toward more beef cattle or dairy grazers.

Higher lamb prices encouraged additional ewe hogget mating this year, offering a worthwhile return on extra feed and work required. Hoggets were at excellent weights with good body condition after good summer and autumn pasture growth.

Conditions at Lambing

Cool but dry spring weather favoured lamb survival with few prolonged cold, wet periods until late October. Overall, lamb survival was near average for the region but variable between farms and districts. Ewes were generally in much better condition than in 2024, with higher colostrum and milk output further boosting lamb survival and growth prospects.

Severe windstorms on 23 October led to power outages and damage to trees, fences, sheds, houses, plant and machinery. A state of emergency was declared across Canterbury and Southland in response to the storms. The damage was localised to properties in north Canterbury, Culverden, Waiau and Hanmer with the recovery expected to take months.

In a near-repeat of Labour Weekend 2024, cold rain and snow fell to low levels causing some losses on later-lambing High and Hill Country farms. Labour weekend snows coincided with the peak of lambing for some farms.

Lambs on the lower hills and plains were generally older and able to cope although some hogget-lambing flocks were affected for a short time. Districts north of Christchurch and coastal plains had kinder weather, fewer vulnerable multiples and lower competition for feed and shelter.

Sodden winter soils slowed pasture growth in early spring. Feed demand was high with more multiple lambs consuming spring feed rapidly. Feed quality dropped as moisture stress triggered flowering in pasture grasses, reducing energy supply for lactating ewes and young lambs. Farmers reported tight feed supplies (except Mackenzie Basin and Nelson) due to high feed demand, drying winds and lack of rain. Dry conditions were apparent early.

Lamb Growth Rates (aka thrift)

Farmers reported average to good lamb growth before the feed supply tightened.

Marlborough lamb growth was below expectations due to feed supply dropping relatively early in lactation. The best lamb performance was noted in North Canterbury (before feed tightened up) and southern areas (Waimate, Waitaki districts).

Early Drafting Intentions

Farmers intend to market more lambs in the first quarter than last year. Good lamb growth should support early drafting. If dry conditions persist then farmers may market more lambs at reduced carcass weights due to feed supply pressure, especially as the store market is limited to Finishing and irrigated farms. In Marlborough, slightly lighter-than-usual lambs were processed in November with feed in short supply.

Otago-Southland

Small decrease in lambs tailed due to decline in breeding ewe flock

Otago-Southland

	2025-26	
	(000)	% change
Ewes to Ram	4,571	-2.6%
Lambs from Ewes	5,690	+0.2%
Ewe Lambing %	124.5%	3.5ppt
Lambs from Hoggets	252	-9.0%
Total Lambs Tailed	5,942	-0.3%

NB: Ewe Lambing change is percentage points on previous season

Ewe lambing percentages improved on last year, particularly in Otago, as conditions were less extreme than the very wet and cold 2024 spring. However, unsettled weather, rainfall and Labour Weekend wind and snow caused some losses.

Severe wind and snowstorms on 23 October led to a state of emergency for Canterbury and Southland. The state of emergency remained in place for two weeks in Clutha District. Farmers lost power, for weeks in some cases, and sustained damage to trees, fences, sheds, houses, plant and machinery. The recovery is expected to take months for those affected.

Farm profitability improved substantially in 2024-25 and is expected to increase again this season. Farm working expenses will increase by more than earlier forecasts in order to repair damage from windstorms. While a few farmers have shifted from sheep to beef cattle, particularly to reduce workload, many plan to continue with the same farming policies.

- **Total lambs decrease marginally (-0.3%) to 5.94 million** — an estimated decrease of around 15,000 head this spring as more lambs tailed in Otago is offset by a reduction in Southland. The lower lamb crop is attributed to the decline in the ewe flock. In Southland, the ewe lambing percentage improved from last year but was not sufficient to counter the decline in the number of breeding ewes, and fewer mated hoggets. Lambs from ewe hoggets represent 4.2% of total lambs for the region.
- **Ewe lambing percentage increases to 124.5%** — although conditions were not favourable this spring, they were somewhat better than in 2024 and lamb survival improved – more so in Otago than Southland. Lambing dates were similar to last season although a few farmers delayed mating to try and avoid unsettled weather after the conditions experienced last spring.
- **Breeding ewes decreased 2.6% to 4.57 million** — a permanent decline in ewe numbers in both regions followed afforestation within farm boundaries and whole farm conversion to pine trees. Many of these breeding ewes went directly to processors and a higher-than-usual number of wet-dry ewes were culled after 2024 lambing. Strong farmgate beef prices have shifted the ratio of sheep to beef on Otago farms.

Fewer ewe hoggets were mated on both Otago and Southland. Poor pasture growth in 2024-25 had season-long impacts on lamb growth rates, fewer ewe hoggets reached acceptable weights for mating.

Conditions at Lambing

Winter conditions were generally favourable. In August, temperatures increased and pasture growth looked promising for spring. However, unsettled conditions in September through into late-October disrupted lambing for many. A major windstorm at Labour Weekend damaged shelter belts and farm infrastructure, sadly some stock losses occurred. Spring was reported by farmers as being windier than usual in the south.

Snowfalls coincided with lambing in the High and Hill Country and hogget lambing for those at lower altitude. Overall, lamb survival was better than last spring.

Lamb Growth Rates (aka thrift)

Pasture growth was below average in spring, putting pressure on pasture covers and lamb growth rates. Winter pasture growth, which was above the 20-year mean in July, had dropped to below average by September creating supply constraints.

Farmers were generally positive about lamb growth rates this season compared to last spring, which had been an abysmal period for the deep south. Sunshine and warmer temperatures saw pasture growth accelerate in November and lambs were doing well.

Early Drafting Intentions

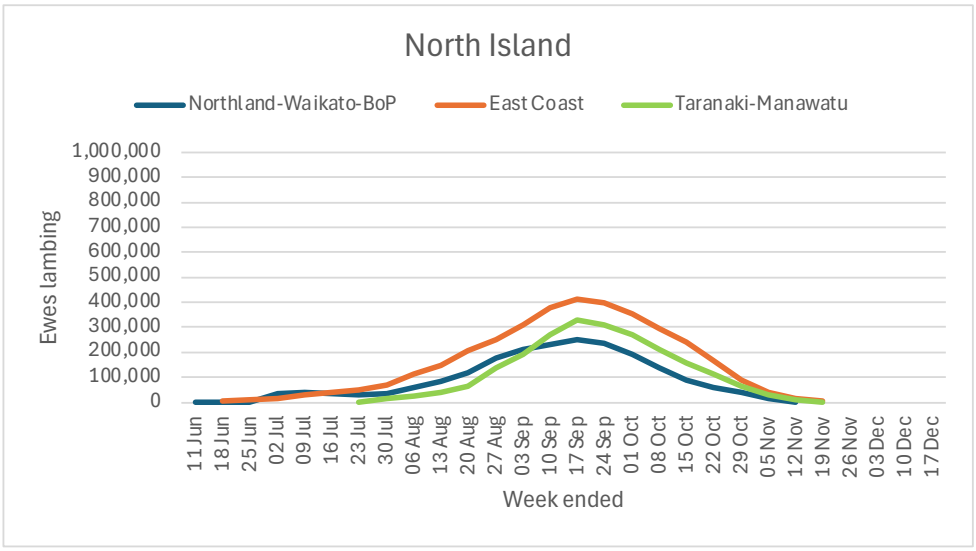
Farmers intend to market more prime lambs in the first quarter this season than for the same period last year. A sizeable proportion of first quarter processing in Southern South Island is old season lamb, often from High Country farms and winter lamb finishing operations. The Stock Number Survey indicated more 'other' hoggets (usually destined for processing) were on hand at 30 June 2025.

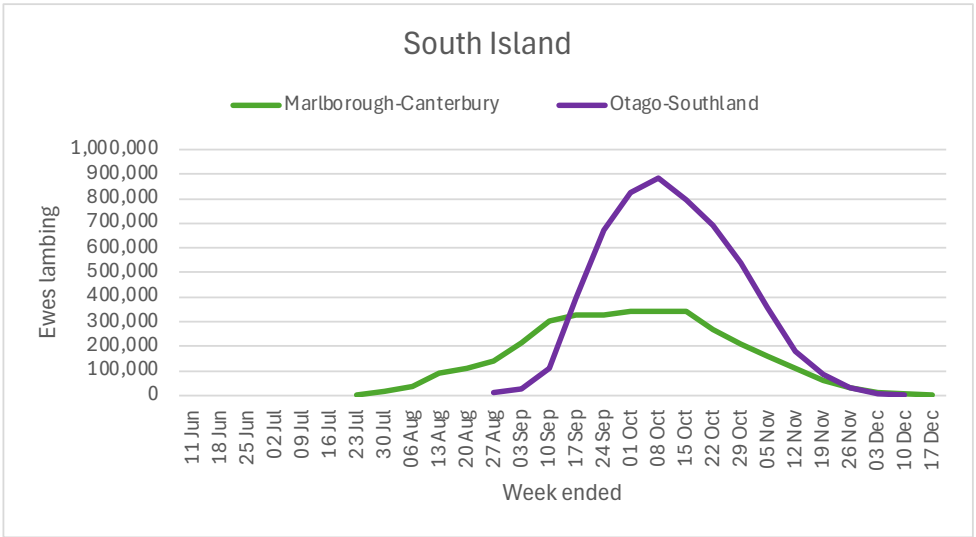
Ewe lambing dates by region

This section provides an estimate of ewe lambing dates by region for 2025.

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
2024-25	Ewes to Ram	(000)	1	1,787	3,495	1,785	7,066	2,797	2,543	2,152	7,492	14,558
2025-26e	Ewes to Ram	(000)	2	1,737	3,520	1,720	6,977	2,733	2,497	2,074	7,304	14,281
2024-25	Lambs from Ewes	(000)	1	2,408	4,680	2,338	9,426	3,443	3,029	2,651	9,123	18,549
2025-26e	Lambs from Ewes	(000)	2	2,272	4,889	2,298	9,459	3,569	3,089	2,601	9,259	18,718
2024-25	Ewe Lambing %	(%)	1	134.8%	133.9%	131.0%	133.4%	123.1%	119.1%	123.2%	121.8%	127.4%
2025-26e	Ewe Lambing %	(%)	2	130.8%	138.9%	133.6%	135.6%	130.6%	123.7%	125.4%	126.8%	131.1%
2024-25	Lambs from Hoggets	(000)	1	145	208	133	486	159	142	135	436	922
2025-26e	Lambs from Hoggets	(000)	2	113	245	111	469	220	135	117	472	941
2024-25	Total Lambs Tailed	(000)	1	2,553	4,888	2,471	9,912	3,602	3,171	2,786	9,559	19,471
2025-26e	Total Lambs Tailed	(000)	2	2,385	5,134	2,409	9,928	3,789	3,224	2,718	9,731	19,659

1 Statistics New Zealand ewe numbers, Beef + Lamb New Zealand Insights Team Lamb Crop Survey
2 Beef + Lamb New Zealand Insights Team Livestock Number Survey, Beef + Lamb New Zealand Insights Team Lamb Crop Survey
e Beef + Lamb New Zealand Insights Team Estimate


beef+lamb
new zealand