

2025 NHIA Semen Survey Highlights Stabilising Dairy Market and Growing Role of Beef Genetics

The National Herd Improvement Association of Australia (NHIA) has released the results of its 2025 Semen Market Survey, revealing a year of stabilisation in the dairy genetics market alongside continued growth in beef semen sales and beef-on-dairy breeding programs.

The survey shows total dairy semen sales for import, domestic and export combined declined just 0.3% year-on-year, from 1,744,081 doses in 2024 to 1,739,599 in 2025, indicating the market has largely stabilised following the more substantial decline recorded in 2024.

Dairy market steadies as exports recover

While import and domestic dairy semen sales declined 3.5% to 1,585,679 doses, this was offset by a significant recovery in exports, with dairy semen export sales increasing by more than 50% to 153,920 doses.

The result follows a much sharper decline in 2024, when lower domestic demand and the continued impact of reduced dairy heifer export activity weighed on the market.

NHIA Chair Nick Brasher said the 2025 results pointed to a more stable market overall, supported by stronger export activity and increasingly strategic breeding decisions on farm.

“After the significant decline recorded in 2024, the 2025 survey suggests the dairy semen market has steadied,” Brasher said.

“Domestic demand remains under some pressure, but stronger exports have helped support the overall result. At the same time, producers are making increasingly deliberate decisions about how they use sexed, conventional and beef semen across the herd, with sexed semen being used more selectively over the top end of the herd, conventional dairy semen through the middle, and beef semen over lower-ranking cows.”

Jersey growth and changing buying patterns

The 2025 survey also revealed a strong increase in Jersey semen sales, which rose 23.2% to 327,405 doses, while Holstein semen sales declined 5.4% to 1,284,970 doses.

Tyson Shea, General Manager, Semex Australia, said the result reflected both export opportunities and the strength of the domestic Jersey offering.

“The Australian Jersey remains a highly respected product internationally and there are some very strong bulls available in the market at the moment,” Shea said.

“Export demand has clearly been a factor, but there is also ongoing confidence in domestically bred Jersey genetics from established cow families and studs.”

The survey also recorded a notable shift in product mix, with proven dairy semen sales increasing to 524,414 doses in 2025 while genomic semen sales declined to 1,061,265 doses, reversing the longer-term trend towards genomics.

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Shea said the result may reflect a combination of product mix, availability and commercial decision-making rather than a fundamental move away from genomic genetics.

“It was one of the more surprising results in the survey,” he said. “It may be partly a product mix issue for the year, along with supply and availability of some high-ranking bulls, and economics always play a role in semen purchasing decisions.”

Sexed semen sales declined just 2% year-on-year to 538,544 doses, suggesting the steep correction seen in recent years may be flattening as producers take a more targeted approach to its use.

“There is much more strategy in the way producers are using semen across the herd,” Shea said. “That’s being driven by better information, genomics and a stronger focus on maximising the value of every mating decision.”

Beef genetics continue to grow in importance

The survey also highlighted the growing role of beef genetics within the Australian market.

Total import and domestic beef semen sales increased by almost 19% in 2025 to 545,533 doses, the strongest result recorded since NHIA began collecting beef semen data. Combined imported and domestic beef-on-dairy semen sales increased 27% year-on-year to 323,618 doses, reinforcing the extent to which dairy-beef breeding has become embedded in the mainstream dairy herd strategy.

Brasher said the beef results reflected the increasing importance of beef genetics to both dairy and beef businesses.

“Beef-on-dairy is now firmly embedded in the breeding strategy of many dairy producers, while the broader beef semen result also points to continued investment in genetics across the beef sector,” he said.

“That reflects a wider focus on profitability, herd efficiency and making each mating decision work harder within the overall farm business.”

The National Herd Improvement Association of Australia Semen Survey is conducted annually with data drawn from Australia’s leading genetics companies.

NHIA would like to thank the 2025 Semen Market Survey participants who provided the raw data for this report. The participants were:

ABS Australia | Agri-Gene | Alta Genetics | Breeder Genetics | LIC | Genetics Australia Holdings | Semex | ST Genetics | Viking Genetics | World Wide Sires

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About NHIA: The National Herd Improvement Association of Australia Incorporated (NHIA) is the industry organisation that promotes herd improvement within the Australian dairy industry, providing a range of services to its membership, and through that membership, to benefit Australian dairy farmers. The member base includes organisations involved directly in the provision of herd improvement services, a range of activities that lead to productivity gains to farmers as well as herd industry improvement suppliers.

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