

INDUSTRY ANALYSIS · WESTERN AUSTRALIA

# WA Farmers Are Betting Everything on *Grain*.

The live sheep export ban is forcing a historic land-use shift. More crops, more harvesters, more fire risk — and a funding window to do something about it.

MAY 2026 · IGNISENSE MARKET INTELLIGENCE

Western Australia is undergoing the largest agricultural land-use transformation in a generation. The federal government's legislated ban on live sheep exports by sea — set to take full effect on 1 May 2028 — is forcing thousands of farming operations to fundamentally reinvent their business models. The answer, for the vast majority, is more grain. And more grain means more combine harvesters operating in hot, dry, combustible conditions across millions of hectares of WA wheatbelt. It means more fire risk. And right now, it means a once-in-a-generation funding window to address that risk before it becomes catastrophic.

**99%**

OF AUSTRALIA'S LIVE SHEEP EXPORTS FROM WA <sup>[1]</sup>

**120K**

HECTARES NEW CROPLAND ADDED IN WA, 2025 <sup>[2]</sup>

**\$139M**

FEDERAL TRANSITION PACKAGE FLOWING TO WA NOW <sup>[3]</sup>

THE MARKET SHIFT

## A Generation of Farming, Rewritten in Four Years

The live sheep export ban is not a distant policy concern — it is the defining commercial reality of the next four years. **Western Australia accounts for 99% of all Australian live sheep exports**, meaning the entire structural impact of the ban lands squarely on WA farming communities. <sup>[1]</sup>

Gross margins for cropping have outperformed sheep production for three consecutive seasons, from 2022 to 2025, driven by stronger international grain prices and efficiency gains from scale. <sup>[2]</sup> WA added 120,000 hectares of newly cropped land in 2025 — contributing to the state's largest winter crop area on record. Across Australia, the total winter crop area now exceeds 23 million hectares. <sup>[2]</sup>

## IgniSense

Fire Pre-Ignition Warning System  
for Combine Harvesters

### KEY STATISTICS

**3,500+**

WA farming operations affected by the live export ban

**\$1.5M**

replacement cost of a modern combine harvester

**8M+**

hectares under winter crop in WA — and growing

**\$75K**

maximum grant per farm under Transition Program

### CRITICAL TIMELINE

● JULY 2024

**Ban legislation passed**  
Export Control Act amended

The dominant crops expanding across the WA wheatbelt are wheat (4.4 million hectares), barley (2.01 million hectares), canola (1.65 million hectares), and lupins (472,000 hectares and growing).<sup>[4]</sup>

RISK	<b>Canola</b> Oily residue accumulates on hot exhaust and engine surfaces — a persistent ignition hazard across the entire harvest window.	<b>1.65M ha</b>
RISK	<b>Lupins</b> Fine dust and chaff are highly combustible. Now WA's fourth-largest crop and actively expanding toward higher-value human food markets.	<b>472K ha</b>
RISK	<b>Wheat</b> Dry chaff and straw accumulation around bearings and engines is the most common harvester ignition pathway in WA conditions.	<b>4.4M ha</b>
RISK	<b>Barley</b> Awns and fine material create persistent fire risk at header points during long daily runs in extreme summer heat.	<b>2.01M ha</b>

#### THE FIRE RISK

## Why Combine Harvesters Catch Fire — and Why It's Getting Worse

Harvest fires are not accidents. They are a predictable consequence of operating high-temperature machinery through dry, combustible crop material at scale, during the hottest part of the WA summer. Every hectare converted from sheep pasture to grain or oilseed cropping adds to the total operating hours of the WA harvester fleet — and every hour of operation is an hour of fire risk.

The ignition pathways are well understood. Dry chaff and straw accumulate around bearings and engine components. Canola's oily residue builds up on exhaust surfaces. Lupin dust — fine, dry, protein-rich — is among the most combustible materials generated in any Australian harvest. A single ignition event, on a day with a north wind and dry conditions, can destroy not only the machine but standing crop across a wide area, and potentially spread to neighbouring properties within minutes.

*For a farmer who has just absorbed the loss of their live export income stream, a harvester fire is not a setback. It is potentially a business-ending event.*

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A modern combine harvester represents **\$800,000 to \$1.5 million in capital**. Add the value of standing crop, cost of neighbouring property damage, potential legal liability, and lost revenue

● MAY 2026 — NOW

#### Round 2 grants open

Applications open May–July 2026

● 2026–2027

#### Peak transition activity

Maximum harvester fleet exposure

● 1 MAY 2028

#### Live export ends

Full transition to grain model complete

#### WHY LUPINS MATTER

WA grows **60–80%** of global lupin production. Fine lupin dust is highly combustible at harvest — and plantings are actively expanding for the human food market.

472,000 ha sown in 2025. CSIRO and Curtin University investing in lupin as a **40% protein crop** for human consumption.

from a shortened harvest window — and a single fire event can erase years of farm profitability in an afternoon.

### Machine replacement

\$800,000–\$1.5 million per harvester. Modern headers are not quickly or cheaply replaced mid-season.

### Harvest window lost

WA grain harvest windows are narrow and weather-dependent. Lost cutting time cannot be recovered.

### Crop and property damage

Standing crop and neighbouring properties are at serious risk. Dry conditions and north winds mean fire spreads rapidly.

### What insurance won't cover

Downtime costs, contractor disruption, mental health toll, and reputational damage in rural communities are rarely recoverable.

## THE LUPIN OPPORTUNITY

# From Sheep Feed to Human Superfood — and Why It Matters

WA grows 60–80% of the world's lupin production — yet currently only 4% is consumed by humans, with the remainder going into stockfeed export to the EU, Japan, and Korea.<sup>[5]</sup> That is changing rapidly. Farmers are being actively encouraged by government agencies, CSIRO, Curtin University, and ASX-listed companies to pivot lupins toward high-value human protein consumption.<sup>[6]</sup>

Lupin seeds contain up to 40% protein — rivalling soy — along with high fibre, low starch, and a low glycaemic index. The crop's current gross value in WA is approximately \$200 million, with significant upside as the human food market develops.<sup>[7]</sup>

For IgniSense, the lupin story matters because **lupin dust and chaff are among the most combustible materials in the WA harvest fleet**. As plantings expand, the fire risk profile of the WA harvest season increases in direct proportion.

## THE FUNDING WINDOW

# \$139 Million Is Flowing to WA Farmers Right Now

The Australian Government's Sheep Industry Transition Assistance Package is the largest targeted agricultural support program WA has seen in decades — and it is flowing now. The package is **WA-specific in its core programs**. Eligibility for the Farm Business Transition Program requires applicants to be WA sheep producers who participated in live sheep exports in at least one of the last three financial years.<sup>[8]</sup>

## Transition Package — Key Programs

\$30M

**Farm Business Transition Program** — up to \$75,000 per farm for equipment, infrastructure, and adoption of alternative farming systems. Round 2 opens May 2026. <sup>[9]</sup>

**\$40M Supply Chain Capacity Program** — capital works increasing capacity and productivity across the WA sheep supply chain. Round 2 open now. <sup>[3]</sup>

**\$27M Enhancing Market Demand Program** — growing domestic and international demand for Australian sheep products and agri-food in the MENA region. <sup>[3]</sup>

**\$2.4M Rural Financial Counselling Service (WA)** — expanded counselling for WA farm businesses through the transition. <sup>[3]</sup>

The Farm Business Transition Program explicitly funds "investment in on-farm infrastructure" to boost alternative farming practices. <sup>[8]</sup> A fire pre-ignition warning system for a combine harvester sits squarely within that definition. Farmers investing in their grain futures are already in a capital investment mindset. The IgniSense conversation is, for the first time, a government-funded one.

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#### INDUSTRY DYNAMICS

## Consolidation Is Accelerating the Risk Profile

One of the less-discussed consequences of the live export phaseout is the structural consolidation it is driving in the WA sector. Many specialist sheep farms lack the scale and cash reserves to diversify profitably into cropping. The result is industry consolidation — smaller operations absorbed into larger ones, with corporate holdings operating more machines across more hectares. <sup>[10]</sup>

As the WA grain sector consolidates, fire risk management shifts from a gut-instinct decision to a formal risk framework. IgniSense speaks both languages. For the family farmer, it is peace of mind through the most financially stressful transition season in living memory. For the corporate operator, it is fleet-wide risk management, insurance leverage, and operational continuity assurance.

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#### THE IGNISENSE ADVANTAGE

## Pre-Ignition Warning Changes Everything

Most harvester fire prevention relies on reactive measures — fire extinguishers, crew vigilance, and post-ignition suppression. These are all responses to a fire that has already started. Pre-ignition warning technology represents a fundamentally different proposition: **detecting the conditions that lead to fire before ignition occurs**, giving operators the window to stop the machine, clear accumulations, and prevent the event entirely.

The difference between a warning and a loss is the difference between a brief operational pause and a \$1.5 million machine on fire in a paddock. In WA harvest conditions — where situations can turn catastrophic in minutes — that warning is not a convenience. It is the margin between a season and a tragedy.

*Every hectare converted from sheep pasture to grain is another harvester in the field, and another fire risk. The transition that is reshaping WA farming is the same transition that makes IgniSense essential.*

IGNISENSE MARKET INTELLIGENCE, 2026

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