



## Australian supply brief



## MLA Lamb survey results

**October 2010**

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## Lamb survey methodology

The Meat & Livestock Australia (MLA) lamb survey October 2010 was part of an updated set of producer surveys that began in June 2010 to gauge short term trends and movements in the national sheep flock. The survey was comprised of a mail-out component, and an online component, and received responses from 1,907 producers across Australia.

The mail-out component was focussed on the composition of the breeding ewe flock and lambs on hand in October. A question regarding wool production for the financial year was also included for the first time, in collaboration with Australian Wool Innovation. The online component was an extended version of the survey, including a question on lambs marked, and qualitative questions regarding seasonal conditions and flock intentions for 2011.

To improve the wool production results, the survey was expanded to include producers in Merino dominated pastoral areas. As a result of this change, comparisons to previous surveys should be treated with caution.

## Key findings from the survey

### Respondent summary

- A total of 1,907 producers responded to the survey, with 691 completing the survey online, and the remainder completing the mail-out survey.
- Of the respondents, 903 were pure Merino producers, with the remaining 1,004 running mixed enterprises or other breeds.
- There were 593 responses from NSW (247 online), 498 from Victoria (149 online), 411 from SA (133 online), 247 from WA (106 online), 91 from Queensland (42 online) and 67 from Tasmania (14 online – interpret results with caution).

### Seasonal conditions

#### Figures 1-7, Tables 1-2

- Nationally, 62% of respondents indicated current seasonal conditions were 'above average' and 17% of respondents reported conditions as 'below average', 'drought', or 'too wet'. The remaining 21% reported 'average' conditions.
- Compared with the same time last year, 75% of respondents reported better conditions, 9% said they were the same, and 16% had worse conditions.
- The majority of respondents from Queensland (91%), NSW, (77%), Victoria (75%), and SA (62%) reported 'above average' seasonal conditions. In Tasmania, 71% indicated 'average' conditions, while in WA, 45% responded with 'below average' conditions, and 44% with 'drought'.
- Reflecting current seasonal conditions, in WA, 90% of respondents said conditions were worse than last year, while in the eastern states, the majority of respondents reported better conditions than last year.

## **Key findings from the MLA lamb survey September 2010 - continued...**

### **Breeding ewes on hand (31 October 2010)**

#### **Figures 8-14**

- The breeding ewe population on hand at 31 October 2010 was 39.9 million head – with straight bred Merino to Merino production dominant at 51% of the total.
- The next largest segment was first cross ewes (18%), being mainly Merino X Border Leicesters. Merino ewes to be crossed with other sires accounted for 10% of the breeding ewe population.
- The number of Dorper ewes on hand reflected the growing popularity of the breed, accounting for 3%. Other breeds made up smaller percentages to account for the remaining 18%.

### **Lambs on hand (31 October 2010)**

#### **Figures 15, 17-23**

- Australia's lamb population on hand at 31 October 2010 was 35.2 million head, of which 38% were pure Merino lambs.
- NSW had the largest Merino lamb population, with 32% of the total, followed by WA (28%), Victoria (15%) and SA (14%).
- Second cross lambs accounted for the second largest group of lambs, with 21% of the population. This was made up primarily of first cross ewes joined to Poll Dorset and White Suffolk rams, with most of these found in NSW and Victoria.
- First cross lambs made up 20% of the lamb population, with the most popular sires being White Suffolk (mainly NSW and SA), Border Leicester (mainly NSW and Victoria), Poll Dorset (WA, NSW and SA), Suffolk (Black) (WA), and SAMM (SA and WA).

### **Expected lamb sales (November 2010 - February 2011)**

#### **Figures 16-23**

- Producers expected to sell 14.8 million lambs in the four months from November to February. Second cross lambs made up 33% of this total, with the majority being lambs born to first cross ewes and Poll Dorset or White Suffolk rams, mostly in NSW and Victoria.
- First cross lambs were expected to make up 28% of lamb sales, with White Suffolk, Border Leicester, Poll Dorset, Suffolk (Black), and SAMM sired lambs the most popular, reflecting the lambs on hand (see above).
- The third largest category was Merino lambs, expected to make up 13% of total lamb sales. These were expected to mainly come from WA, followed by NSW, SA and Victoria.

## **Lamb markings (July 2010 - October 2010)**

### **Figures 24-32**

- Between July and October 2010, producers marked 33.4 million lambs from 34.4 million ewes joined across Australia, to give an overall marking rate of 97%. The highest marking rates were recorded in Victoria (106%), Tasmania (104%), SA (101%) and NSW (99%). The lowest marking rates were in Queensland (73%) and WA (90%).
- There were 14.9 million pure Merino lambs marked from 17.3 million ewes joined, for a national marking rate of 86%. Most states were fairly steady around this mark, except SA (93%) and Queensland (68%).
- There were 18.4 million other lambs marked from 17.0 million ewes joined, for a national marking rate of 108%. Victoria (117%) and SA (112%) had the highest marking rates. Queensland (92%) had the lowest marking rate.

## **Ewe flock intentions for 2011**

### **Table 3**

- Nationally, 45% of respondents intend to increase the size of their ewe flock in 2011, 45% intend to maintain their ewe flock, and 8% intend to decrease their ewe flock.
- WA was the key exception to this trend, reflecting the continued poor seasonal conditions. Of the respondents, 29% intended to decrease the size of their ewe flock in 2011, compared to just 18% intending to increase. Results indicated that 51% of respondents intended to maintain their ewe flock size.

## **Slaughter lamb turnoff intentions for 2011**

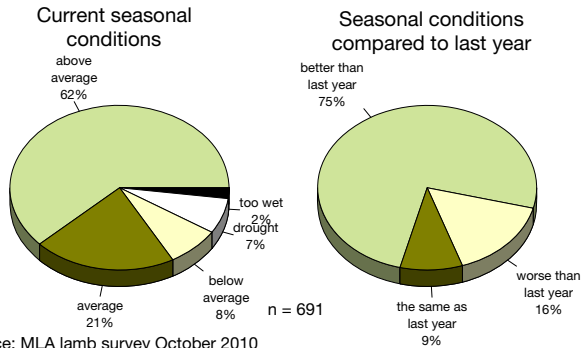
### **Table 5**

- Nationally, 43% of respondents intend to increase their slaughter lamb turnoff in 2011, 41% intend to maintain the number of slaughter lambs turned off, and 7% intend to decrease slaughter lamb turnoff. The remaining 9% of respondents indicated this was not applicable to them.

**X1. How would you rate the current seasonal conditions in your area? and**

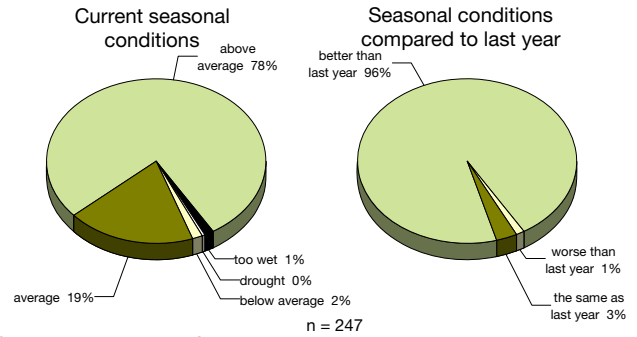
**X2. Compared with this time last year, are current conditions...**

**Figure 1**  
Seasonal conditions: Australia



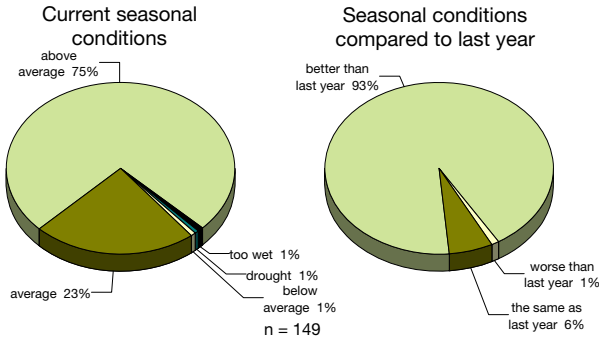
Source: MLA lamb survey October 2010

**Figure 2**  
Seasonal conditions: NSW



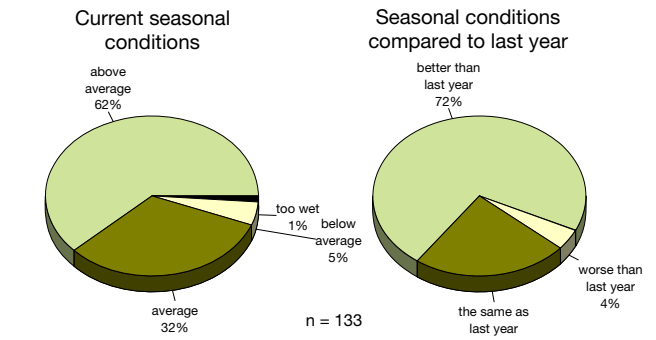
Source: MLA lamb survey October 2010

**Figure 3**  
Seasonal conditions: Victoria



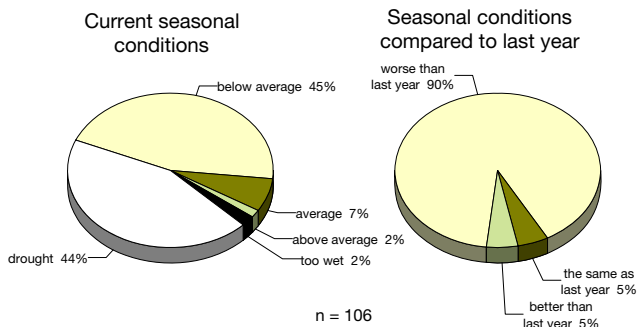
Source: MLA lamb survey October 2010

**Figure 4**  
Seasonal conditions: SA



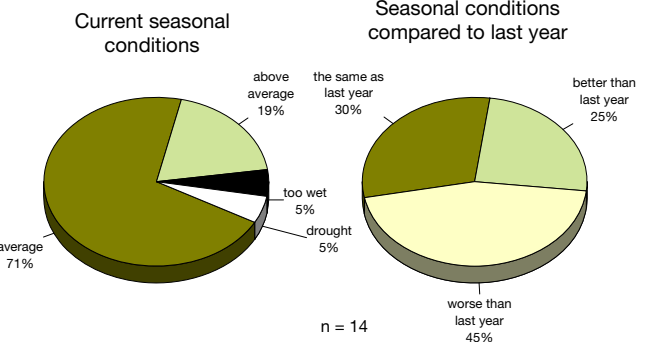
Source: MLA lamb survey October 2010

**Figure 5**  
Seasonal conditions: WA



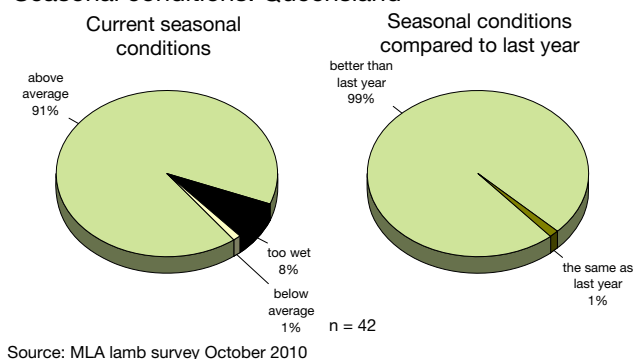
Source: MLA lamb survey October 2010

**Figure 6**  
Seasonal conditions: Tasmania



Source: MLA lamb survey October 2010

**Figure 7**  
Seasonal conditions: Queensland



Source: MLA lamb survey October 2010

**Table 1**  
Seasonal conditions as at October 2010: State

State	above average	average	below average	drought	too wet
<b>NSW (n=247)</b>	77%	19%	2%	0%	1%
<b>Vic (n=149)</b>	75%	23%	1%	1%	1%
<b>SA (n=133)</b>	62%	32%	5%	0%	1%
<b>WA (n=106)</b>	2%	7%	45%	44%	2%
<b>Tas (n=14)</b>	19%	71%	0%	5%	5%
<b>Qld (n=42)</b>	91%	0%	1%	0%	8%
<b>National (n=691)</b>	62%	21%	8%	7%	2%

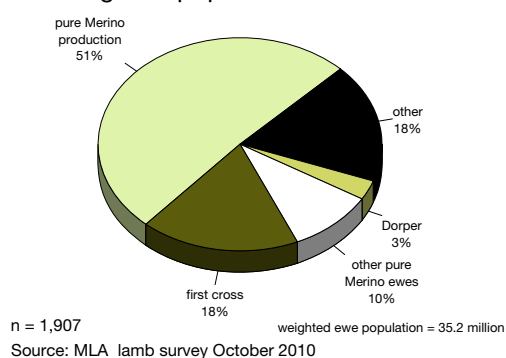
**Table 2**  
Seasonal conditions as at October 2010: State

State	Better than last year	The same as last year	Worse than last year
<b>NSW (n=247)</b>	95%	3%	1%
<b>Vic (n=149)</b>	93%	6%	1%
<b>SA (n=133)</b>	73%	24%	3%
<b>WA (n=106)</b>	5%	5%	90%
<b>Tas (n=14)</b>	25%	30%	45%
<b>Qld (n=42)</b>	99%	1%	0%
<b>National (n=691)</b>	75%	9%	16%

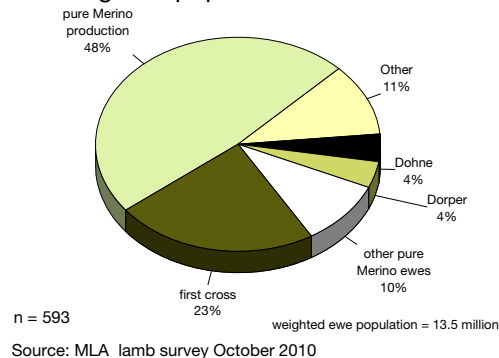
### 1. Breeding ewes - on hand at 31 October 2010

Note: 'other pure Merino ewes' are Merino ewes to be joined with rams other than Merinos. ie. to breed first cross lambs.

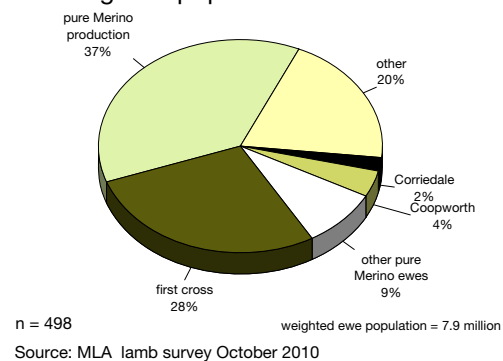
**Figure 8**  
Breeding ewe population: Australia



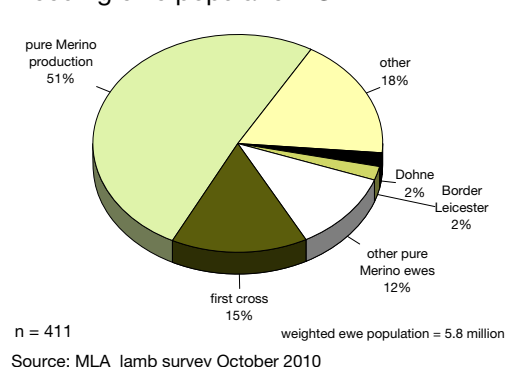
**Figure 9**  
Breeding ewe population: NSW



**Figure 10**  
Breeding ewe population: Victoria



**Figure 11**  
Breeding ewe population: SA



1. Breeding ewes - on hand at 31 October 2010 - continued...

Figure 12

Breeding ewe population: WA

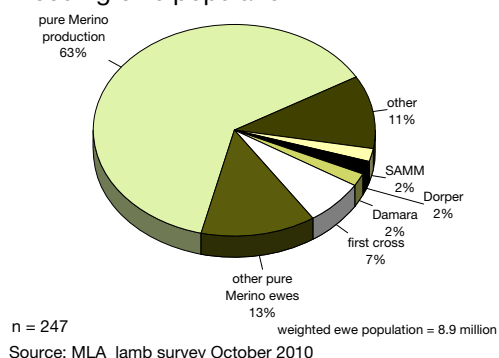


Figure 13

Breeding ewe population: Tasmania

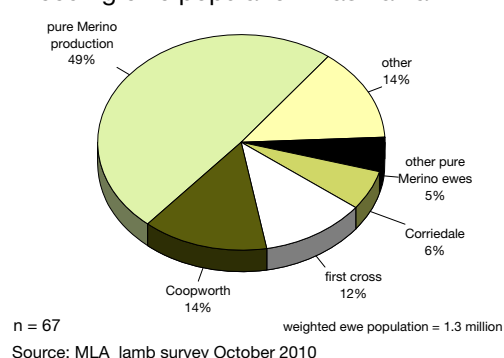
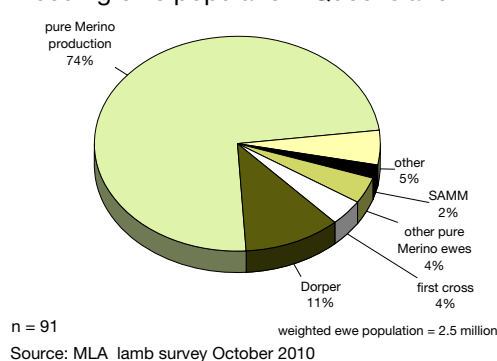


Figure 14

Breeding ewe population: Queensland



**X3. Do you intend to increase, maintain or decrease the size of your breeding ewe flock in 2011?**

Table 3

Intentions to increase, decrease or maintain ewe flock size in 2011: state

State	Increase ewe flock size	Maintain ewe flock size	Decrease ewe flock size	N/A	No response
NSW (n=247)	53%	38%	7%	2%	1%
Vic (n=149)	50%	44%	5%	1%	0%
SA (n=133)	37%	61%	1%	1%	0%
WA (n=106)	18%	51%	29%	0%	2%
Tas (n=14)	77%	18%	5%	0%	0%
Qld (n=42)	62%	34%	4%	0%	0%
National (n=691)	45%	45%	8%	1%	0%

**X4. Do you intend to increase, maintain or decrease the size of your wether flock in 2011?**

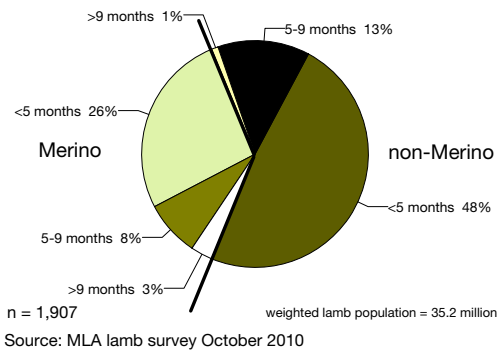
Table 4

Intentions to increase, decrease or maintain wether flock size in 2011: state

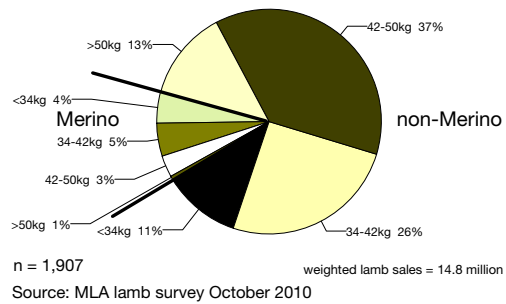
State	Increase wether flock size	Maintain wether flock size	Decrease wether flock size	N/A	No response
NSW (n=247)	9%	23%	6%	58%	3%
Vic (n=149)	8%	19%	7%	62%	4%
SA (n=133)	4%	28%	4%	63%	1%
WA (n=106)	3%	27%	23%	44%	2%
Tas (n=14)	16%	11%	4%	58%	11%
Qld (n=42)	15%	41%	12%	32%	0%
National (n=691)	8%	24%	9%	57%	3%

**2. Lamb counts - on hand at 31 Oct 2010; and  
3. Expected lamb sales - Nov 2010 to Feb 2011**

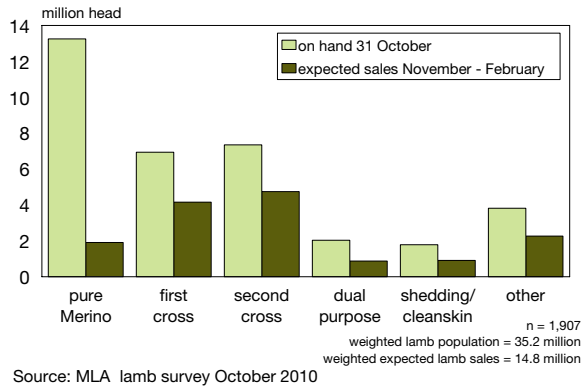
**Figure 15**  
Lambs on hand at  
31 October 2010: Australia



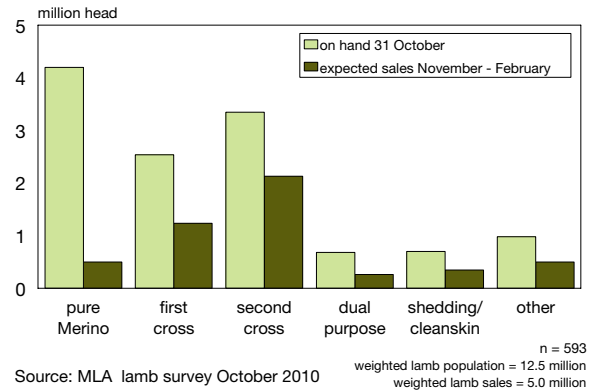
**Figure 16**  
Expected lamb sales  
November 2010 - February 2011: Australia



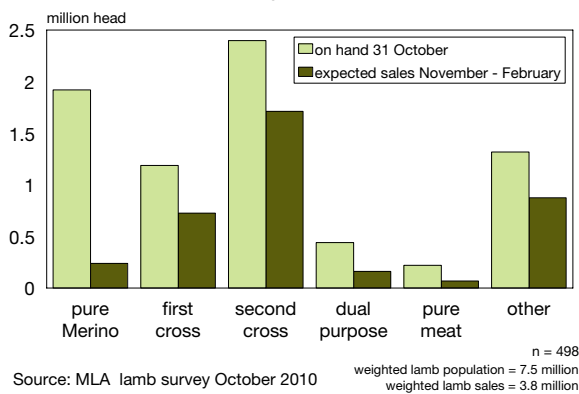
**Figure 17**  
Lambs on hand and expected sales: Australia



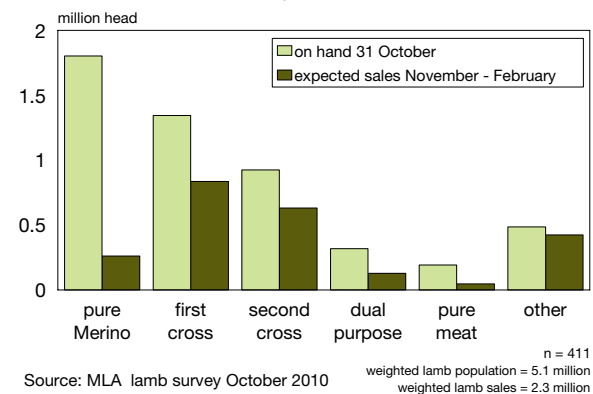
**Figure 18**  
Lambs on hand and expected sales: NSW



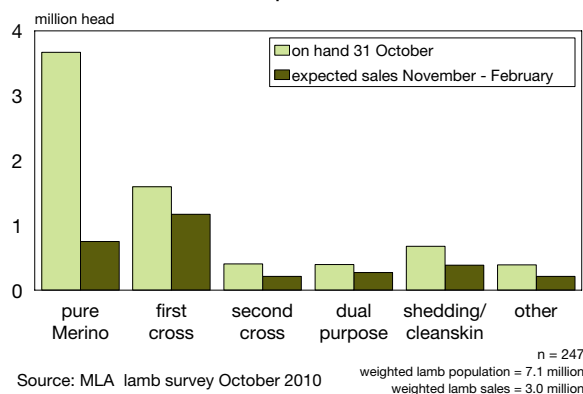
**Figure 19**  
Lambs on hand and expected sales: Victoria



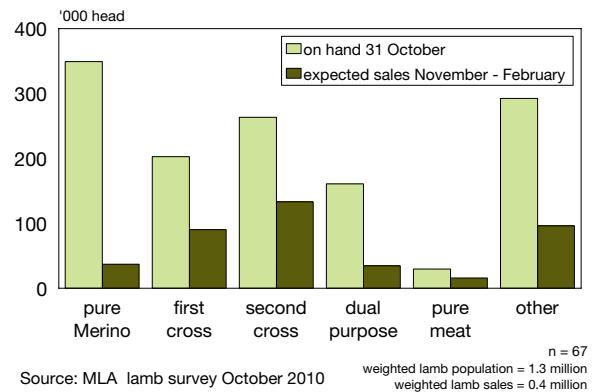
**Figure 20**  
Lambs on hand and expected sales: SA



**Figure 21**  
Lambs on hand and expected sales: WA

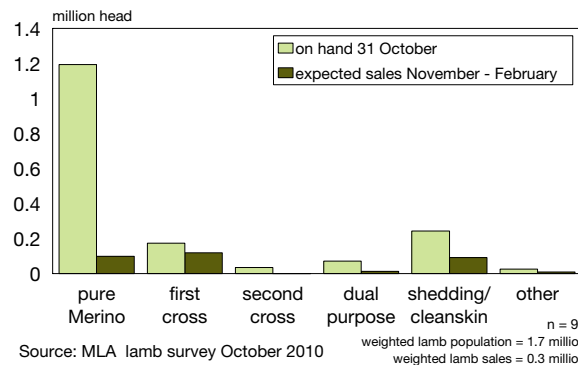


**Figure 22**  
Lambs on hand and expected sales: Tasmania



**2. Lamb counts - on hand at 31 Oct 2010; and  
3. Expected lamb sales - Nov 2010 to Feb 2011 - continued...**

**Figure 23**  
Lambs on hand and expected sales: Queensland



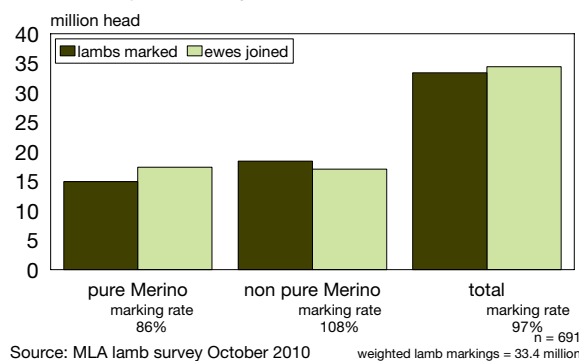
**X5. Do you intend to increase, maintain or decrease slaughter lamb turnoff in 2011?**

**Table 5**  
Slaughter lamb turnoff intentions: State

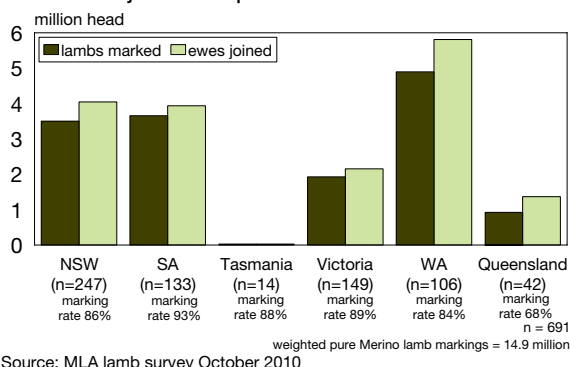
State	Increase	Maintain	Decrease	N/A	No response
NSW (n=247)	47%	39%	6%	8%	0%
Vic (n=149)	48%	36%	5%	11%	0%
SA (n=133)	41%	47%	3%	9%	0%
WA (n=106)	22%	48%	18%	11%	1%
Tas (n=14)	34%	62%	4%	0%	0%
Qld (n=42)	53%	34%	0%	9%	4%
<b>National (n=691)</b>	<b>46%</b>	<b>38%</b>	<b>6%</b>	<b>9%</b>	<b>0%</b>

**4. Ewes joined and lambs marked - Nov 2010 to Feb 2011**

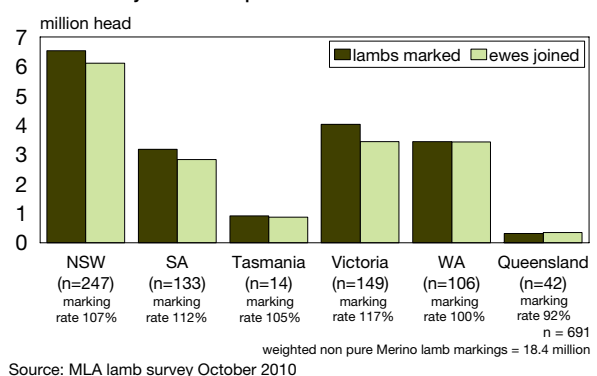
**Figure 24**  
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: Australia



**Figure 25**  
Pure Merino lambs marked Jul-Oct 2010 and ewes joined to produce these lambs



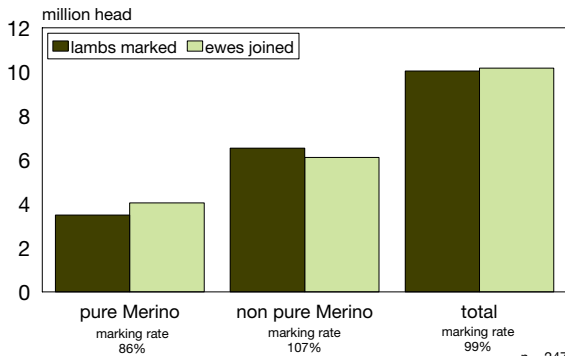
**Figure 26**  
Non pure Merino lambs marked Jul-Oct 2010 and ewes joined to produce these lambs



4. Ewes joined and lambs marked - Nov 2010 to Feb 2011 - continued...

Figure 27

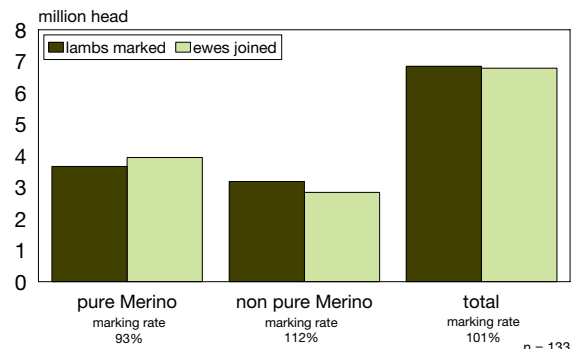
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: NSW



Source: MLA lamb survey October 2010

Figure 28

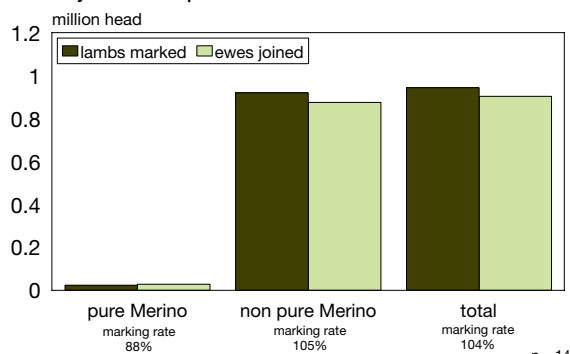
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: SA



Source: MLA lamb survey October 2010

Figure 29

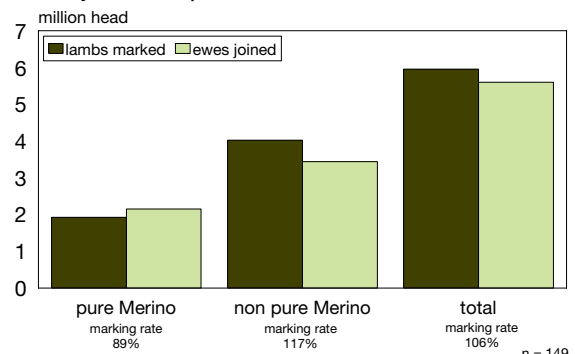
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: Tasmania



Source: MLA lamb survey October 2010

Figure 30

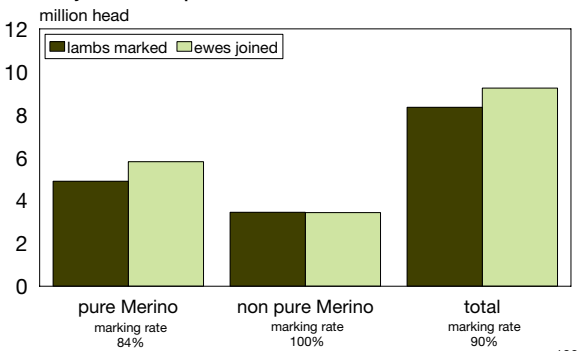
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: Victoria



Source: MLA lamb survey October 2010

Figure 31

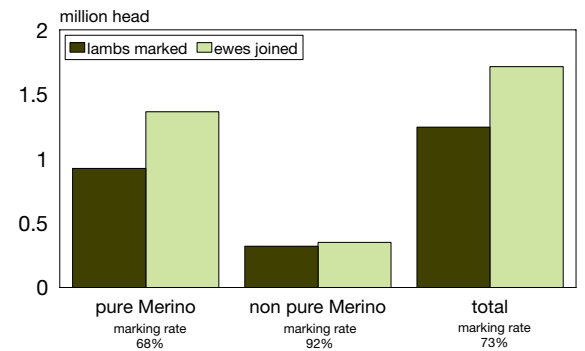
Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: WA



Source: MLA lamb survey October 2010

Figure 32

Lambs marked Jul-Oct 2010 and ewes joined to produce these lambs: Queensland



Source: MLA lamb survey October 2010

ISSN 1837-4492

Free to MLA members

For further information

please call toll free 1800 023 100 or 02 9463 9301 or fax 02 9954 0752

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