



Australian supply brief



MLA and AWI sheepmeat and wool survey February 2011 results

Sheepmeat and wool survey methodology

The Meat & Livestock Australia (MLA) and Australian Wool Innovation (AWI) sheepmeat and wool survey in February 2011 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 and lamb supply. The survey was comprised of a mail-out component, and an online component, and received responses from 2,226 producers across Australia.

The mail-out component was focussed on the composition of the breeding ewe flock and lambs on hand in February. A question regarding wool production for the financial year (2010-11) was included in collaboration with Australian Wool Innovation. The online component was an extended version of the survey, including a question on lambs marked, and 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 surveys prior to October 2010 should be treated with some caution.

Key findings from the survey

Respondent summary

- A total of 2,226 producers responded to the survey, with 970 completing the survey online, and the remainder completing the mail-out survey.
- Of the respondents, 558 were pure Merino producers, with the remaining 1,668 running mixed enterprises or other breeds.
- There were 672 responses from NSW (328 online), 519 from Victoria (195 online), 538 from SA (192 online), 316 from WA (179 online), 120 from Queensland (57 online) and 61 from Tasmania (19 online – interpret results with caution).

Seasonal conditions as at February 2011

Figures 1-3, Tables 1-2

- Nationally, 67% of respondents indicated current seasonal conditions were 'above average'. 21% of respondents reported conditions as 'below average', 'drought', or 'too wet'. The remaining 12% reported 'average' conditions.
- Compared to the same time last year, 73% of respondents reported 'better' conditions, 11% said they were 'the same', and 15% had 'worse' conditions.
- The majority of respondents from Tasmania (90%), Queensland (83%), NSW, (82%), Victoria (72%), and SA (71%) reported 'above average' seasonal conditions. A notable feature in Victoria was 19% of respondents indicating the season was 'too wet'. In WA, 40% responded with 'below average' conditions, and an additional 46% with 'drought'.
- Reflecting current seasonal conditions, in WA, 73% of respondents said conditions were 'worse than last year', while in the eastern states, the majority of respondents reported 'better' conditions than last year.

Breeding ewes on hand (28 February 2011)

Figures 4-10

- The breeding ewe population on hand at 28 February 2011 was estimated at 38.7 million head – with straight Merino to Merino production being the dominant mating at 53% of the total.
- The next largest segment was Merino ewes to be crossed with other sires, accounting for 19% of the breeding ewe population. First cross ewes, mainly Merino X Border Leicesters, made up 15% of the ewe population.
- The number of Dorper and White Dorper ewes on hand reflected the increasing popularity of the breed in recent times, accounting for 2%. Other breeds made up smaller percentages to account for the remaining 11%.

Lambs on hand (28 February 2011)

Figures 11, 13-19

- Australia's lamb population on hand at 28 February 2011 was estimated at 24.1 million head, of which 58% were pure Merino lambs.
- NSW had the largest Merino lamb population, with 34% of the total, followed by WA (26%), SA (16%) and Victoria (12%).
- First cross lambs accounted for the second largest group of lambs, with 17% of the population. The most popular sires were White Suffolk (mainly NSW, SA and Victoria), Border Leicester (mainly NSW and Victoria), Poll Dorset (NSW, WA, Victoria and SA), and SAMM (SA and WA).
- Second cross lambs made up 12% of the lamb 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.

Expected lamb sales (March - June 2011)

Figures 12-19

- Producers expected to sell an estimated 9.5 million lambs in the four months from March to June. First cross lambs made up 31% of this total, with White Suffolk, Border Leicester, Poll Dorset, Suffolk (Black), and SAMM sired lambs the most popular, reflecting the lambs on hand (see above).
- Second cross lambs were expected to make up 27% of lamb sales, with the majority being lambs born to first cross ewes and Poll Dorset or White Suffolk rams, mostly in NSW and Victoria.
- The third largest category was Merino lambs, expected to make up 24% of total lamb sales. These were expected to come mainly from NSW, followed by SA and Victoria.

Lamb markings (November 2010 - February 2011)

Figures 20-30

Note: Due to the seasonality of lamb marking, only a small proportion of respondents answered the marking questions. Treat results with caution.

- Between November 2010 and February 2011, producers were estimated to have marked 6.5 million lambs from 7.3 million ewes joined across Australia, to give an overall marking rate of 89%, which shows some improvement on previous years. The highest marking rates were recorded in Victoria and SA (both 94%), Tasmania and NSW (both 90%), and WA (89%). The lowest marking rates were in Queensland (75%).
- There were 3.4 million pure Merino lambs marked from 4.2 million ewes joined, for a national marking rate of 81%. Most states were fairly steady around this mark, except SA and Queensland (both 74%).
- There were 3.1 million other lambs marked from 3.1 million ewes joined, for a national marking rate of 100%. Victoria and SA (both 106%) had the highest marking rates. Queensland (78%) had the lowest marking rate.
- A new question was asked in this survey regarding the age of ewes that lambed between November 2010 and February 2011. This will perhaps be more informative when compared to future survey results to determine trends in the age of the ewe flock.
- In the case of this survey, the vast majority of ewes were aged between 2-6 years. There was a higher proportion of ewes younger than two years among Merinos, and a higher proportion of ewes older than six years among other ewes than Merinos.
- SA in particular used younger Merino ewes for breeding, while NSW producers used the highest proportion of older ewes among other breeds.

Ewe flock intentions for 2011

Table 3, Figures 31-38

- Nationally, 44% of respondents intend to increase the size of their ewe flock in 2011, 46% intend to maintain their ewe flock, and 6% intend to decrease their ewe flock.
- The largest difference between those intending to increase and decrease the flock was in Tasmania, followed by NSW and Victoria.
- WA was the key exception to this trend, reflecting the continued poor seasonal conditions. Just 24% of respondents intend to increase the size of their ewe flock in 2011, with 61% intending to maintain and 12% intending to decrease their ewe flock.
- A new question was asked in this survey about how an intended increase in ewe flock size was to be brought about. The results were relatively steady across the country, with retention of more replacement ewes and older ewes the main methods. In Victoria and SA, producers indicated a greater willingness to purchase additional ewes to build their flock than in other states. In contrast, few producers in WA were intending to purchase additional ewes.
- Some producers indicated a combination of methods, including culling older ewes and either purchasing additional ewes or retaining replacement ewes.

Wether flock intentions for 2011

Table 4, Figure 39

- Half of the overall respondents indicated that wether flock intentions did not apply to them. 28% indicated they intend to maintain their wether flock size in 2011, and 13% intend to increase. This was a positive change from the October 2010 survey, in which 24% intended to maintain their wether flock size, and only 8% intended to increase.

Slaughter lamb turnoff intentions for 2011

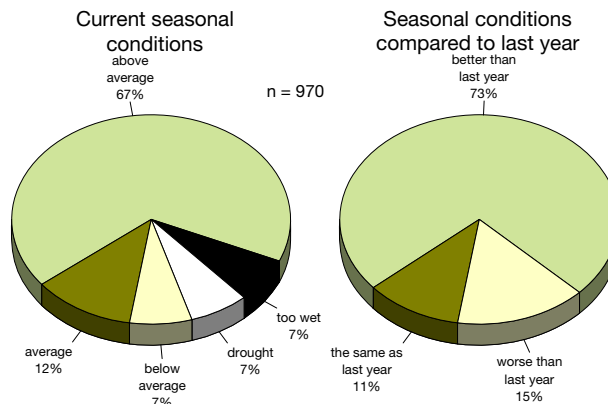
Table 5, Figure 40

- Nationally, 36% of respondents intend to increase their slaughter lamb turnoff in 2011, 40% intend to maintain the number of slaughter lambs turned off, and 11% intend to decrease slaughter lamb turnoff. 12% of respondents indicated this was not applicable to them.
- The difference between the number of respondents intending to increase their slaughter lamb turnoff in 2011 and those intending to decrease turnoff was large in all states, except WA, with the strongest net increase in Victoria, followed by Tasmania and NSW.

Seasonal conditions questions

1. How would you rate the current seasonal conditions in your area? and
2. Compared with this time last year, are current conditions...

Figure 1
Seasonal conditions: Australia



Source: MLA & AWI sheepmeat and wool survey February 2011

Table 1
Seasonal conditions as at February 2011: State

State	above average	average	below average	drought	too wet
NSW (n=328)	82%	9%	1%	0%	6%
Vic (n=195)	72%	8%	0%	1%	19%
SA (n=192)	71%	26%	1%	0%	2%
WA (n=179)	2%	13%	40%	46%	0%
Tas (n=19)	90%	2%	9%	0%	0%
Qld (n=57)	83%	5%	4%	0%	8%
National (n=970)	67%	12%	7%	7%	7%

Table 2
Seasonal conditions as at February 2011: State

State	Better than last year	The same as last year	Worse than last year
NSW (n=328)	88%	10%	1%
Vic (n=195)	86%	3%	12%
SA (n=192)	80%	15%	4%
WA (n=179)	7%	20%	73%
Tas (n=19)	67%	22%	11%
Qld (n=57)	78%	17%	6%
National (n=970)	73%	11%	15%

Figure 2
Seasonal conditions as at February 2011



Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 3
Seasonal conditions as at February 2011



Source: MLA & AWI sheepmeat and wool survey February 2011

Composition of flock questions

1. Breeding ewes – on hand at 28 February 2011

Figure 4
Breeding ewe population: Australia

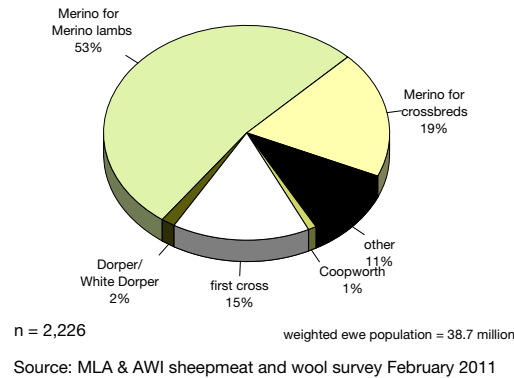


Figure 5
Breeding ewe population: NSW

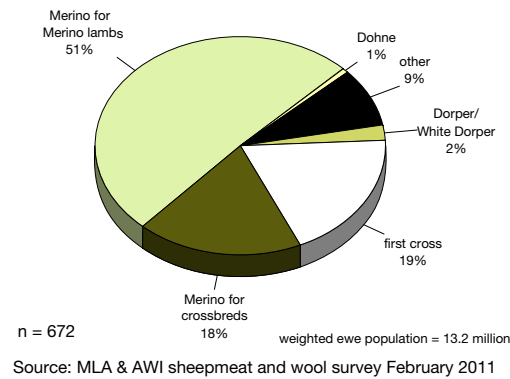


Figure 6
Breeding ewe population: Victoria

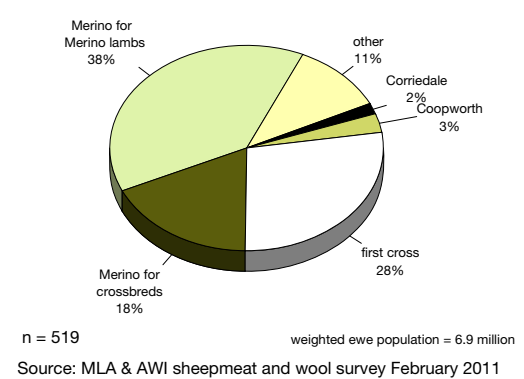


Figure 7
Breeding ewe population: SA

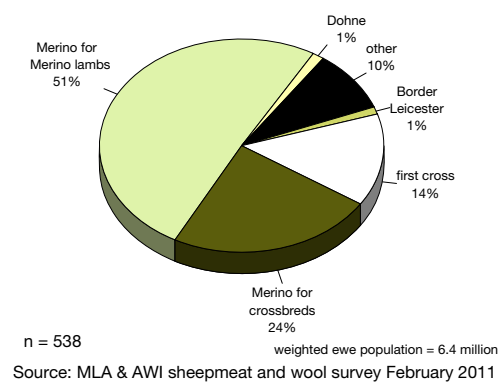


Figure 8
Breeding ewe population: WA

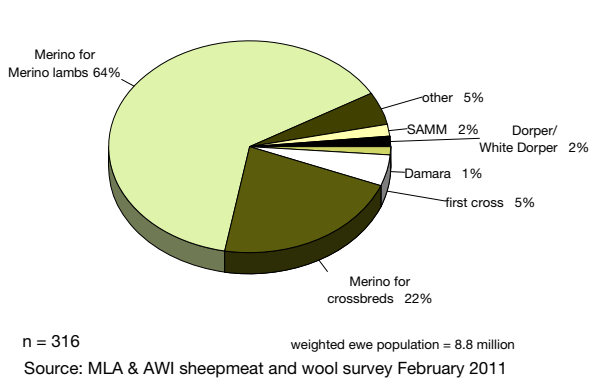


Figure 9
Breeding ewe population: Tasmania

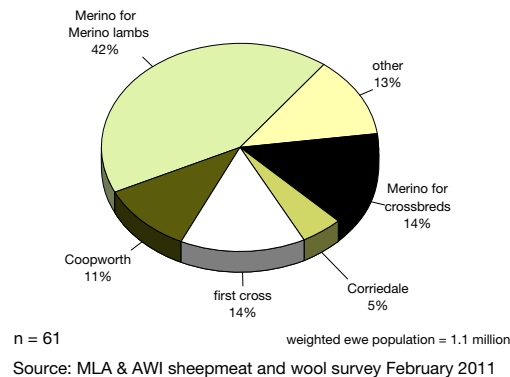
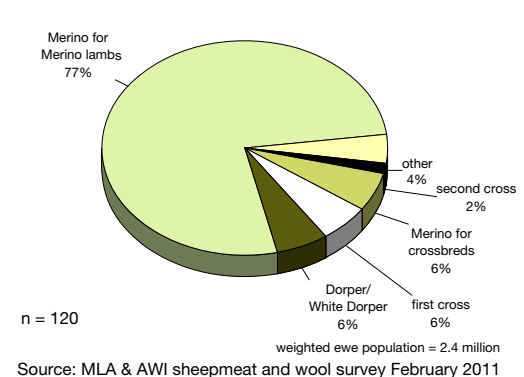


Figure 10
Breeding ewe population: Queensland



2. Lamb counts – on hand at 28 February 2011; and
3. Expected lamb sales – March to June 2011

Figure 11
Lambs on hand at
28 February 2011: Australia

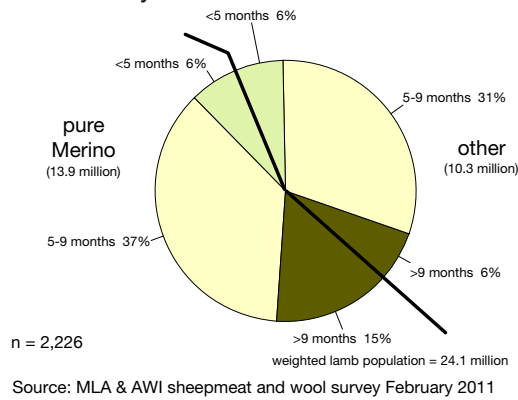


Figure 12
Expected lamb sales
March - June 2011: Australia

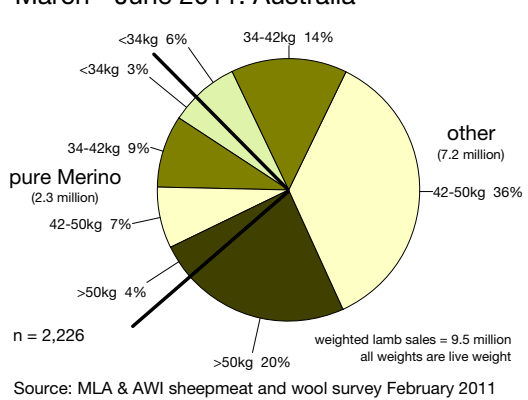


Figure 13
Lambs on hand and expected sales: Australia

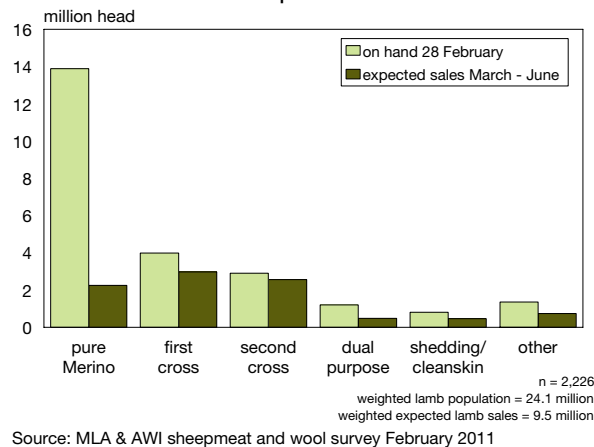


Figure 14
Lambs on hand and expected sales: NSW

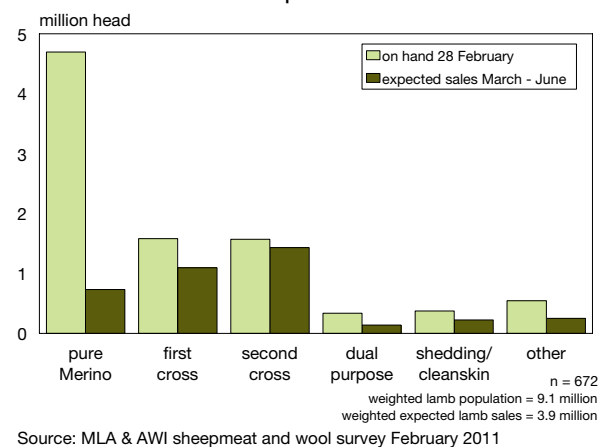


Figure 15
Lambs on hand and expected sales: Victoria

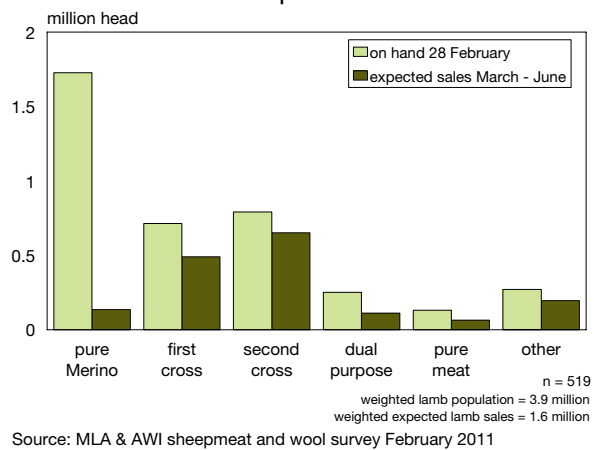
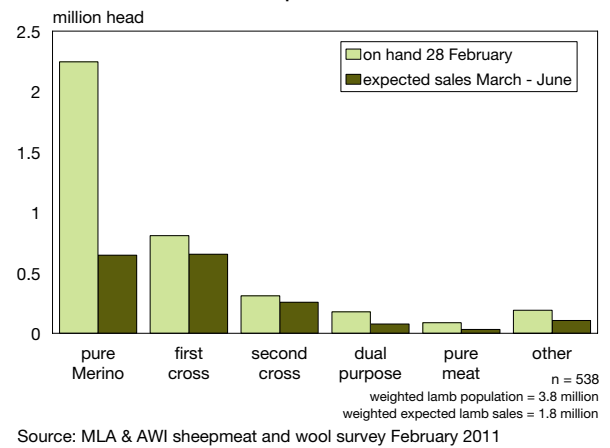
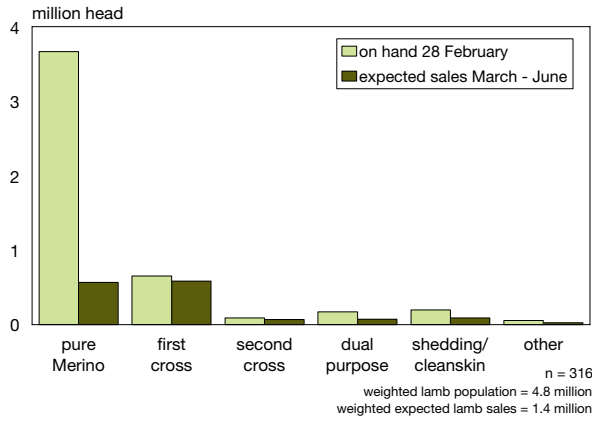


Figure 16
Lambs on hand and expected sales: SA



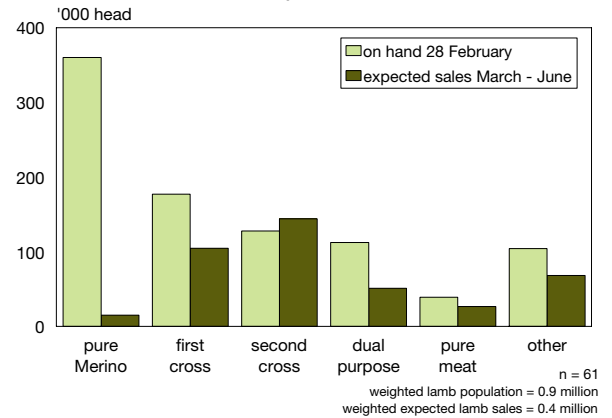
2. Lamb counts – on hand at 28 February 2011; and
 3. Expected lamb sales – March to June 2011 – continued...

Figure 17
 Lambs on hand and expected sales: WA



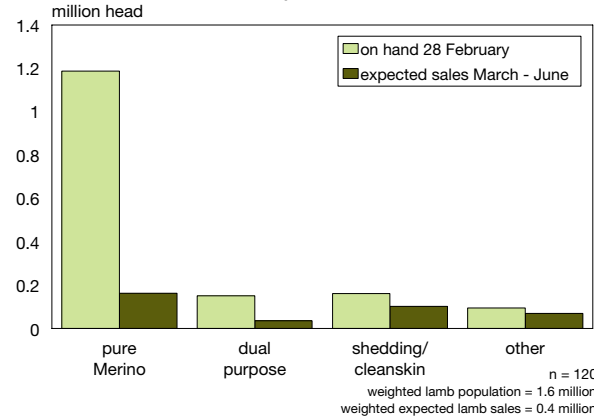
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 18
 Lambs on hand and expected sales: Tasmania



Source: MLA & AWI sheepmeat and wool survey February 2011

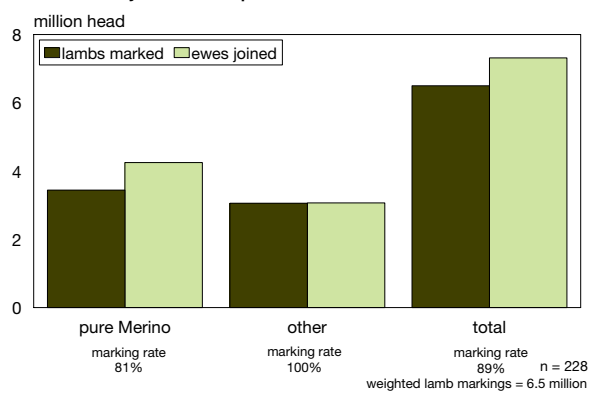
Figure 19
 Lambs on hand and expected sales: Queensland



Source: MLA & AWI sheepmeat and wool survey February 2011

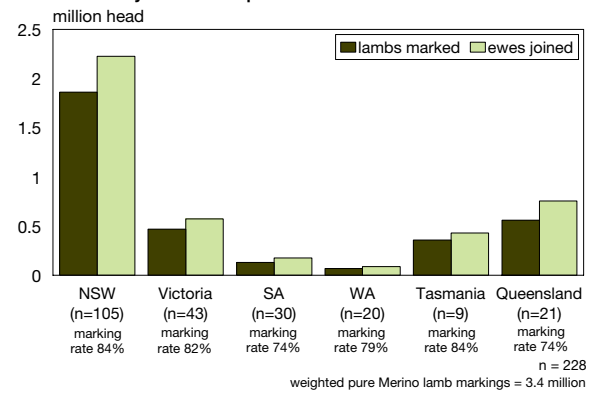
4. Ewes joined and lambs marked – November 2010 to February 2011

Figure 20
 Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: Australia



Source: MLA & AWI sheepmeat and wool survey February 2011

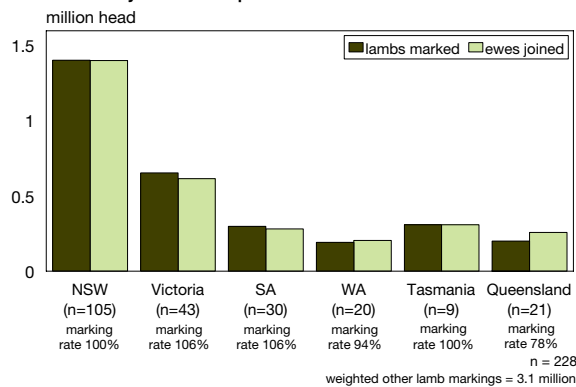
Figure 21
 Pure Merino lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs



Source: MLA & AWI sheepmeat and wool survey February 2011

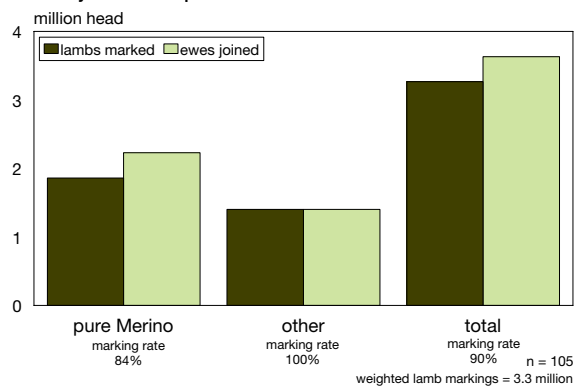
4. Ewes joined and lambs marked – November 2010 to February 2011 – continued...

Figure 22
Other lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs



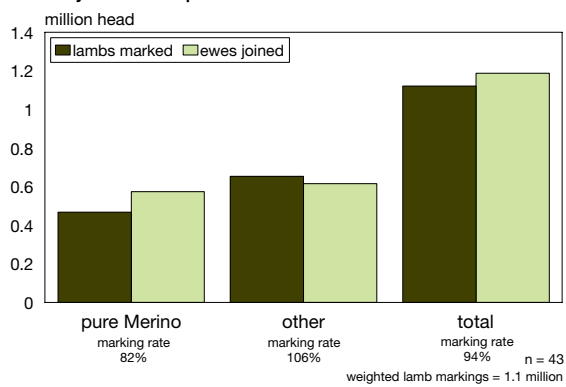
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 23
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: NSW



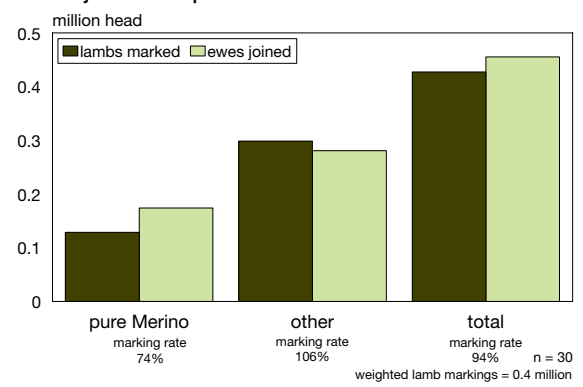
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 24
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: Victoria



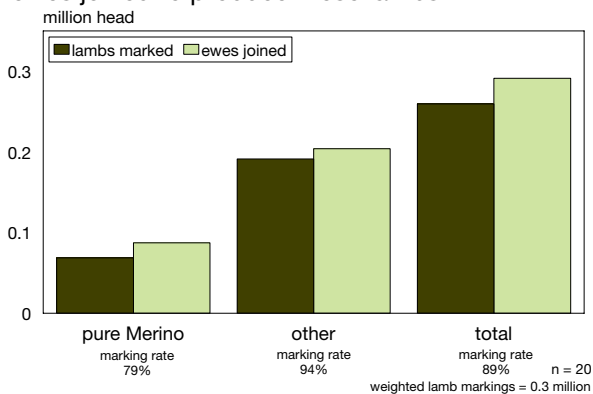
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 25
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: SA



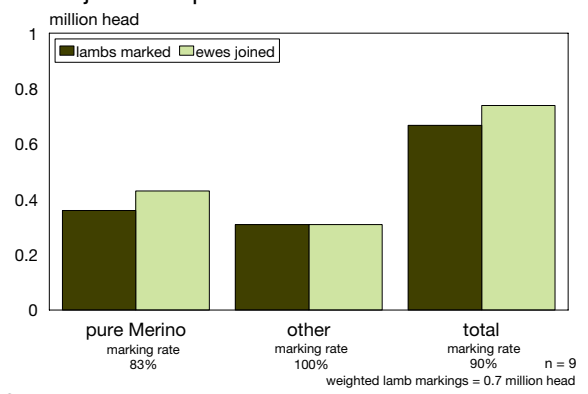
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 26
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: WA



Source: MLA & AWI sheepmeat and wool survey February 2011

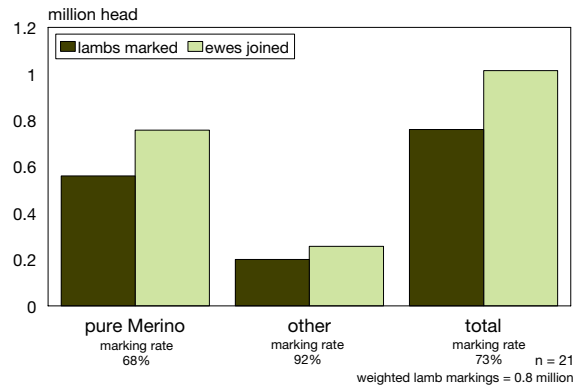
Figure 27
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: Tasmania



Source: MLA & AWI sheepmeat and wool survey February 2011

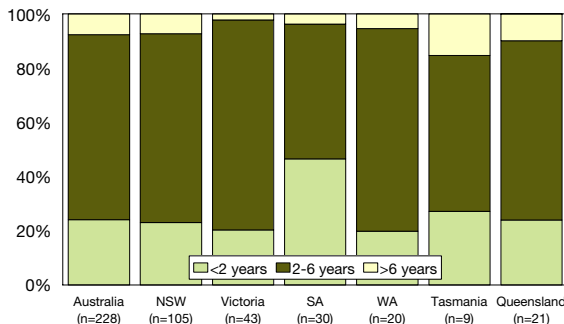
4. Ewes joined and lambs marked – November 2010 to February 2011 – continued...

Figure 28
Lambs marked Nov 2010 - Feb 2011 and ewes joined to produce these lambs: Queensland



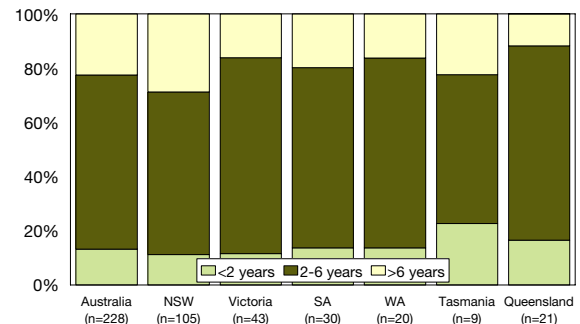
Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 29
Age of Merino ewes joined for markings Nov-Feb



Source: MLA & AWI sheepmeat and wool survey February 2011

Figure 30
Age of other ewes joined for markings Nov-Feb



Source: MLA & AWI sheepmeat and wool survey February 2011

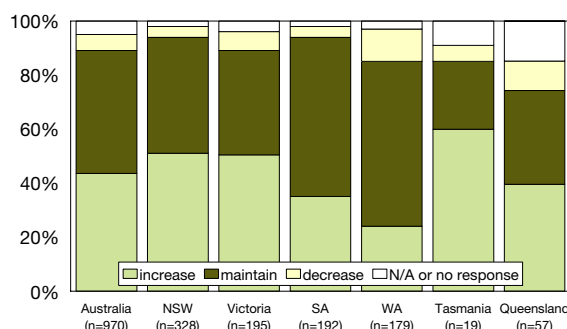
Flock intention questions

1a. 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=328)	51%	43%	4%	2%	1%
Vic (n=195)	51%	39%	7%	4%	0%
SA (n=192)	35%	59%	4%	2%	0%
WA (n=179)	24%	61%	12%	3%	0%
Tas (n=19)	60%	25%	6%	9%	0%
Qld (n=57)	40%	35%	11%	15%	0%
National (n=970)	44%	46%	6%	4%	0%

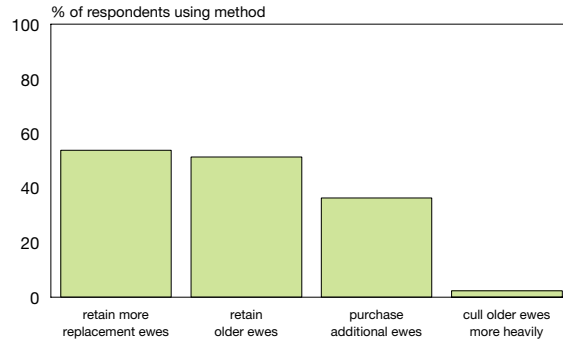
Figure 31
Ewe flock size intentions for 2011



Source: MLA & AWI sheepmeat and wool survey February 2011

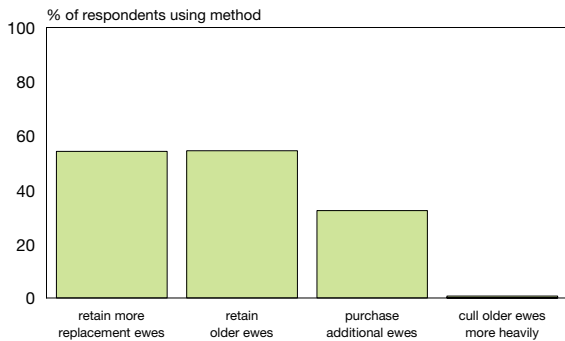
1b. How do you intend to increase your breeding ewe flock in 2011?

Figure 32
How will increase be achieved - Australia



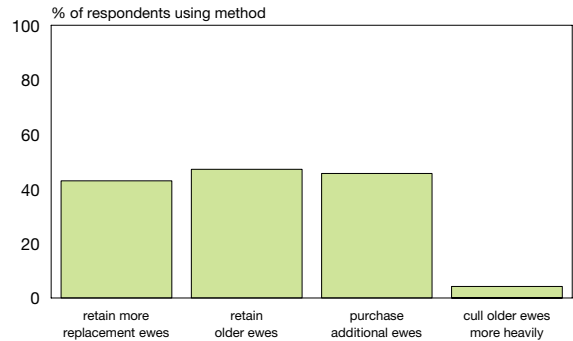
Source: MLA & AWI sheepmeat and wool survey February 2011 n = 413

Figure 33
How will increase be achieved - NSW



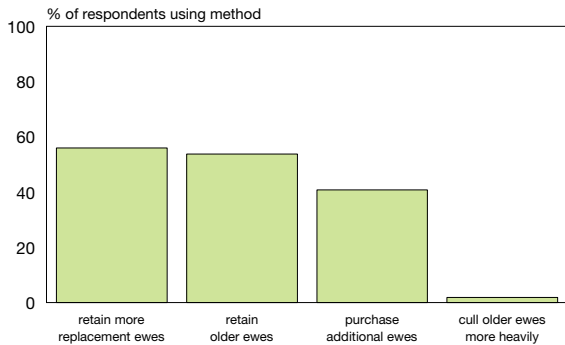
Source: MLA & AWI sheepmeat and wool survey February 2011 n = 172

Figure 34
How will increase be achieved - Victoria



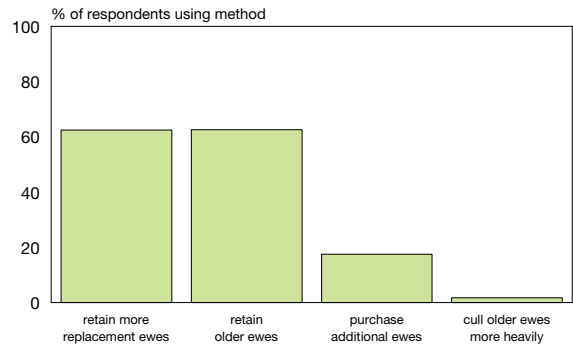
Source: MLA & AWI sheepmeat and wool survey February 2011 n = 97

Figure 35
How will increase be achieved - SA



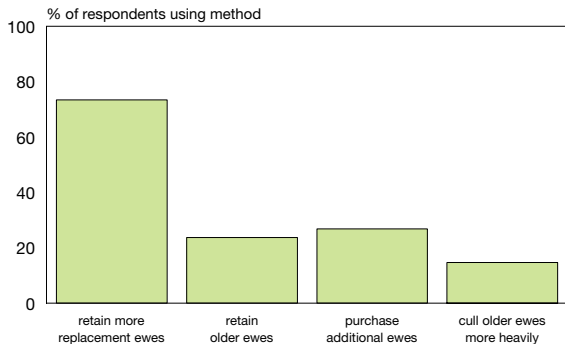
Source: MLA & AWI sheepmeat and wool survey February 2011 n = 66

Figure 36
How will increase be achieved - WA



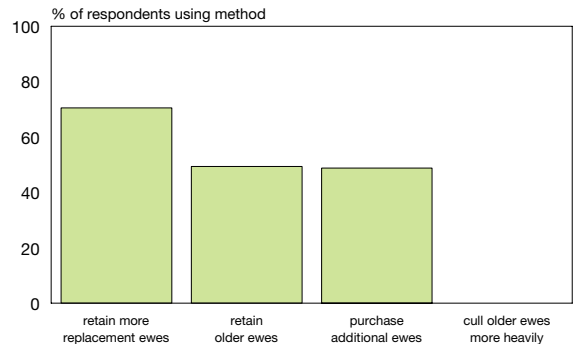
Source: MLA & AWI sheepmeat and wool survey February 2011 n = 41

Figure 37
How will increase be achieved - Tasmania



Source: MLA & AWI sheepmeat and wool survey February 2011 n = 12

Figure 38
How will increase be achieved - Queensland



Source: MLA & AWI sheepmeat and wool survey February 2011 n = 25

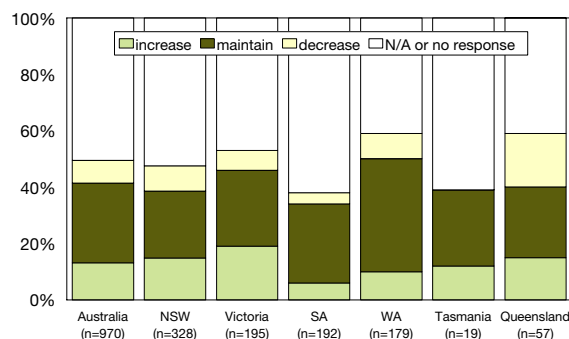
2. Do you intend to increase, maintain or decrease the size of your wether flock in 2011?

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=328)	15%	24%	9%	50%	3%
Vic (n=195)	19%	27%	7%	46%	1%
SA (n=192)	6%	28%	4%	61%	1%
WA (n=179)	10%	40%	9%	41%	0%
Tas (n=19)	12%	27%	0%	61%	0%
Qld (n=57)	15%	25%	19%	41%	0%
National (n=970)	13%	28%	8%	49%	1%

Figure 39
Wether flock size intentions for 2011



Source: MLA & AWI sheepmeat and wool survey February 2011

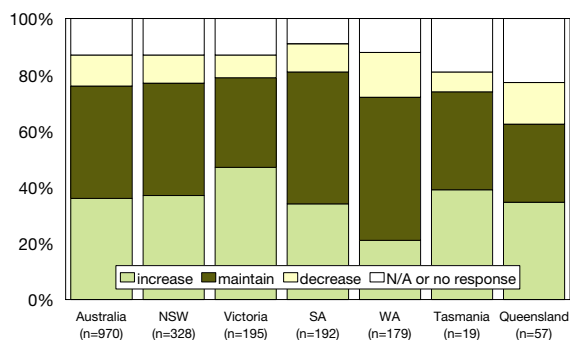
3. Do you intend to increase, maintain or decrease slaughter lamb turnoff in 2011?

Table 5

Slaughter lamb turnoff intentions: State

State	Increase	Maintain	Decrease	N/A	No response
NSW (n=328)	37%	40%	10%	11%	2%
Vic (n=195)	47%	32%	8%	13%	0%
SA (n=192)	34%	47%	10%	9%	0%
WA (n=179)	21%	51%	16%	12%	0%
Tas (n=19)	39%	35%	7%	17%	2%
Qld (n=57)	35%	28%	15%	23%	0%
National (n=970)	36%	40%	11%	12%	1%

Figure 40
Slaughter lamb turnoff intentions for 2011



Source: MLA & AWI sheepmeat and wool survey February 2011

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* results from MLA Market Information subscriber survey – conducted in August 2009

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