



## Australian supply brief

# MLA and AWI sheepmeat and wool survey October 2011 results

## Sheepmeat and wool survey methodology

The Meat & Livestock Australia (MLA) and Australian Wool Innovation (AWI) sheepmeat and wool survey October 2011 is part of a continually evolving set of producer surveys that began in June 2010 to gauge short term trends and movements in the national sheep flock and lamb supply. This survey was comprised of a mail-out component and an online component, and received responses from 1,911 producers across Australia.

The mail-out component was focussed on the composition of the breeding ewe flock and lambs on hand in October 2011. In collaboration with AWI, a question regarding wool production for the 2011-12 financial year was included. The online component was an extended version of the survey, including a question on lambs marked and qualitative questions regarding current seasonal conditions and flock intentions for 2012.

The survey responses are extrapolated to represent Australian Bureau of Statistics (ABS) demographic figures of the composition of the sheep industry.

## Executive summary

The Australian sheep flock started to show signs of recovery in 2010, with the decade-long drought broken across the eastern states allowing producers to start to realise their intentions of flock rebuilding. As at June 30 2011, the national sheep flock was estimated to be 74.3 million head, 6.2 million higher than one year prior, according to Australian Bureau of Statistics data. Since winter 2011, WA has also experienced a recovery in seasonal conditions, with flock rebuilding intentions increasing in recent months.

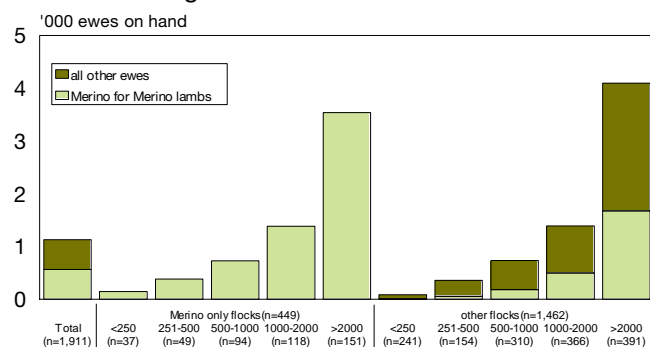
Consistently high prices received for lambs and sheep over the past two years, as well as a sustained run of better than average prices for wool, has assisted the growth of dual purpose sheep breeds, such as Dohnes and South African Meat Merinos (SAMM) in the Australian sheep flock, although these breeds still represent a very minor proportion of the flock. There also appears to be a concerted intention to halt the decline in the Merino portion of the national flock. While prime lamb production is still seen as viable in its own right, the current and expected returns from wool are proving attractive with a clear intent to retain more wethers in some key wool growing regions.

## Key findings from the survey

### Respondent summary

- A total of 1,911 producers responded to the most recent survey, with 650 completing the survey online and the remainder completing the mail-out survey.

### National average ewe flock size



Source: MLA & AWI sheepmeat and wool survey October 2011

- Of the respondents, 449 were pure Merino producers, with the remaining 1,462 running mixed enterprises or other breeds.

- There were 509 responses from NSW (209 online), 455 from Victoria (134 online), 471 from SA (132 online), 261 from WA (119 online), 123 from Queensland (36 online – interpret results with caution) and 92 from Tasmania (20 online – interpret results with caution).

## Seasonal conditions as at October 2011

### Figures 1-3, Tables 1-2

- Nationally, 38% of respondents indicated current seasonal conditions were 'above average'. 15% of respondents reported conditions as 'below average', 'drought', or 'too wet'. The remaining 47% reported 'average' conditions.
- Compared to the same time last year, 41% of respondents reported 'better' conditions, 29% said they were 'the same', and 30% had 'worse' conditions.
- The majority of respondents from Tasmania (64% and WA (59%) reported 'above average' seasonal conditions. All other states had 78% or more respondents indicating 'average' or 'above average' conditions.
- The widespread rain across most of the agricultural regions of WA through winter and spring resulted in just 5% of respondents indicating 'below average' or 'drought' conditions. In the eastern states, there was a decline in the average quality of seasonal conditions relative to last year, although this is more reflective of the good season in October 2010..

## Breeding ewes on hand (31 October 2011)

### Figures 4-10

- The breeding ewe population on hand at 31 October 2011 was estimated at 38.7 million head. Straight bred Merino to Merino production was still the dominant mating, at 50% of the total.
- The next largest segment was Merino ewes to be crossed with other sires - accounting for 21% of the breeding ewe population. First cross ewes, mainly Merino X Border Leicesters, made up 14% of the ewe population.
- Dorper ewes (including White Dorpers and crosses) accounted for 3% of breeding ewes on hand. Dohne and SAMM varieties accounted for 2% and 1% of the national ewe flock, respectively. Other breeds, some of which may include crosses of those mentioned previously, made up smaller proportions, but accounted for 10% of the breeding ewe flock when combined.

## Lambs on hand (31 October 2011)

### Figures 11, 13-20

- Australia's lamb population on hand at 31 October 2011 was estimated at 31.3 million head, of which 48% were pure Merino lambs.
- 32% of the lambs on hand were Merino lambs under five months of age and 39% were other lambs under five months of age.
- NSW had the largest Merino lamb population, with 33% of the total, followed by WA (25%), SA (19%) and Victoria (13%).
- First cross lambs accounted for the second largest group of lambs, with 20% of the population. The most popular sires were White Suffolk (mainly SA, NSW, Victoria and WA), Border Leicester (mainly NSW and Victoria), and Poll Dorset (WA, NSW, Victoria and SA).

***Lambs on hand (31 October 2011) continued..***

- Various pure meat breed lambs also made up 20% of the lamb population. This was made up primarily of first cross ewes joined to Poll Dorset or White Suffolk rams, with most of these found in NSW and Victoria.
- Shedding or cleanskin breeds accounted for 5% of the lamb population on hand, with Dorper varieties the most common in NSW and Queensland, and mainly Dorpers and Damaras in WA.

**Expected lamb sales (November 2011 - February 2012)*****Figures 12-20***

- Producers expected to sell 11.6 million lambs in the four months from November 2011 to February 2012. Of this 11.6 million, 36% were lambs other than Merinos expected to be sold between 42-50kg live weight, and 25% were lambs other than Merinos expected to be sold between 34-42kg live weight.
- Pure meat breeds made up 35% of this total, mainly lambs from first cross ewes, sired by Poll Dorset or White Suffolk rams.
- The second largest category was first cross lambs, expected to make up 31% of the total, with White Suffolk, Border Leicester, and Poll Dorset sired lambs the most popular, with the breakdown similar to the lambs on hand.
- Merino lambs were expected to make up just 15% of lambs sold in the coming four months – just 11% of Merino lambs on hand were expected to be sold over this period. These were expected to come mainly from NSW, followed by WA and SA.
- Shedding or cleanskin lambs were expected to make up 6% of sales from November to February, mainly Dorpers in NSW and Queensland, and Dorpers and Damaras in WA.

**Lamb markings (July - October 2011) - online*****Figures 21-31***

- Between July and October 2011, producers were estimated to have marked 22.4 million lambs from 23.6 million ewes joined across Australia, to give an overall marking rate of 95% - an improvement compared with previous years. The highest marking rates were recorded in Victoria (107%), Tasmania (103% - although, note the small sample size) and SA (102%). NSW recorded a 90% marking rate, and WA 89%. Queensland respondents indicated an overall marking rate of 63%.
- There were 11.0 million pure Merino lambs marked from 13.1 million ewes joined, for a national marking rate of 84%. There were quite large fluctuations in Merino lamb marking rates, from 95% in SA, down to 56% in Queensland.
- There were 11.4 million other lambs marked from 10.5 million ewes joined, for a national marking rate of 108%. Tasmania had the highest marking rate, at 122% (note the small sample size), followed by Victoria (117%) and SA (110%). Queensland recorded the lowest marking rate for lambs other than Merinos, at 87%.
- The majority of lambs marked in this period were from ewes joined between 2-6 years of age (72% of Merino ewes and 71% of other ewes).

**Lamb markings (July – October 2011) – online continued..**

- Merino ewes tended to be joined younger than other breeds across the country, with 23% of Merino ewes joined at less than 2 years of age, compared with 19% of other ewes. For the other ewe category, this is a significant increase on the June figure of 12%.
- Conversely, around 5% of Merino ewes were joined over 6 years of age, compared with 10% of other ewes.

**Ewe flock intentions for 2012 - online****Table 3, Figures 32-39**

- Nationally, 41% of respondents intend to increase the size of their ewe flock in 2012. Additionally, 49% of respondents intend to maintain their ewe flock, with only 8% intending to decrease in size.
- The largest difference between those intending to increase and decrease the flock was in Tasmania, followed by Queensland (although, note the small sample sizes for these two states), WA and Victoria.
- WA ewe flock intentions have changed dramatically compared with earlier surveys, as the much improved seasonal conditions increased optimism among producers.
- Those producers intending to increase their ewe flocks were asked a follow-up question as to which methods they intended to use. Retaining more replacement ewes was the most popular method, followed by retaining older ewes, although this measure was lower than recorded in June. Purchasing additional ewes remained the least popular method of rebuilding ewe flocks.

**Wether flock intentions for 2012 - online****Table 4, Figure 40**

- Just under half (47%) of the total respondents indicated that wether flock intentions did not apply to them. A total of 27% indicated they intended to maintain their wether flock size in 2011, and 15% intended to increase. This marks a very similar response to that seen in June.

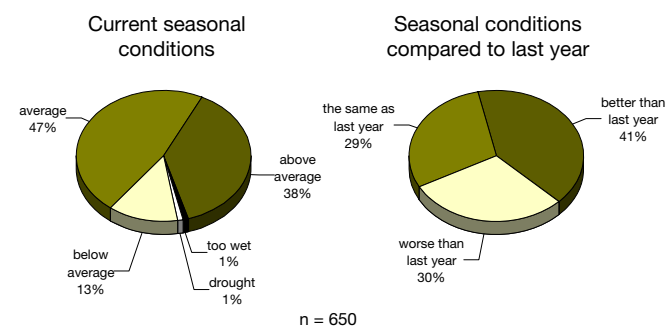
**Slaughter lamb turnoff intentions for 2012 - online****Table 5, Figure 41**

- Nationally, 30% of respondents intended to increase their slaughter lamb turnoff in 2012, 43% intended to maintain the number of slaughter lambs turned off, and 11% intended to decrease slaughter lamb turnoff. 16% of respondents indicated this was not applicable to them.
- The difference between the number of respondents intending to increase their slaughter lamb turnoff in 2012 and those intending to decrease turnoff was 10 percentage points or more in all states.

### 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 October 2011

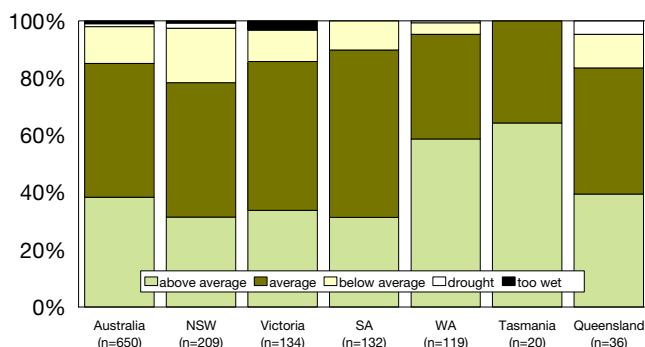
**Table 1**  
Seasonal conditions as at October 2011: State

State	above average	average	below average	drought	too wet
NSW (n=209)	32%	47%	19%	2%	1%
Vic (n=134)	38%	45%	12%	0%	4%
SA (n=132)	31%	59%	10%	0%	0%
WA (n=119)	59%	37%	4%	1%	0%
Tas (n=20)	64%	36%	0%	0%	0%
Qld (n=36)	40%	44%	12%	5%	0%
<b>National (n=650)</b>	<b>38%</b>	<b>47%</b>	<b>13%</b>	<b>1%</b>	<b>1%</b>

**Table 2**  
Seasonal conditions as at October 2011: State

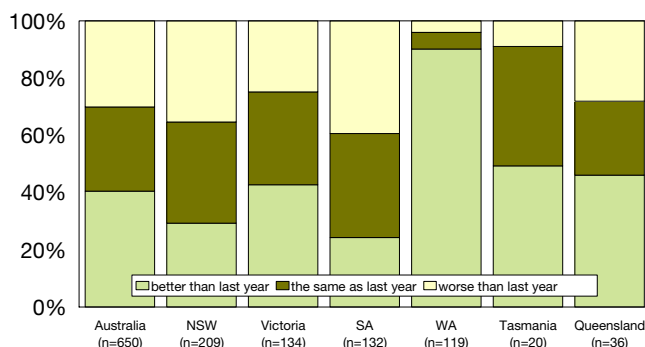
State	Better than last year	The same as last year	Worse than last year
NSW (n=209)	27%	32%	41%
Vic (n=134)	42%	32%	25%
SA (n=132)	24%	36%	39%
WA (n=119)	90%	6%	4%
Tas (n=20)	49%	42%	9%
Qld (n=36)	46%	26%	28%
<b>National (n=650)</b>	<b>41%</b>	<b>29%</b>	<b>30%</b>

**Figure 2**  
Seasonal conditions as at October 2011



Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 3**  
Seasonal conditions as at October 2011

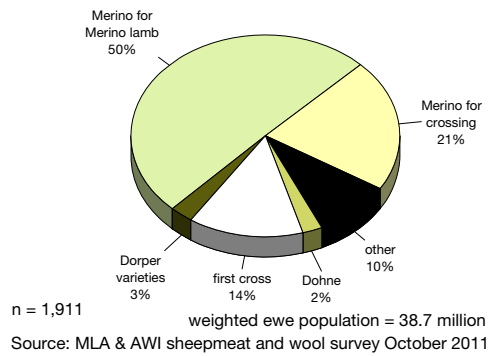


Source: MLA & AWI sheepmeat and wool survey October 2011

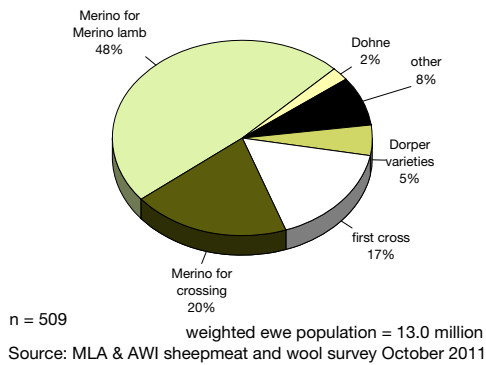
**Composition of flock questions**

**1. Breeding ewes – on hand at 31 October 2011**

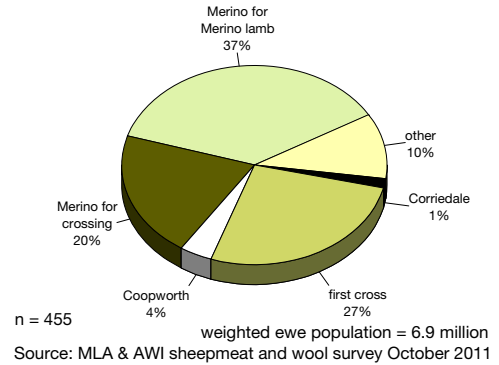
**Figure 4**  
Breeding ewe population: Australia



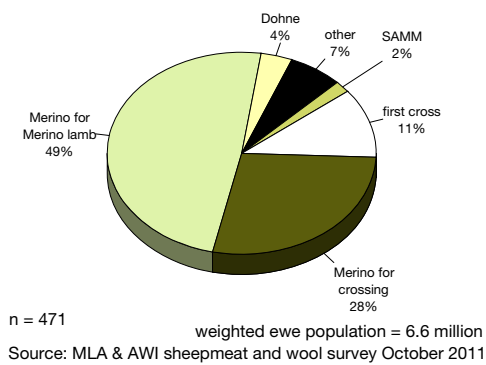
**Figure 5**  
Breeding ewe population: NSW



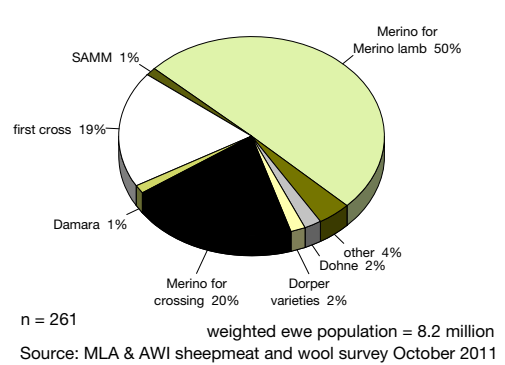
**Figure 6**  
Breeding ewe population: Victoria



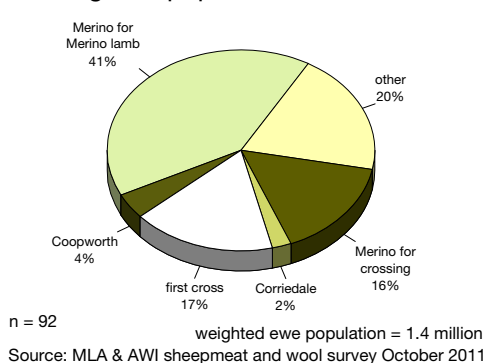
**Figure 7**  
Breeding ewe population: SA



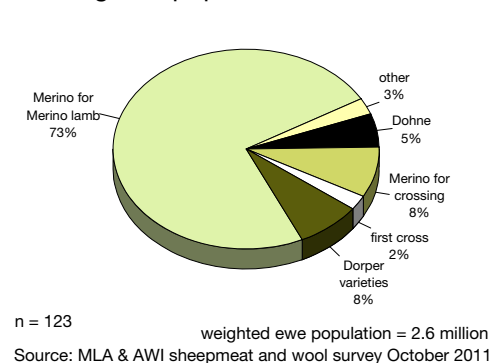
**Figure 8**  
Breeding ewe population: WA



**Figure 9**  
Breeding ewe population: Tasmania



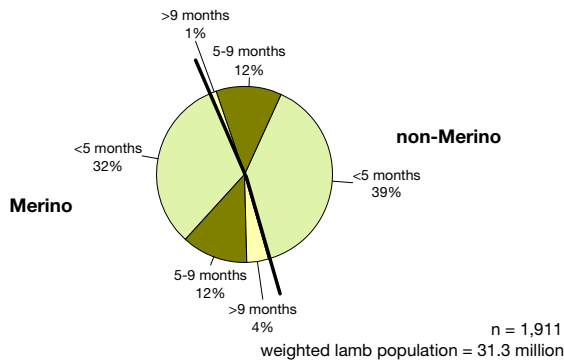
**Figure 10**  
Breeding ewe population: Queensland



2. Lamb counts – on hand at 31 October 2011; and  
3. Expected lamb sales – November 2011 to February 2012

Figure 11

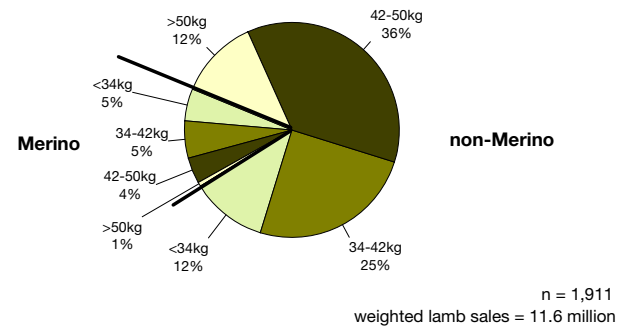
Lambs on hand at 31 October 2011: Australia



Source: MLA & AWI sheepmeat and wool survey October 2011

Figure 12

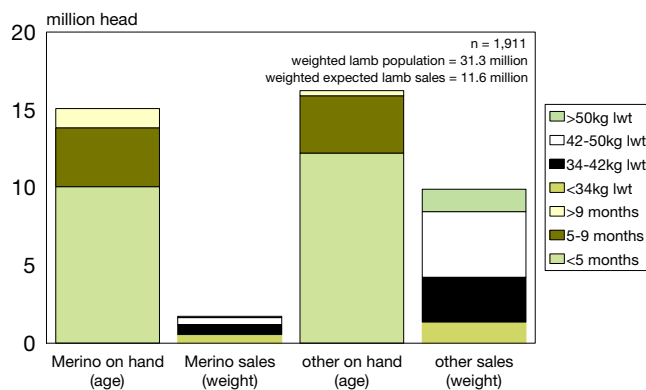
Expected lamb sales November 2011-February 2012: Australia



Source: MLA & AWI sheepmeat and wool survey October 2011

Figure 13

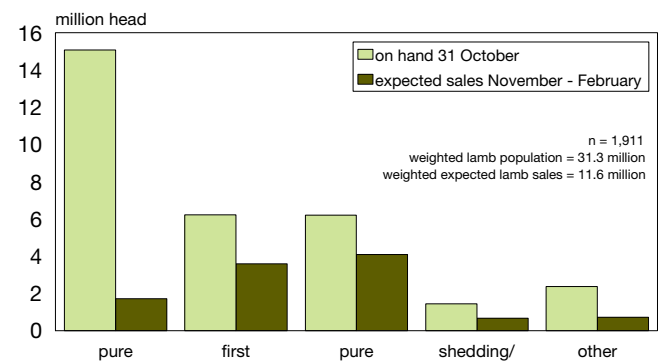
Lambs on hand and expected sales: Australia



Source: MLA & AWI sheepmeat and wool survey October 2011

Figure 14

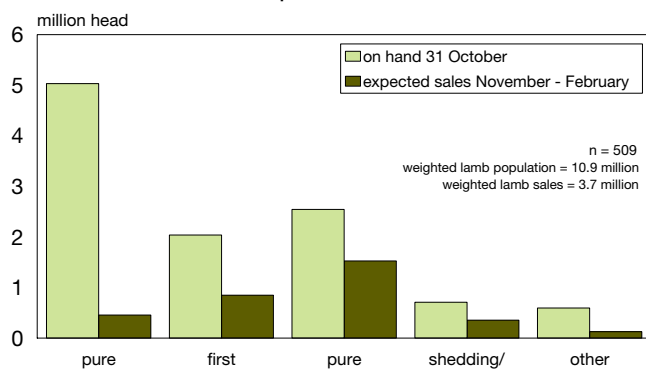
Lambs on hand and expected sales: Australia



Source: MLA & AWI sheepmeat and wool survey October 2011

Figure 15

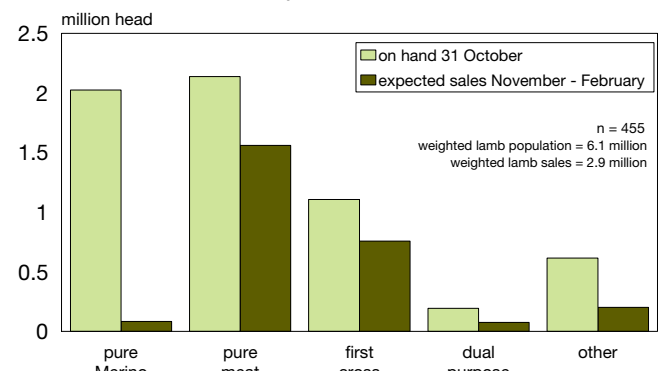
Lambs on hand and expected sales: NSW



Source: MLA & AWI sheepmeat and wool survey October 2011

Figure 16

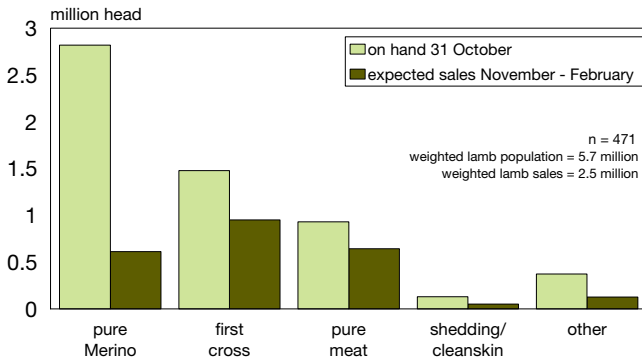
Lambs on hand and expected sales: Victoria



Source: MLA & AWI sheepmeat and wool survey October 2011

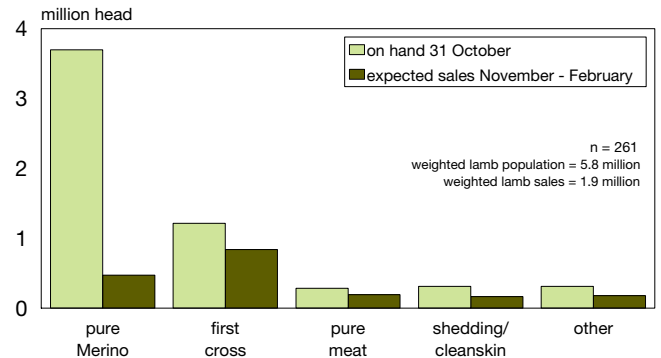
2. Lamb counts – on hand at 31 October 2011; and  
 3. Expected lamb sales – November 2011 to February 2012 – continued...

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



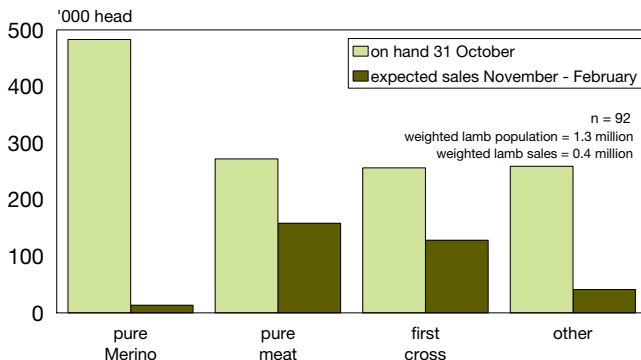
Source: MLA & AWI sheepmeat and wool survey October 2011

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



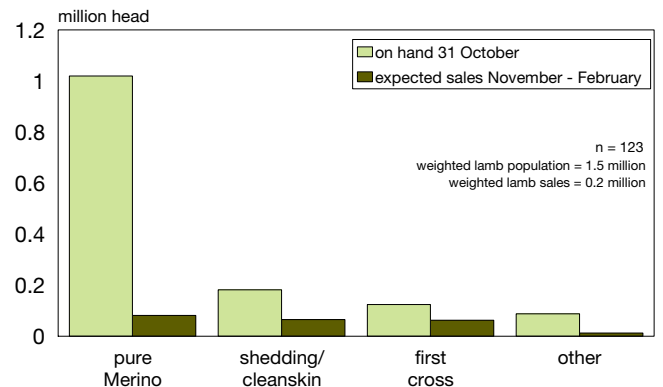
Source: MLA & AWI sheepmeat and wool survey October 2011

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



Source: MLA & AWI sheepmeat and wool survey October 2011

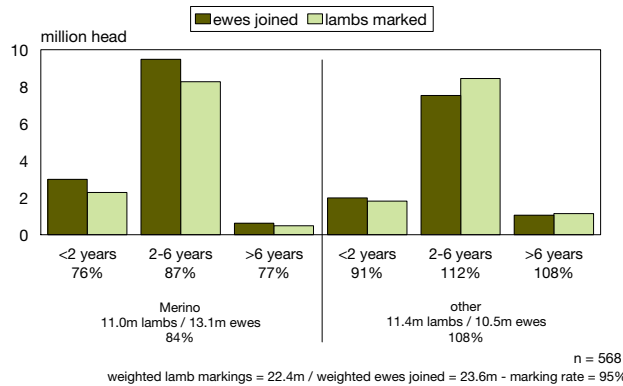
**Figure 20**  
 Lambs on hand and expected sales: Queensland



Source: MLA & AWI sheepmeat and wool survey October 2011

4. Ewes joined and lambs marked – July to October 2011

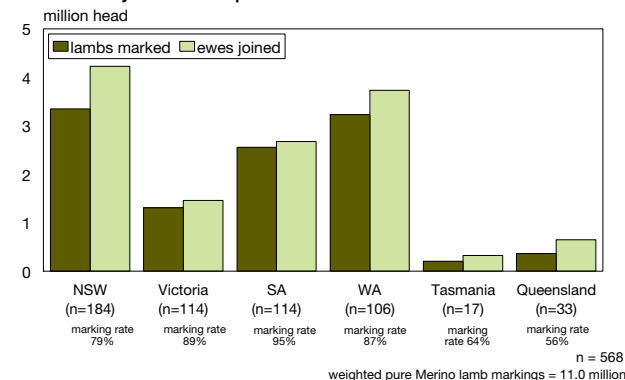
**Figure 21**  
 Lambs marked July - October 2011  
 and ewes joined to produce these lambs: Australia



Source: MLA & AWI sheepmeat and wool survey October 2011

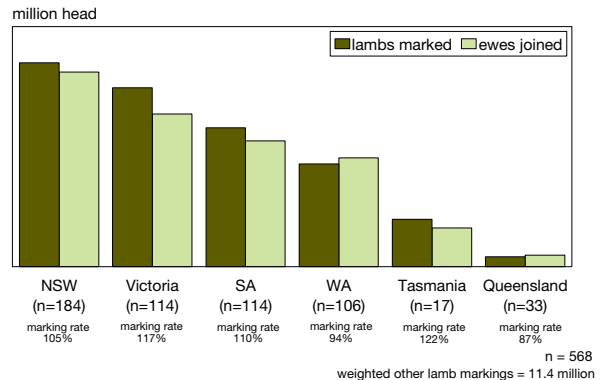
4. Ewes joined and lambs marked – July to October 2011 – continued...

**Figure 22**  
Pure Merino lambs marked July - October 2011 and ewes joined to produce these lambs



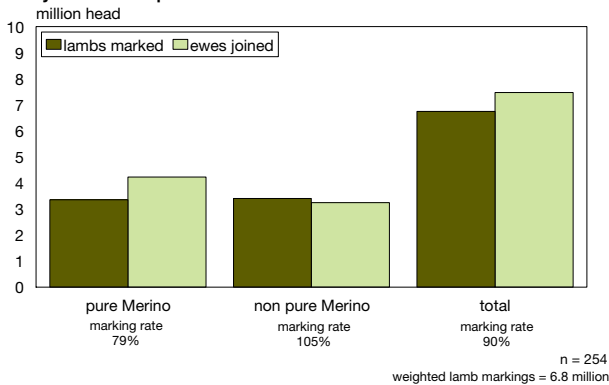
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 23**  
Other lambs marked July - October 2011 and ewes joined to produce these lambs



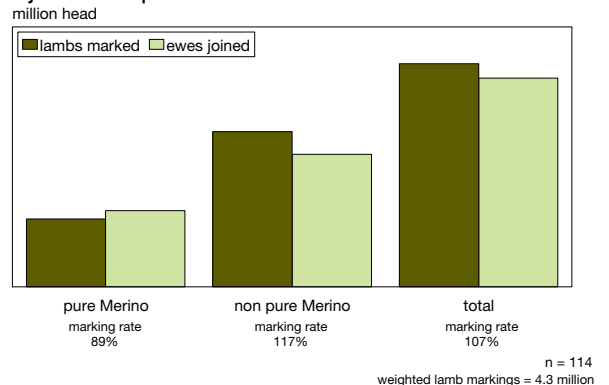
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 24**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: NSW



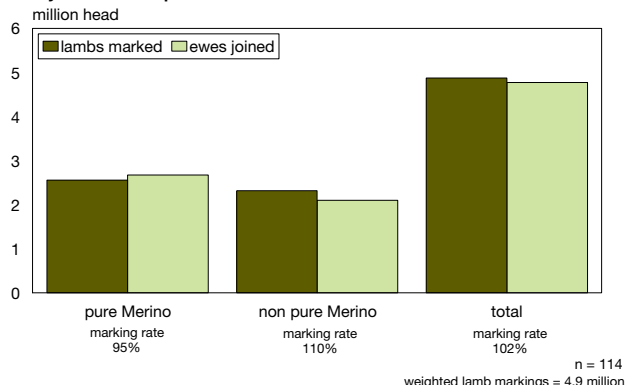
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 25**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: Victoria



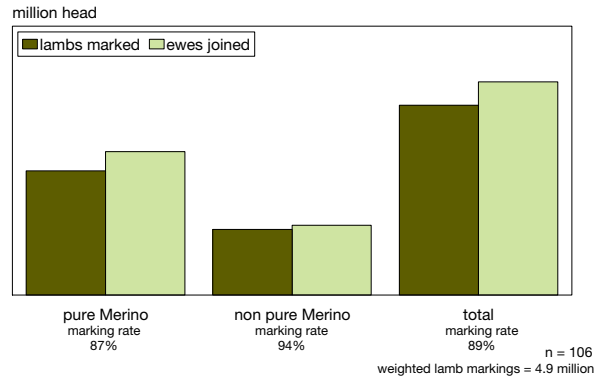
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 26**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: SA



Source: MLA & AWI sheepmeat and wool survey October 2011

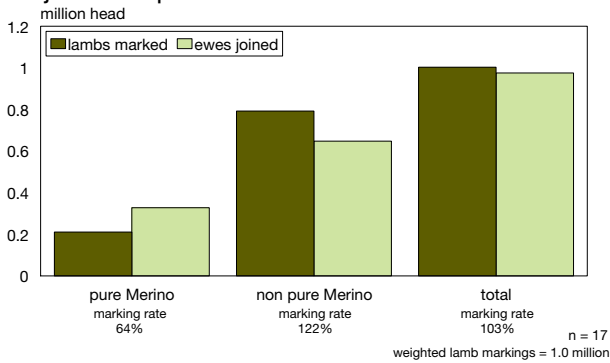
**Figure 27**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: WA



Source: MLA & AWI sheepmeat and wool survey October 2011

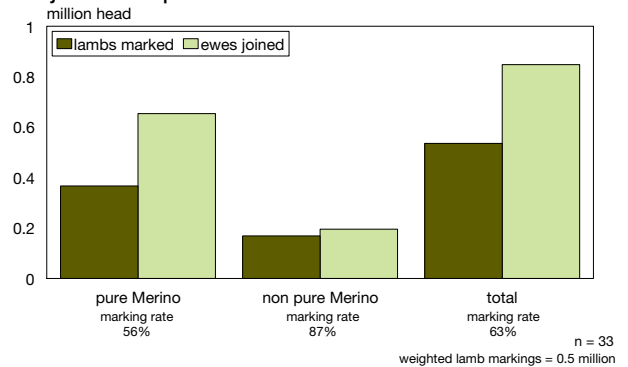
4. Ewes joined and lambs marked – July to October 2011 – continued...

**Figure 28**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: Tasmania



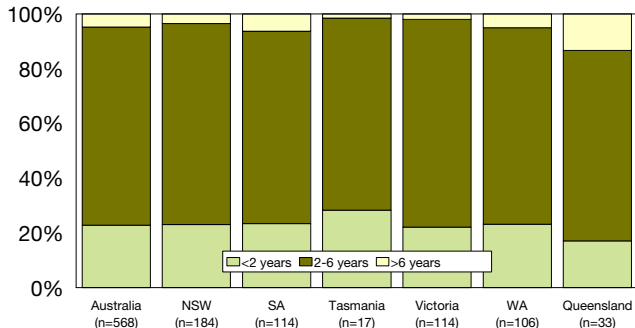
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 29**  
Lambs marked July - October 2011 and ewes joined to produce these lambs: Queensland



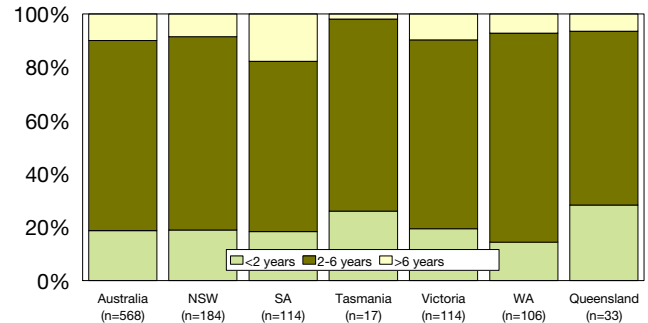
Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 30**  
Age of Merino ewes joined for markings July - October



Source: MLA & AWI sheepmeat and wool survey October 2011

**Figure 31**  
Age of other ewes joined for markings July - October



Source: MLA & AWI sheepmeat and wool survey October 2011

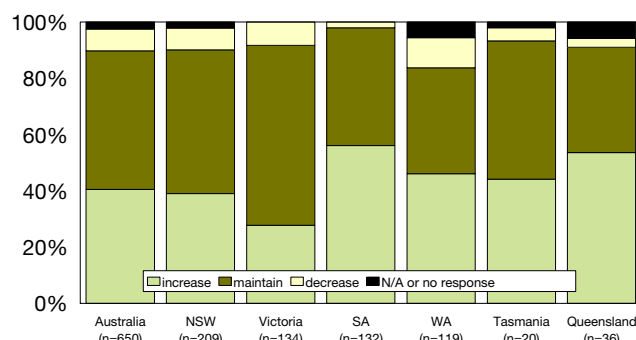
**Flock intention questions**

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 2012: state

State	Increase ewe flock size	Maintain ewe flock size	Decrease ewe flock size	N/A or no response
NSW (n=209)	39%	51%	8%	2%
Vic (n=134)	46%	38%	11%	6%
SA (n=132)	28%	64%	8%	0%
WA (n=119)	44%	49%	5%	2%
Tas (n=20)	56%	42%	2%	0%
Qld (n=36)	54%	37%	3%	6%
National (n=650)	41%	49%	8%	3%

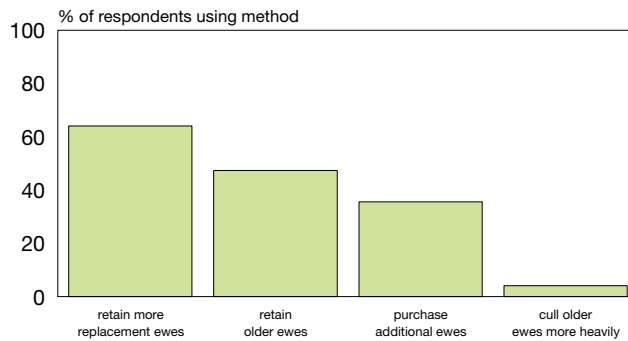
**Figure 32**  
Ewe flock size intentions for 2012



Source: MLA & AWI sheepmeat and wool survey October 2011

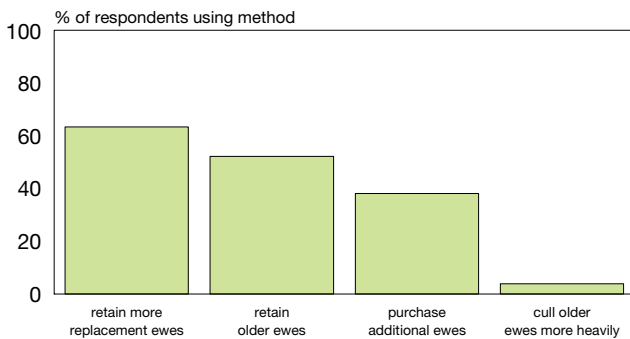
1b. How do you intend to increase your breeding ewe flock in 2012?

**Figure 33**  
How will increase be achieved - Australia



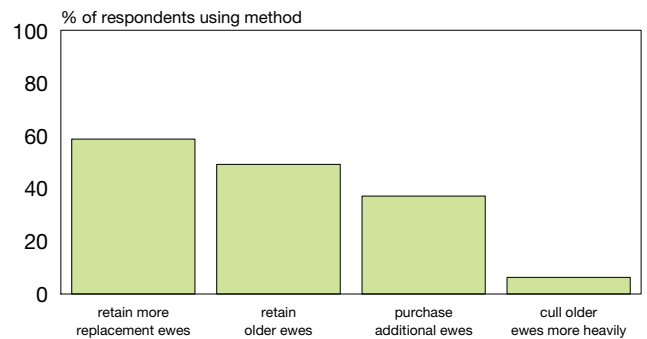
Source: MLA & AWI sheepmeat and wool survey October 2011 n = 272

**Figure 34**  
How will increase be achieved - NSW



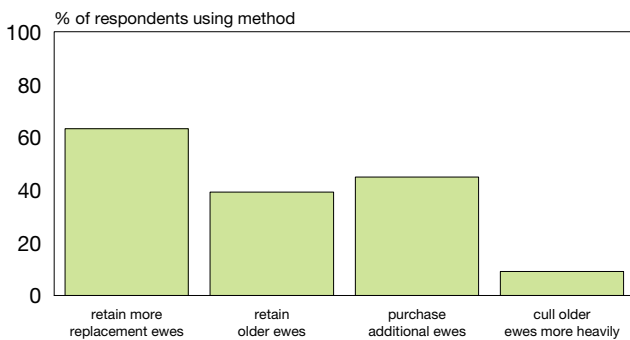
Source: MLA & AWI sheepmeat and wool survey October 2011 n = 88

**Figure 35**  
How will increase be achieved - Victoria



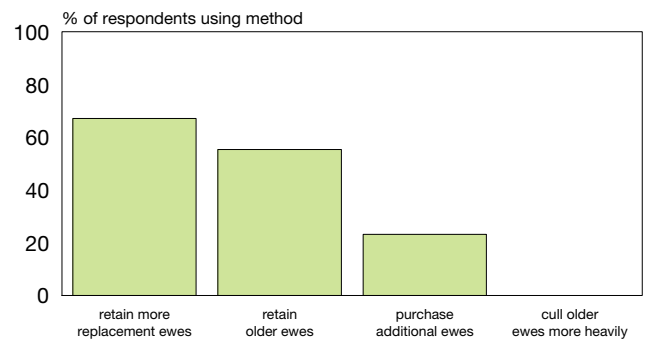
Source: MLA & AWI sheepmeat and wool survey October 2011 n = 62

**Figure 36**  
How will increase be achieved - SA



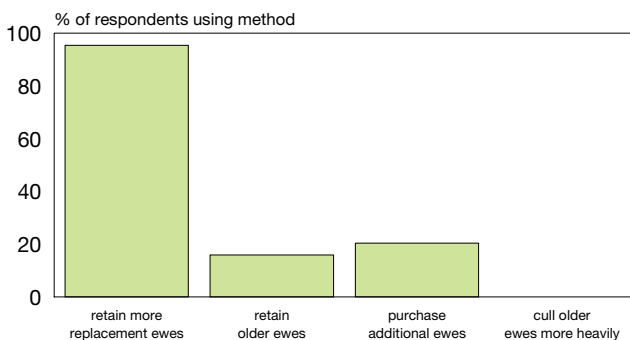
Source: MLA & AWI sheepmeat and wool survey October 2011 n = 40

**Figure 37**  
How will increase be achieved - WA



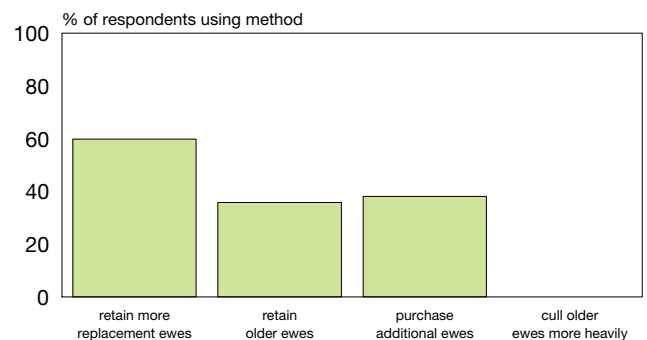
Source: MLA & AWI sheepmeat and wool survey October 2011 n = 54

**Figure 38**  
How will increase be achieved - Tasmania



Source: MLA & AWI sheepmeat and wool survey October 2011 n = 8

**Figure 39**  
How will increase be achieved - Queensland



Source: MLA & AWI sheepmeat and wool survey October 2011 n = 20

## 2. Do you intend to increase, maintain or decrease the size of your wether flock in 2012?

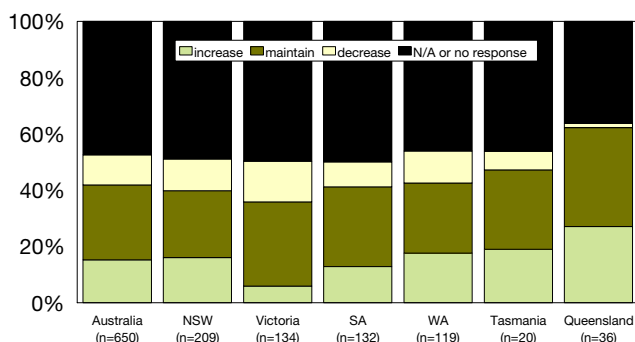
**Table 4**

Intentions to increase, decrease or maintain wether flock size in 2012: state

State	Increase wether flock size	Maintain wether flock size	Decrease wether flock size	N/A or no response
NSW (n=209)	16%	24%	11%	49%
Vic (n=134)	18%	25%	11%	46%
SA (n=132)	6%	30%	14%	50%
WA (n=119)	19%	28%	7%	46%
Tas (n=20)	13%	28%	9%	50%
Qld (n=36)	27%	35%	2%	36%
<b>National (n=650)</b>	<b>15%</b>	<b>27%</b>	<b>11%</b>	<b>47%</b>

**Figure 40**

Wether flock size intentions for 2012



Source: MLA & AWI sheepmeat and wool survey October 2011

## 3. Do you intend to increase, maintain or decrease slaughter lamb turnoff in 2012?

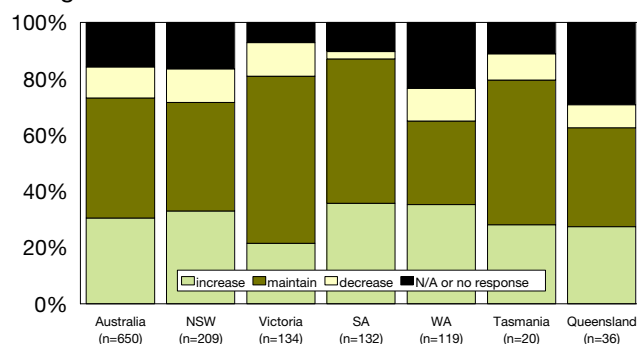
**Table 5**

Slaughter lamb turnoff intentions: State

State	Increase	Maintain	Decrease	N/A or no response
NSW (n=209)	33%	39%	12%	17%
Vic (n=134)	35%	30%	12%	23%
SA (n=132)	22%	59%	12%	7%
WA (n=119)	28%	52%	9%	11%
Tas (n=20)	36%	51%	3%	10%
Qld (n=36)	28%	35%	8%	29%
<b>National (n=650)</b>	<b>31%</b>	<b>43%</b>	<b>11%</b>	<b>16%</b>

**Figure 41**

Slaughter lamb turnoff intentions for 2012



Source: MLA & AWI sheepmeat and wool survey October 2011

## Producing, buying or selling livestock?

**Stay on top of the latest livestock & red meat market news, analysis & forecasts in Australia & around the world!**

Read MLA's publications for the latest news and statistics – Meat & Livestock Weekly, Cattle & Sheep Industry projections, Red Meat Market Reports, and many more.



77% use MLA Market Information to stay informed  
56% use it to help make buying/selling decisions  
96% find it valuable to their business  
97% rate it as accurate and timely

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

**Get up-to-the-minute information on MLA's website [www.mla.com.au](http://www.mla.com.au)**

- daily red meat market news
- daily & weekly livestock market reports & analysis from the National Livestock Reporting Service
- on-line access to one of the best red meat databases in the world & to ABARE farm data
- overseas market information & detailed export data.

Talk with MLA's specialised market analysts

**Can you afford not to be informed?**

More information

Phone: 02 9463 9163

Email: [marketinfo@mla.com.au](mailto:marketinfo@mla.com.au)

Web: [www.mla.com.au](http://www.mla.com.au)

ISSN 1837-4492

Free to MLA members

For further information

please call toll free 1800 023 100 or 02 9463 9163 or fax 02 9954 0752

Also available on [www.mla.com.au](http://www.mla.com.au)

© Meat & Livestock Australia, 2011. ABN 39 081 678 364.

MLA makes no representations as to the accuracy of any information or advice contained in *Supply brief* and excludes all liability, whether in contract, tort (including negligence or breach of statutory duty) or otherwise as a result of reliance by any person on such information or advice.

