Sheep Producers Intentions Survey

OCTOBER 2022

MEAT & LIVESTOCK AUSTRALIA

Australian Wool Innovation Limited

November 2022

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About the research

The survey, undertaken by MLA and AWI, is used to help industry determine wool and lamb production forecasts and to understand the breed composition of the Australian flock on a national, state and regional basis. It is used by processors for budgeting purposes and allows import markets to ascertain short-term supply estimates.

The research has three primary objectives, namely to:

- ✓ Measure and report on flock population, demographics, sheepmeat and wool supply information and producer production intentions.
- ✓ Ensure estimates are reliable and based on sufficiently large sample sizes to ensure the robustness and accuracy of estimates. The sample should be representative or weighted to be representative of the producer population structure.
- ✓ Provide capacity to explore and investigate results at a smaller area and segment level. This will include – among other things – across states and MLA reporting regions.

The following report provides an overview of results for the OCTOBER 2022 survey.

The October 2022 survey

Feedback was sought from producers over the period 29th September – 24th October 2022. Producers were initially invited to complete an online survey with the final sample complemented with a smaller number of phone interviews.

A total of 1,963 producers from across Australia respond to the survey invitation. The feedback was then weighted, using the latest available ABS data, to produce industry estimates.

A full breakdown of the sample make up, plus a description of the ABS data used and the weighting approach is included as an attachment to this report.

Please note that the October 2022 survey was a significant departure from previous surveys in terms of design and questions asked. Care should be taken in comparing the results from this survey to previous surveys.

An overview of the research design

Three separate but integrated surveys will be conducted across the calendar year. Each survey will have a specific focus and purpose and provide the required flock and producer intention estimates required.

October	February	May
FULL SURVEY Provides an estimate of the total flock size, a profile of the lamb flock and measures of producer intentions for lambs and breeding ewes	*PULSE SURVEY* Provides a quick update on produces' actual lamb sales to date and forecasts for future sales.	*FULL SURVEY* Provides an estimate of the total flock size, a profile of the breeding ewes flock and measures of producer intentions for lambs and breeding ewes

More detail on the research design is included in the Attachments to this report.

State of play: an overview of the industry analysis

State of play…

The wool and sheepmeat sectors operate in highly dynamic markets. There is also clear evidence of significant pressures on producers including increasing on-farm costs (input costs), challenges around workforce shortages as well as supply chain and market pressures (domestic and global).

The FMD incidents, while not directly impacting wool or sheepmeat, has had reverberations across the sectors.

The content opposite provides a brief overview of the wool and sheep meat sectors by the agribusiness units within Rabobank and ANZ Agribusiness.

The discussion provides a useful context for interpreting the results in the October 2022 Sheep Producers Intentions Survey.

RABOBANK Commentary

- ✓ Sheepmeat: Stability appears to have returned to the lamb market as new-season lambs start to dominate sales. But with a weaker US market, prices will not be as strong as last year. However export returns will receive a boost from a lower AUD.
- ✓ Wool: Downside risk in prices is elevated. Rabobank expects wool prices to continue to soften in the coming months on the back of softening consumer demand and increased domestic production of wool.

ANZ Agribusiness Commentary:

- ✓ Lamb prices have continued to decline over the past two months with the benchmark Eastern States Trade lamb Indicator (ESTLI) down 20 per cent through the month of July, before bouncing back strongly in early August.
- ✓ Prices hit their lowest since 2020, when post drought restocking and strong exports fueled demand.
- ✓ Exports to China remain subdued however total lamb exports are up 5 per cent on 2021, supported by strong growth in the US market.
- ✓ Ongoing export demand is predicted to remain strong, supporting the likelihood of price recovery through the second half of the year.
- ✓ Wool prices remain down on 2021 levels and large volumes hit the market prior to the annual recess, dampening any potential price rises.
- ✓ Australian wool production is tipped to grow to its highest level in five years in 2022/2023.

1. Rabobank. Australia Agribusiness Monthly – October 2022. Source: Rabo Agri Knowledge Hub (rabobank.com.au)
2. ANZ Agribusiness: Sheep and Wool Insights – August 2022. Source: ANZ Agri In Focus, August 2022

observations and insights

Sheep Producers Intentions Survey

October 2022

We spoke to 1,963 producers about their industry sentiment and the profile and intentions for their lamb flock...

Sentiment

Nett Sentiment
(% positive - % negative)

+12
Wool industry

+67
Sheepmeat industry

Producers are most likely to expect the following changes...

Increase to input costs

No change to wool prices

No change to lamb prices

65% Believe it will become more difficult to access skilled labour in their local region over the next 12 months

Lamb Flock Profile

26.78 million Estimate of total lambs after lambing but before sales (37% of total flock size)

Dominant breeds on hand in the total lamb flock estimate:

40%	35%	15%
Merino	Prime lamb	First cross

Actual sales already made this spring	Expected sales to be made in the remaining spring flush (up to 31 December 2022)	Expected sales of lambs in the first half of 2023 (January to June)
13%	41%	46%

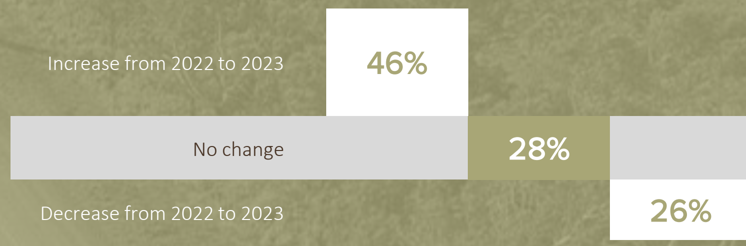
Lamb Flock Intentions

26.78 million
Reported lamb flock size for 2022

28.49 million
Forecast lamb flock size for 2023

+ 6% Forecasted change in total lamb flock

The estimates above indicate the forecast change in lamb flock numbers. Producer-level intentions for increases, decreases or maintaining flock levels (ignoring the size of the flock) were:



Producers who forecast an increase in their lamb flock report three major factors influencing their plans for the next 12 months:

60%	47%	29%
Looking to expand our sheep operations	Expect good conditions over the next 12 months	Looking to increase our revenues and profits

Observations and insights

While the purpose of the research did not include the presentation of an interpretation of the survey results, we provide some initial observations and insights in the following discussion.

Producer sentiment

The results indicate that producers are cautiously optimistic about the future of the wool sector (nett sentiment: +12). Given the pressures described earlier, it was not surprising to see a muted outlook for the wool sector.

What is clear from the analysis is that only the very small businesses have some degree of optimism, with all other producers reporting a much more conservative outlook for wool. There is some variation across states, but this appears to be a result of having more (or fewer) very small businesses.

In contrast, producers appear much more buoyant about the future of the sheepmeat sector (nett sentiment: +67). This view is largely consistent across states and business sizes.

Producers reported a mixed response on future wool and lamb prices. The mixed responses reflect a level of uncertainty across the sector.

In contrast, there was a consensus view that input costs would inevitably rise over the upcoming 12 months. This, together with an expectation that accessing labor would be more difficult, is likely shaping producers' overall outlook and their decisions on-farm.

A profile of the lamb flock

The October 2022 survey had a specific focus on understanding the profile of Australia's lamb flocks. Of the estimated 26M+ lambs on hand:

- Merinos (40% of total lamb flock) and prime lambs (35%) are the dominant breed types on hand (accounting for 75% of the total lamb flock). We note that there are a similar proportion of producers holding prime lambs as there are holding Merinos (estimated at 39%), but obviously hold more Merino numbers.

- The breed mix varies across farm businesses with different flock size with the larger farms having a greater proportion of Merinos in their flock. Producers in QLD and WA also have a larger proportion of Merinos, with Victoria reporting the lowest proportion.

- The survey has estimated that

    - An estimated 54% of the lambs to be sold are forecast to be sold in the 2022 calendar year, with an estimate 13% of this forecast volume already sold.

    - Producers have reported most of these lambs scheduled to be sold in 2022 will be sold through saleyard auctions (58%) and over the hooks (23%). Not surprisingly, smaller producers are more likely to use just a single sales channel with the larger producers using more than one. For the larger producers, forward contracts and online auctions are used more often than other segments.

- Based on the feedback provided by producers, it is estimated that approximately 89% of Merino lambs had been marked up to the time of the October 2022 survey.

Observations and insights

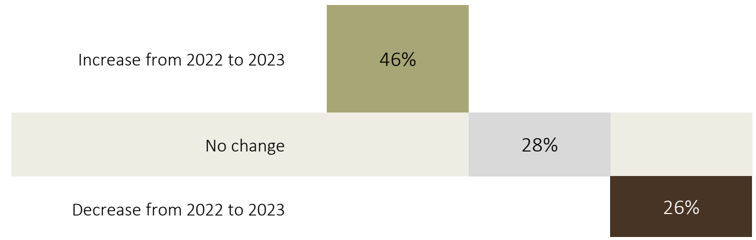
Producer intentions – lamb flock

Analysis of the feedback provided shows that:

- At the producer level (that is considering each producer equal), there is a net intention to increase their lamb flocks in the next 12 months:

  - 46% indicating they would increase their lamb flock size;
  - 28% indicating it would remain unchanged; and
  - 26% indicating they would decrease their lamb flock size.

  The growth posture was stronger among producers in QLD and NSW, although we do note QLD represents a small proportion of the overall national flock. The very large producers (10K+ sheep) are less likely to be forecasting a reduction in their flock – they overwhelmingly reported a “no change” or “increase” posture.



- Analysis of the reported change in the number of lambs suggests a forecast increase of approximately 1.7M lambs over the estimated 2022 flock size, an increase of 6% on the 2022 estimates. This result highlights the importance of considering the reported changes in flock size rather than just producers’ disposition to change.

  Details on the forecast change estimate – showing the impact from producers who have reported an increase as well as producers who were forecasting a decrease in their lamb flock – is shown opposite.

  Consistent with the result above, QLD producers are reporting a strong uplift in lamb flock numbers in the next 12 months, although we would note that QLD will remain a small contributor to the overall national flock. NSW producers are reporting a forecast uplift of around 9% on the estimated 2022 lamb flock numbers, an intention somewhat higher than producers from other states.

  The very small producers (less than 1,000 sheep) are the cohorts reporting the strongest uplift forecasts, but again they represent only a small proportion of the overall national flock.

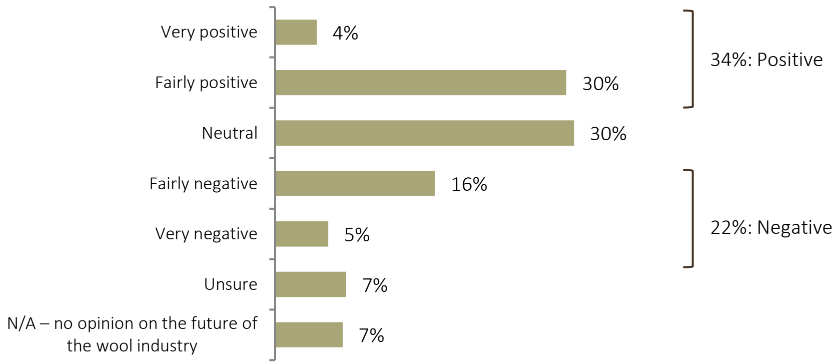
	2023 LAMB FLOCK FORECAST
Total reported flock size for 2022:	26,775,446
Total expected flock size for 2023:	28,493,226
Difference of:	+ 1,717,780
% forecast change on 2022:	+ 6%

The detailed results from the October 2022 Sheep Producers Intentions Survey now follow.

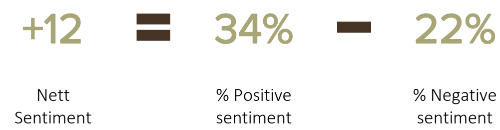
producer sentiment

Sentiment: outlook for the wool sector

Q1. Firstly, how do you feel about the future of the wool industry over the next 12 months? Would you say you feel…?
Base: All respondents, n = 1,963



Nett Sentiment
(scale of -100 to +100)



	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Nett Sentiment	+14	+38	+11	-3	+11	+6	+23	+7	+3	0	+1	0	-5	+1

The comparative Rabobank measure. . . . .

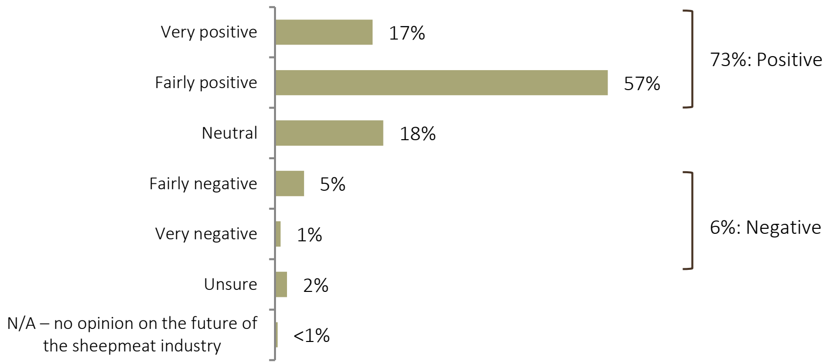
'And although close to half the sheep producers surveyed, which includes lamb and wool producers, expect conditions to stay the same over the year ahead, optimism has certainly dipped – just 12 per cent are optimistic of better circumstances next year.

Concerns about FMD and an expectation of further rising input costs were drivers of negative sentiment in the sheep industry. Considerable processor constraints, especially in southern NSW, Victoria and South Australia, were adding to anxiety about what the coming months might look like for the sector.'

Rabobank Rural Confidence Survey, September Quarter, 2022

Sentiment: outlook for the sheepmeat sector

Q2. And how do you feel about the future of the sheepmeat industry over the next 12 months? Would you say you feel…?
Base: All respondents, n = 1,963



Nett Sentiment
(scale of -100 to +100)

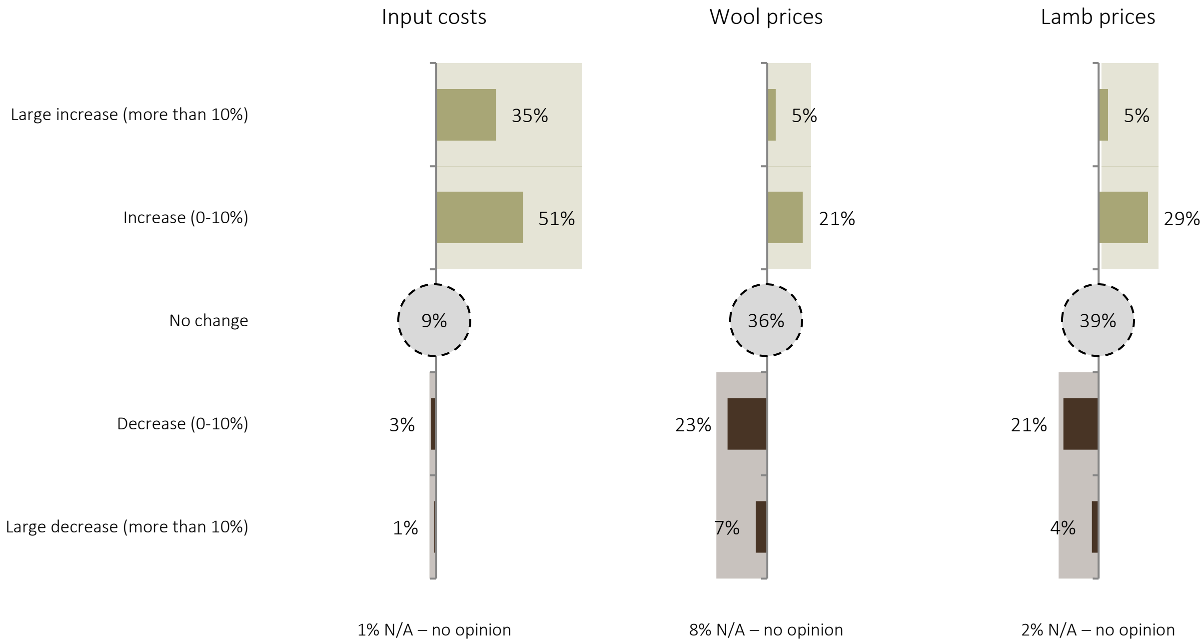
+67 = 73% − 6%

Nett Sentiment = % Positive sentiment − % Negative sentiment

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Nett Sentiment	+68	+75	+69	+60	+77	+42	+75	+59	+65	+58	+57	+60	+59	+75

Expected changes in costs and prices

Q3. In your opinion, what changes do you expect to occur across input costs, wool prices and lamb prices over the next 12 months?
Base: All respondents, n = 1,963



*There is a majority view that **input costs** are likely to **increase** over the next 12 months. This view is consistent across states and farm businesses of various flock sizes.*

*In contrast, there is a much more **mixed response** to wool and lamb prices.*

Producers provided different views on whether prices will increase, decrease or remain around the same level.

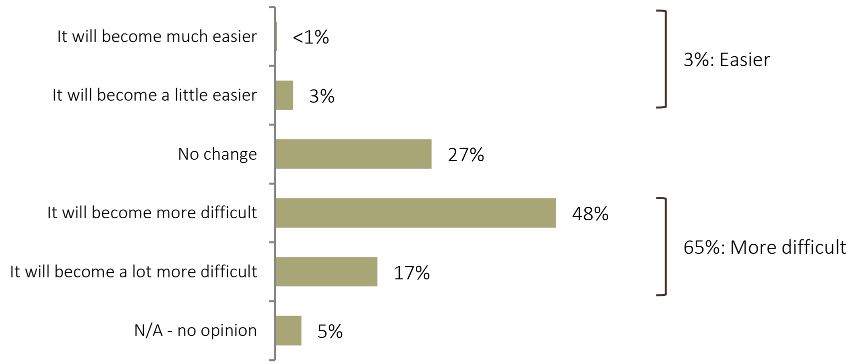
Expected changes in costs and prices

Q3. In your opinion, what changes do you expect to occur across input costs, wool prices and lamb prices over the next 12 months?
Base: All respondents, n = 1,963

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
INPUT COSTS														
Increase	88%	90%	89%	80%	83%	88%	83%	89%	88%	89%	90%	89%	94%	88%
No change	7%	10%	9%	17%	10%	8%	10%	7%	9%	6%	7%	6%	0%	6%
Decrease	4%	0%	2%	3%	5%	2%	4%	4%	3%	5%	2%	3%	6%	6%
WOOL PRICES														
Increase	25%	38%	19%	23%	28%	27%	27%	31%	24%	25%	23%	21%	24%	21%
No change	35%	34%	40%	50%	36%	29%	39%	30%	36%	33%	32%	33%	30%	23%
Decrease	30%	10%	35%	24%	30%	34%	20%	35%	36%	39%	42%	43%	42%	56%
LAMB PRICES														
Increase	32%	37%	28%	33%	40%	34%	40%	34%	28%	26%	30%	26%	28%	21%
No change	41%	47%	42%	49%	38%	26%	38%	36%	44%	42%	35%	40%	35%	44%
Decrease	24%	12%	28%	15%	21%	36%	18%	29%	27%	30%	35%	32%	36%	35%

Expected changes on accessing skilled labour

Q4. Over the next 12 months, how easy will it be to access skilled labour in your local region?
Base: All respondents, n = 1,963



*There is a majority view that **accessing skilled labour** is more than likely to get more difficult in the next 12 months.*

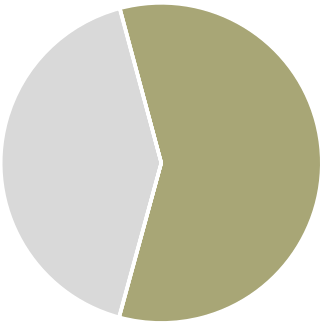
This will be important for all producers, but is likely to have a more significant impact on those focusing on wool production.

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
% more difficult + % a lot more difficult	66%	76%	70%	64%	67%	53%	64%	68%	68%	64%	66%	69%	62%	69%

lamb flock profiles

Estimates of the lamb and breeding ewe flock sizes

For the purposes of this research, the total flock estimates included estimates of breeding ewes on hand as at 30 September 2022 and lambs after lambing but before sales.



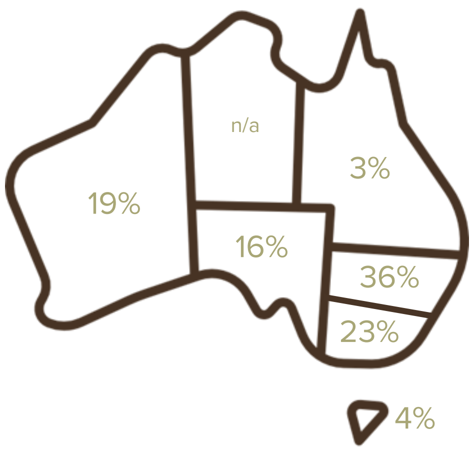
Q5-Q7. What were the total number of breeding ewes you had on hand at 30 September 2022 and lambs you had after lambing but before sales (not including ewe lambs and hoggets intended for breeding)?
Base: All respondents, n = 1,963

		% of producers with type
Breeding ewes (including ewe lambs and hoggets intended for breeding) on hand at 30 September 2022:	37,588,003	95%
Lambs after lambing but before sales (not including ewe lambs and hoggets intended for breeding):	26,775,446	89%

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
% of total flock size														
Breeding ewes	60%	67%	57%	64%	55%	58%	59%	57%	59%	58%	60%	58%	57%	58%
Lambs	40%	33%	43%	36%	45%	42%	41%	43%	41%	42%	40%	42%	43%	42%

Estimates of the lamb and breeding ewe flock sizes

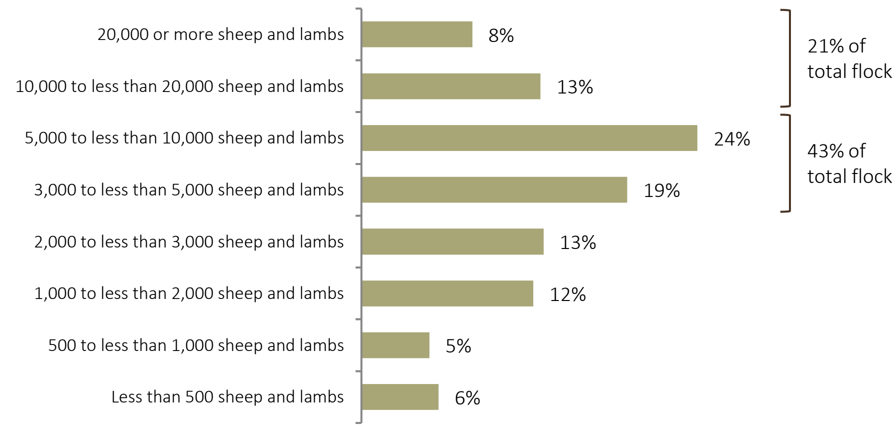
Proportion of total flock size across states



NSW and VIC account for an estimated 59% of the total flock size.

SA and WA account for 35% with QLD, TAS and the territories estimated to account for just a small proportion of the total national flock.

Proportion of total flock size across total flock size categories



While there are many smaller producers (for example 36% of producers have less than 3,000 sheep) it is the larger producers which have a greater proportion of the national sheep flock (64% of the total flocks held by producers with 3,000 or more sheep and 21% with producers who have 10,000 or more sheep).

It will inevitably be then the decisions made by these larger producer cohorts that will shape and influence national trends.

Lamb flock profiles

Q7. What were the total number of lambs you had after lambing but before sales (not including ewe lambs and hoggets intended for breeding)?

Lambs after lambing but before sales
(not including ewe lambs and hoggets intended for breeding): 26,775,446

% of total flock size: 37%

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Lamb flock size	9,200,649	583,294	4,518,671	840,680	6,476,439	5,154,612	1,405,906	1,300,536	3,225,927	3,573,933	4,989,611	6,526,556	3,606,595	2,146,380
% of total flock size	35%	25%	40%	31%	40%	38%	35%	37%	36%	38%	36%	38%	39%	37%

Lamb flock – breeds on hand

Q11 and Q12. Of these [Q7 ANSWER] lambs you mentioned earlier, please tell us which of the following types of lamb breeds you have across your properties (after lambing but before sales, not including ewe lambs and hoggets intended for breeding).
Base: All respondents with lambs, n = 1,832

Total lamb flock size reported: 26,775,446

		% of total lamb flock	% of producers with breed
Merino	10,716,915	40%	39%
Prime lamb	9,282,710	35%	39%
First cross	4,007,326	15%	24%
Dual purpose	1,235,764	5%	9%
Shedding	1,055,184	4%	15%
Other	477,548	2%	3%

Definitions of breeds presented to producers:

Merino	Main breed of sheep for wool production.
First cross	Merino crossed with a long-haired sheep of a different breed.
Shedding	Breeds of sheep that shed their wool without shearing e.g. Australian White or Dorper. Could also be referred to as hair sheep.
Prime lamb	Animal entirely focused on meat (lamb) production e.g. Composite, Terminal, Suffolk or Dorset.
Dual purpose	Animal with no more than 50% Merino content geared towards both meat and wool production equally.
Other	Any breeds that do not fit into the definitions above.

Lamb flock – breeds on hand

Q11 and Q12. Of these [Q7 ANSWER] lambs you mentioned earlier, please tell us which of the following types of lamb breeds you have across your properties (after lambing but before sales, not including ewe lambs and hoggets intended for breeding).
Base: All respondents with lambs, n = 1,832

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*626*	*61*	*316*	*64*	*444*	*318*	*290*	*183*	*308*	*268*	*318*	*293*	*121*	*51*
Total lamb flock size	9,200,649	583,294	4,518,671	840,680	6,476,439	5,154,612	1,405,906	1,300,536	3,225,927	3,573,933	4,989,611	6,526,556	3,606,595	2,146,380
% of total lamb flock														
Merino	40%	72%	44%	27%	21%	58%	19%	22%	34%	40%	44%	42%	44%	50%
Prime lamb	31%	7%	30%	53%	55%	21%	38%	42%	36%	38%	31%	36%	32%	31%
First cross	18%	6%	16%	15%	15%	10%	16%	24%	17%	12%	15%	15%	17%	5%
Dual purpose	4%	1%	6%	3%	4%	6%	9%	2%	8%	5%	6%	4%	3%	2%
Shedding	6%	14%	2%	1%	2%	4%	16%	8%	4%	4%	2%	1%	2%	10%
Other	2%	0%	2%	<1%	3%	1%	2%	1%	1%	1%	2%	2%	2%	2%

Lamb flock – lambs marked

Q13. Of these [Q7 ANSWER] lambs across each breed type, how many have been marked up to this point?
Base: All respondents with lambs, n = 1,832

Total lambs marked: 24,259,156

		% of lamb breed marked
Merino	9,573,386	89%
Prime lamb	8,645,225	93%
First cross	3,672,119	92%
Dual purpose	1,067,236	86%
Shedding	912,281	86%
Other	388,908	81%

Calculation of % of lamb breed marked (example: Merino):

Estimated total number of marked up breed: 9,573,386

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Estimate of total number of breed in flock: 10,716,915

=

% of lamb breed marked: 89%

Lamb flock – breeding ewes joined and marking rates

Q14. Of the [Q12 BREED ANSWER] lambs that have been marked to this point, how many breeding ewes were joined to produce these lambs?
Base: All respondents with lambs and breeding ewes joined to produce lambs, n = 1,700

Total breeding ewes joined to produce lambs: 24,505,909

		Marking rate
Merino	10,867,840	88%
Prime lamb	7,520,421	115%
First cross	3,616,369	102%
Dual purpose	1,178,392	91%
Shedding	947,522	96%
Other	375,365	104%

Calculation of marking rate (example: Merino):

Estimated total number of marked up breed: 9,573,386

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Estimate of total number of breeding ewes joined to produce these lambs: 10,867,840

=

Marking rate: 88%

Lamb flock – sales

Q15. Now we would like you to think about the lamb sales already made and those expected to be made. Could you please provide the number of lamb sales across the following time periods, both actual and expected:
Base: All respondents with lambs, n = 1,832

Total actual and expected sales

22,005,735

	Actual sales already made this spring	Expected sales to be made in the remaining spring flush and the period up to 31 December 2022	Expected sales of lambs in the first half of 2023 (January to June)
	2,926,017	8,914,707	10,165,011
% of total sales	13%	41%	46%

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*626*	*61*	*316*	*64*	*444*	*318*	*290*	*183*	*308*	*268*	*318*	*293*	*121*	*51*
Total actual and expected sales	7,654,154	474,757	3,968,824	757,880	5,317,775	3,832,198	1,393,534	1,221,607	2,924,998	3,087,322	3,744,496	5,291,321	2,717,914	1,624,542
% of total sales														
Actual sales already made	19%	22%	12%	4%	8%	11%	13%	14%	21%	13%	13%	11%	10%	14%
Expected sales to be made up to Dec-22	36%	24%	48%	15%	47%	39%	39%	46%	37%	36%	42%	40%	47%	40%
Expected sales from Jan-22 to Jun-22	45%	54%	40%	81%	45%	50%	48%	40%	42%	51%	45%	49%	44%	46%

Lamb flock – expected sales with 35 days of grain

Q16. Of the expected sales to be made in 2022, what proportion will have spent at least 35 days with grain as their primary food source (continual access to supplement grain, excluding trail feeding or grazing on stubble)?

Base: All respondents with lambs sold or expected to sell in 2022, n = 1,301

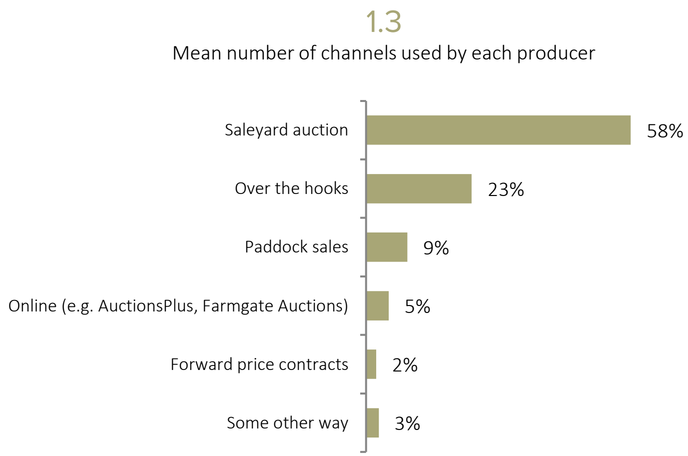
88%

Proportion of producers with 0% expected sales in 2022 with 35+ days with grain as primary food source

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*456*	*32*	*245*	*31*	*326*	*210*	*180*	*127*	*222*	*186*	*233*	*217*	*91*	*45*
Proportion of producers with 0% expected sales in 2022 with 35+ days with grain as primary food source	86%	99%	86%	95%	93%	83%	90%	89%	88%	87%	84%	85%	87%	96%

Lamb flock – sales channels

Q17. Of the expected sales to be made in 2022, what proportion will be made through the following sales channels?
Base: All respondents with lambs sold or expected to sell in 2022, n = 1,299 (n = 2 did not answer)



Producers responding to the October 2022 survey have indicated saleyard auctions and over the hook sales will be the two primary channels for lamb sales this year.

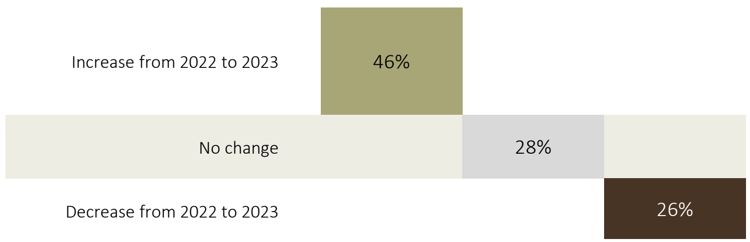
Smaller businesses are more likely to use a single sales channel with the larger producers likely to use more than a single channel.

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*456*	*32*	*245*	*31*	*324*	*210*	*180*	*126*	*222*	*185*	*233*	*217*	*91*	*45*
Mean number of channels used	1.2	1.2	1.3	1.3	1.2	1.3	1.1	1.2	1.3	1.3	1.5	1.6	1.6	1.6
Saleyard auction	73%	33%	37%	49%	69%	27%	71%	65%	56%	53%	35%	31%	18%	23%
Over the hooks	12%	23%	35%	30%	20%	42%	13%	22%	25%	30%	39%	37%	37%	34%
Paddock sales	4%	22%	16%	10%	4%	21%	9%	3%	8%	9%	12%	14%	19%	19%
Online	7%	10%	6%	10%	2%	1%	2%	4%	6%	4%	8%	13%	14%	9%
Forward price contracts	2%	1%	3%	1%	2%	2%	0%	3%	4%	2%	4%	4%	8%	12%
Some other way	1%	11%	3%	0%	2%	6%	5%	2%	1%	1%	2%	1%	4%	3%

producer intentions

Producer intentions over the next 12 months
Lamb flock

Q19. And how many lambs (as defined earlier) are you expecting to have at the same time next year, in 2023 (30 September 2023)?
Base: All respondents, n = 1,963



Producers provided an indication of their intention for their lamb flock over the next 12 months.

Among the producers responding to the October 2022 survey, almost one in two (46%) reported they would be increasing their flock, with 26% indicating some level of downsizing of their flock.

This provides a useful producer sentiment, with the following analysis exploring the impact of this stated intention on the forecast lamb flock sizes (remembering producers have different flock sizes).

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Increase from 2022 to 2023	52%	62%	41%	33%	44%	40%	48%	42%	45%	48%	43%	48%	54%	47%
No change	28%	27%	26%	39%	27%	27%	29%	28%	22%	25%	30%	30%	29%	38%
Decrease from 2022 to 2023	20%	10%	33%	28%	30%	33%	24%	29%	33%	27%	27%	22%	17%	15%

Lamb flock size intentions by producer outlook

	Of those who expect an increase in lambs	Of those who expect no change in lambs	Of those who expect a decrease in lambs
Q1. Firstly, how do you feel about the future of the wool industry over the next 12 months? Would you say you feel...?			
Base:	*909*	*541*	*513*
Nett Sentiment	+19	+18	-7
Q2. And how do you feel about the future of the sheepmeat industry over the next 12 months? Would you say you feel...?			
Base:	*909*	*541*	*513*
Nett Sentiment	+72	+65	+62
Input costs – Q3. In your opinion, what changes do you expect to occur across input costs, wool prices and lamb prices over the next 12 months?			
Base:	*909*	*541*	*513*
Increase	85%	88%	86%
No change	8%	10%	8%
Decrease	4%	2%	5%
Wool prices – Q3. In your opinion, what changes do you expect to occur across input costs, wool prices and lamb prices over the next 12 months?			
Base:	*909*	*541*	*513*
Increase	30%	21%	23%
No change	31%	41%	39%
Decrease	29%	28%	33%
Lamb prices – Q3. In your opinion, what changes do you expect to occur across input costs, wool prices and lamb prices over the next 12 months?			
Base:	*909*	*541*	*513*
Increase	40%	30%	30%
No change	35%	41%	43%
Decrease	23%	25%	27%
Q4. Over the next 12 months, how easy will it be to access skilled labour in your local region?			
Base:	*909*	*541*	*513*
Easier	5%	2%	3%
No change	28%	27%	23%
More difficult	62%	67%	69%

Perhaps not surprisingly, producers' stated intentions are correlated with their overall outlook for the sector.

Input costs are front of mind for most producers, but this does not appear to be a significant influence on their decisions about the lamb flock over the next 12 months.

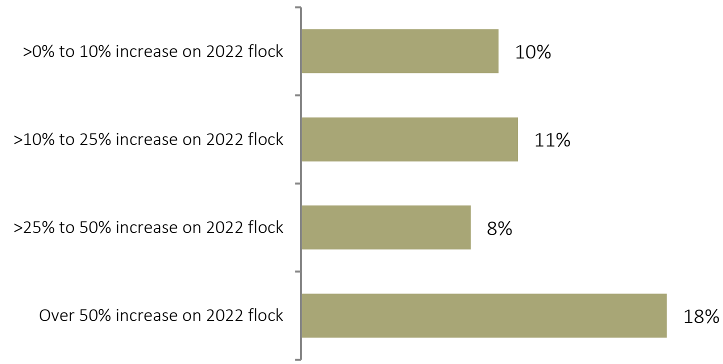
Producer forecasts for prices (for wool and sheepmeat) appear be different for those with a growth posture versus other producers.

While access to skilled labour is an important issue, the results don't indicate this to be a major obstacle to the plans for the lamb flock over the next 12 months.

How the forecast increase translates to lamb flock numbers

46% of producers reported they are likely to have MORE lambs next year

We asked these producers what they forecast the increase in lamb flock numbers would be…



Of those who forecast an **increase** in lambs…

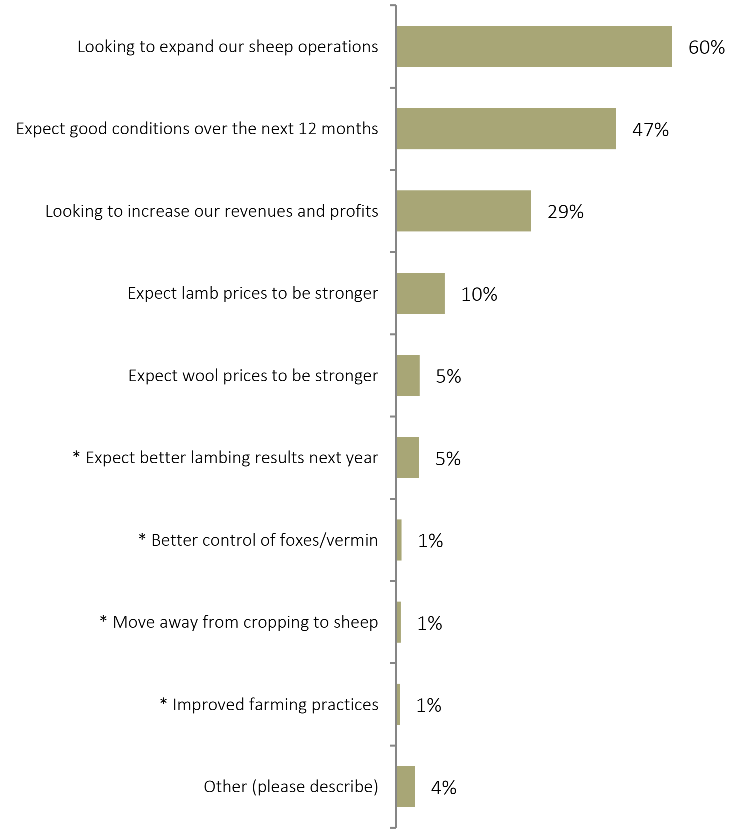
Total reported flock size for 2022:	12,285,858
Total forecast flock size for 2023:	16,201,719
Difference of:	+ 3,915,861

Factors influencing the expected increase in lambs in 2023

Q20. You've indicated that you are likely to have more lambs next year compared to this year. What factors are influencing your plans for the next 12 months?
Please select all the factors that are influencing your plans.
Base: All respondents who expect an increase in lamb flock size in 2023, n = 909

46% of producers reported they are likely to have MORE lambs next year

We asked these producers what factors were influencing their plans to increase the number of lambs…

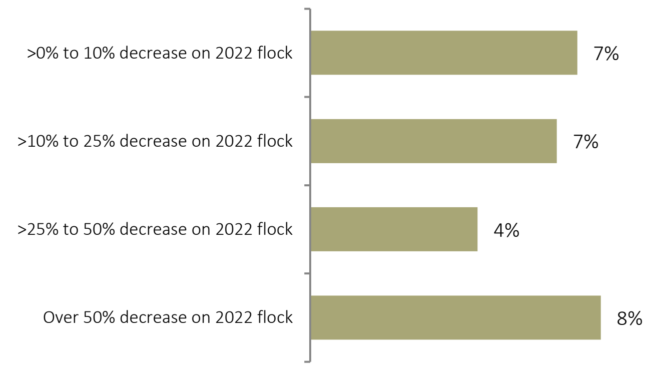


* Response has been coded from open-ended feedback via "Other (please describe)".

How the forecast decrease translates to lamb flock numbers

26% of producers reported they are likely to have FEWER lambs next year

We asked these producers what they forecast the decrease in lamb flock numbers would be…



Of those who forecast a **decrease** in lambs…

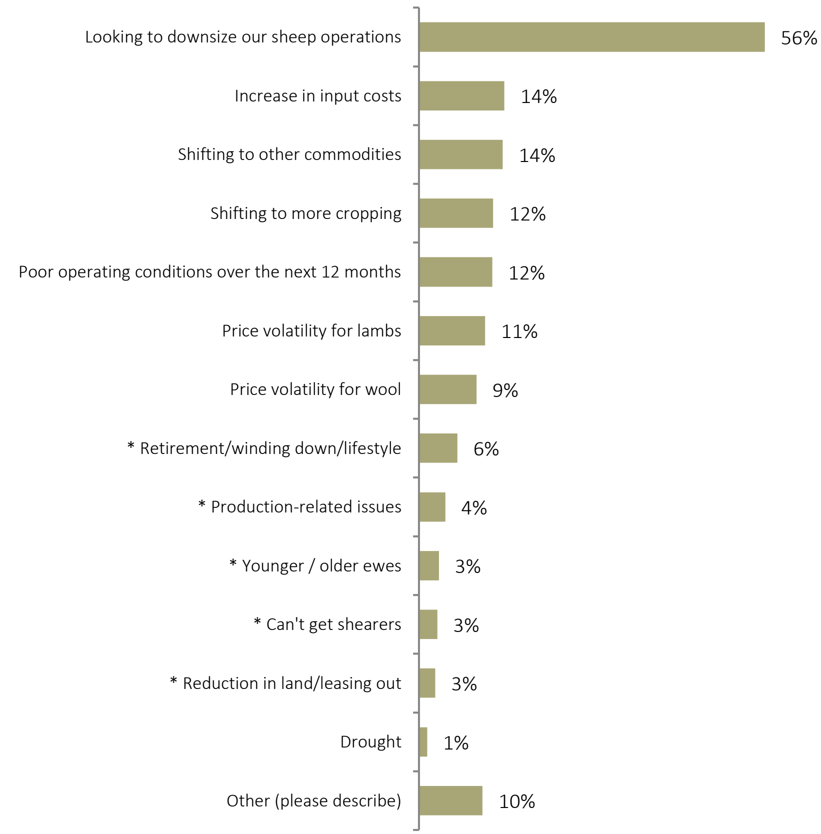
Total reported flock size for 2022:	7,316,896
Total forecast flock size for 2023:	5,118,815
Difference of:	- 2,198,081

Factors influencing the expected decrease in lambs in 2023

Q21. You've indicated that you are likely to have fewer lambs next year compared to this year. What factors are influencing your plans for the next 12 months?
Please select all the factors that are influencing your plans.
Base: All respondents who expect a decrease in lamb flock size in 2023, n = 513

26% of producers reported they are likely to have FEWER lambs next year

We asked these producers what factors were influencing their plans to decrease the number of lambs...



* Response has been coded from open-ended feedback via "Other (please describe)".

Lambs forecast for 2023

Taking into account the forecast size of the lamb flock for those producers who indicated they would be increasing their flock size as well as those producers who indicated they would decrease their flock size, an estimation of the forecast lamb flock for 2023 is shown below. . .

	2023 LAMB FLOCK FORECAST		Of those who expect an increase in lambs		Of those who expect no change in lambs		Of those who expect a decrease in lambs
Total reported flock size for 2022:	26,775,446	=	12,285,858	+	7,172,692	+	7,316,896
Total expected flock size for 2023:	28,493,226	=	16,201,719	+	7,172,692	+	5,118,815
Difference of:	+ 1,717,780	=	+ 3,915,861	+	0	+	- 2,198,081
% forecast change on 2022:	+ 6%						

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Total reported flock size for 2022:	9,200,649	583,294	4,518,671	840,680	6,476,439	5,154,612	1,405,906	1,300,536	3,225,927	3,573,933	4,989,611	6,526,556	3,606,595	2,146,380
Total expected flock size for 2023:	10,038,093	962,670	4,693,228	884,722	6,664,237	5,249,962	1,841,364	1,495,308	3,348,449	3,814,593	5,078,760	6,837,473	3,851,096	2,226,183
Difference of:	837,445	379,376	174,558	44,042	187,798	95,351	435,457	194,771	122,522	240,659	89,149	310,917	244,501	79,803
% forecast change on 2022:	9%	65%	4%	5%	3%	2%	31%	15%	4%	7%	2%	5%	7%	4%

* Response has been coded from open-ended feedback via “Other (please describe)”.

summary of results: state & flock size

Summary of results by state

	OVERALL	State NSW	QLD	SA	TAS	VIC	WA
Base:	*1,963*	*696*	*73*	*325*	*72*	*469*	*324*
SENTIMENT							
Nett sentiment – wool industry	+12	+14	+38	+11	-3	+11	+6
Nett sentiment – sheepmeat industry	+67	+68	+75	+69	+60	+77	+42
Producers most likely to expect change:							
Input costs	Increase	Increase	Increase	Increase	Increase	Increase	Increase
Wool prices	No change	No change	Increase	No change	No change	No change	Decrease
Lamb prices	No change	No change	No change	No change	No change	Increase	Decrease
% more difficult to access skilled labour	65%	66%	76%	70%	64%	67%	53%
LAMB FLOCK PROFILE							
Estimate of total lamb flock	26.78M	9.20M	0.58M	4.52M	0.84M	6.48M	5.15M
Dominant breeds on hand:							
Merino	40%	40%	72%	44%	27%	21%	58%
Prime lamb	35%	31%	7%	30%	53%	55%	21%
First cross	15%	18%	6%	16%	15%	15%	10%
Proportion of lamb sales:							
Actual sales already made this spring	13%	19%	22%	12%	4%	8%	11%
Expected sales – spring flush to 30 Dec	41%	36%	24%	48%	15%	47%	39%
Expected sales – Jan-Jun 2023	46%	45%	54%	40%	81%	45%	50%
LAMB FLOCK INTENTIONS							
Reported lamb flock size for 2022	26.78M	9.20M	0.58M	4.52M	0.84M	6.48M	5.15M
Forecast lamb flock size for 2023	28.49M	10.04M	0.96M	4.69M	0.88M	6.66M	5.25M
Forecasted change in total lamb flock	+ 6%	+ 9%	+ 65%	+ 4%	+ 5%	+ 3%	+ 2%
Producer-level intentions (ignoring size):							
Increase from 2022 to 2023	46%	52%	62%	41%	33%	44%	40%
No change	28%	28%	27%	26%	39%	27%	27%
Decrease from 2022 to 2023	26%	20%	10%	33%	28%	30%	33%
Major factors influencing increase in 2023:							
Looking to expand our sheep operation	60%	64%	68%	52%	47%	55%	59%
Expect good conditions next 12 months	47%	54%	60%	47%	40%	42%	29%
Looking to increase revenues/profits	29%	33%	31%	28%	7%	27%	26%

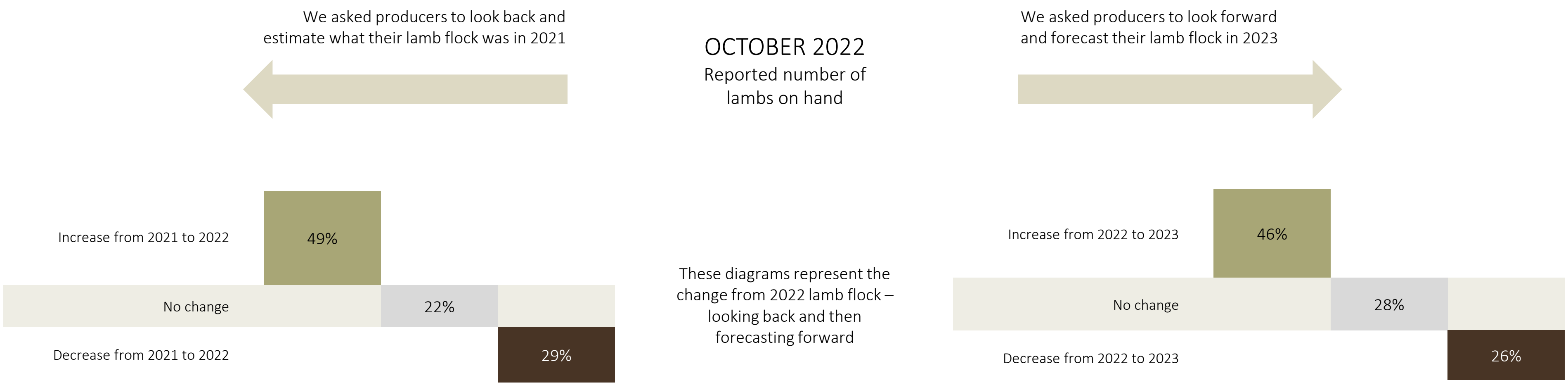
Summary of results by total flock size

		Total Flock Size (sheep and lambs)							
	OVERALL	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*1,963*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
SENTIMENT									
Nett sentiment – wool industry	+12	+23	+7	+3	0	+1	0	-5	+1
Nett sentiment – sheepmeat industry	+67	+75	+59	+65	+58	+57	+60	+59	+75
Producers most likely to expect change:									
Input costs	Increase	Increase	Increase	Increase	Increase	Increase	Increase	Increase	Increase
Wool prices	No change	No change	Decrease	Decrease	Decrease	Decrease	Decrease	Decrease	Decrease
Lamb prices	No change	Increase	No change	No change	No change	No change	No change	Decrease	No change
% more difficult to access skilled labour	65%	64%	68%	68%	64%	66%	69%	62%	69%
LAMB FLOCK PROFILE									
Estimate of total lamb flock	26.78M	1.41M	1.30M	3.23M	3.57M	4.99M	6.53M	3.61M	2.15M
Dominant breeds on hand:									
Merino	40%	19%	22%	34%	40%	44%	42%	44%	50%
Prime lamb	35%	38%	42%	36%	38%	31%	36%	32%	31%
First cross	15%	16%	24%	17%	12%	15%	15%	17%	5%
Proportion of lamb sales:									
Actual sales already made this spring	13%	13%	14%	21%	13%	13%	11%	10%	14%
Expected sales – spring flush to 30 Dec	41%	39%	46%	37%	36%	42%	40%	47%	40%
Expected sales – Jan-Jun 2023	46%	48%	40%	42%	51%	45%	49%	44%	46%
LAMB FLOCK INTENTIONS									
Reported lamb flock size for 2022	26.78M	1.41M	1.30M	3.23M	3.57M	4.99M	6.53M	3.61M	2.15M
Forecast lamb flock size for 2023	28.49M	1.84M	1.50M	3.35M	3.81M	5.08M	6.84M	3.85M	2.23M
Forecasted change in total lamb flock	+ 6%	+ 31%	+ 15%	+ 4%	+ 7%	+ 2%	+ 5%	+ 7%	+ 4%
Producer-level intentions (ignoring size):									
Increase from 2022 to 2023	46%	48%	42%	45%	48%	43%	48%	54%	47%
No change	28%	29%	28%	22%	25%	30%	30%	29%	38%
Decrease from 2022 to 2023	26%	24%	29%	33%	27%	27%	22%	17%	15%
Major factors influencing increase in 2023:									
Looking to expand our sheep operation	60%	61%	51%	62%	53%	63%	61%	72%	67%
Expect good conditions next 12 months	47%	43%	52%	55%	55%	52%	41%	52%	47%
Looking to increase revenues/profits	29%	24%	36%	27%	33%	38%	42%	33%	40%

additional analysis

Lamb flock size: a 3-year perspective

As part of the October 2022 Sheep Producers Intentions Survey, producers were asked to look back and estimate what their lamb flock was in 2021 as well as to look forward and forecast their lamb flock size for 2023. This then provided 3 points in time – the 2021 flock size, the current 2022 flock size and the forecast flock size for 2023. An analysis of this data is shown below.



Lamb flock size: a 3-year perspective

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*324*	*355*	*205*	*324*	*275*	*333*	*297*	*122*	*52*
Increase from 2022 to 2023	**52%**	**62%**	**41%**	**33%**	**44%**	**40%**	**48%**	**42%**	**45%**	**48%**	**43%**	**48%**	**54%**	**47%**
2021 -> Increase 2022 -> Increase 2023	27%	34%	20%	14%	21%	21%	22%	21%	25%	24%	27%	26%	34%	38%
2021 -> Same 2022 -> Increase 2023	6%	6%	5%	6%	3%	7%	5%	4%	4%	6%	6%	7%	6%	6%
2021 -> Decrease 2022 -> Increase 2023	19%	23%	16%	13%	20%	12%	20%	17%	16%	18%	10%	15%	14%	3%
No change	**28%**	**27%**	**26%**	**39%**	**27%**	**27%**	**29%**	**28%**	**22%**	**25%**	**30%**	**30%**	**29%**	**38%**
2021 -> Increase 2022 -> Same 2023	9%	9%	11%	9%	7%	12%	8%	9%	8%	11%	13%	15%	16%	14%
2021 -> Same 2022 -> Same 2023	14%	17%	10%	16%	15%	12%	15%	15%	10%	12%	14%	12%	14%	20%
2021 -> Decrease 2022 -> Same 2023	6%	1%	5%	13%	4%	3%	7%	5%	4%	2%	3%	3%	0%	3%
Decrease from 2022 to 2023	**20%**	**10%**	**33%**	**28%**	**30%**	**33%**	**24%**	**29%**	**33%**	**27%**	**27%**	**22%**	**17%**	**15%**
2021 -> Increase 2022 -> Decrease 2023	13%	9%	21%	18%	17%	24%	13%	21%	20%	18%	19%	18%	13%	14%
2021 -> Same 2022 -> Decrease 2023	2%	1%	5%	4%	4%	2%	4%	1%	3%	4%	4%	2%	2%	0%
2021 -> Decrease 2022 -> Decrease 2023	5%	<1%	8%	6%	9%	6%	6%	8%	10%	5%	5%	2%	2%	1%

Breeding ewe flock size: a 3-year perspective

As part of the October 2022 Sheep Producers Intentions Survey, producers were asked to look back and estimate what their breeding ewe flock was in 2021 as well as to look forward and forecast their breeding ewe flock size for 2023. This then provided 3 points in time – the 2021 flock size, the current 2022 flock size and the forecast flock size for 2023. An analysis of this data is shown below.

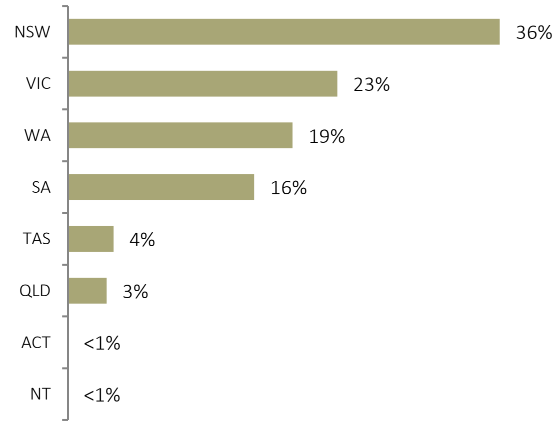
Breeding ewe flock size: a 3-year perspective

	State						Total Flock Size (sheep and lambs)							
	NSW	QLD	SA	TAS	VIC	WA	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
Base:	*696*	*73*	*325*	*72*	*469*	*323*	*355*	*205*	*324*	*275*	*333*	*297*	*121*	*52*
Increase from 2022 to 2023	**33%**	**36%**	**23%**	**19%**	**24%**	**26%**	**26%**	**26%**	**32%**	**26%**	**29%**	**33%**	**37%**	**42%**
2021 -> Increase 2022 -> Increase 2023	21%	30%	12%	6%	13%	16%	14%	14%	19%	17%	20%	25%	26%	34%
2021 -> Same 2022 -> Increase 2023	5%	5%	4%	3%	3%	3%	5%	5%	3%	4%	3%	3%	8%	1%
2021 -> Decrease 2022 -> Increase 2023	6%	1%	7%	9%	7%	7%	7%	7%	10%	5%	6%	4%	2%	7%
No change	**38%**	**53%**	**38%**	**49%**	**43%**	**37%**	**42%**	**42%**	**36%**	**41%**	**37%**	**39%**	**33%**	**38%**
2021 -> Increase 2022 -> Same 2023	18%	25%	12%	17%	13%	14%	15%	14%	13%	17%	20%	18%	20%	20%
2021 -> Same 2022 -> Same 2023	16%	27%	19%	19%	18%	16%	17%	21%	17%	20%	16%	19%	13%	15%
2021 -> Decrease 2022 -> Same 2023	4%	1%	6%	12%	12%	7%	10%	6%	6%	4%	1%	3%	0%	3%
Decrease from 2022 to 2023	**30%**	**10%**	**39%**	**32%**	**34%**	**37%**	**33%**	**32%**	**32%**	**33%**	**34%**	**28%**	**31%**	**19%**
2021 -> Increase 2022 -> Decrease 2023	19%	10%	19%	16%	18%	26%	17%	19%	19%	21%	24%	20%	24%	13%
2021 -> Same 2022 -> Decrease 2023	3%	0%	5%	8%	4%	4%	4%	3%	5%	2%	6%	4%	3%	6%
2021 -> Decrease 2022 -> Decrease 2023	7%	<1%	14%	8%	11%	7%	11%	10%	8%	9%	5%	4%	3%	0%

attachments

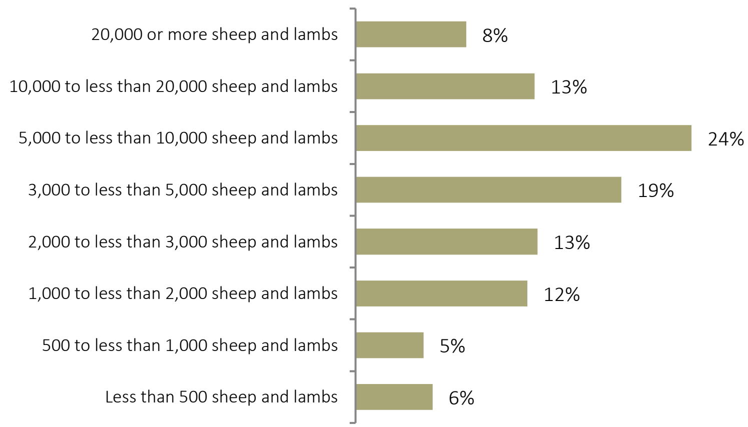
Estimates of total flock size

Proportion of total flock size across states and territories
(Producer-reported estimates)



	ABS 2020-21 estimated % of total flock size *	ABS 2020-21 estimated % of producers *
NSW	36%	37%
VIC	23%	28%
WA	19%	12%
SA	16%	15%
TAS	4%	4%
QLD	3%	5%
ACT	<1%	<1%
NT	<1%	<1%

Proportion of total flock size across total flock size categories
(Producer-reported estimates)



	ABS 2020-21 estimated % of total flock size *	ABS 2020-21 estimated % of producers *
20,000 or more sheep and lambs	7%	<1%
10,000 to less than 20,000 sheep and lambs	13%	2%
5,000 to less than 10,000 sheep and lambs	24%	6%
3,000 to less than 5,000 sheep and lambs	19%	9%
2,000 to less than 3,000 sheep and lambs	13%	9%
1,000 to less than 2,000 sheep and lambs	13%	15%
500 to less than 1,000 sheep and lambs	5%	12%
Less than 500 sheep and lambs	7%	47%

* Includes adjustment for very small producers due to ABS data not collected for those with Estimated Value of Agricultural Operations (EVAO) under $40,000.

Survey definitions

There were several definitions and specifications provided to producers in the survey. An outline of the key definitions used in the October survey are provided below.

Flock Categories

Breeding ewes	Breeding ewes (including ewe lambs and hoggets intended for breeding).
Lambs	Lambs producers had after lambing but before sales (not including ewe lambs and hoggets intended for breeding).

Sheep Breeds

Merino	Main breed of sheep for wool production.
First cross	Merino crossed with a long-haired sheep of a different breed.
Shedding	Breeds of sheep that shed their wool without shearing e.g. Australian White or Dorper. Could also be referred to as hair sheep.
Prime lamb	Animal entirely focused on meat (lamb) production e.g. Composite, Terminal, Suffolk or Dorset.
Dual purpose	Animal with no more than 50% Merino content geared towards both meat and wool production equally.
Other	Any breeds that do not fit into the definitions above.

Lamb Sales Periods

Sales completed	Actual sales made by producers this spring up to the point of interview.
EOY Sales	Expected sales to be made in the remaining spring flush and the period up to 31 December 2022.
Sales next year	Expected sales of lambs in the first half of 2023.

Sales Channels

Saleyard auction

Paddock sales

Over the hooks

Forward price contracts

Online (e.g. AuctionsPlus, Farmgate Auctions)

Some other way

Research design

Survey Program

The Sheep Producers Intentions Survey, undertaken by MLA and AWI, is used to help industry determine wool and lamb production forecasts, and to understand the breed composition of the Australian flock on a national, state and regional basis. The results are used by processors for budgeting purposes and allows import markets to ascertain short-term supply estimates.

Methodology

The October 2022 survey used a mixed-method approach. Producers with email contact details were provided with the opportunity to respond to an online survey invitation. After 3 reminders, phone surveys were used as the method to 'top up' the final sample of respondents.

Sample lists

A list of producers was provided by MLA and AWI separately, These lists were merged, de-duped and producers who had requested not to be contacted for market research removed.

Questionnaire

A 15-minute questionnaire was used to collected the required information. The survey questionnaire covered the following topic areas:

- Producer sentiment and outlook – on the wool sector, on the sheepmeat sector, on input prices, wool prices, lamb prices and access to skilled labour;
- Flock size estimates (flock estimates included breeding ewes and lambs)
- Lamb flock profiles
- Producer intentions (for their lamb flock and breeding ewe flock)

Sample size

A total of n = 1,963 responses were provided by producers as follows:

	Overall	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
# of surveys	n = 1,963	n = 4	n = 696	n = 0	n = 73	n = 325	n = 72	n = 469	n = 324

Timing

The interviewing was undertaken between the 29th September – 24th October 2022.

Weighting

The survey results were weighted. A description of the weighting process used for the October 2022 Sheep Producers Intentions Survey follows next.

Weighting of survey data

Survey data is often weighted to ensure estimates provide a representative match of the population being estimated and the estimates deliver statistical reliable measures.

For the Sheep Producers Intentions Survey, data has been weighted to ensure the sample provides a strong representation of the population of producers as possible. For this survey, it was considered important to weight the survey data to ensure we have:

- Coverage across the various regions as producers will have different operating conditions. For our purposes, a region is a state – so we need to weight so that our final sample is representative of the distribution of producers across states.

- Coverage across farm businesses of different sizes – obviously, the larger businesses have larger flocks so ensuring we have an appropriate mix of small, medium, large and very large producers is vital for the estimation process.

There may be other variables that help describe the possible differences across producers, but these two variables (state and flock size) will more than likely account for the likely differences that exist in the population of all producers.

For this survey, ABS data was used as the population structure that guided the weighting approach. Data at a state and flock size segment was requested from the ABS. This data and its source are shown opposite. The weighting approach involved:

- Using the estimate of the total number of agricultural businesses with sheep and lambs produced by the ABS as the population estimates.

- Adjust this number to reflect that the ABS survey does not include estimates of producers with an EVAO (Estimated Value of Agricultural Operations) of less than $40,000.

This final weighting matrix was then used to weight the October 2022 Sheep Producers Intentions survey data.

Total number of agricultural businesses with sheep and lambs (ABS 2020-21) *

	ALL FLOCK SIZES	Less than 500	500 – < 1,000	1,000 – < 2,000	2,000 – < 3,000	3,000 – < 5,000	5,000 – < 10,000	10,000 – < 20,000	20,000 or more
AUSTRALIA	**40,949**	**19,200**	**4,813**	**6,197**	**3,787**	**3,573**	**2,513**	**709**	**157**
NSW	**14,981**	6,768	1,876	2,414	1,431	1,341	851	239	61
VIC	**11,445**	6,067	1,390	1,561	963	766	539	127	30
QLD	**1,881**	1,350	93	124	85	97	96	29	7
SA	**5,980**	2,305	829	1,192	627	556	346	102	24
WA	**5,107**	1,736	473	770	611	735	590	171	20
TAS	**1,522**	950	148	135	70	76	90	40	15
NT	**1**	1	0	0	0	0	0	0	0
ACT	**32**	23	4	1	0	1	1	1	0

* Based on Australian Bureau of Statistics data (ABS, Customised report, 2022)

Sheep Producers Intentions Survey October 2022

This research was conducted by Intuitive Solutions on behalf of MLA and AWI. For more information, please contact:

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