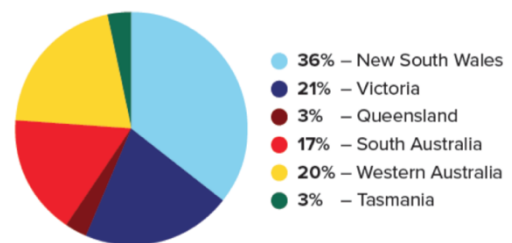


Sheep (grazing)

Overview of the sheep industry

- Total value of industry is \$7.5 billion
 - \$4.5 billion = lamb and mutton
 - \$3.0 billion = wool production
- Australia has one of the highest rates of sheep meat consumption in the world
- China has the largest sheep flock – accounting for one third of sheep meat production
- The number of sheep in Australia is declining – nearly at a historical low – dry, drought don't help.
- Sheep distribution in Australia
 - Approximately 32,000 farm businesses with sheep in Australia
 - Concentrated in NSW, located between the dairy and beef industries
 - South QLD used to have an extensive sheep system – but has declined due to labour costs and issues with wild dogs.
- Sheep breeds and their location
 - Dependent on local climate
 - Merino = better suited to hot and dry climates (Can be found in southern AUS too though)
 - Prime lamb production = better suited to reliable rainfall, longer growing season with more time with good quality pastures
- Sheep distribution of Victoria
 - Lot of lamb and mutton production occurs in Victoria – about 50% of AUS production
 - Sheep numbers are highest in South West Victoria
 - Hamilton = sheep capital
- Sheep export – lamb and mutton – dead
 - In 2018/19, 66% of Australian lamb production was exported and 96% of mutton
- Live export
 - Sending live sheep to the middle east
 - Numbers are reducing
 - Issues:
 - Suspension of sheep live export trade in 2018 lead to regulations:
 - No live export during hot periods
 - Long term future of live sheep export industry is questionable.
- Top producers of sheep meat
 - China is the top followed by Australia, New Zealand, Turkey, Iran

Figure 56. Australian sheep flock by state (2018)



Sheep for wool

Types of Merino

- Fine and superfine – Saxon
 - Lower body weight
 - Lower fertility
 - Lower fleece weight
 - Found in Victoria and some NSW
- Medium Merino
 - Includes both Peppin and non-Peppin
 - Most common sheep in Australia
 - Developed in Riverina
 - Micron range 20-22
 - Often used in breeding first cross ewes
- Strong wool
 - South Australian type
 - Higher bodyweight
 - Higher reproduction

| Strain | Greasy fleece weight – kg | Fibre diameter – micron | Adult body weight – kg |
|-----------|------------------------------|----------------------------|---------------------------|
| Superfine | 2-4 | <= 18.5 | 35-40 |
| Fine | 3-5 | 18.6-20 | 40-45 |
| Medium | 4-6 | 20-22 | 35-55 |
| Strong | 5-7 | 22+ | 50-60 |

Wool production

- There are 4 main types of merino in Australia
 - Superfine merino (<18-micron fibre diameter)
 - Fine wool merino (19-micron fibre diameter)
 - Medium wool merino (20-22-micron fibre diameter)
 - Strong wool merino (23-35-micron fibre diameter)
- Climatic, geographic and management factors determine the distribution of types:
 - Finer wool sheep are best in cooler areas
 - Stronger wool sheep better suited to hotter, lower rainfall areas (harsher environments)

Pigs

Pig industry overview

- Consists of about 260,000 sows
- Mostly located around the wheat area
 - 60-75% of the cost of production is from feed – therefore to reduce transport cost they are close to where the food is produced.
- Australian pork industry has a high health status on world standards
 - This is due to no pigs being bred from other regions for 40 years
 - High biosecurity
- Australia imports 90,000 tonnes/year and exports 50,000 tonnes/year of pork
 - All imported meat is frozen, must be cooked, removal of bones, cannot be sold as fresh pork
- Structure of the pig industry;
 - Not many farrow-to-finish family owned units
 - Mostly multi-site contract operations
 - Seeing an increase in vertical integration = one company owning abattoir, piggery, cropping system etc.
 - Increase in size of operations
 - Increase in alliances
 - Seeing a decrease in the number of Australian pig producers but an increase in the size of Australian piggeries.
- The amount of pork consumed is increasing in the world – it is at about the same level in Australia since 2000's

Main drivers of pig production in the future

- Profitability
- Improve efficiency
- Lower the cost of production
- Meet the expectations of consumers
 - Eating quality
 - Environmental impact
 - Welfare
- Evaluate and adopt new technology