

Making More From Sheep



Australian Wool
Innovation Limited



Meating the Challenge

Sam Gill

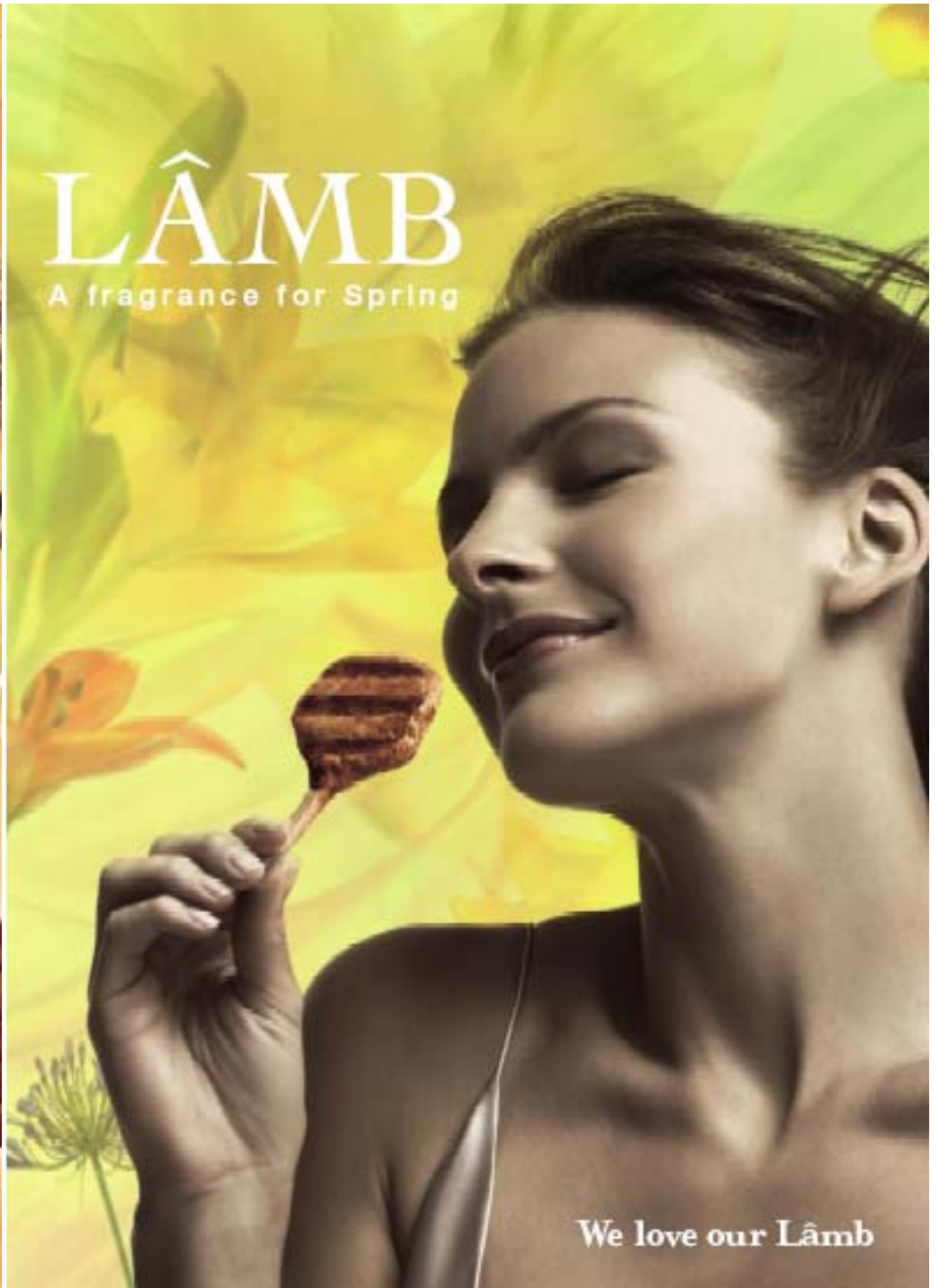


I
A

LÂMB
A fragrance for



We love our



LÂMB
A fragrance for Spring

We love our Lâmb

Lamb – Australia’s national dish

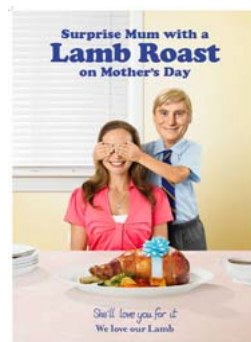
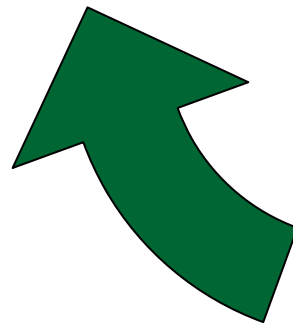
Spring
(September)



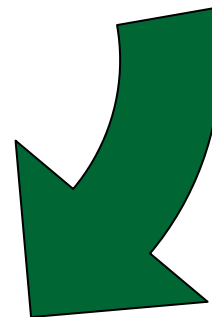
'We love our lamb' year round



Australia Day
(January)



Mother's Day
(May)



Australian consumer expenditure on lamb has doubled over the last 10 years, reaching a record \$2.3 billion in 2009.

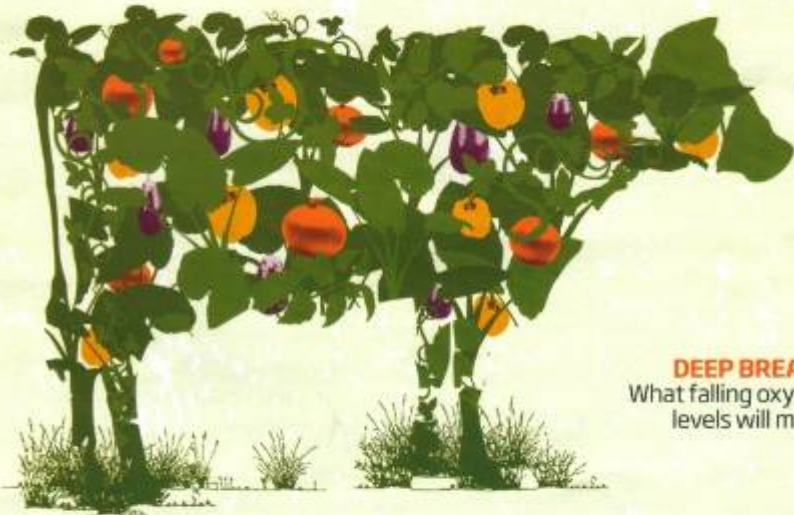
Dark side of the sun Exotic matter lurks inside our star

NewScientist

WEEKLY 17 July 2010 No.2769 Australia \$7.95 (inc.GST) New Zealand NZ\$7.95 (inc.GST) Print Post Approved 230000100015

WHAT HAPPENS IF WE ALL QUIT MEAT?

Why eating greens won't save the world



DEEP BREATH
What falling oxygen levels will mean

SPECIAL REPORT

Mysteries of laughter

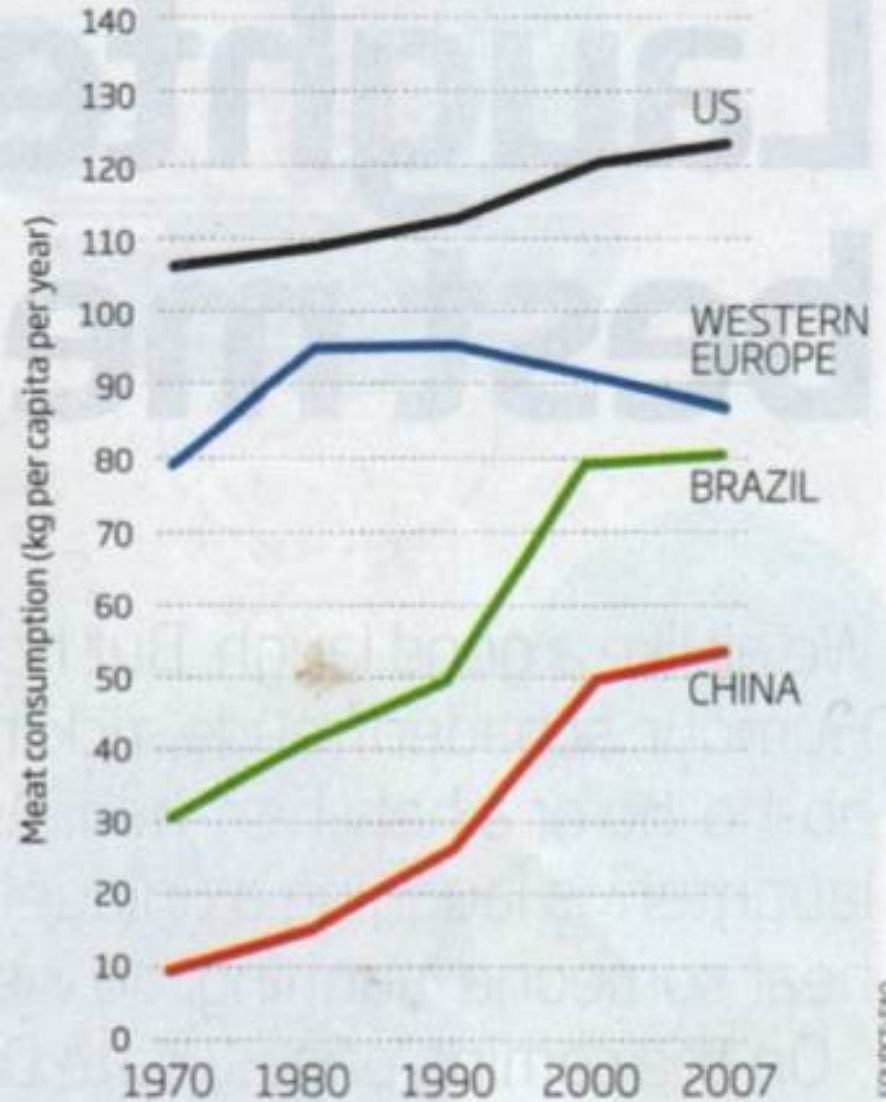
More than just a funny noise

News, ideas and innovation www.NewScientist.com

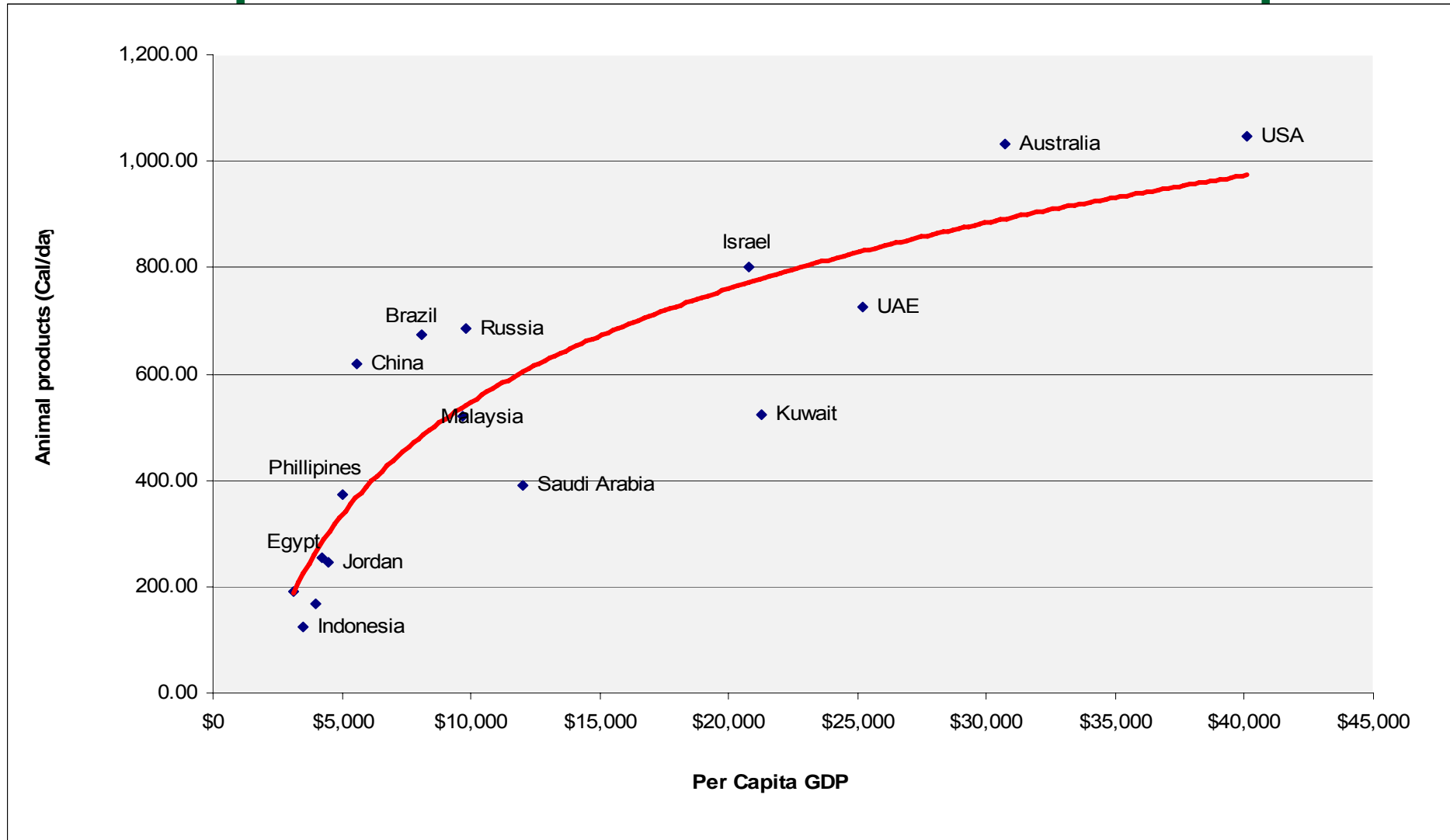


A growing taste for meat

As people get richer, they tend to eat more meat



Per Capita GDP and Animal Protein Consumption

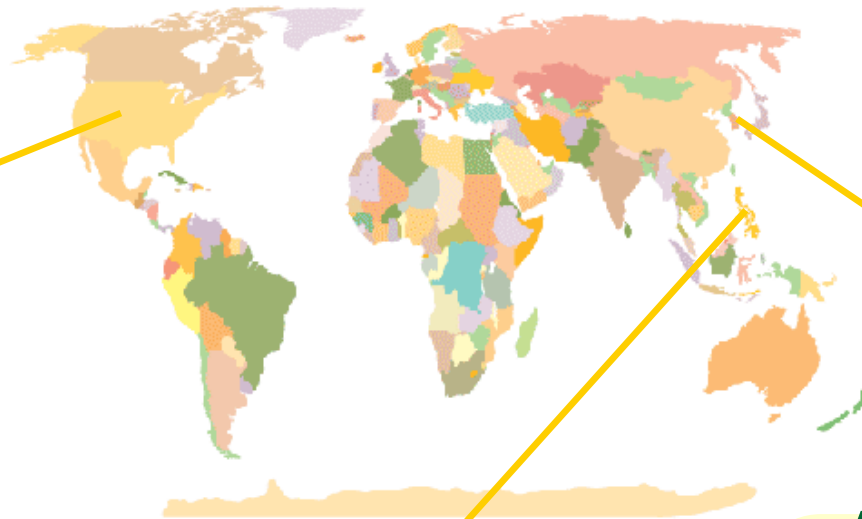


Keeping the lamb feast in the Middle East, the 'rack' in Barack...

US - chefs battle to be burger king and bring lamb to the masses



Korea – Culinary Challenge – getting Aussie product onto restaurant menus

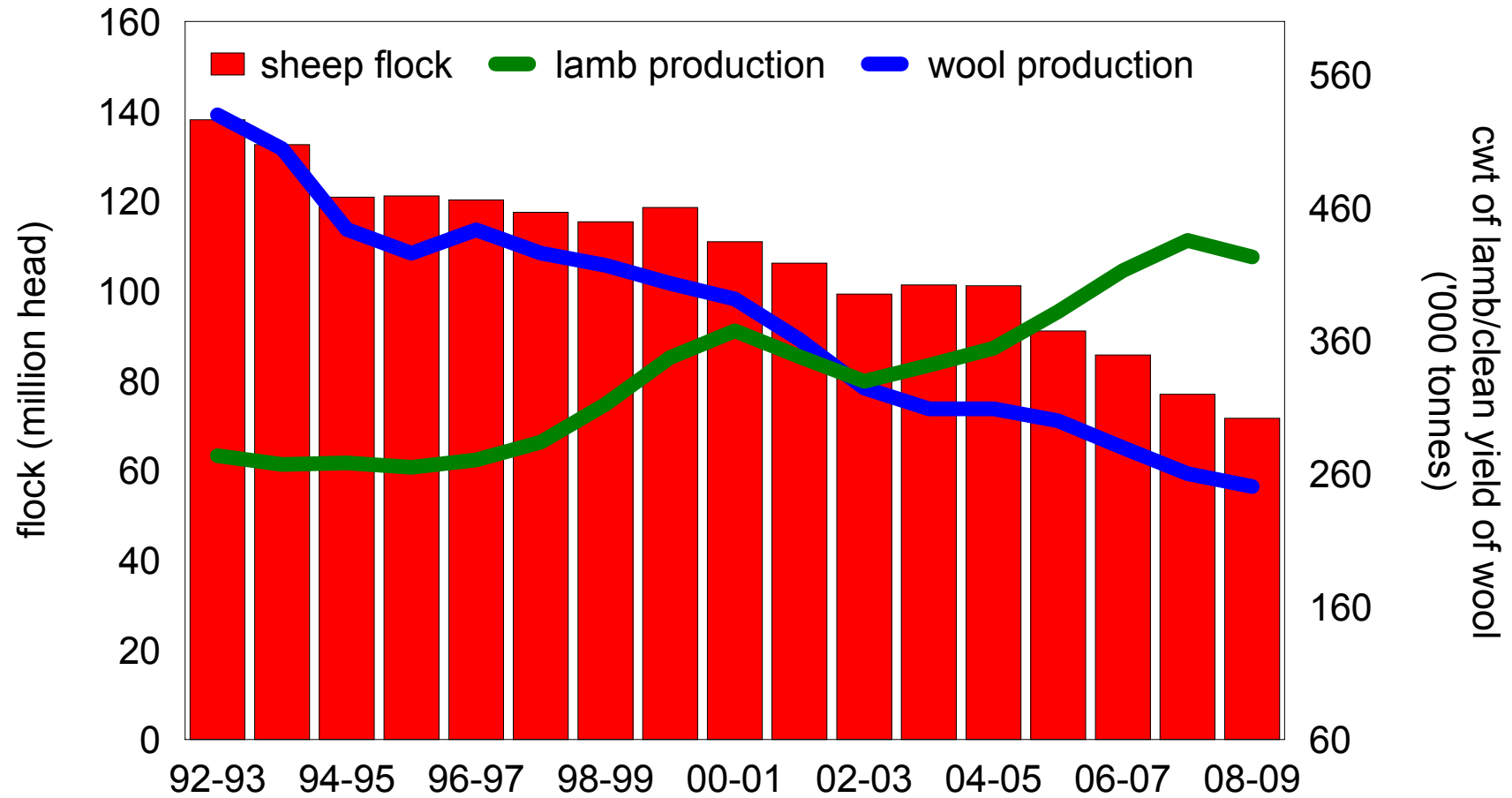


The Philippines – lamb for special occasions at retail



Australian lamb exports have quadrupled over the last 10 years to reach nearly 200,000t valued at \$996m in 2009.

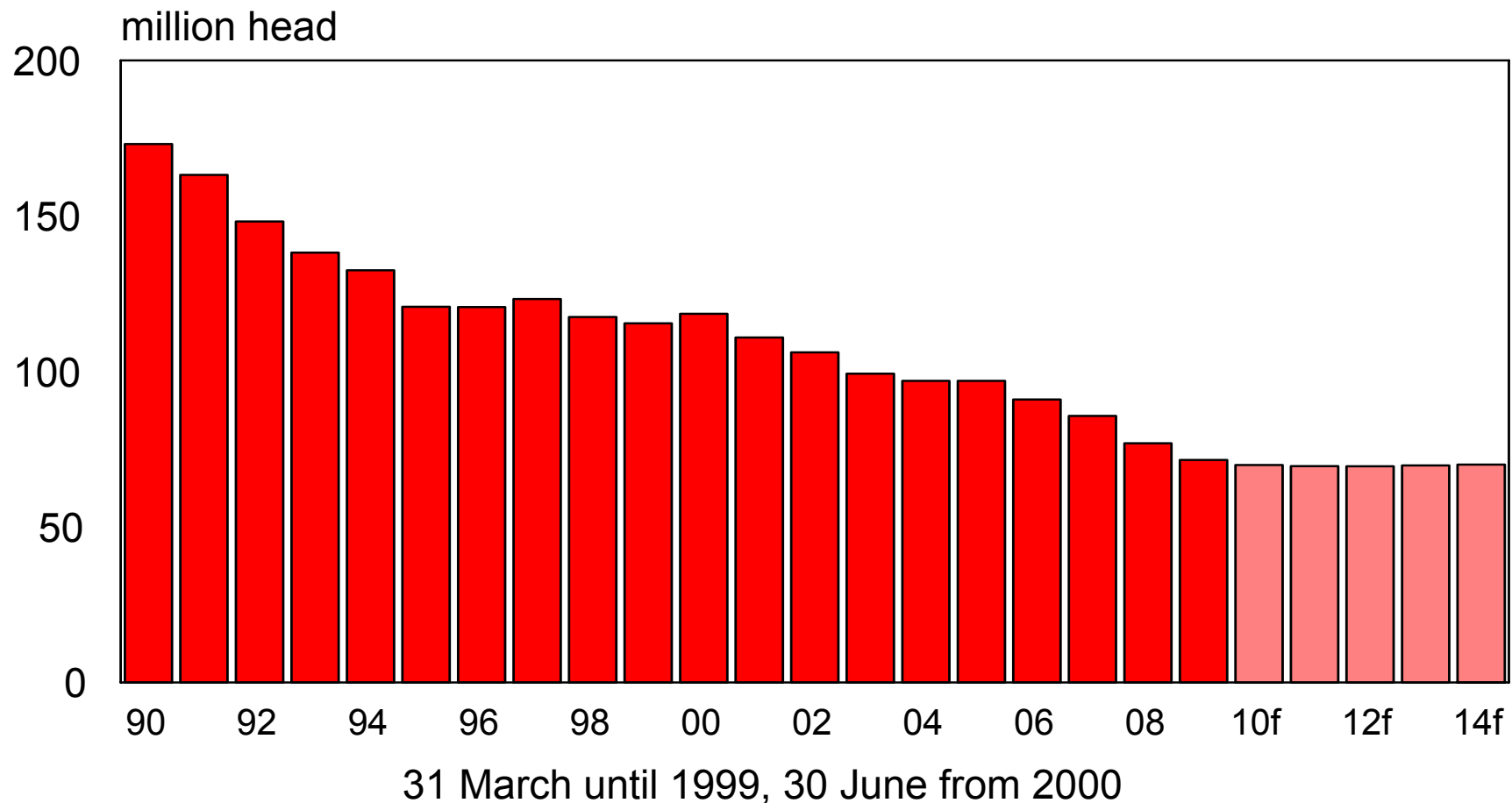
Change in Australian sheep flock, lamb and wool production



Source: ABS

Slower rate of flock decline expected in 2010

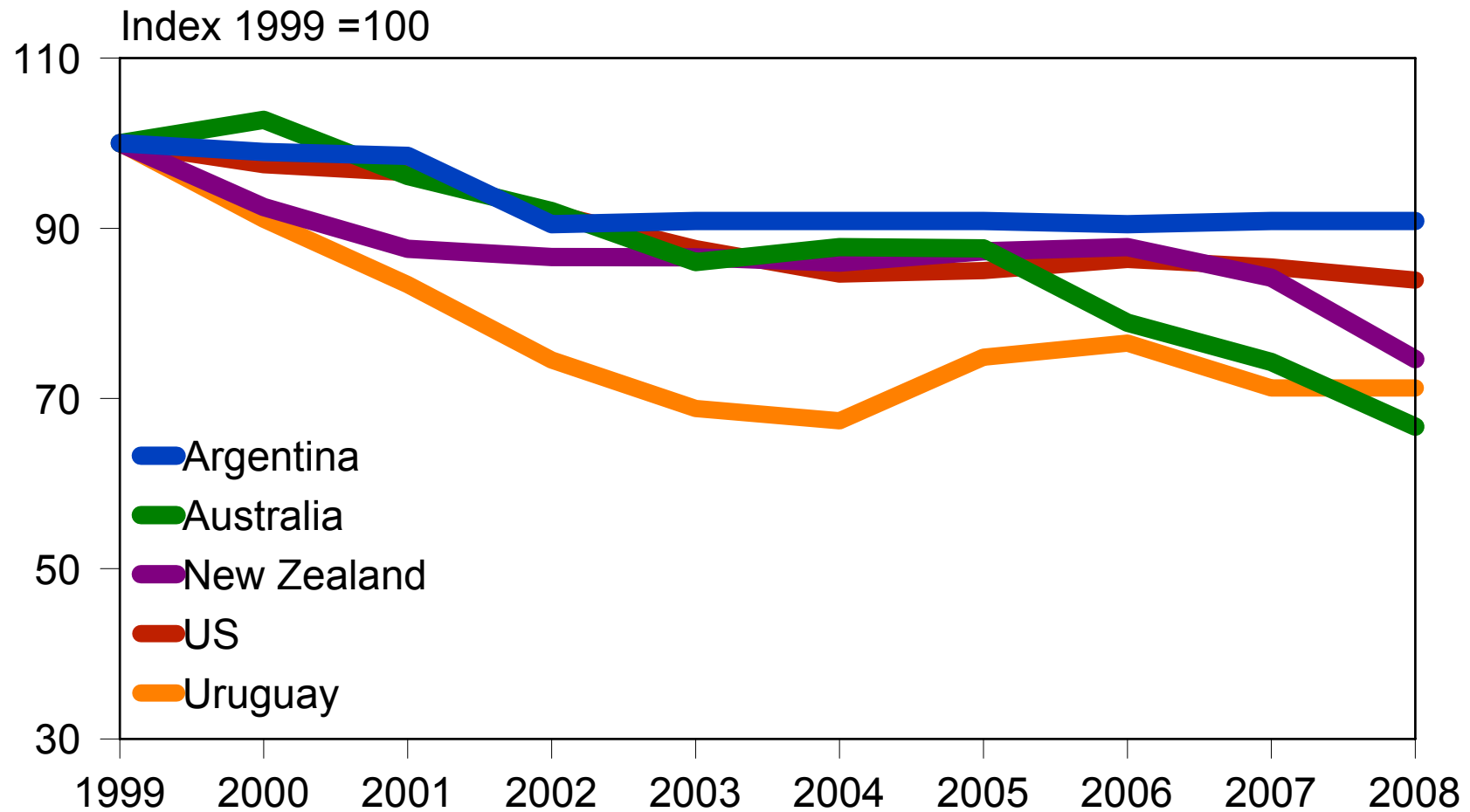
- flock to fall 2% to 69.9 million head



Source: ABS, MLA forecasts

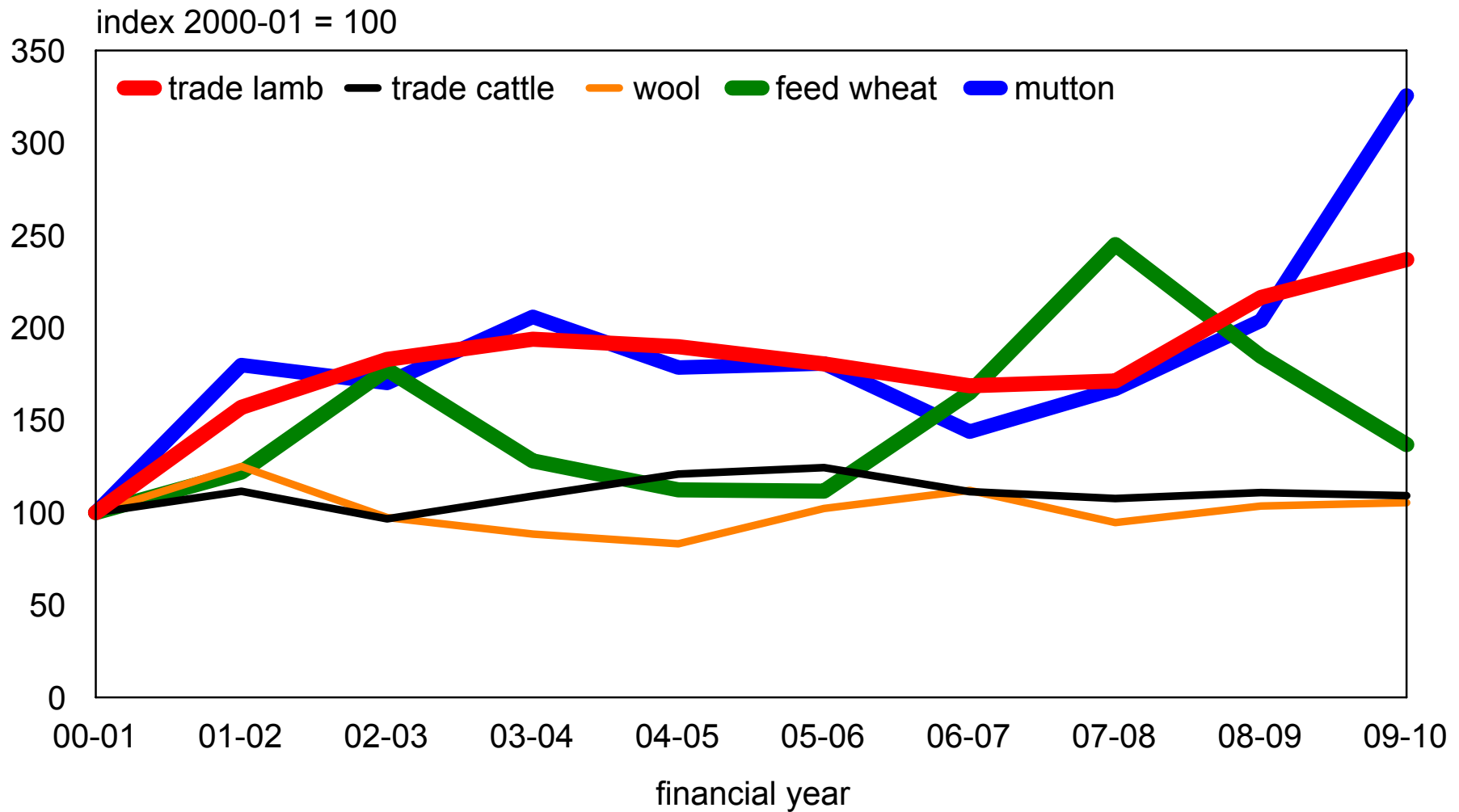
f = forecast

World sheep flocks on the decline.....



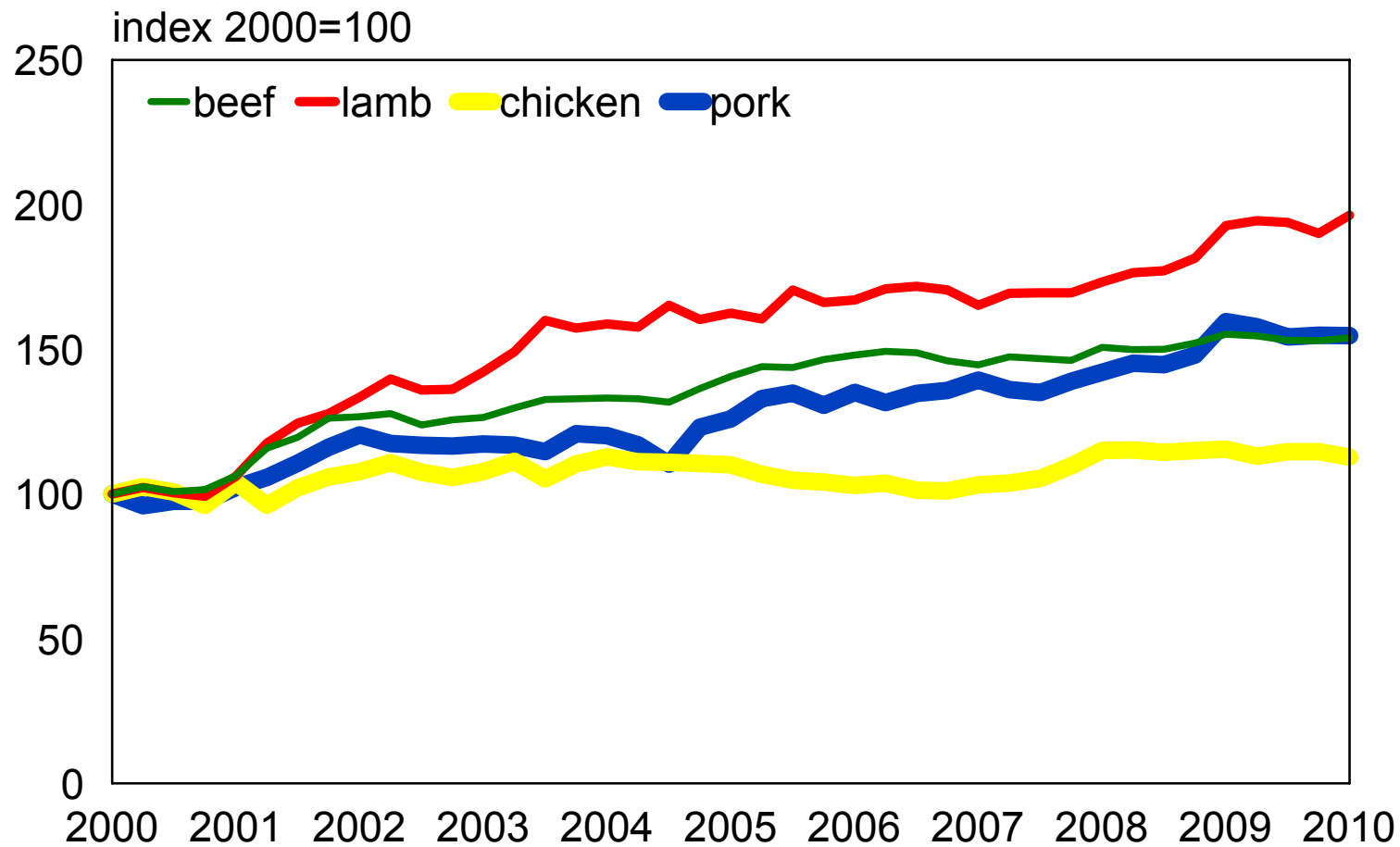
Source: FAO, ABS

Commodity prices



Source: MLA's NLRS, ABARE, The Land

Lamb price increases outstripping rises in competitor meats

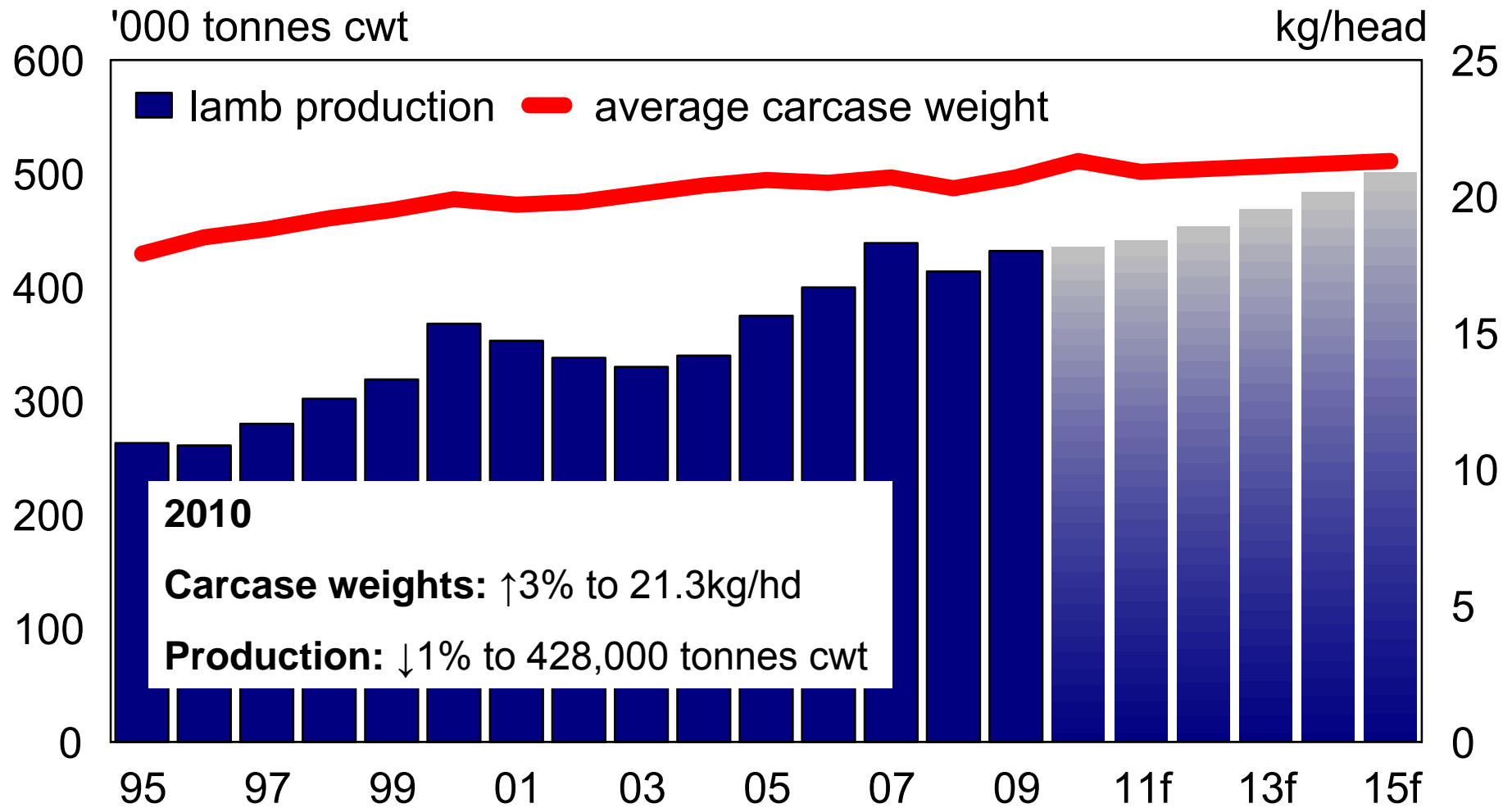


Source: ABS, ABARE, MLA

Domestic lamb consumption vs. retail prices



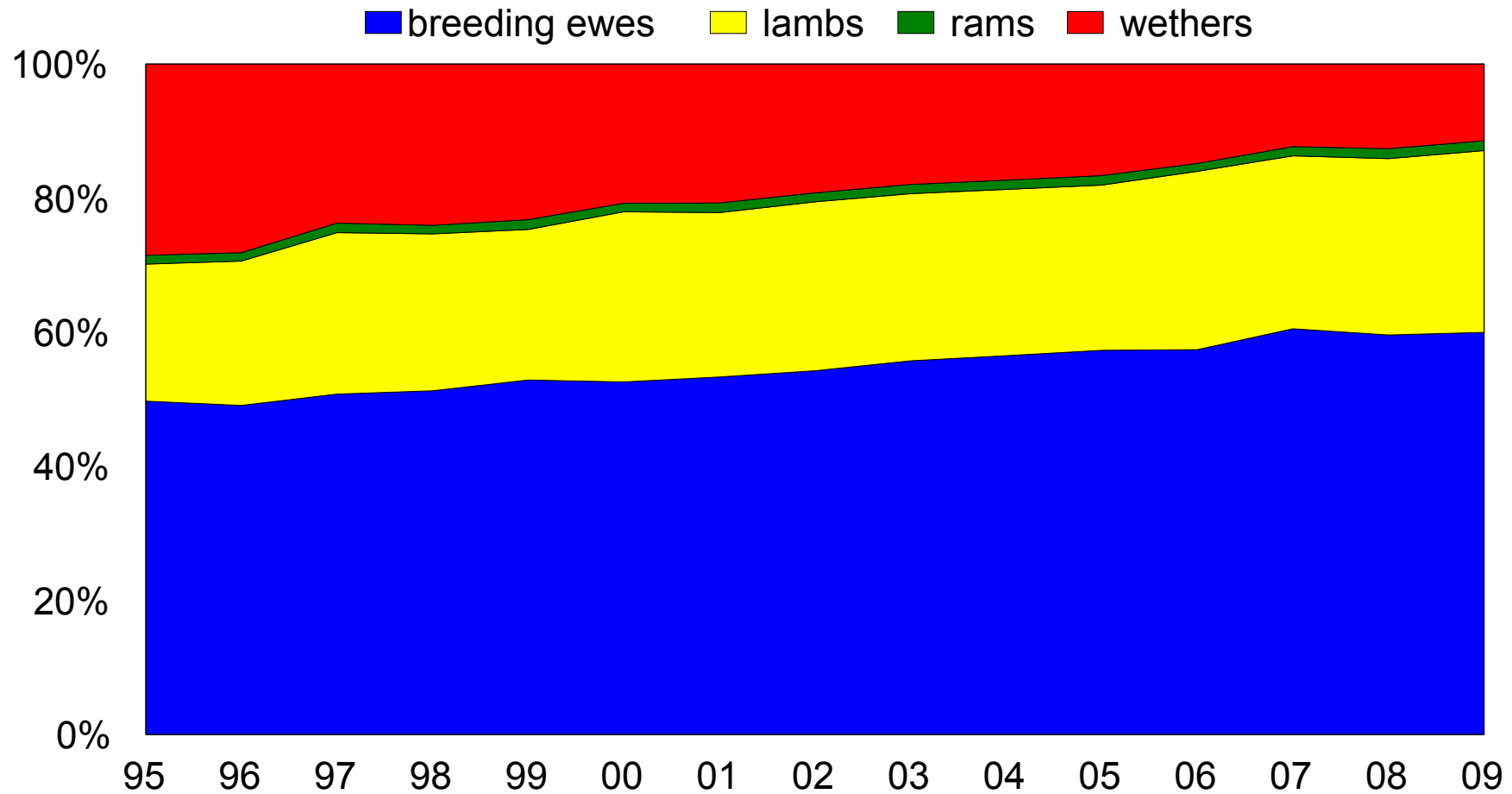
Lamb production and carcasse weights



Source: ABS, MLA forecasts

f = forecast

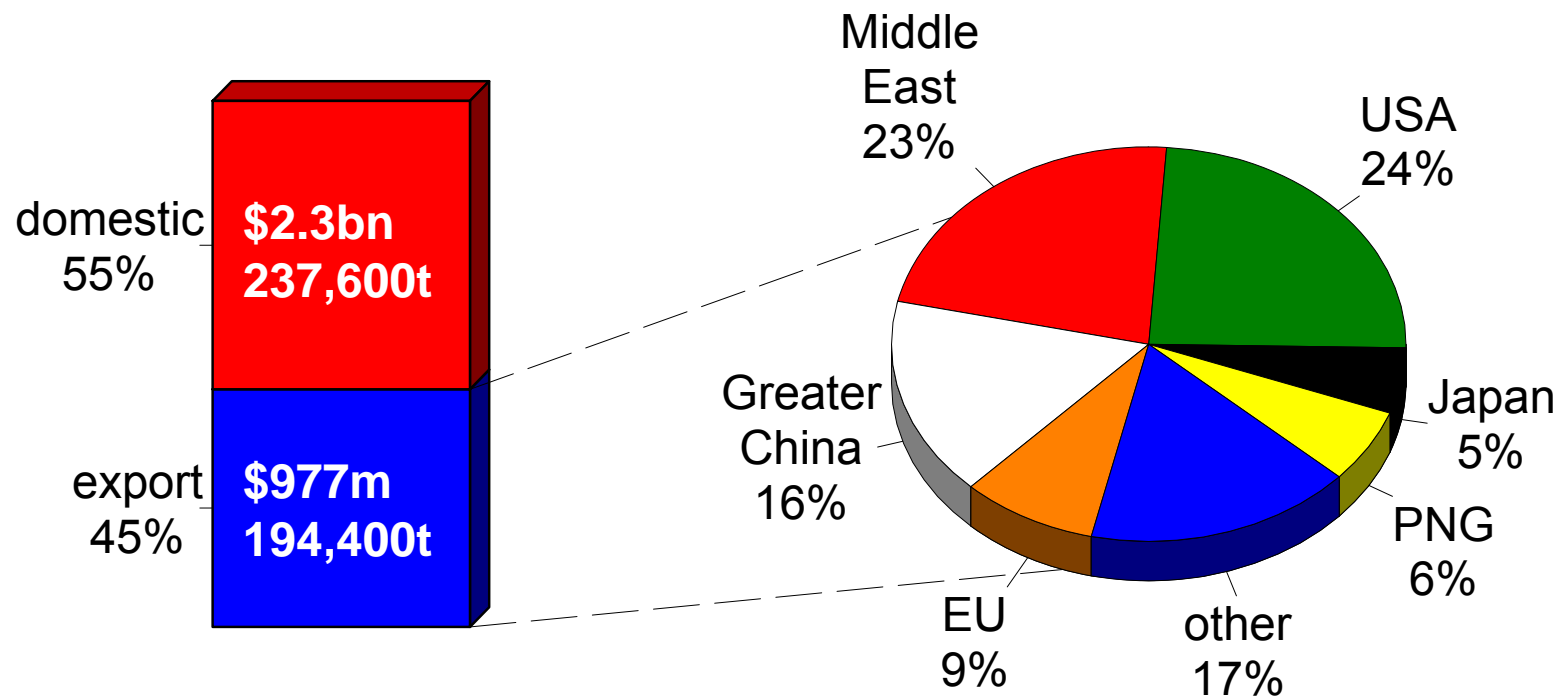
Ewe & lamb proportion of the flock to continue rising



Source: ABARE, ABS, MLA

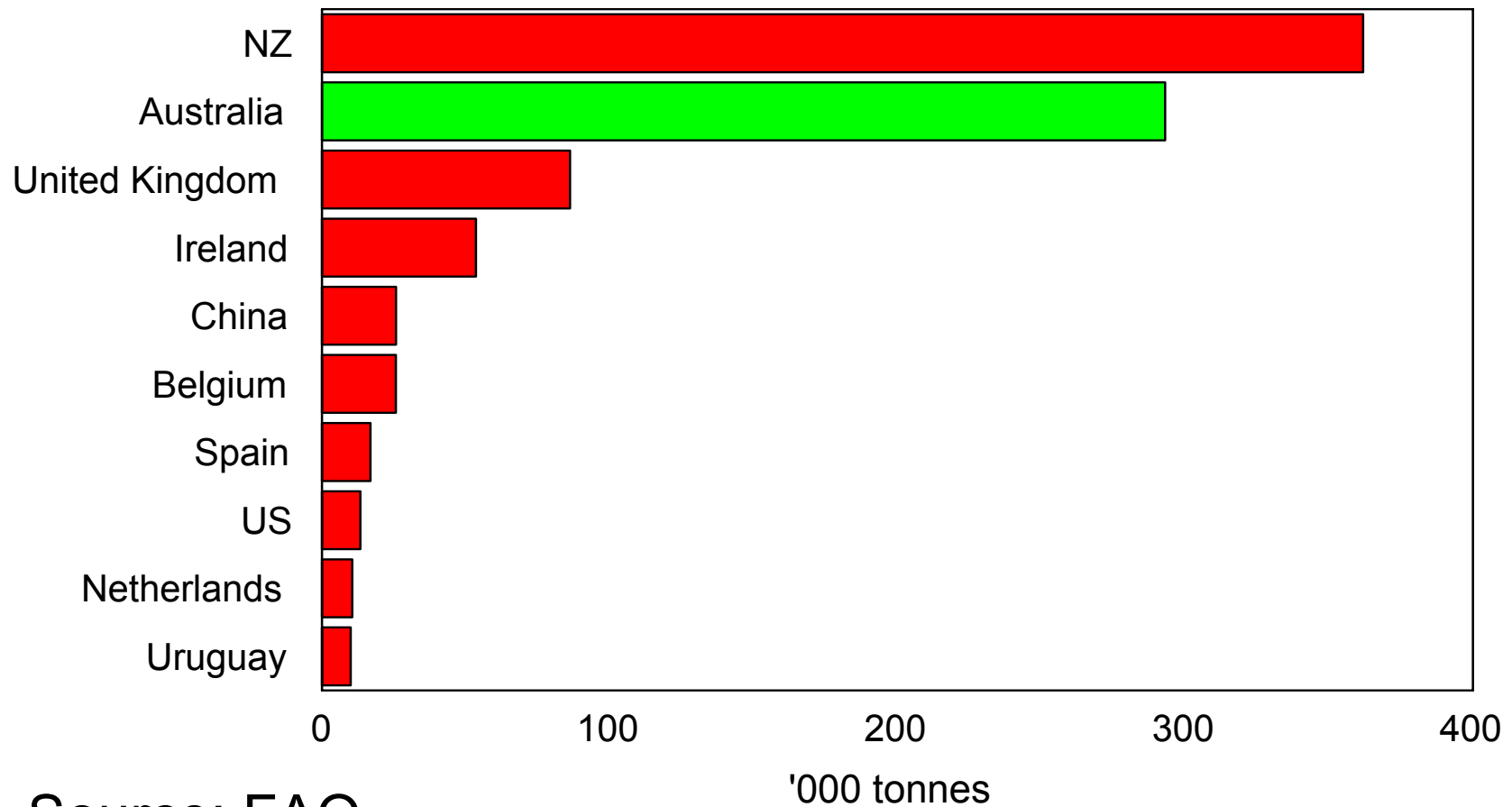
Australian lamb production and exports 2009

2009 lamb production = 432,000 tonnes cwt



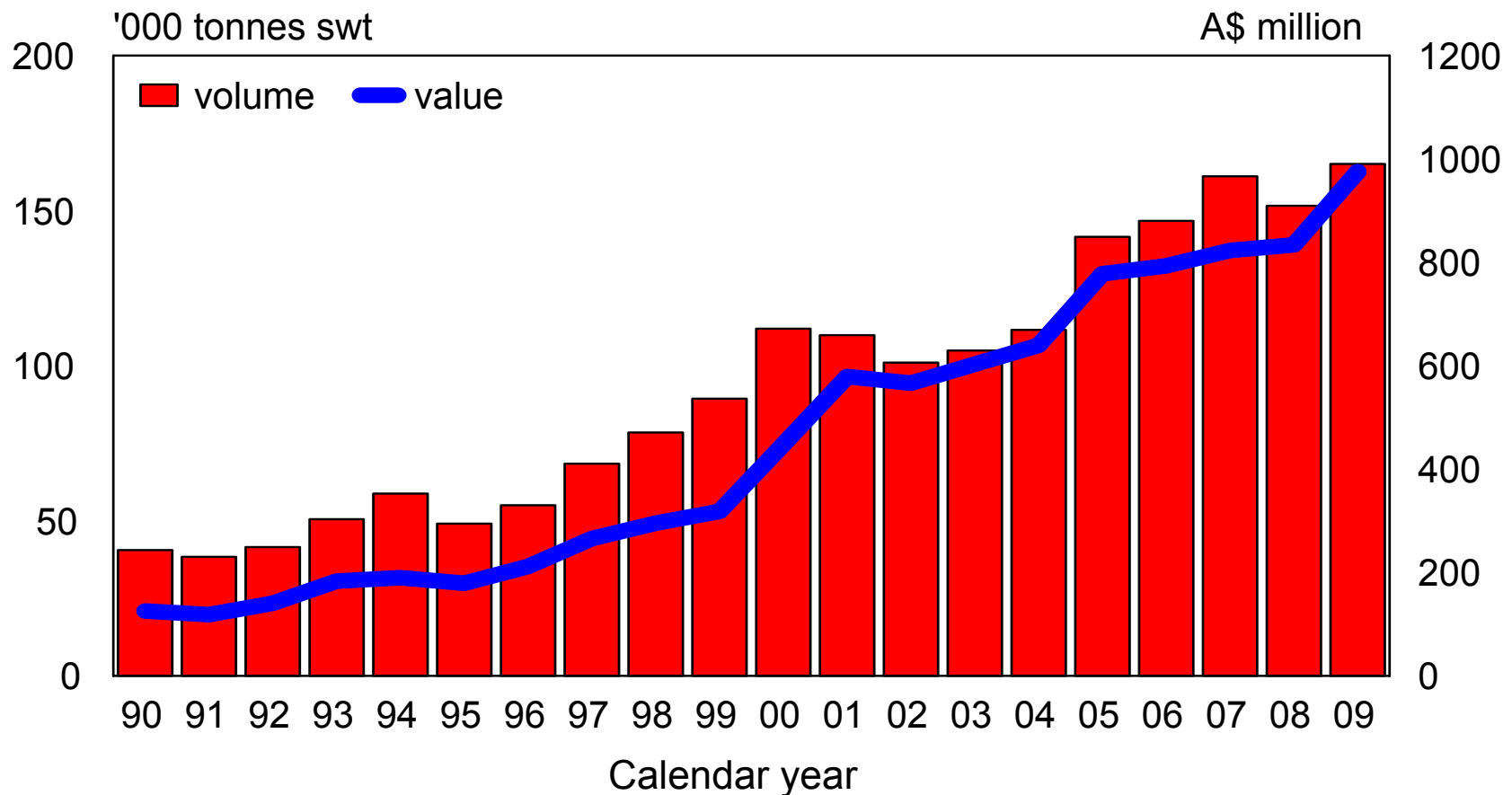
Source: DAFF, ABS, MLA

Australian & NZ the main mutton and lamb exporters



Source: FAO

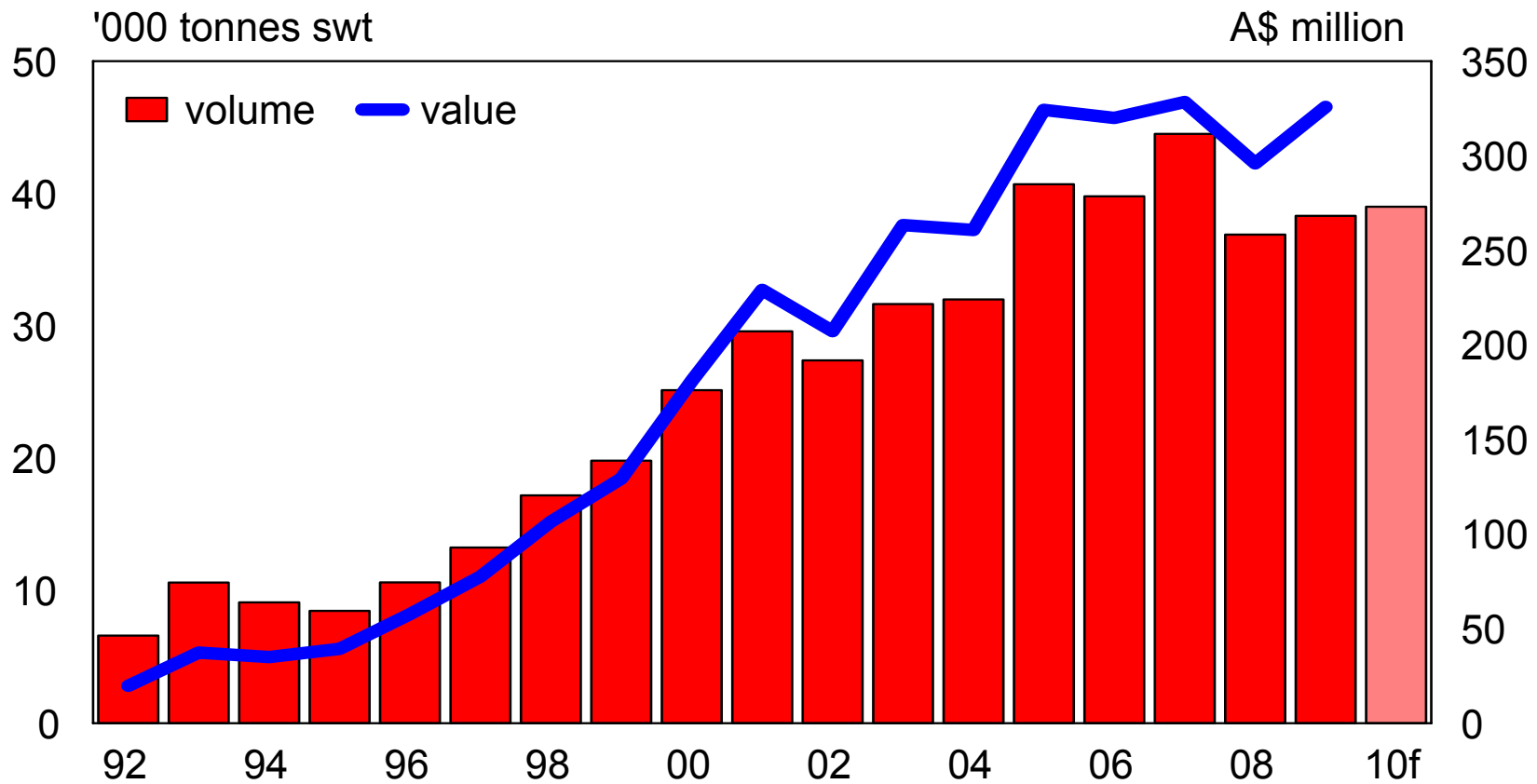
Australian lamb exports



Source: DAFF, ABS

Australian lamb exports to the US

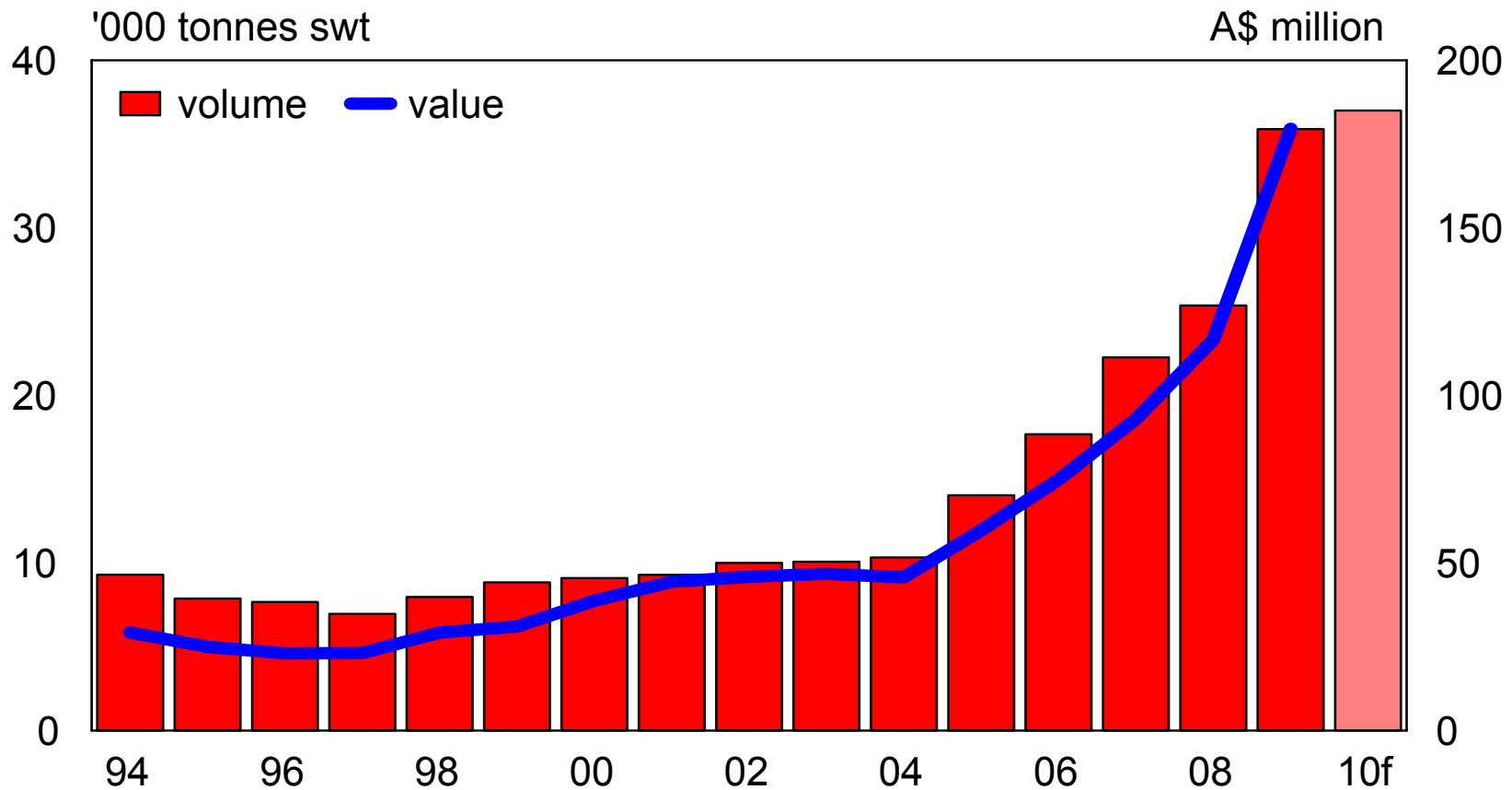
- up 2%, to 39,000 tonnes CWT



Source: DAFF volumes, ABS values, MLA forecasts

f = forecast

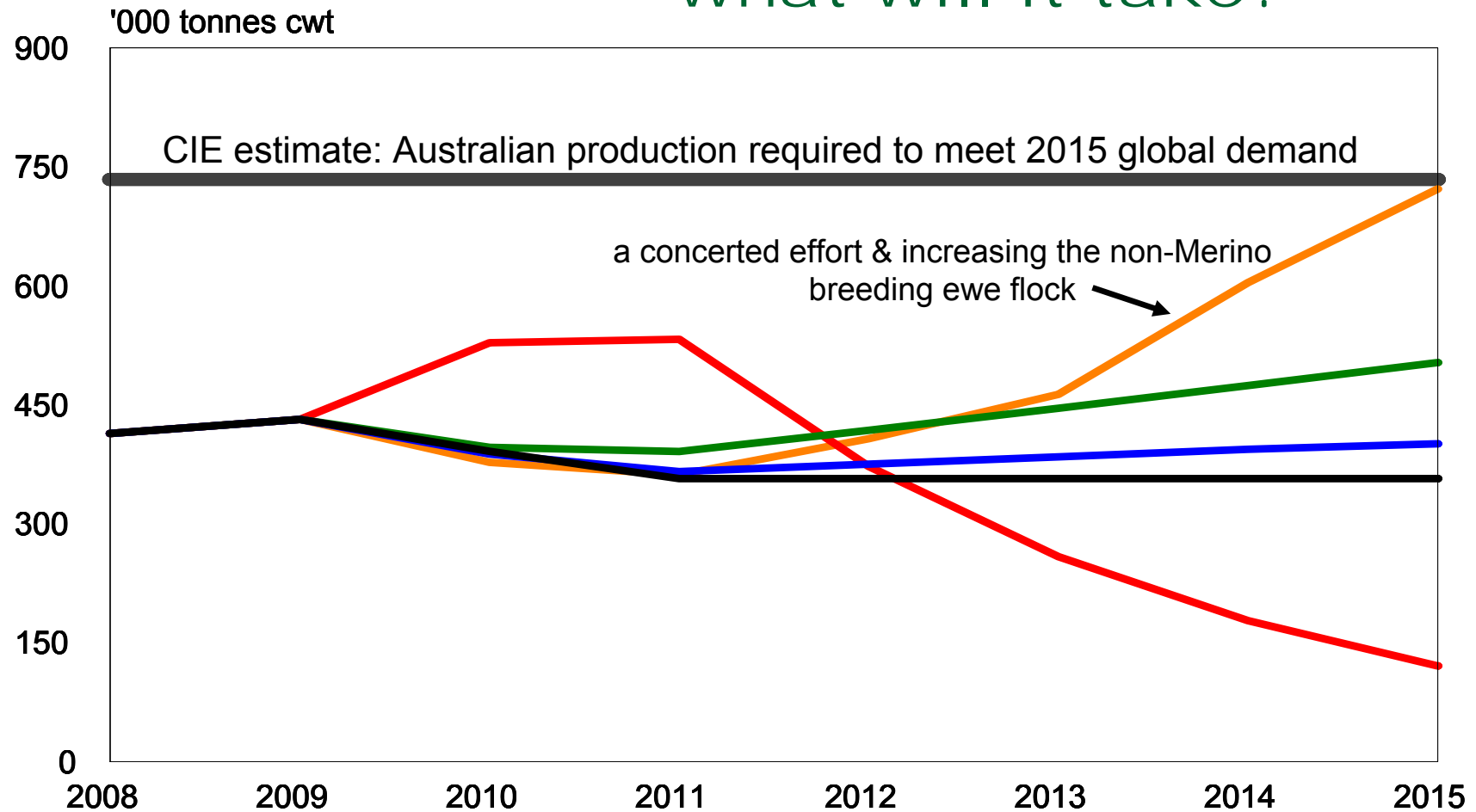
Australia lamb exports to the Middle East - up 8%, to 38,900 tonnes swt



Source: DAFF volumes, ABS values, MLA forecasts

f = forecast

Realising the potential – what will it take?



The industry challenge

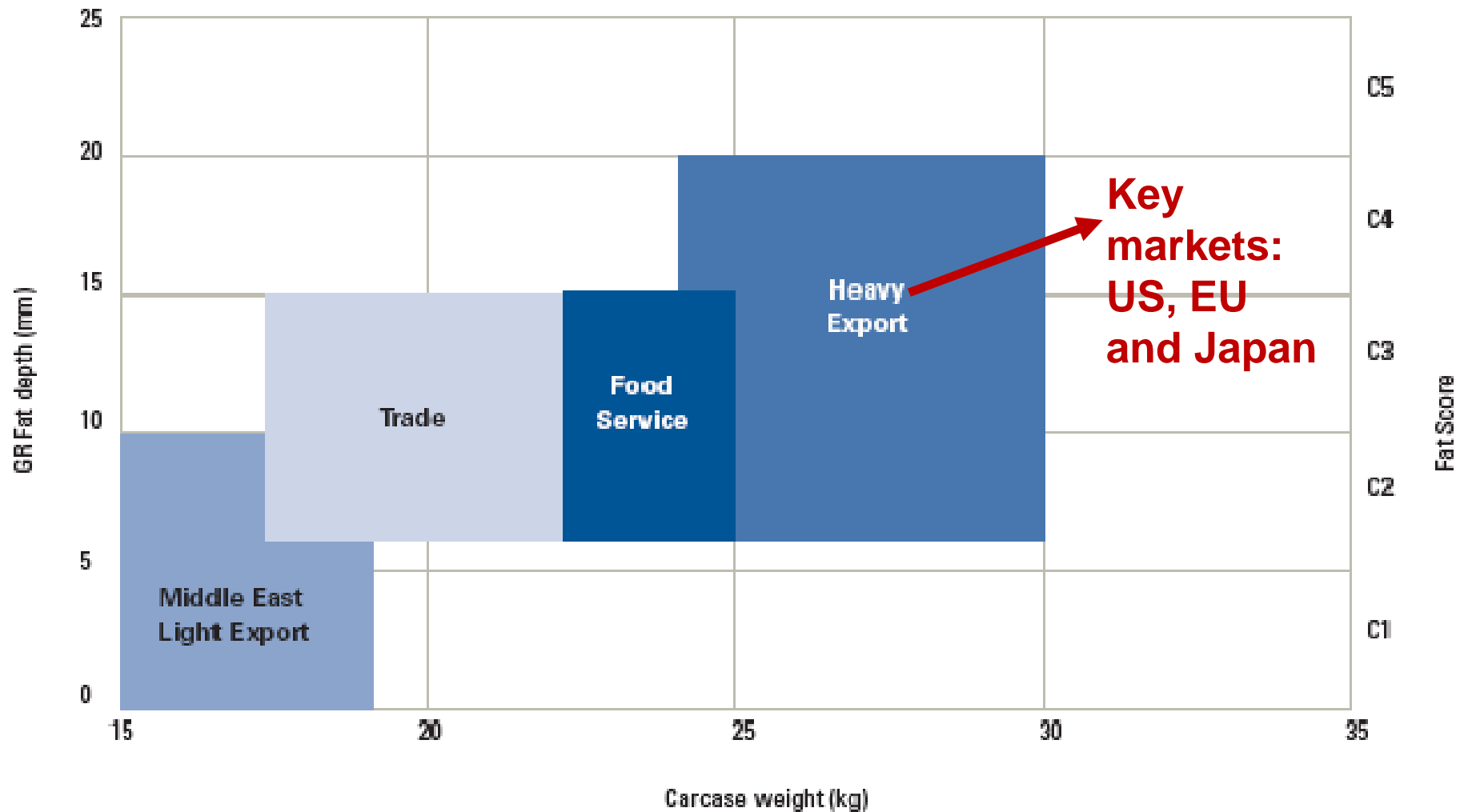
- Increase:
 - carcase weight by 0.6kg per year
 - reproductive rate by 2% per year
 - lean meat yield
- Maintain or improve eating quality
- Manage adult ewe size
- Reduce worms and maintain lambing ease



What's needed in 2010-11?

- Continue to deliver what the customer wants – compliance to specs
- Marketing focus on leanness and health aspects
- Genetic improvement – increased growth rate, optimum fat , improving muscling, better marking %
- Production systems – especially feeding systems

Guide to processor specifications

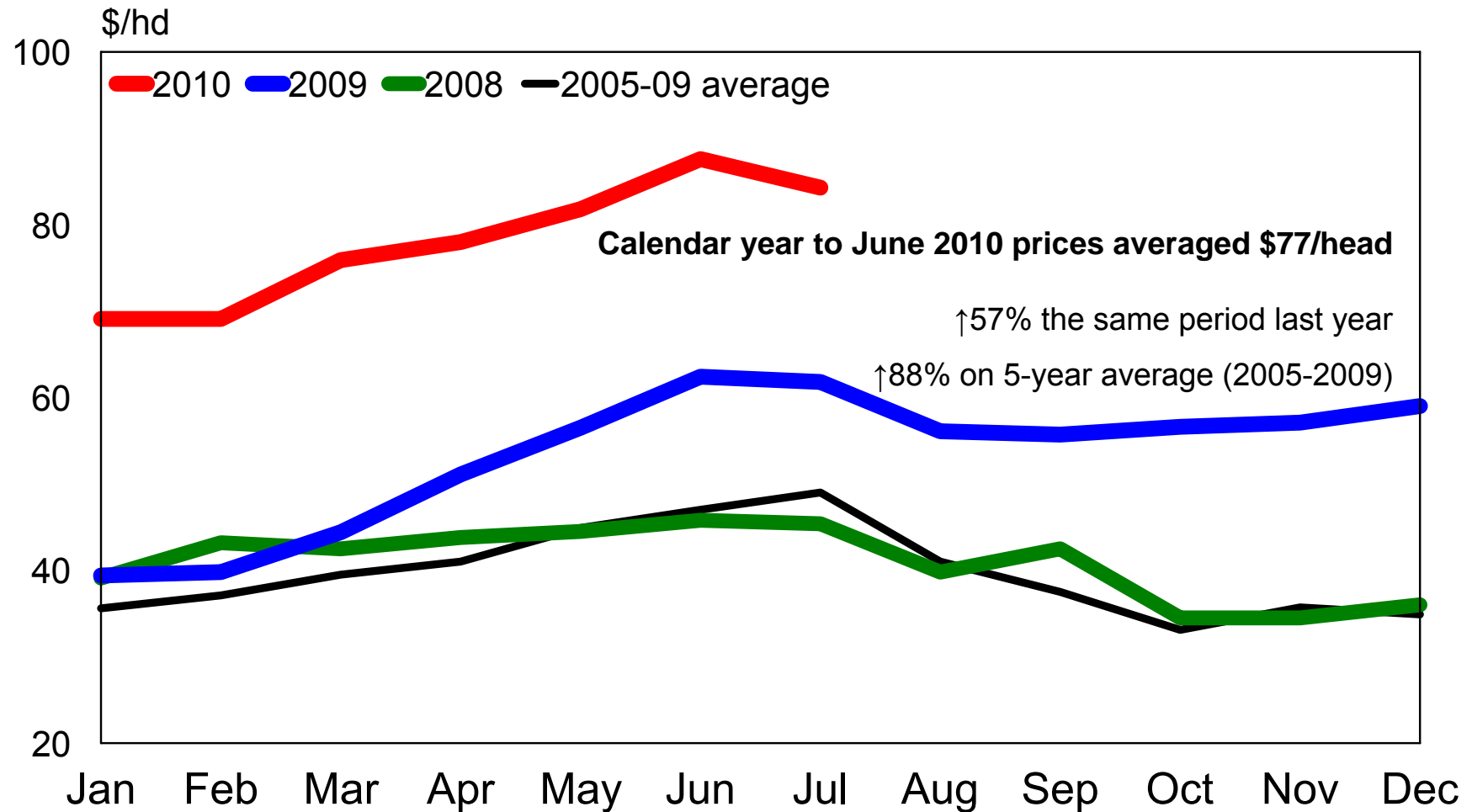


What can we do.....

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- Co
- Co

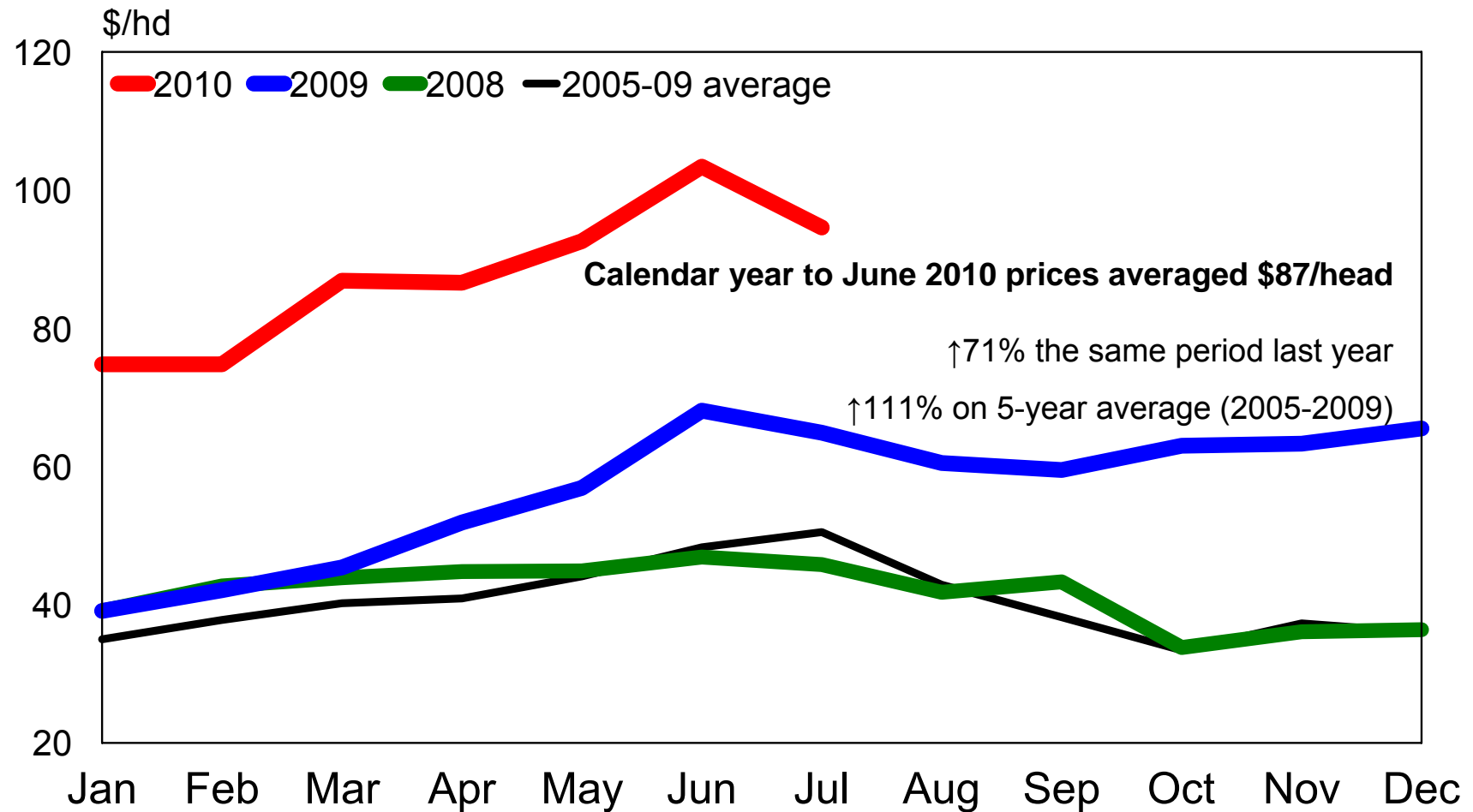


Average Merino ewe saleyard prices



Source: NLRS

Average first cross ewe saleyard prices



Source: NLRS

What's EWETIME

Weaning %
NLW, LE,
BWT



Growth Rate
WWT, PWT

Carcase \$\$
PFAT,
PEMD
LMY

Wool \$\$
GFW, FD,
SS, SL

Mature Ewe Size
AWT

Easy Care
WEC,
EBWR,
DAG, POLL

Things you can't see are often the most important in maternal traits!

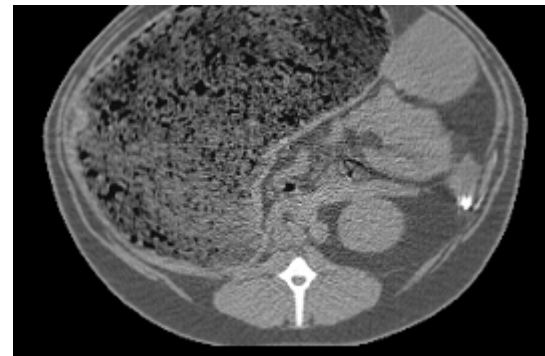
- **Reproductive rates**



- **Maternal performance**



- **Fat and Muscle**



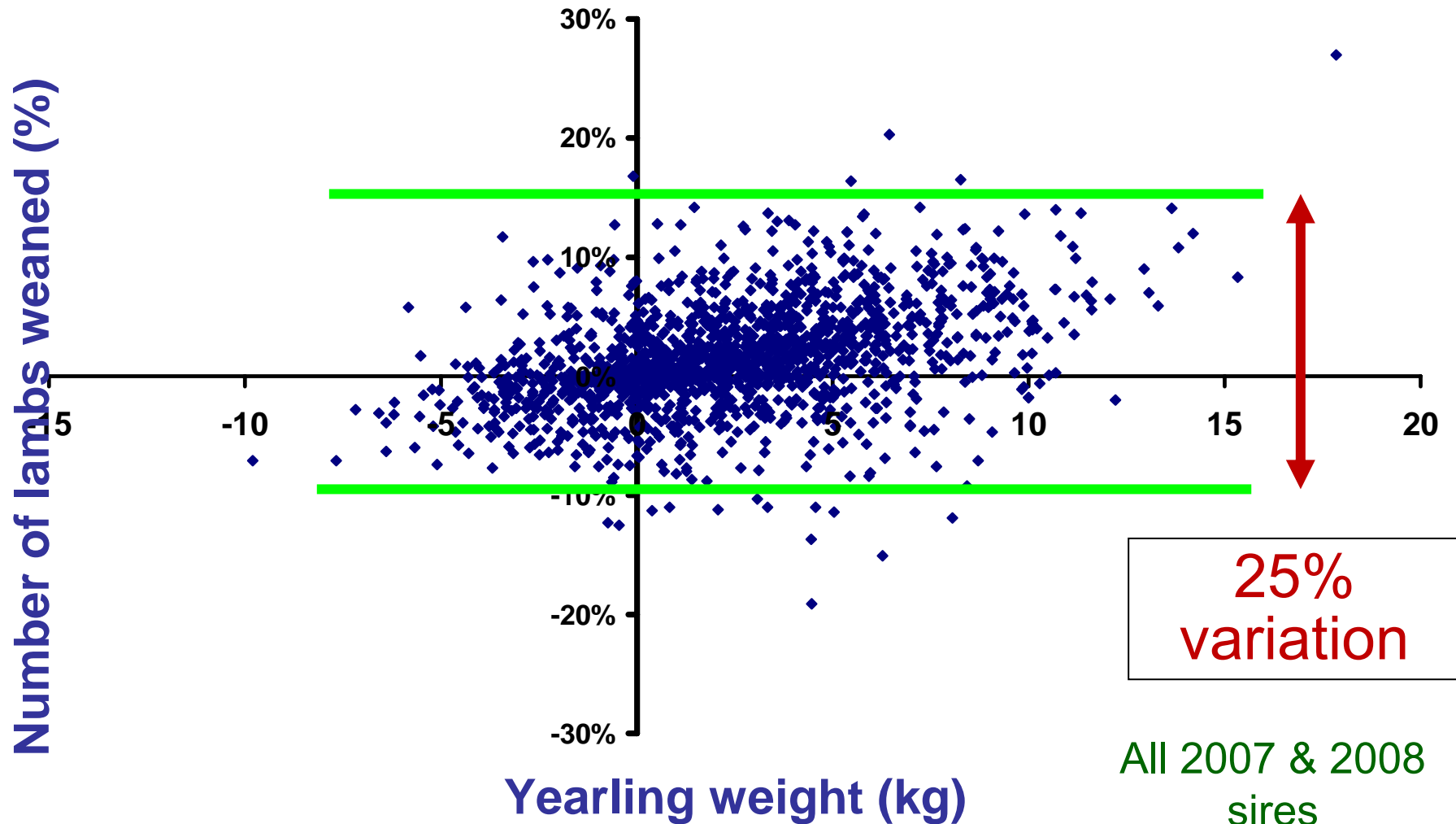
- **Internal parasite resistance (Worms)**



Making More From Sheep



Weight does not = fertility



All 2007 & 2008
sires
MERINOSELECT

Muscle for EWE (most important)

- EMD is positively related to weight and proportion of muscle in the loin and hind-quarter of the carcass in all lambs (greater acceptance by processors)
- Muscle helps in the glycogen story (dark cutting)
- Muscle helps with milk
- Muscle linked with WEC
- Muscle helps with mating ewe lambs
- **Muscle is a no-brainer for all sheep breeders**

Making More From Sheep

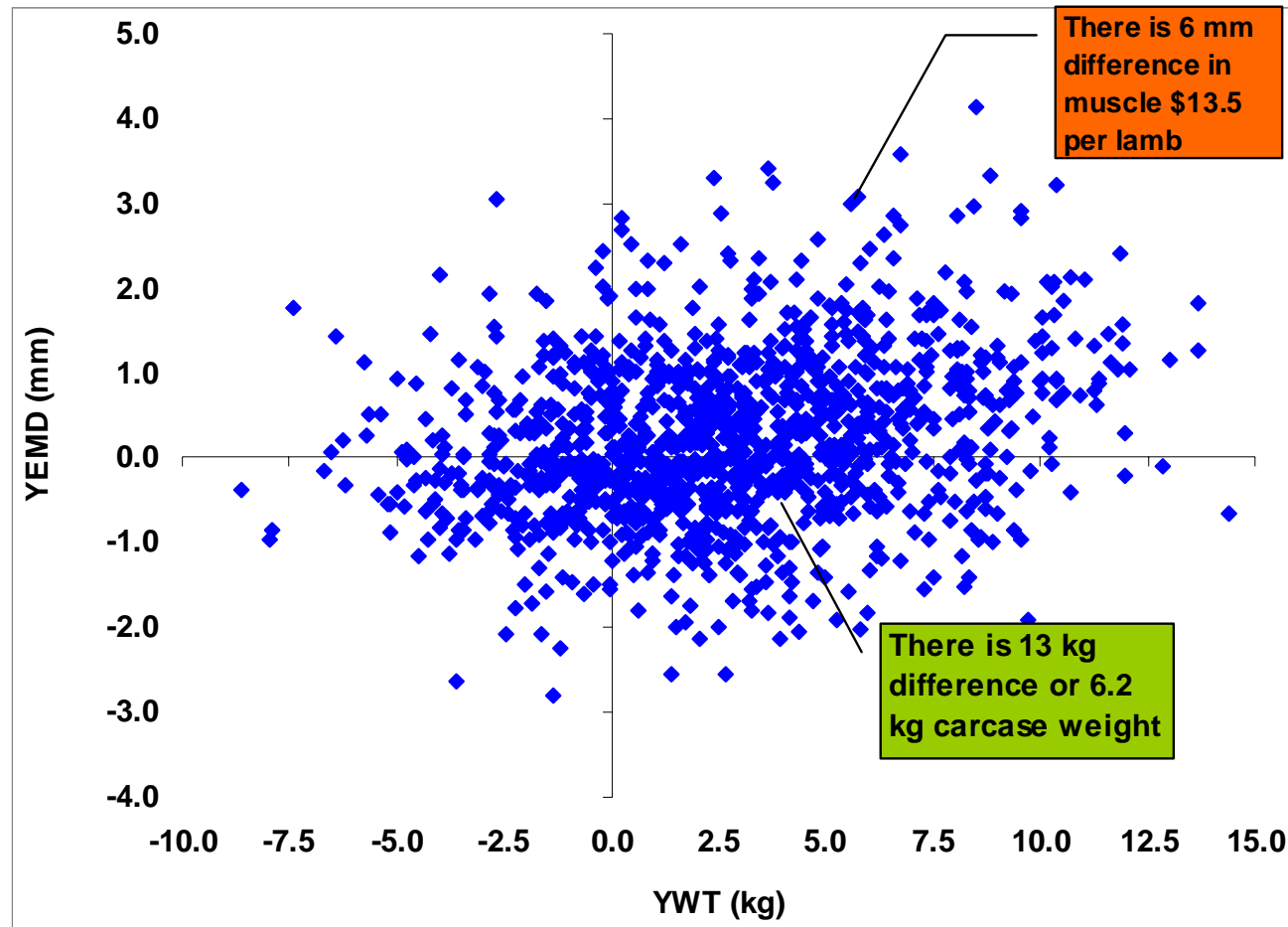


Real muscle required!



Growth and muscle in Merinos

(1,604 sires)



Weight does not = muscle

YEMD (mm)
-10

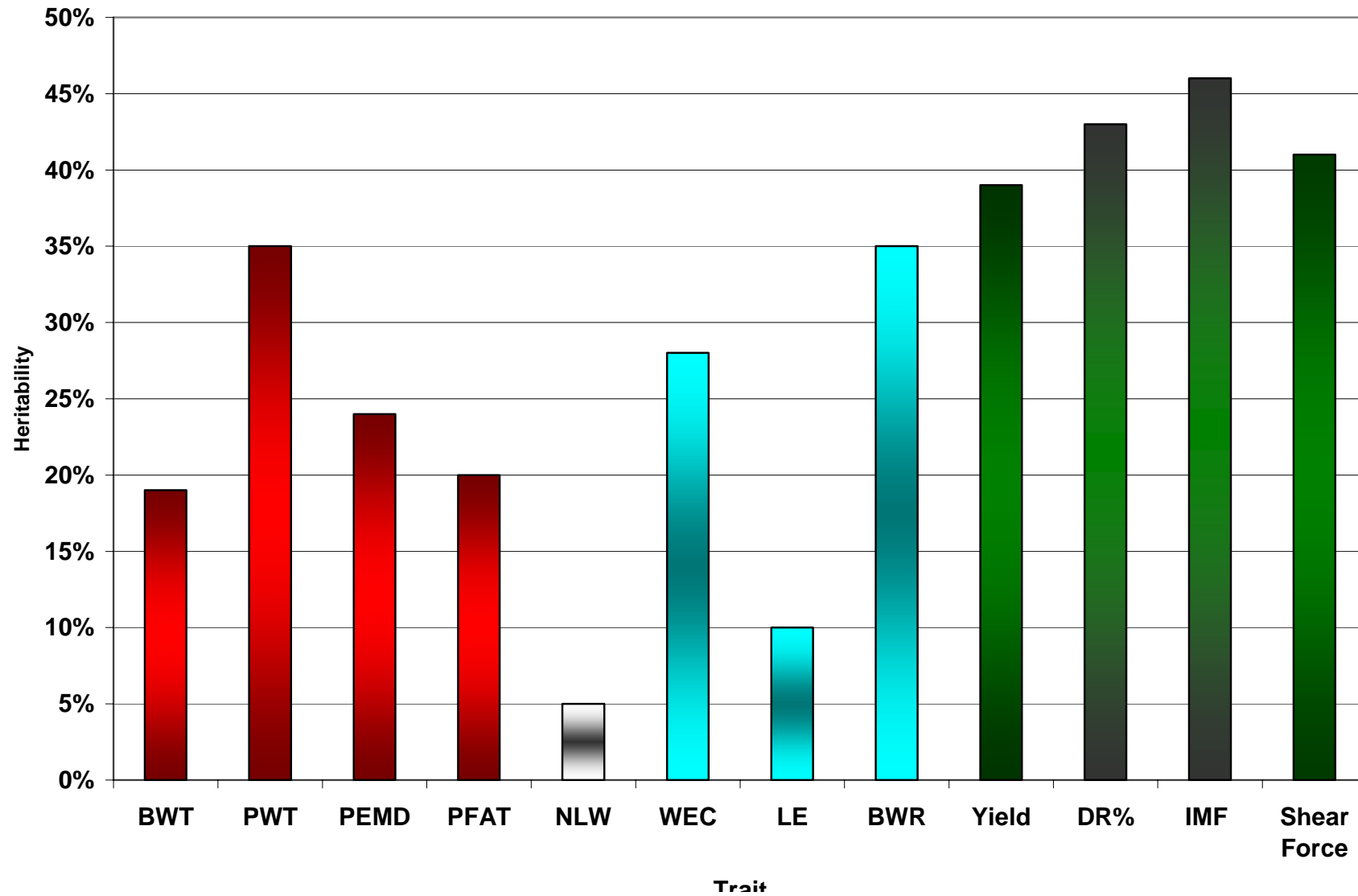


mm
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20

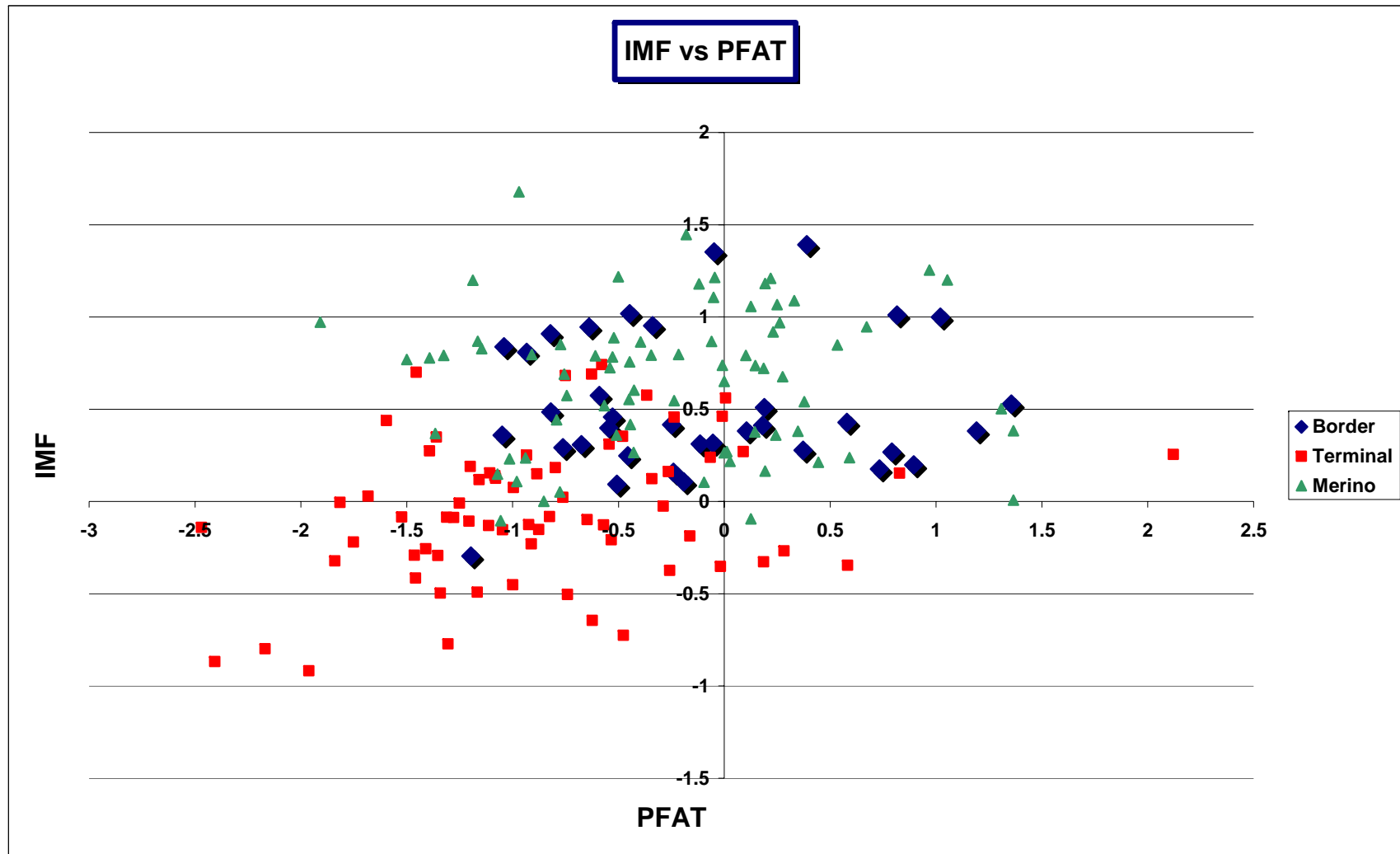
-3

YWT (kg)

Heritability of key meat traits



Variation in Intramuscular Fat!



Must make every lamb count !

- FIRST -> breed the right lamb
- Manage nutrition
- Manage compliance and yield
- Manage cost of production (know what drives profit)



Making More From Sheep

