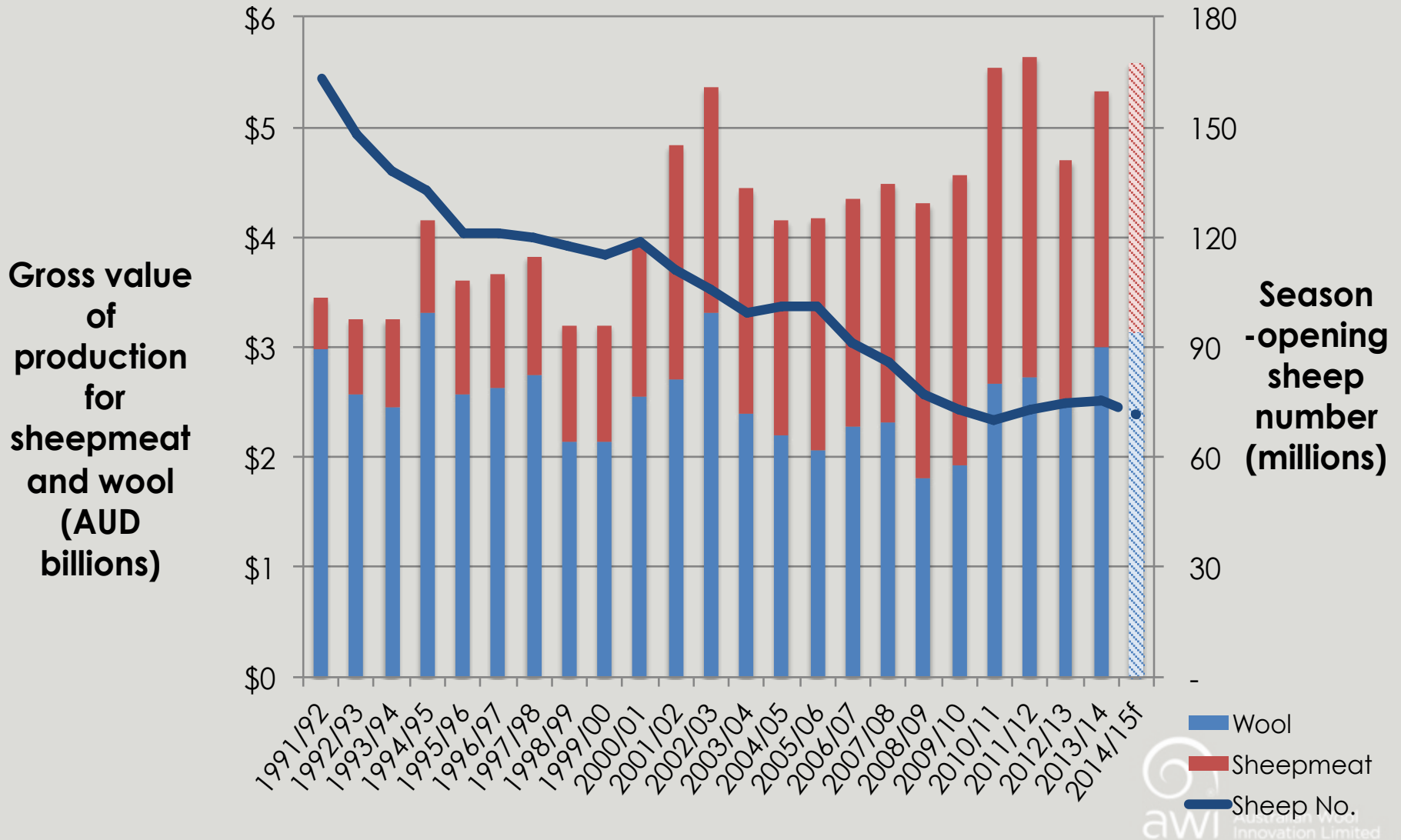


AWI Breech Strike R&D Technical Update
Maritime Museum, Sydney
12th July 2016

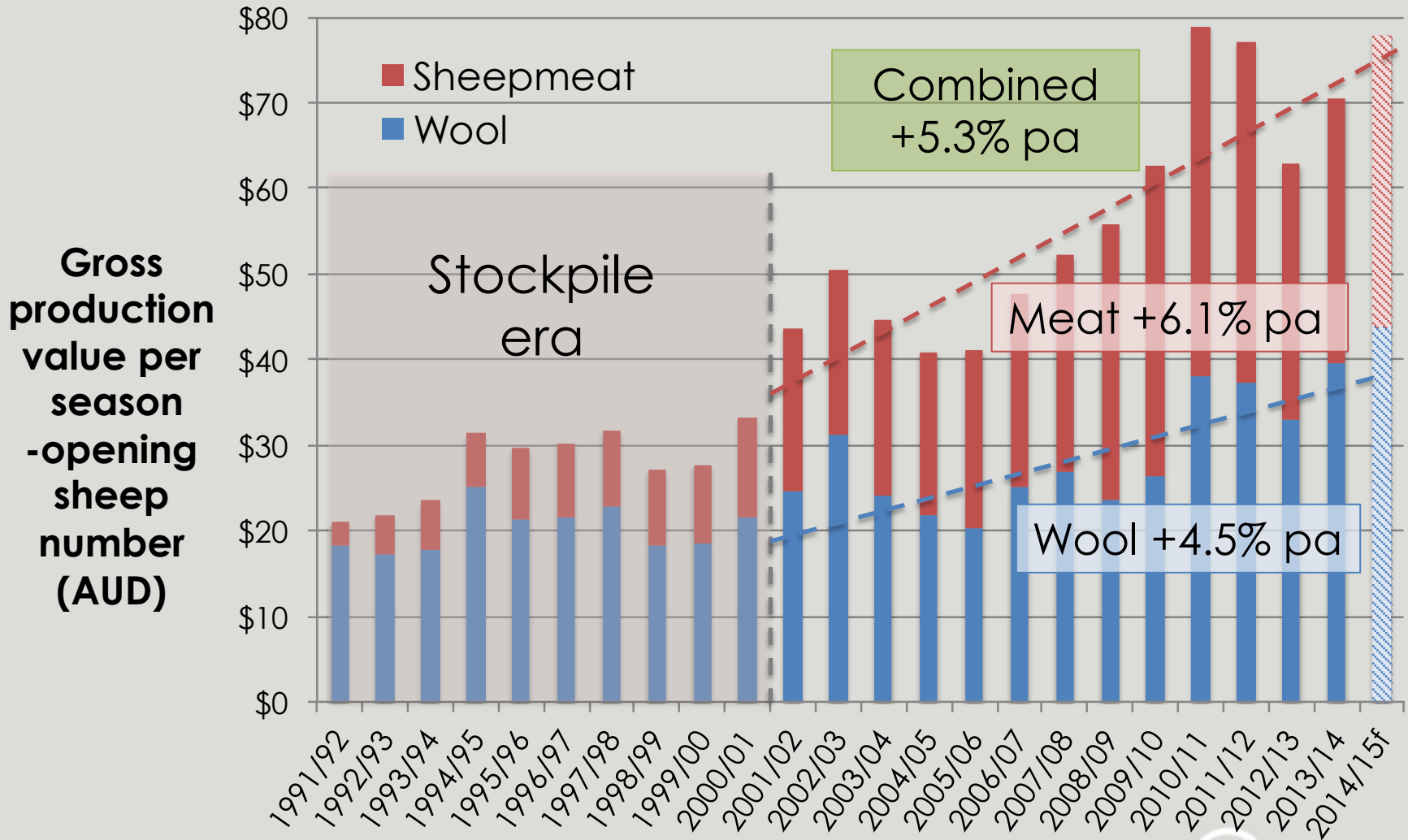
Dr Paul Swan
Australian Wool Innovation

Australian Sheep Flock Demographics
Changes Last 10 years

Rising protein demand is transforming our industry

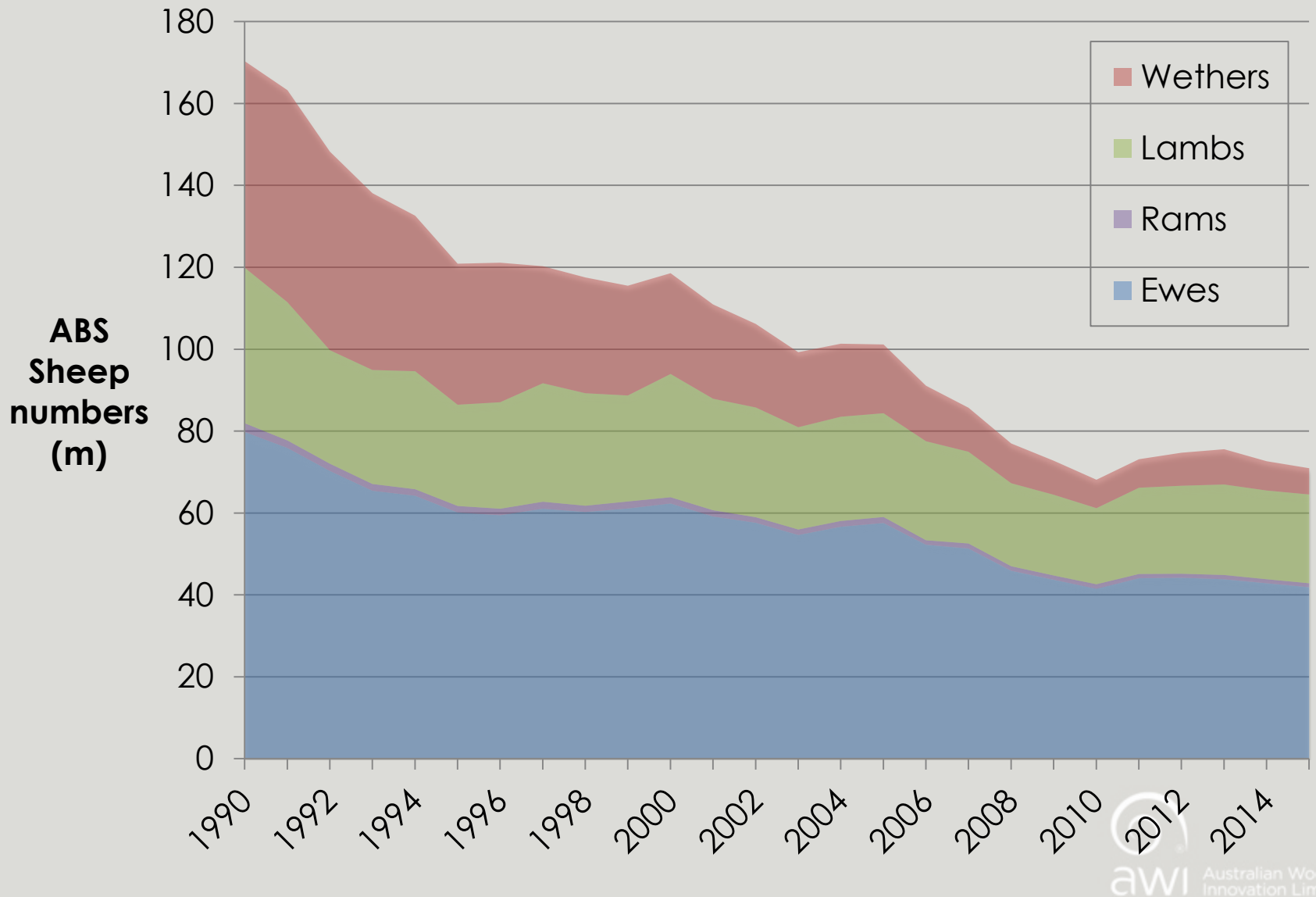


Tight supply is driving value per head up

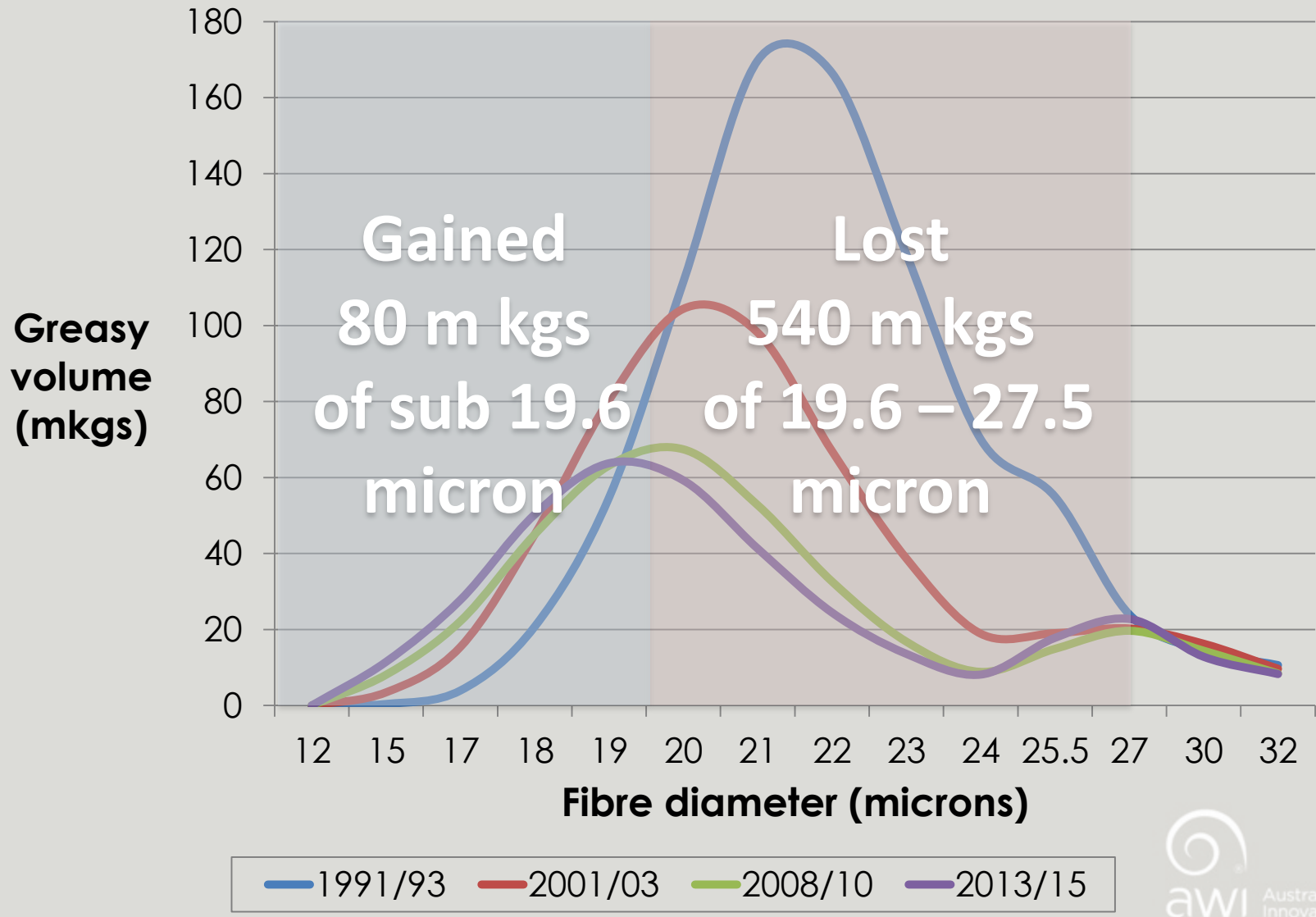


This is why sheep are becoming more expensive

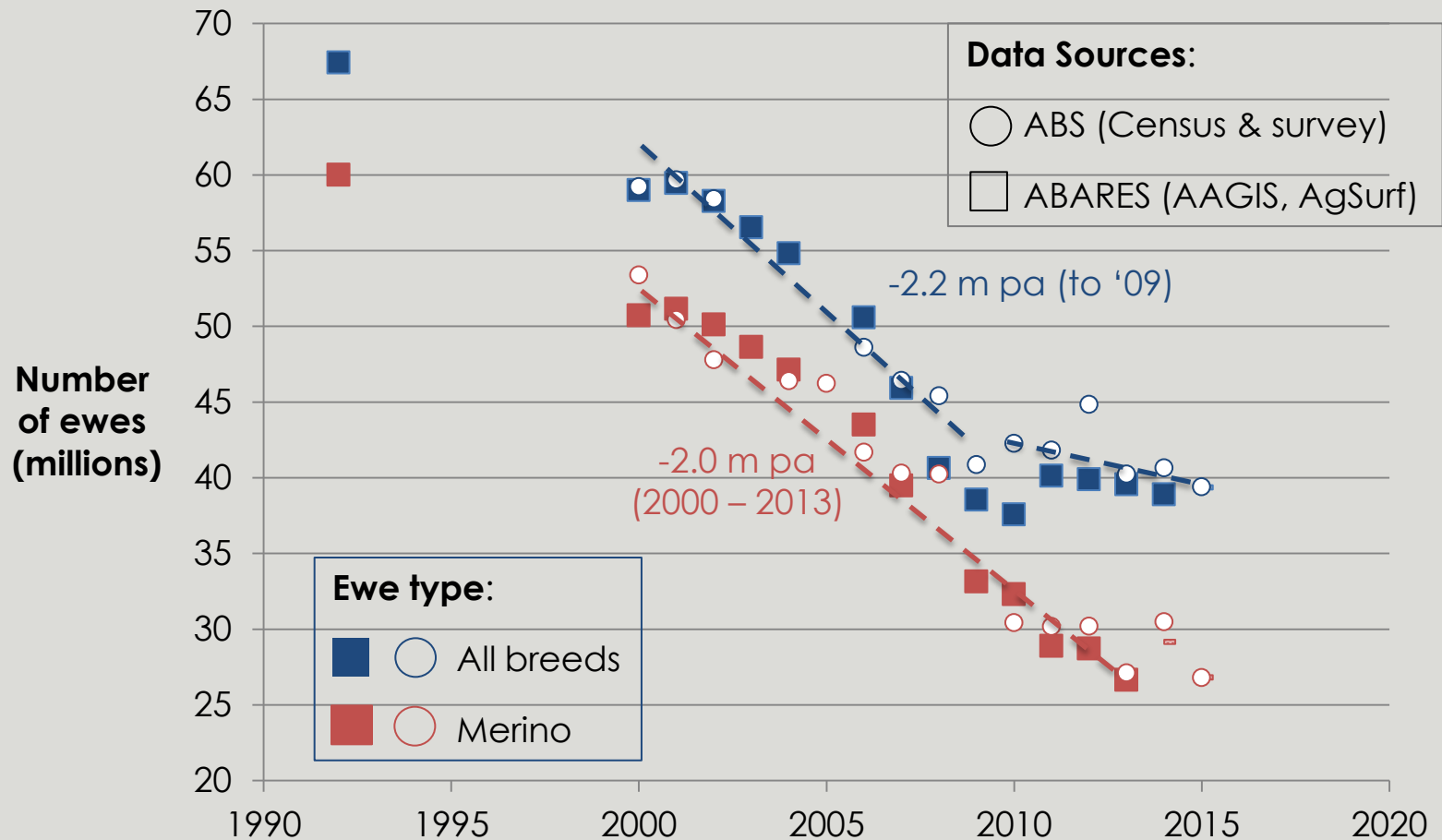
Wethers: 50m to 6m (-87%). Ewes: 80m to 42m (-48%)



Wool is wearing these demographic changes

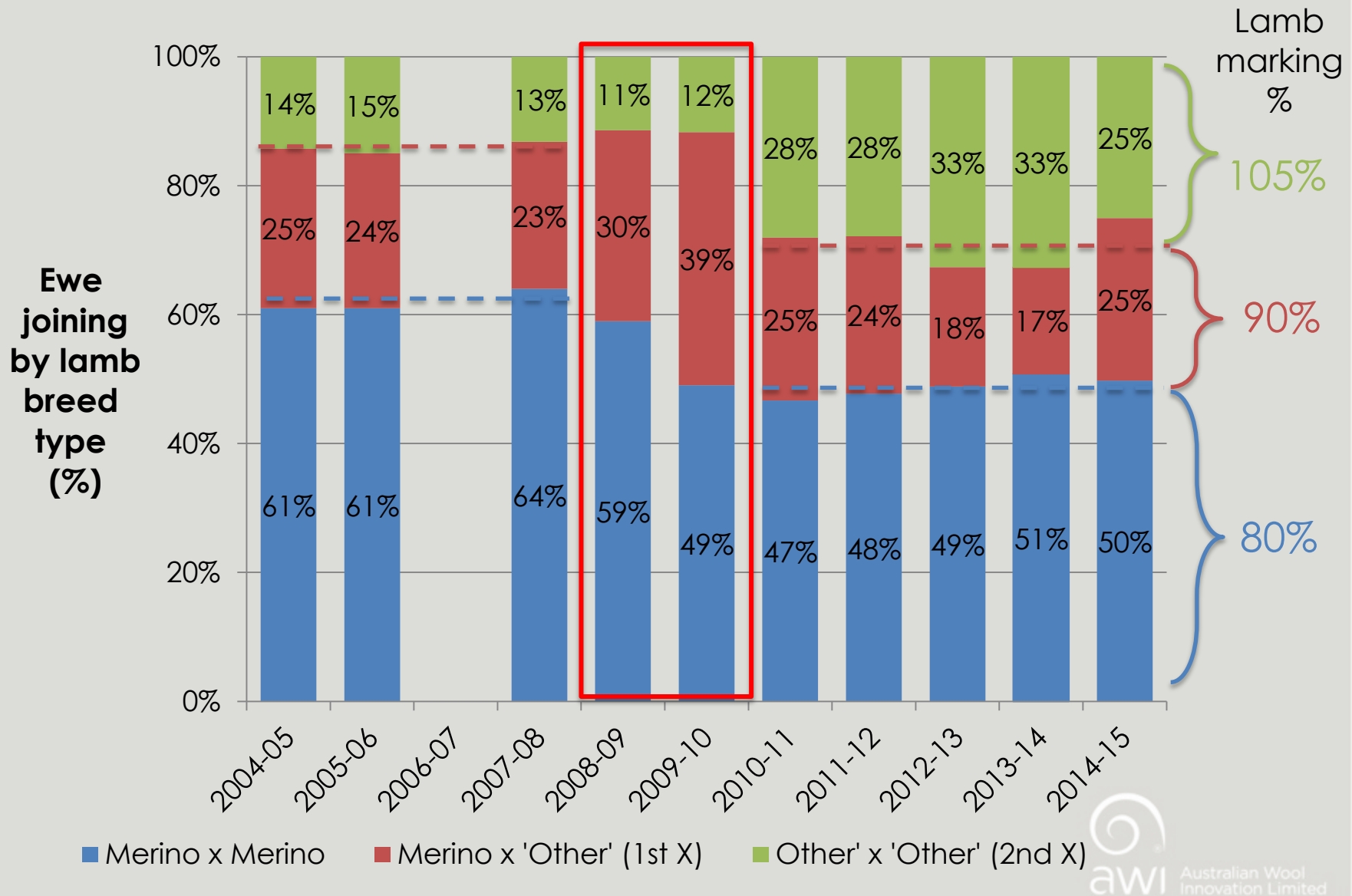


Our ewe flock breed balance changed post GFC

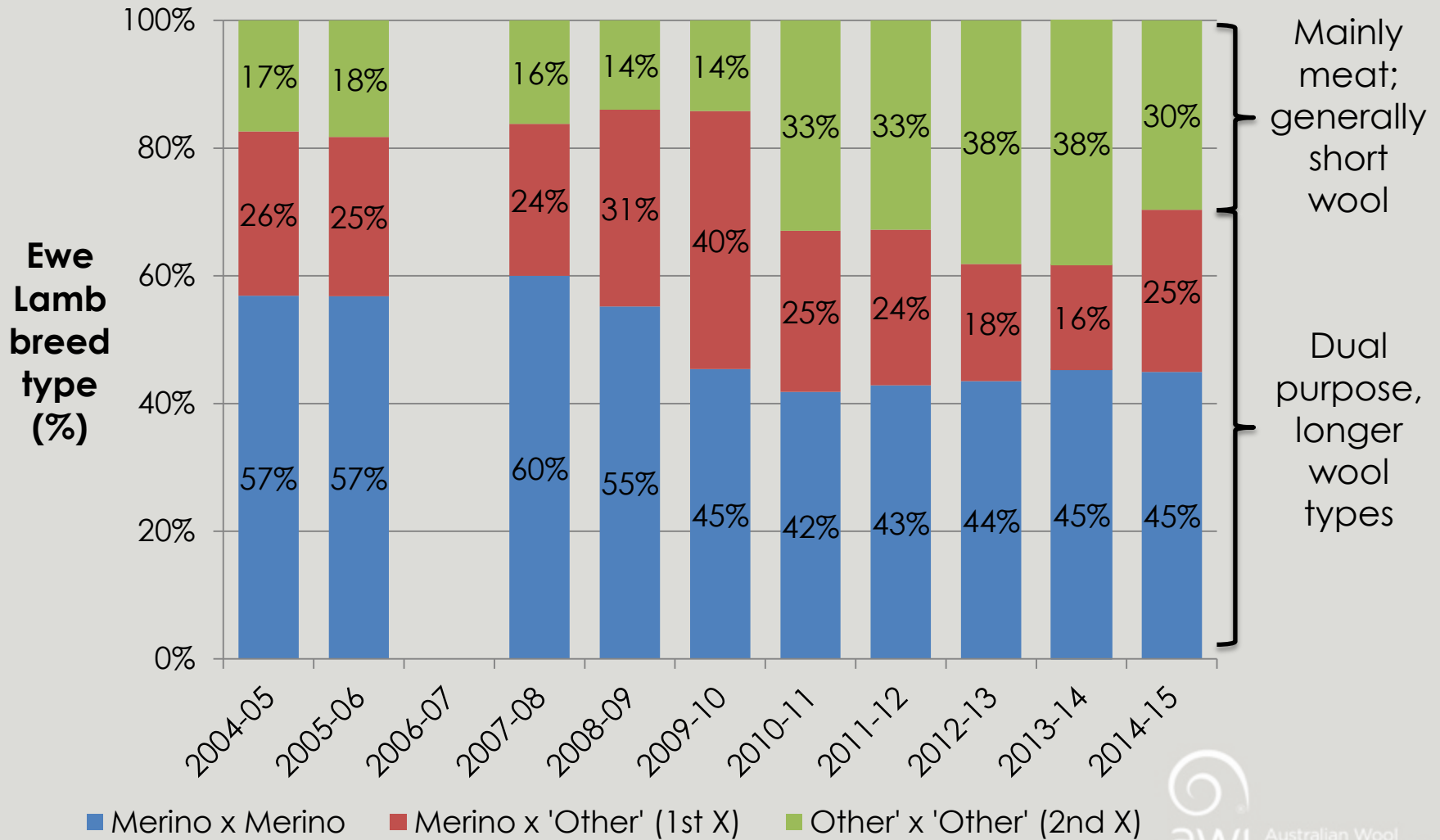


Merino ewe share has dropped from 85% to 60%.

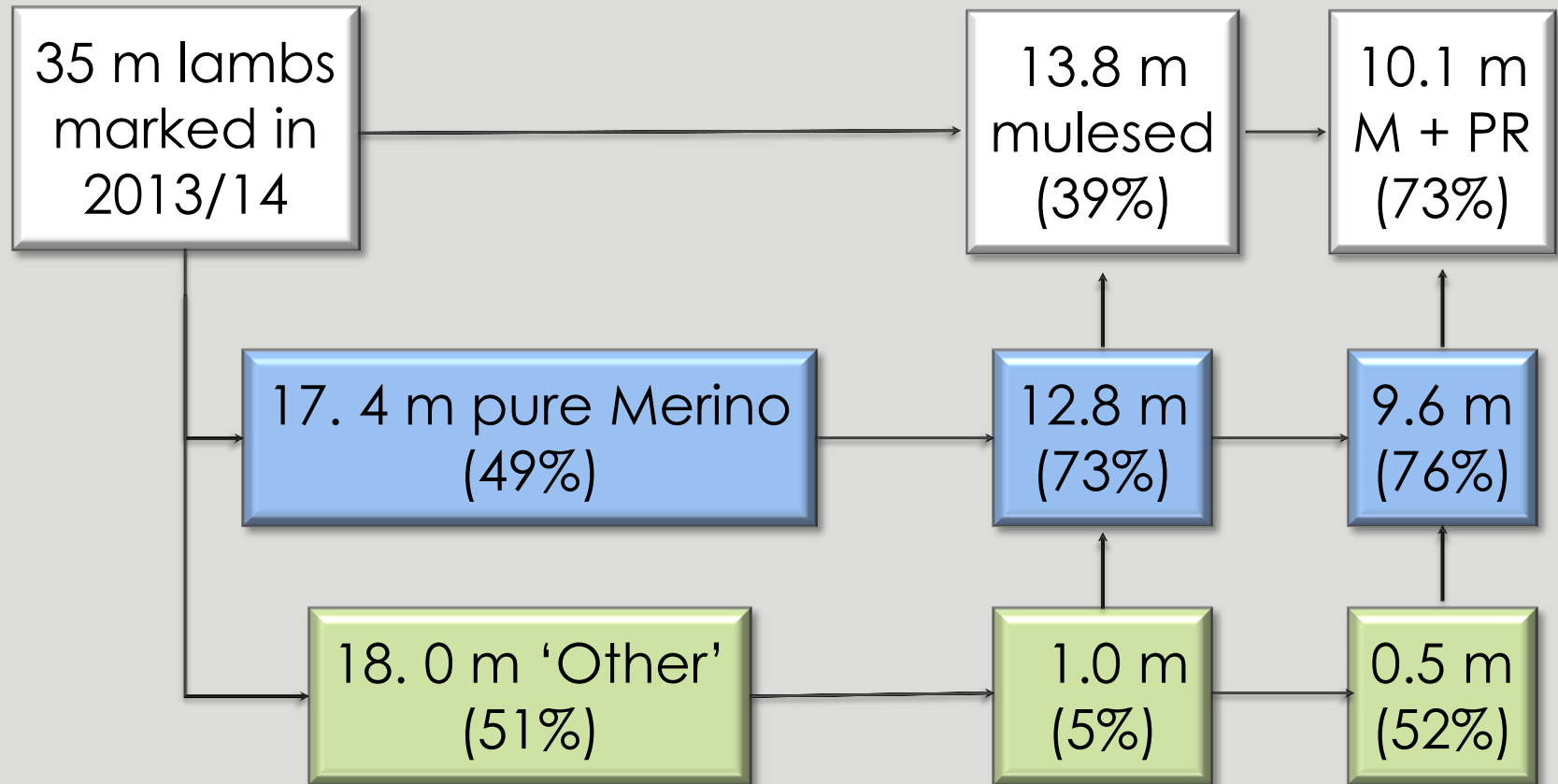
A new norm? 50% of ewes joined to produce Merinos



The need to mules has changed, demographically



AWI:MLA 2013/14 survey: 40% of lambs mulesed



93% of Mulesed lambs were Merino, and these represented 97% of those treated with pain relief

Key messages

Rising protein demand is driving demographic change

Major demographic 'waves':

- from sheep to specialist cropping and cattle
- toward ewes & lambs, away from adult wethers
- toward terminals/maternals, post GFC.

Major changes:

- Trend away from a 'need to mules' type
- 60% of lambs marked are not mulesed
- 95% of non-Merino lambs are not mulesed
- 25% of Merino lambs are not mulesed
- 75% of Merino lambs have pain relief applied



This publication is based on information presented at the Australian Wool Innovation Limited (AWI) National Wool Research and Development Technical Update on Breech Flystrike Prevention held on 12th July 2016. Some information in this publication has been contributed by one or more third parties and licenced to AWI, and AWI has not verified whether this information is correct.

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AWI gratefully acknowledges the funds provided by the Australian government to support research, development and marketing of Australian wool.