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## **Wool Desk Report—June 2009**

# **Flock Demographics and Producer Intentions— February 2009 National Survey Results**

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## Executive Summary

This issue of Wool Desk Report presents the results of a survey of 1 410 Australian sheep producers conducted in February 2009. The survey was done to provide information to the Australian Wool Innovation's Production Forecasting Committee and to update the flock model that is used by the relevant state forecasting committees. The survey methodology follows that reported in the May 2007 issue of Wool Desk Report (Curtis 2007).

The producers in the survey collectively produced 24.3 thousand tonnes of wool from a total of 4.3 million adult sheep and 1.7 million lambs shorn during 2007–2008. This represented a sample size of 6.1 per cent of the Australian wool production and 6.6 per cent of the adult sheep and lambs shorn during 2007–2008.

### Key findings from the survey

- In 2009, 39 per cent of producers reported conditions as average or above average compared to 65 per cent of producers in 2008.
- Twenty-four per cent of producers reported that the seasonal conditions of February 2009 were better than those of February 2008.
- Sixty per cent of producers reported that they intended to maintain their current mix of wool and prime lamb production in 2009. Twenty-five per cent of producers intended to move toward more prime lamb production.
- Surveyed producers reported they intended to mate 59 per cent of all ewes to Merino rams in 2009, down from 64 per cent in 2008. For Merino ewes, the producers reported they intended to mate 67 per cent to Merino rams during 2009.
- In 2008, the marking rate (lambs marked relative to ewes joined) for Merino lambs was 84 per cent, while the rate for Merino first cross lambs was 92 per cent, for Merino second cross lambs, 95 per cent, and for meat breed lambs, 106 per cent.
- At the start of 2009, ewes accounted for 73 per cent of the national flock and 85 per cent of these ewes were pure Merino. Of the sheep over 12 months old, 80 per cent were ewes and 89 per cent were Merino.

High lamb prices and depressed wool prices resulted in a shift to prime lamb production. Poor seasonal conditions across New South Wales, Victoria and Tasmania persisted. As a result, sheep numbers are unlikely to expand in the near term.

Merino sheep continue to provide the backbone of the Australian flock in terms of producing fine Merino wool and prime lambs through the use of terminal sires. Retention of first cross ewes to produce prime lambs will have to be considered in those states not traditionally associated with significant prime lamb production.

## Methodology

On behalf of Australian Wool Innovation (AWI) and the Department of Agriculture and Food, Western Australia, Taverner Market Research Pty Ltd surveyed 1 410 sheep producers across Australia during February 2009. The number of producers surveyed in each statistical division was determined by the relative proportion of wool producers in each division according to the AWI shareholder database. These statistical divisions represented 99 per cent of the Australian sheep population, as recorded in the 2007 Australian Bureau of Statistics agriculture survey.

Each producer was asked to nominate the locality nearest their property and this information was used to map the distribution of the wool producers surveyed (Figure 1).

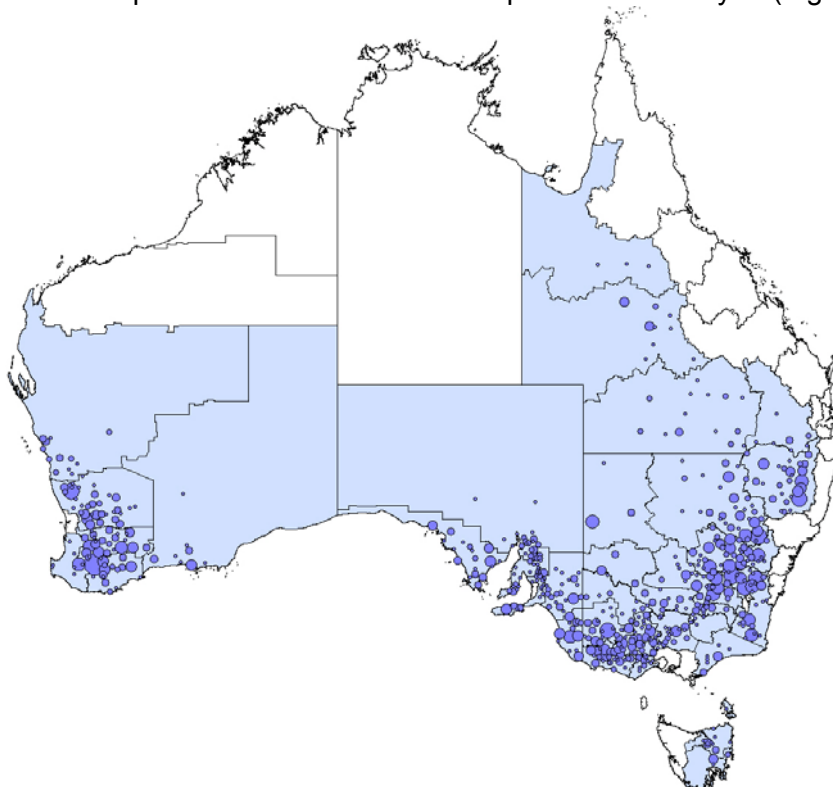


Figure 1 **Distribution of the surveyed statistical divisions (shaded areas) and of the survey participants (dots). Larger dots indicate multiple producers from the same locality.**

Interviewers used a set of standard questions. All interviews were conducted via telephone. Producers with fewer than 500 sheep on their property were excluded.

Detailed flock compositions were only collected from producers shearing 1 200 or more adult sheep in 2008–2009. While this reduced the sample size for these measures to 1 107 producers, it accounted for over 94 per cent of the adult sheep shorn by all of the producers surveyed.

Wool production was reported by producers in either bales or kilograms greasy. Average bale weight by state for lots sold at auction was used to convert between bales and kilograms. The average bale weight was 176 kg for New South Wales, 182 kg for Queensland, 180 kg for South Australia, 173 kg for Tasmania, 177 kg for Victoria and 178 kg for Western Australia.

## Results

### Survey coverage

Survey participants produced 24 300 tonnes of greasy wool during 2007–2008 and estimated production for 2008–2009 at 22 700 tonnes. These figures were achieved from a combined total of 4.3 million adult sheep and 1.7 million lambs shorn in 2007–2008 and from an estimated 4.0 million adult sheep and 1.7 million lambs in 2008–2009. The data represent 6.1 per cent of the Australian wool production, and 6.6 per cent of the sheep and lambs shorn during 2007–2008 as reported by the AWI Production Forecasting Committee.

### *Sheep shorn and bales produced*

Each producer was asked how much wool they had produced, or would produce, and how many adult sheep and lambs had been or would be shorn during 2008–2009 (Table 1).

Table 1 Median values by state for wool produced and adult sheep and lambs shorn per producer during 2008–2009

	NSW	QLD	SA	TAS	VIC	WA	AUST
Wool production							
bales	60	100	56	80	60	84	65
kg greasy	10 600	18 200	10 000	13 800	10 600	15 000	11 600
Sheep shorn							
Adults	1 900	3 750	1 500	3 000	2 000	2 500	2 000
Lambs	800	800	700	600	700	1 200	800
No. of producers	528	51	224	25	277	288	1 393

Figure 2 plots median wool production against median number of adult sheep shorn for 2008–2009<sup>1</sup> in each state and for Australia. The straight line of best fit ( $R^2 = 0.91$ ) is also plotted.

Including lambs as 0.7 of an adult produced a slightly better fit ( $R^2 = 0.96$ ). Using the combination of adults and lambs indicated that 221 adult sheep equivalents were shorn per tonne of greasy wool across Australia. This value varied between states ranging from 199 adult sheep equivalents for South Australia to 223 for Western Australia, 233 for New South Wales, 234 for Victoria, 237 for Queensland and 247 for Tasmania.

<sup>1</sup> Wool production from adult sheep and lambs shorn in 2008–2009 includes producer estimates of expected wool production and sheep shorn to the end of June 2009.

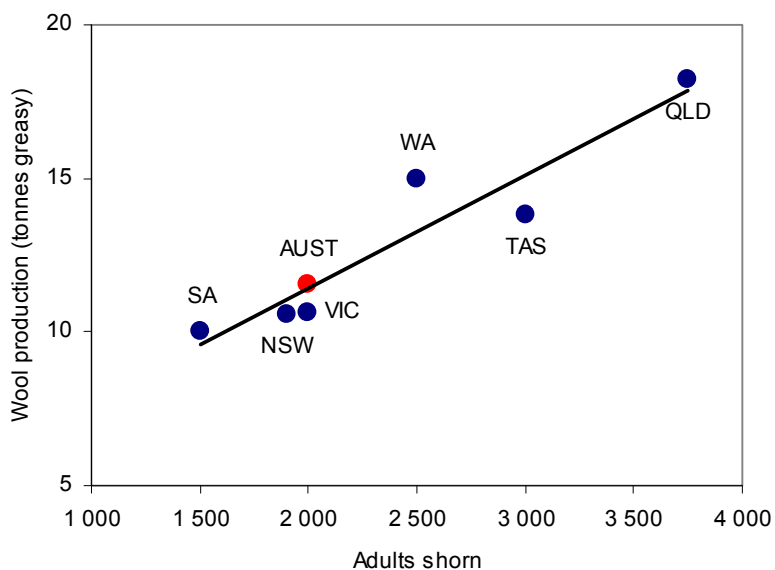


Figure 2 Relationship between median wool production (tonnes greasy) and median number of adult sheep shorn across Australia in 2008–2009.

Flock and clip sizes varied between producers (Figures 3 and 4). While 96 per cent of producers were shearing between 500 and 16 000 adult sheep, 75 per cent of producers were shearing 1200 or more adult sheep. This accounted for 94 per cent of all adult sheep shorn and 93 per cent of all wool produced by the survey participants.

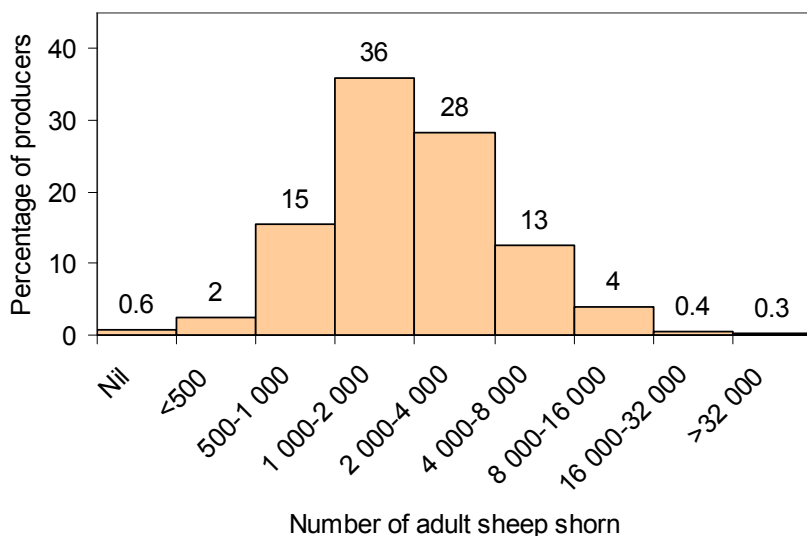


Figure 3 Size of the adult flock shorn per producer during 2008–2009 (data from 1 405 producers surveyed across Australia).



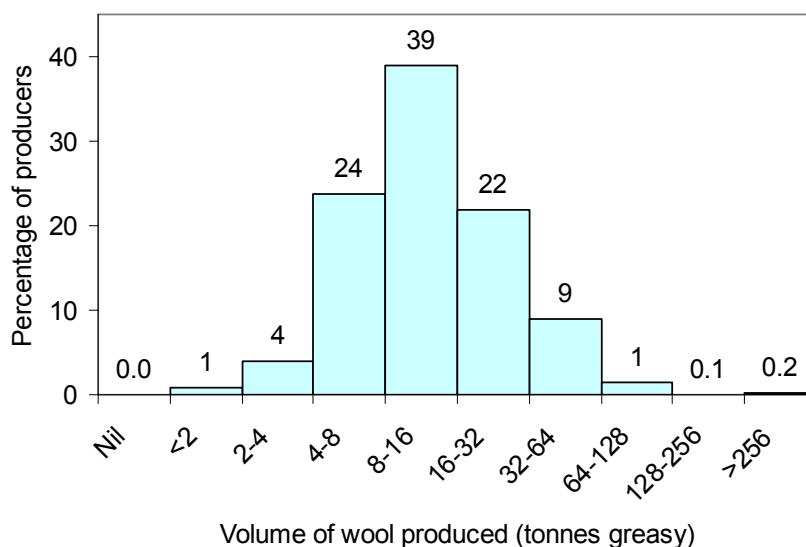


Figure 4 Volume of greasy wool produced (tonnes) per producer during 2008–2009 (data from 1 393 producers surveyed across Australia).

## On-farm situation

### Current on-farm conditions

Quarterly meetings of state AWI Production Forecasting Committees maintain records of current conditions on farms and assess them against conditions in the previous year.

Surveyed producers were asked to rate current conditions as either 'above average', 'average', 'below average' or 'drought'. Figure 5 combines the producer responses for all states. Figure 6 presents the results for each state. Almost two-thirds of producers rated conditions 'below average' or 'drought' (compared with only 35 per cent in 2008) indicating an overall decline in conditions. The exceptions were Queensland with 70 per cent of producers and Western Australia with 71 per cent of producers reporting 'average' or 'above average' conditions.

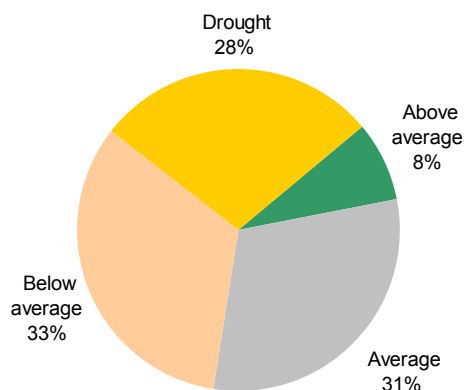


Figure 5 Farm conditions for all of Australia at time of survey (February 2009) as assessed by surveyed producers.

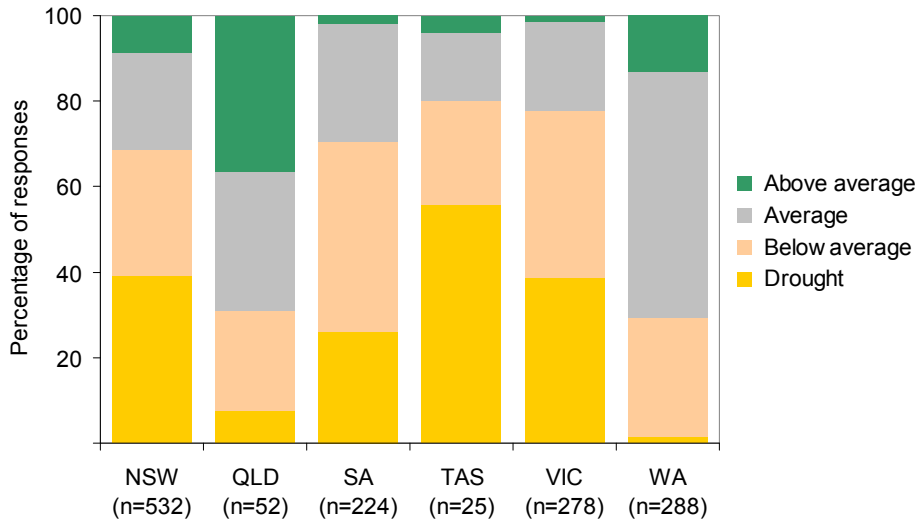


Figure 6 Farm conditions for each state at time of survey (February 2009) as assessed by surveyed producers.

Figures 7 and 8 indicate that changes in seasonal conditions over the past 12 months were varied. In New South Wales and Victoria, over 40 per cent of producers reported conditions were worse. In contrast, over 30 per cent of producers in Queensland, Tasmania and Western Australia reported better conditions.

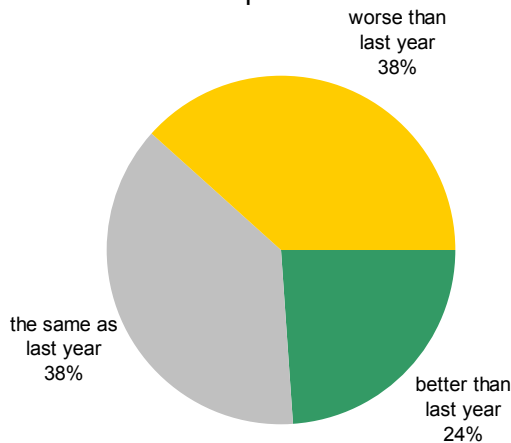


Figure 7 Seasonal conditions for all of Australia at time of survey (February 2009) compared to conditions at same time in 2008.

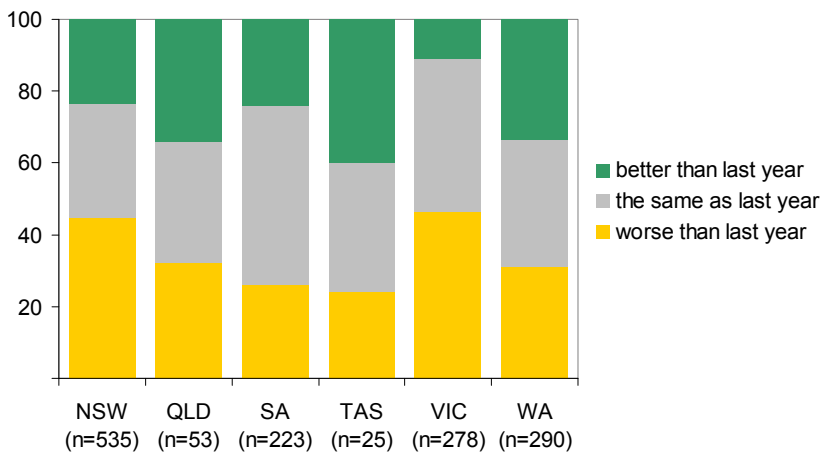


Figure 8 Conditions for each state across Australia at time of survey (February 2009) compared to conditions at same time in 2008.

Overall, conditions were considered to have declined during the past 12 months. Of the surveyed producers, 38 per cent considered conditions were worse in 2009 than in 2008, while only 23 per cent considered conditions were better than in 2008.

### Changes to enterprise mix

As the profitability of each enterprise changes, producers tend to respond by adjusting their mix of wool and prime lamb production or by shifting to other enterprises. Surveyed producers were therefore asked if they were planning to change their mix of wool and prime lamb production during the financial year 2009–2010. Across Australia, 60 per cent of all producers expected to maintain their current mix. Twenty-five per cent of producers indicated they would be moving towards more prime lamb production while only 3 per cent indicated they would be moving towards more wool production (Figure 9).

Tasmania recorded the highest proportion of producers intending to change enterprise mix towards more prime lambs (Figure 10) while all states recorded few or no producers intending to move to more wool production.

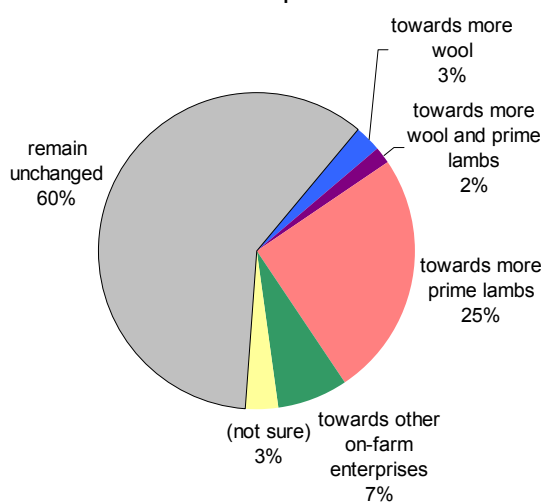


Figure 9 Proportion of producers across Australia (percentage) intending to move towards ‘more wool’, ‘more prime lambs’, ‘other on-farm enterprises’ or ‘remain unchanged’ during 2009-2010.

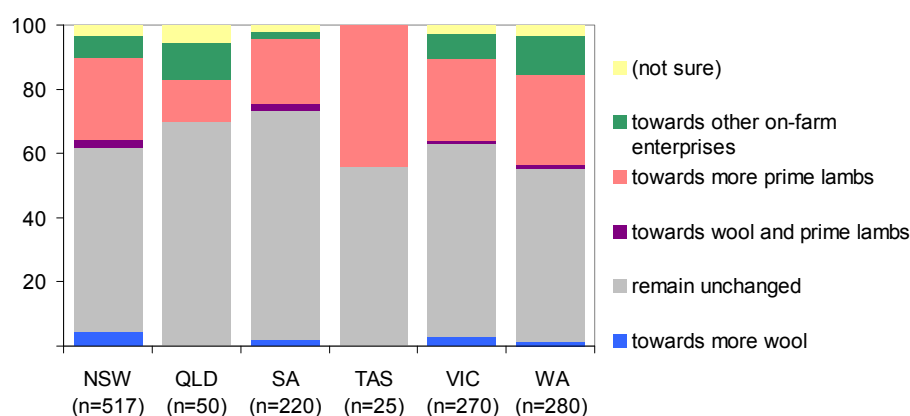


Figure 10 Proportion of producers (percentage) by state intending to move towards ‘more wool’, ‘more prime lambs’, ‘other on-farm enterprises’ or ‘remain unchanged’ during 2009–2010.

## Flock demographics

### *Ram choice*

The Australian sheep flock is dominated by Merino sheep, which produce the world's largest supply of high-quality, fine wool. Merino rams are used where the emphasis is on wool production and to produce sheep to replace those removed from flocks or to increase the numbers on farms. Terminal sires are joined to Merino ewes to produce prime lambs, with some of the Merino first cross ewes being retained and then mated to produce second cross Merino lambs for the meat market.

The choice of ram breed influences the type of lamb that can be turned off and the number of Merino sheep available as replacements. Wool quality and quantity differ between breeds, with Merino sheep producing more and finer wool than cross breeds. Genetic progress in wool traits will be impeded when a proportion of the flock is mated to non-Merino rams, because the selection pressure on wool traits will be reduced.

Producers were asked how many ewes they joined to Merino and other rams in 2008 and their breeding intentions for 2009. These results are shown in Table 2 combined with data from 2004 (Curtis and Croker 2005), 2005 (KMS Curtis unpublished), 2006 (Curtis 2007) and 2007 (Curtis 2008). Producers in New South Wales and Victoria indicated reductions of 7 and 8 per cent respectively in the proportion of their ewes joined to Merino rams (Table 2). Other states indicated smaller changes.

Table 2 **Proportion (percentage) of ewes joined in 2004 through 2008, and intended to be joined in 2009 to Merino rams. Number of responses relates only to the 2008 and 2009 data**

State	2004	2005	2006	2007	2008	2009	Number of responses
NSW	62	61	57	66	64	57	536
QLD	92	87	79	81	82	83	53
SA	55	54	61	64	60	58	225
TAS	66	61	56	65	44	46	25
VIC	53	50	51	55	56	48	278
WA	69	68	69	69	69	66	290
AUST	63	61	61	65	64	59	1 407

For 2009, the data were further split by ewe type (Table 3). The proportion of Merino ewes joined to Merino rams was higher in all states than the proportion of non-Merino ewes joined to Merino rams. According to producer intentions, few Merino first cross ewes will be joined to Merino rams in 2009, as was also the intention reported in previous surveys.

**Table 3 Proportion (percentage) of Merino and Merino first cross (1X) ewes that were joined or are intended to be joined to Merino rams for lambing in 2009**

State	Merino ewes	Merino 1X ewes	Number of responses
NSW	65	14	536
QLD	86	16	53
SA	63	26	225
TAS	56	37	25
VIC	65	6	278
WA	70	28	290
AUST	67	16	1 407

Queensland continues to record the highest proportion of ewes joined to Merino rams, reflecting the emphasis on wool production in this state. At the other extreme, Victorian and Tasmanian producers intend to join only 48 and 46 per cent respectively of their ewes to Merino rams in 2009, reflecting their greater emphasis on prime lamb production.

*Time of lambing*

The distribution of the ‘month lambing commences’ for Merino ewes and Merino first cross ewes for each state is shown in Figure 11. The sample size for Merino first cross ewes was small compared to Merino ewes and this may account for some of the differences between breeds. The distributions are similar to those recorded by Croker et al. (2009). There were insufficient data to produce meaningful distributions for second cross Merino and meat breed ewes.

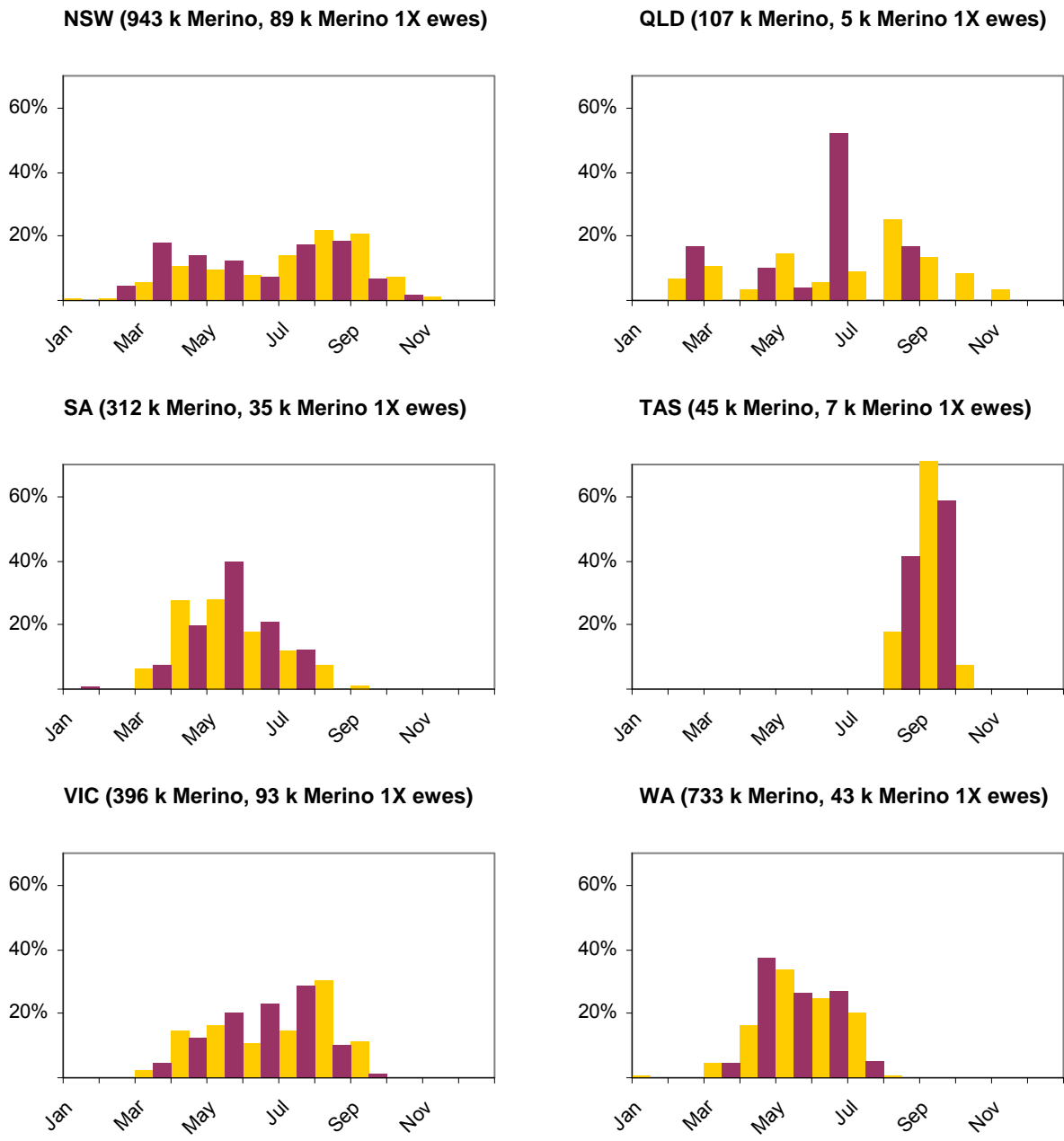


Figure 11 Month lambing commences by state for Merino (■) and Merino first cross (■) ewes weighted by number of ewes to be joined in 2009. The number of Merino and first cross Merino ewes in the distributions are shown as thousands (k).

### Marking percentages

Marking percentages were recorded for Merino lambs (Merino ewe x Merino ram), Merino first cross lambs (1X = Merino ewe x non-Merino ram), Merino second cross lambs (2X = Merino first cross ewe x non-Merino ram) and meat lambs (meat breed ewe x meat breed ram) (Table 4). The sample size for second cross and meat breed lambs in some states was very small.

Marking percentages for Merino lambs tended to be lower than those for Merino first cross lambs. Meat breed lambs had the highest average marking percentages.

Table 4 **Marking percentages by state for different lamb production systems in 2008**

State	Merino lambs		1X lambs		2X lambs		Meat lambs	
	%	Number	%	Number	%	Number	%	Number
NSW	85	395	92	298	93	21	106	57
QLD	75	37	88	12	50	2	83	2
SA	86	169	95	137	96	4	106	13
TAS	75	17	96	12	0	0	122	4
VIC	83	205	92	175	115	9	111	22
WA	85	237	89	156	89	12	96	18
AUST	84	1 060	92	790	95	48	106	116

Table 5 **Marking percentages by state for Merino ewes joined to Merino rams from 2004 to 2008**

State	2004	2005	2006	2007	2008
NSW	74	77	77	80	85
QLD	68	65	64	57	75
SA	82	79	90	87	86
TAS	82	74	83	77	75
VIC	78	78	80	75	83
WA	81	87	81	76	85
AUST	77	79	80	78	84

Table 5 presents the marking percentages recorded for Merino ewes joined to Merino rams in 2004 (Curtis & Croker 2005), 2005 (KMS Curtis unpublished), 2006 (Curtis 2007), 2007 (Curtis 2008) and 2008 (Table 4).

### *Flock composition*

Flock composition on farms at 1 January 2009 was split by breed (Merino, Merino first cross and Merino second cross/meat breeds), by sex (ewes and wethers) and by age (lambs, hoggets and adults). Sheep born in 2008 were classified as lambs while those born in 2007 were classified as hoggets and those born before 2007 as adults.

Merino sheep dominated the flock in all states, averaging 84 per cent of the flock across Australia (Table 6a). Queensland (92 per cent) recorded the highest emphasis on Merinos and Tasmania (68 per cent<sup>2</sup>) and Victoria (76 per cent) were at the other extreme. Second cross Merinos and meat sheep breeds were more prevalent in Victoria (approximately 9 per cent) than in any other state.

Ewes made up 73 per cent of the Australian flock (Table 6b). The percentage of ewes for individual states ranged from 56 per cent in Queensland to 78 per cent in South Australia and Western Australia.

At the beginning of 2009, adults (born before 2007) made up 52 per cent of the Australian flock (Table 6c). Differences in age distribution between the states were mostly small. Western Australia recorded the lowest proportion of adults (51 per cent). Queensland was the highest (58 per cent) at six percentage units above the national average.

The proportion of lambs in the flock at 1 January 2009 (31 per cent) is close to the twenty-nine per cent recorded for the start of 2008 (Curtis 2008). This proportion is influenced by several factors including the 2008 lambing rate (see 'marking percentages' in Table 4); conditions available to finish lambs; market price for lambs; the number of replacement lambs required; time of lambing (Figure 11) and, most importantly, the date the lamb count was recorded. Since the finishing of many late-born lambs is rarely completed before the end of the calendar year, the contribution of lambs to the flock is probably exaggerated due to the timing of the survey, particularly for Merino wether lambs and non-Merino lambs of both sexes.

If lambs are excluded from the flock composition analysis, the pure Merino component of the flock rises to 89 per cent (Table 7a) and ewes to 80 per cent of the flock (Table 7b).

A complete flock composition (breed by sex by age) for each state and Australia-wide is given in Appendix 1, Table A1.

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<sup>2</sup> The latter result is heavily influenced by one producer with a large meat breed flock. Excluding this producer raises the percentage of the Tasmanian flock that is Merino to 79 per cent.



Table 6 Flock composition (per cent) at 1 January 2009 summarised by (6a) breed, (6b) sex, and (6c) age class for each state and Australia-wide

## 6a

State	Merino	Merino 1X	Merino 2X or meat breed
NSW	84	12	4.4
QLD	92	7	1.3
SA	86	11	3.0
TAS	68	13	20.0
VIC	76	15	9.2
WA	89	8	2.6
AUST	84	11	4.8

## 6b

State	Ewes	Wethers
NSW	72	28
QLD	56	44
SA	78	22
TAS	72	29
VIC	70	30
WA	78	22
AUST	73	27

## 6c

State	Lambs	Hoggets	Adults
NSW	32	17	52
QLD	25	17	58
SA	28	18	54
TAS	29	15	56
VIC	29	18	53
WA	32	17	51
AUST	31	17	52

Table 7 Flock composition (per cent) excluding lambs at 1 January 2009 summarised by (7a) breed, and (7b) sex for each state and Australia-wide

## 7a

State	Merino	Merino 1X	Merino 2X or meat breed
NSW	91	7	2.7
QLD	94	5	1.0
SA	90	8	2.2
TAS	75	14	11.2
VIC	80	14	6.0
WA	94	5	0.8
AUST	89	8	2.8

## 7b

State	Ewes	Wethers
NSW	80	20
QLD	56	44
SA	85	15
TAS	81	19
VIC	75	25
WA	87	13
AUST	80	20

## Discussion

### Seasonal conditions

At the time of the survey, on-farm conditions were worse than at the same time in 2008 for the three south-eastern Australian states. Only 8 per cent of all producers questioned reported conditions that were above average in early 2009.

Tasmania was in the worst condition at the start of 2009 with over half of producers surveyed reporting they were in drought.

### Enterprise mix

While the majority of producers (60 per cent) in this survey indicated they did not intend to change their enterprise mix, 25 per cent indicated they intended to move towards production of more prime lambs. This latter move is a lot higher than was reported in 2008 (10 per cent) and 2007 (11 per cent).

As the rise in intent to produce more prime lambs is seen across all states, it is suggested it reflects price (and profit) expectations for wool versus prime lamb enterprises.

### Flock composition

Merino sheep continue to dominate the Australian flock and their proportion has changed very little over the past 12 months. The high proportion of Merinos in the national flock reflects the critical role this breed plays in the fine wool, live export and sheep meat industries.

Ewes accounted for 78 per cent of all Australian sheep over 12 months old, unchanged from the level reported in the previous year (Curtis 2007).

As emphasis is transferred from wool production to prime lamb production, more Merino ewes are joined to non-Merino rams and fewer Merino ewe lambs become available as replacements. To further increase prime lamb production, first cross ewes are retained and used to produce second cross lambs. This results in an increase in the non-Merino component of the flock, and in the proportion of adult wool from cross bred sheep. This latter point is illustrated in Figure 12.

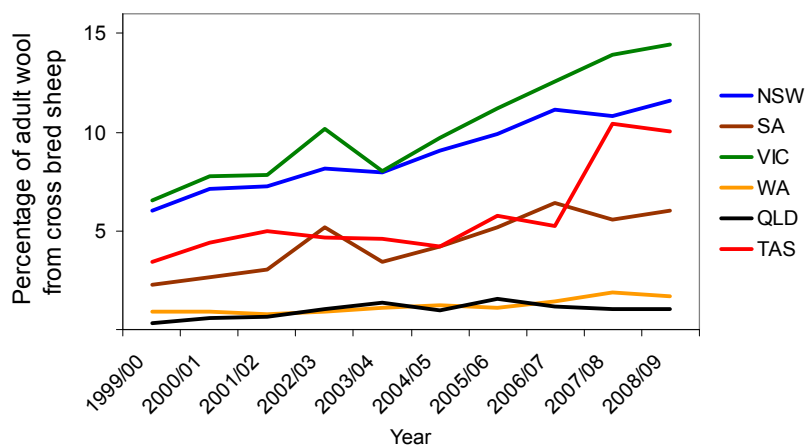


Figure 12 Change in percentage of adult wool from cross bred sheep by state of production (Wool Desk research using Australian Wool Exchange auction data).

## Ram choice

In 2008, producers joined Merino rams to 64 per cent of all ewes and intended to reduce this to 59 per cent in 2009. This is lower than recorded in the last two years and similar to that observed in 2005 and 2006.

Choosing a ram breed to join to Merino ewes must meet the objectives of providing sufficient Merino replacements to cover deaths, the level of culling and sales, and possibly the production of prime lambs. Joining too many Merino ewes to non-Merino rams will reduce the capacity of the Merino component to maintain its flock percentage.

For 2009, 67 per cent of Merino ewes were to be joined to Merino rams, down from 69 per cent reported in 2007 and 73 per cent in 2008. This reflects a rebound from the higher Merino–Merino joinings in recent years and an increase in emphasis on prime lamb production.

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## Appendix 1

Table A1 Flock composition (percentage) at 1 January 2009 by breed, sex and age for each state and Australia-wide. In this table, lambs are sheep born in 2008, hoggets are sheep born in 2007 and adults are sheep born before 2007

Breed	Sex	Age	NSW	QLD	SA	TAS	VIC	WA	AUST
Merino	Ewes	Lambs	12.2	10.8	12.9	7.5	11.4	14.6	12.6
		Hoggets	10.5	8.7	11.3	5.7	9.1	11.6	10.4
		Adults	38.2	31.8	43.0	34.7	30.6	44.4	38.6
	Wethers	Lambs	9.9	10.3	8.6	7.1	8.5	10.9	9.8
		Hoggets	4.3	6.3	4.5	4.9	5.5	4.3	4.7
		Adults	8.7	23.9	5.2	7.6	11.2	3.6	8.2
Merino 1 X	Ewes	Lambs	3.9	2.4	3.0	2.0	3.2	2.7	3.2
		Hoggets	1.0	0.7	1.0	1.5	1.9	0.8	1.1
		Adults	3.3	0.8	4.0	7.8	7.6	2.0	3.8
	Wethers	Lambs	3.1	0.9	2.4	0.6	1.3	2.2	2.3
		Hoggets	0.3	1.3	0.3	0.3	0.2	0.2	0.3
		Adults	0.1	0.7	0.6	0.3	0.4	0.2	0.3
Merino 2 X or meat breed	Ewes	Lambs	1.6	0.4	1.0	4.3	2.5	1.1	1.5
		Hoggets	0.4		0.4	2.2	1.2	0.1	0.5
		Adults	1.2	0.2	1.1	5.8	2.9	0.4	1.3
	Wethers	Lambs	1.1	0.3	0.5	7.7	2.5	0.8	1.3
		Hoggets		0.3			0.1	0.1	0.1
		Adults	0.1	0.1				0.1	0.1
Number of responses			395	42	145	20	206	253	1 061