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PRIME LAMB PRODUCTION IN WESTERN AUSTRALIA

A review of the development of the prime lamb industry in Western Australia.

By R. J. SUITER, Adviser Sheep and Wool Branch

PRIME LAMB production in Western Australia has evolved into an industry based almost entirely on the local market. This has not always been the case. In the 1930-40 era a substantial proportion of the State's prime lamb production was exported to the United Kingdom. During this era the industry was equally dependent on exports and local market.

The past

In 1900, Mr. Percy G. Wicken, Biologist in the Department of Agriculture, wrote: "The demand for good, fat, young lambs in this market is almost unlimited, the supply nearly nil, and the price obtained highly remunerative to the farmers." Evidently others shared Mr. Wicken's view, for an anonymous author in 1902 wrote "wool has almost ceased to be a factor in the sheep industry as farmers have discovered that there is more money in selling early lambs and fat wethers, than to depend solely upon wool as a source of profit from sheep. The fleece is simply a by-product, and no progressive farmer now expects to make sheep pay with wool as the principal source of revenue from the flock. The majority of farmers do not have large flocks, 25 sheep being considered as above average, and they are kept largely because they are valuable assistance on the farm in consuming weeds and other waste materials that possess no value."

There are many such statements of confidence in the prime lamb industry about the turn of the century. They were apparently well founded, as a lively export market developed during the period 1906 to 1914. This market was first broached in 1906 with a trial shipment, which was to have been 2,000 carcasses but was actually only 422 frozen carcasses, aboard R.M.S. Britannia to England from Western Australia.

This shipment was successful, and more than 12,000 prime lamb carcasses were exported in 1907. From here the industry developed rapidly till 1914.

During 1914 to 1929 the trade declined and it was not until 1930 that regular shipments were resumed. This was followed by a period of substantial development. In 1939 exports reached a peak of almost 364,000 carcasses.

Since 1939 there has been a progressive reduction in export of prime lamb until in 1968 46,800 carcasses (710 tons) were exported (Table 1).

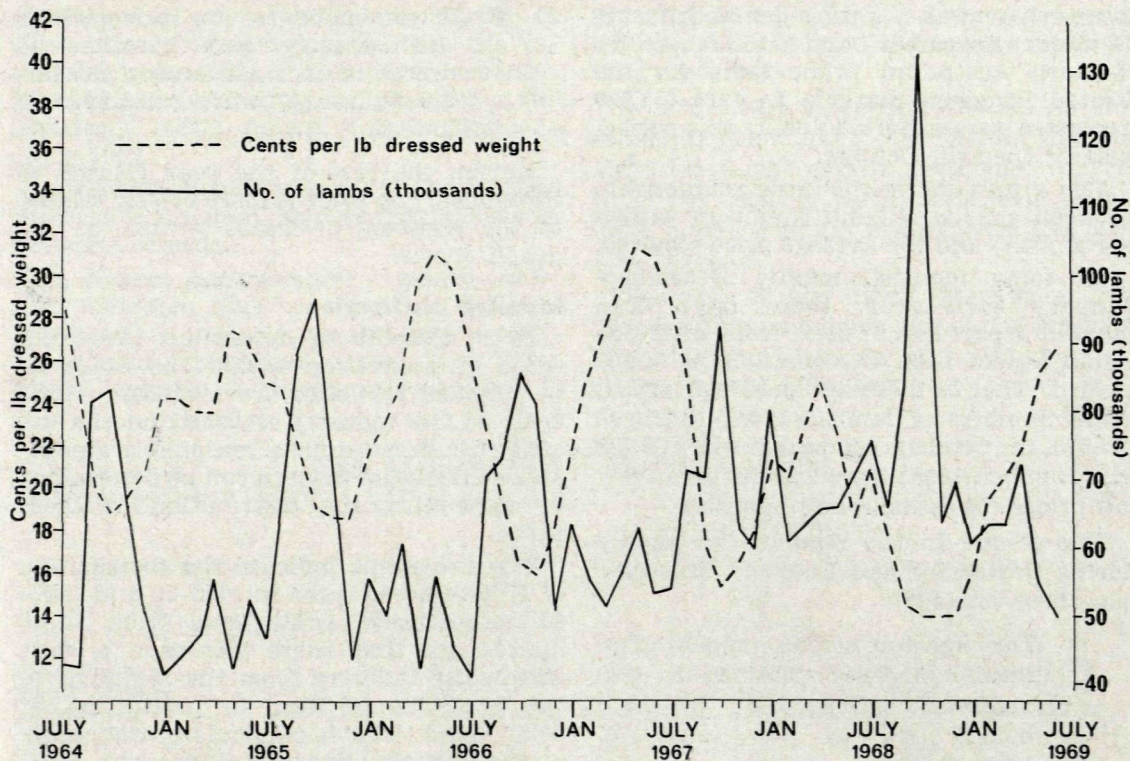
Table 1.—Prime lamb exported from Western Australia

Year ended June	No. of Carcasses
1930	22,826
1939	363,779
1940	315,815
1950	129,023
1960	195,300
1965	114,100
1966	145,900
1967	70,000
1968	46,800

Source—Annual Reports, Australian Meat Board.

Davenport*, writing of the 1955-56 season said "Although the home market is still the main outlet, the availability of an export market at satisfactory price levels is important as a buffer against unduly depressed prices during the periods of peak supply in spring."

* Then Senior Adviser Meat Production, Department of Agriculture.



The relationship between supply of lamb and the average price at Midland Saleyard

There is now only a small export market in most years. Although small, this market still influences spring prices for lamb.

The present

Throughout the history of the industry there have been large variations in price, which appear to be mainly due to seasonal fluctuations in production. This is so even now, as shown in the graph.

In recent years the average monthly minimum price has not fallen substantially in spite of both increases in total production and decreases in total exports.

Table 2 shows how dramatically exports have fallen in the last five years—from 18 per cent. of total production in 1964 to 4 per cent. in 1968.

The 1968-69 season, was unusual. Due to shipping difficulties for New Zealand

Table 2.—Production of prime lamb 1964-1969

Year ended June	Total No.	Export		Home consumption	
		No.	Percentage of total	No.	Percentage of total
1964	12,174	2,224	18	9,950	82
1965	11,428	1,680	15	9,748	85
1966	12,542	2,153	17	9,989	93
1967	13,550	1,061	8	12,489	92
1968	16,936	710	4	13,226	96
1969	20,920	4,054	19	16,866	81

Sources: Statistical Register of W.A. and Annual Reports of the Australia Meat Board.

lamb, there was a strong demand during October, November and December for Western Australian prime lamb for the United Kingdom market. In fact 451,000 carcasses were exported during this period, half of them in October.

The graph shows the close relationship between supply of lamb (numbers yarded per month) and the average price received.

In some months, mainly December-January each year, there have been marked departures in price from what one would expect from the quantity of lambs yarded. That is, there are months in which small numbers of lambs yarded (such as 132,920 in October compared with 63,738 in November, 1968) have brought relatively low prices (14 cents in both months).

This is due to the regular glut supply during September and October. This glut has three effects:

- The export of surplus supplies. The minimum price obtained in the market is governed by the price being paid by the importing market.
- The glut allows chilled storage of carcasses bought at favourable prices (which lessens the demand in later months).

- It establishes a low price which the industry may continue to accept later in the season (December-February) when yardings are lower.

During the rest of the year (March to November) the price is more closely related to the numbers of lambs yarded, as the graph shows.

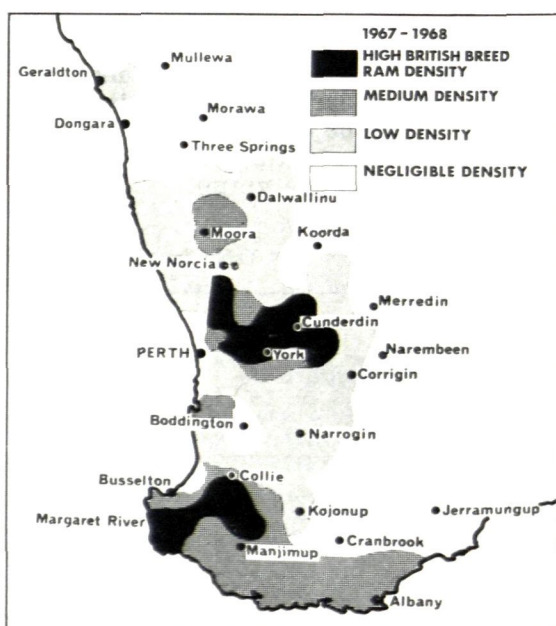
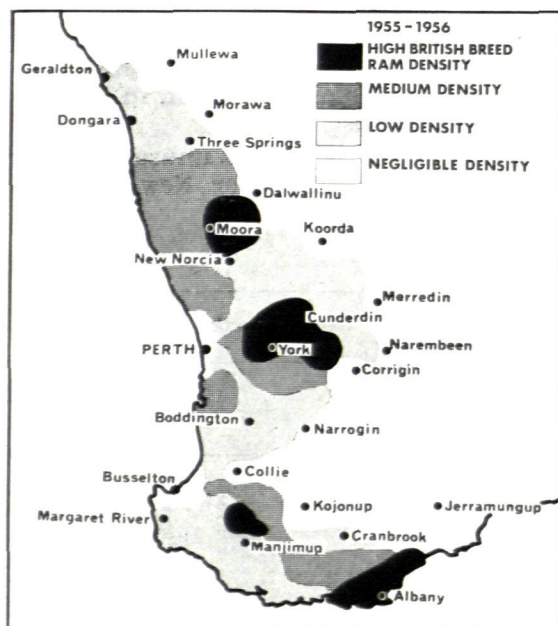
Industry distribution

It is difficult to determine the exact areas of production within the State, as no detailed statistics are available. However, as the industry is based on the use of British breed rams a reasonably acceptable distribution pattern can be determined by examining the distribution of these rams.

The two maps indicate the distribution of British breed rams in 1955-56 and 1967-68 respectively. Indications from these figures are that there has been a shift within the industry from the Midlands to the lower South-West in production of prime lamb. This is particularly noticeable in the Augusta-Margaret River area.

Principal prime lamb sires

Various breeds of sire are used in the prime lamb industry. Changes in the population of these sires can be used as an



The distribution of British breed rams in Western Australia. Left.—1955-56. Right.—1967-68

indication of the relative popularity of those sires. Of particular note is the increasing population of the Border Leicester, Dorset Horn and Suffolk comparative to the relatively static figures for Southdowns since 1962.

Also of particular interest is the marked increase in the dual purpose Corriedale and Polwarth breeds.

In Western Australia the evidence available indicates that consumption of lamb per head is unlikely to increase significantly as it is already at a high level. Thus future growth in demand for lamb is

expected to result mainly from population increase and not from increased consumption per head.

It is difficult to predict the future for export of prime lamb. On current market trends it would appear as though only 5 to 10 per cent. of the State's total prime lamb production will find its way to overseas markets.

However, if the rapid growth of the State's sheep numbers and lamb production continues exports will probably increase beyond this level.

Table 3.—Prime lamb sires in Western Australia

Breed	Year ended 31st March				
	1956	1959	1962	1965	1968
South Down	6,924	8,662	10,517	11,177	11,773
Border Leicester	2,019	2,874	3,668	4,959	10,880
Dorset Horn	4,277	7,035	9,027	9,482	10,812
Romney Marsh	3,438	5,180	4,466	3,892	5,177
Suffolk	539	969	1,501	2,208	2,800
English Leicester	714	763	474	472	452
Shropshire	538	601	616	508	410
Cheviot	20	517	390	361
Corriedale	8,442	9,911	9,362	11,779	22,480
Polwarth	75	216	691	2,552	4,259

Source: Commonwealth Bureau of Census and Statistics.