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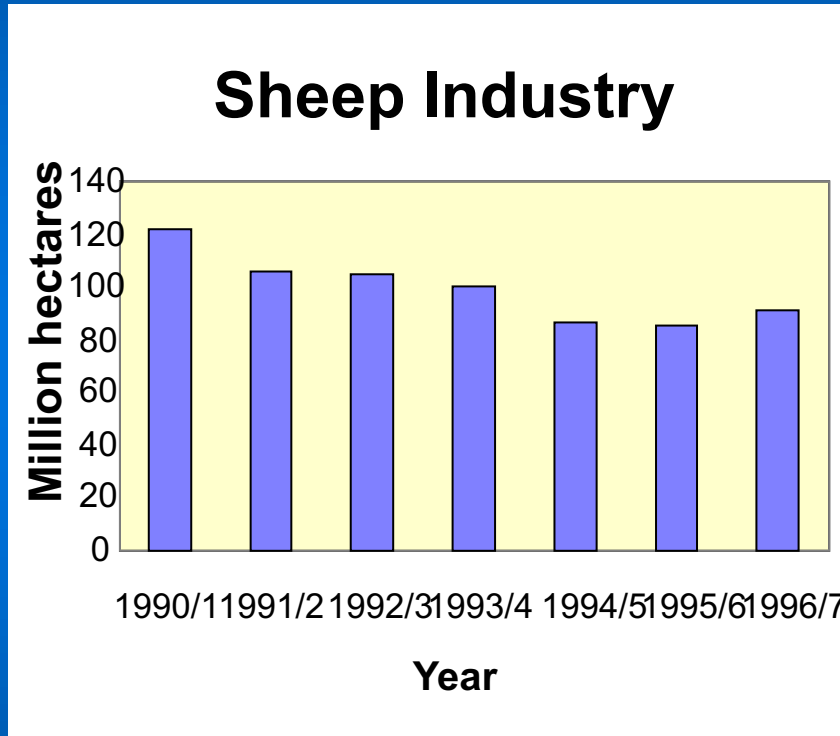
# The Australian Wool Industry (Broadacre & Profile)

Produced for the CRC for Premium Quality Wool undergraduate program by;  
Dr. Peter Auer, The University of New South Wales.



# Land Usage (sector level)

- *decline of land used to primarily produce wool.*



- diversifying into wheat and other crops
- changes in the numbers and the average sizes of units
- continuing increase in Wheat categories
- beef has declined

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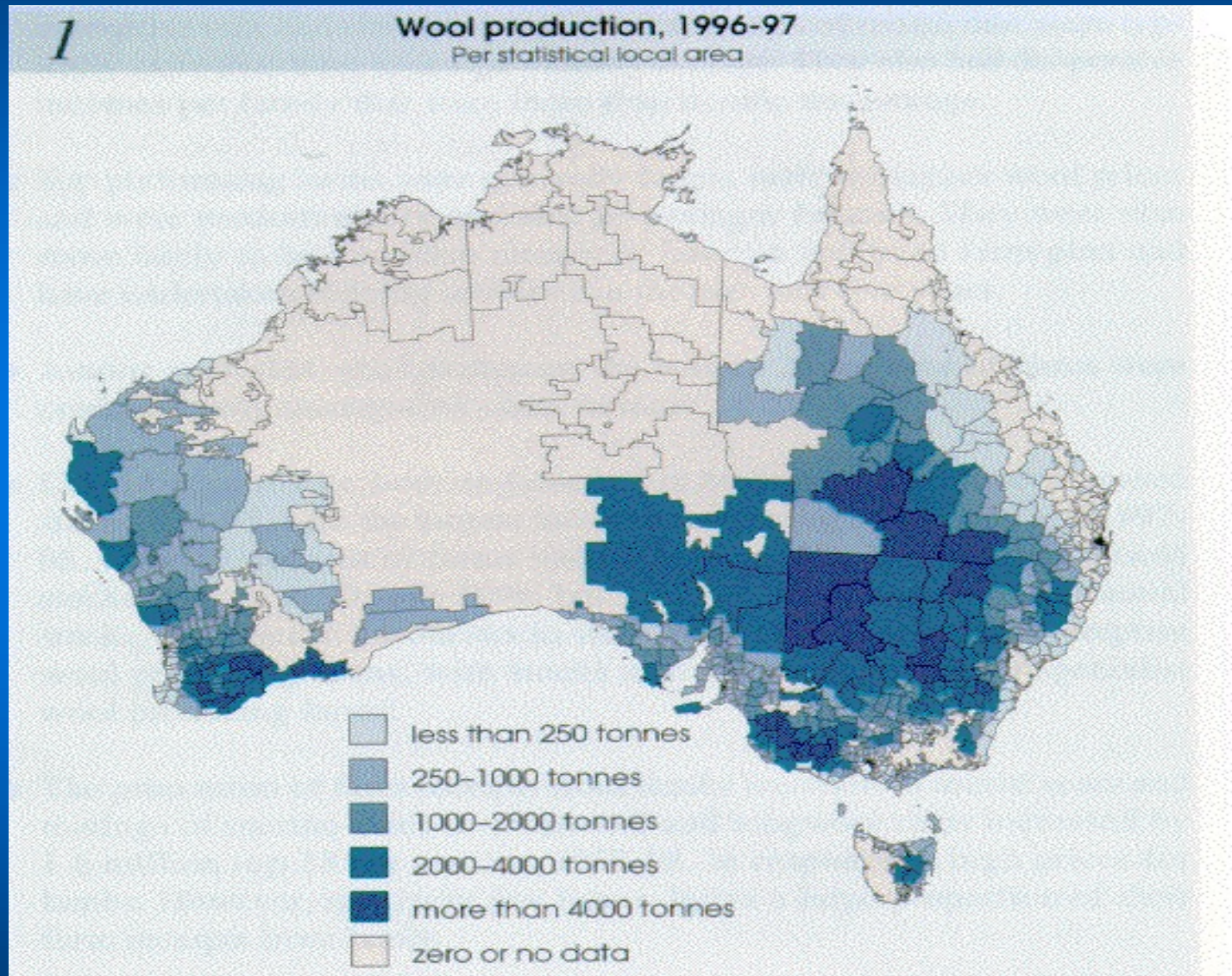
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# Wool Land Usage (1996/97)



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# Producer Numbers

- see Appendix 3

- sector analysis

- Sheep

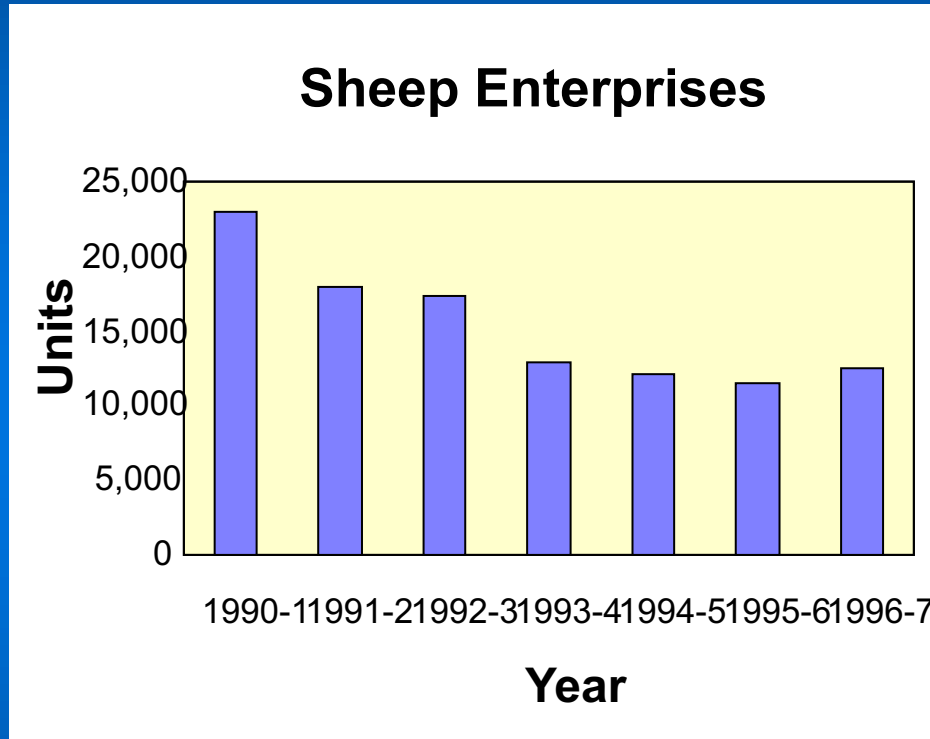
- steep decline
- plateau

- Mixed Livestock - Crops

- significant decline

- Sheep & Beef

- decline



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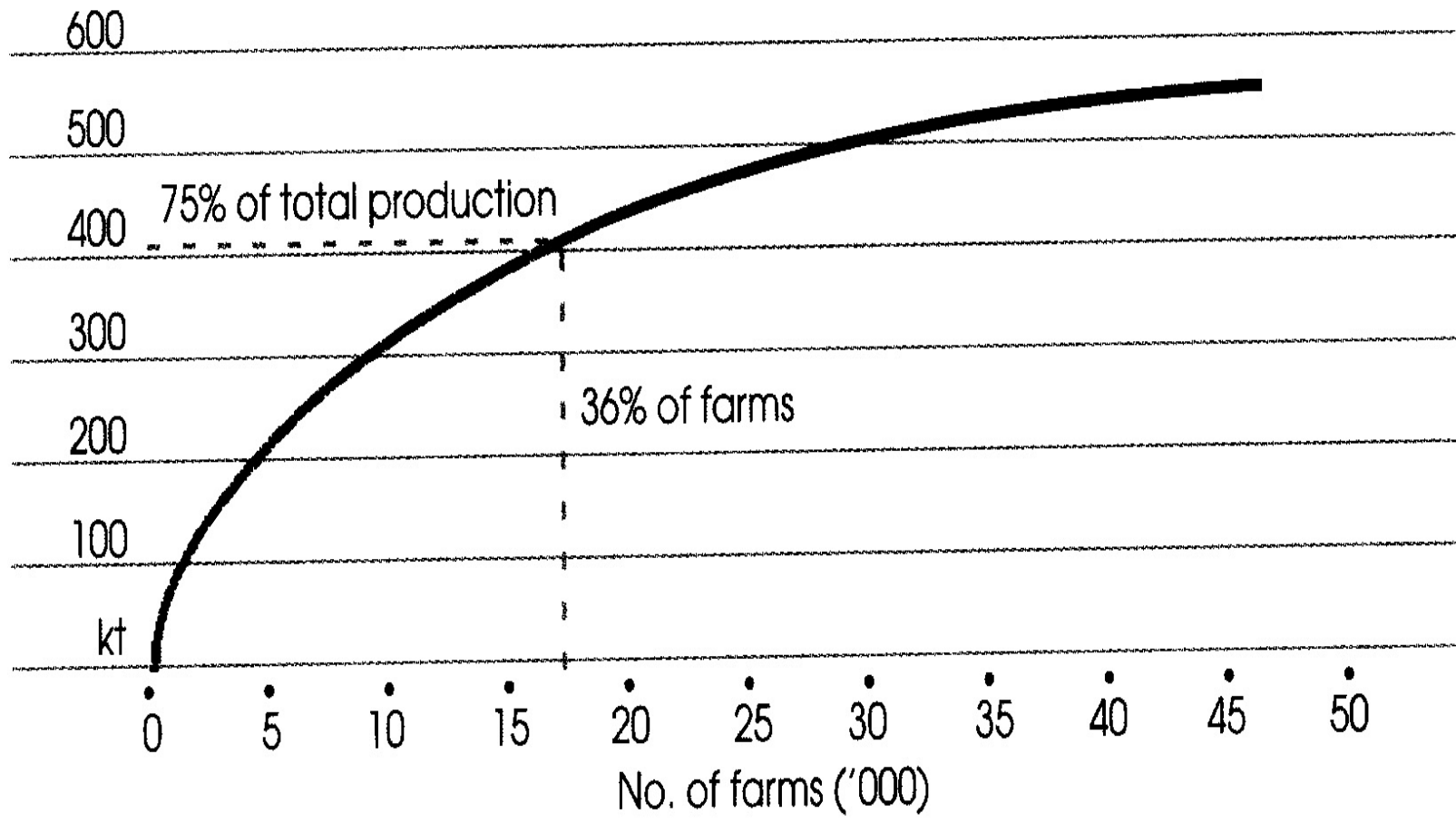
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# Cumulative Production (1996-97)

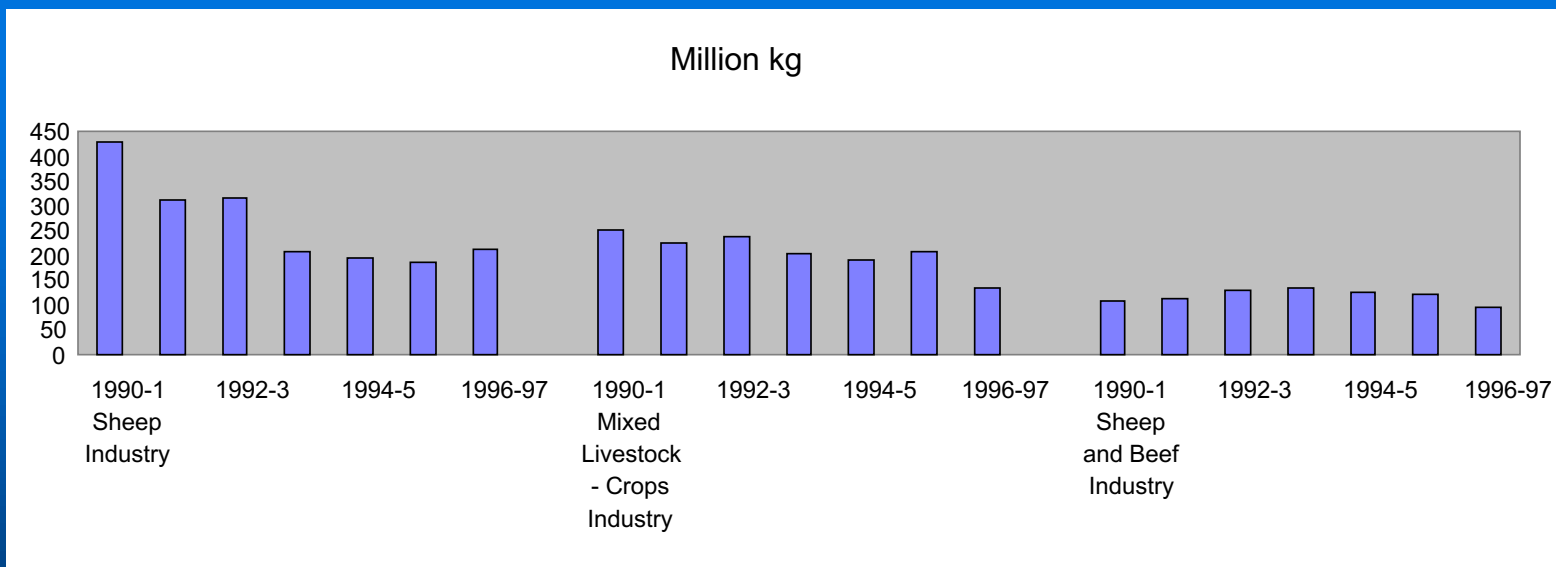
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# Wool Production

- see Appendix 4
- approaching 1957/58 levels
- overall decline since 1990/1
- Sectors
  - Sheep
    - plateau
  - Mixed
    - declining
  - Sheep/Beef
    - steady

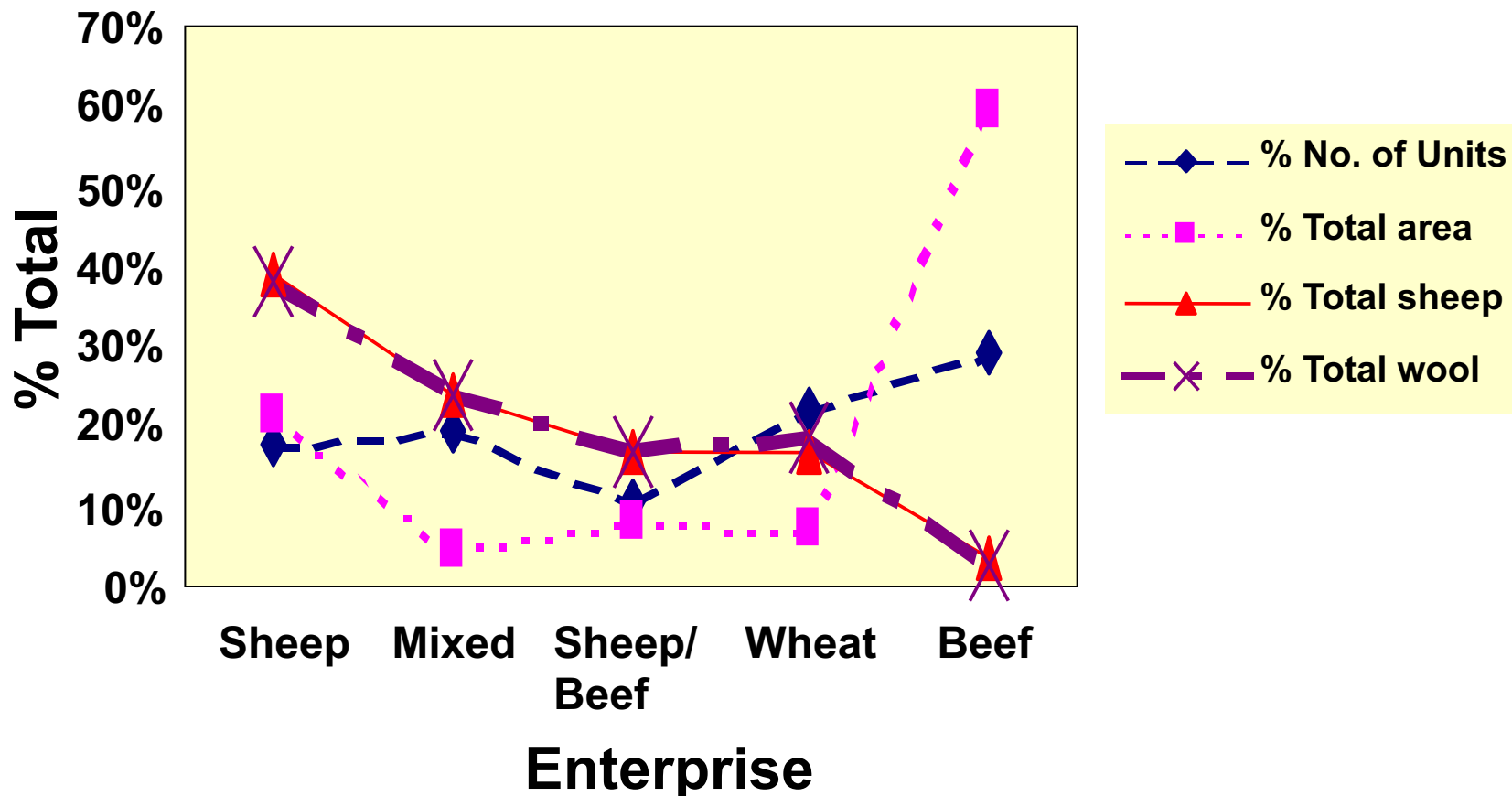




# Influence on Wool Supply

## Chart 1

## 1996/7 ABARE Figures

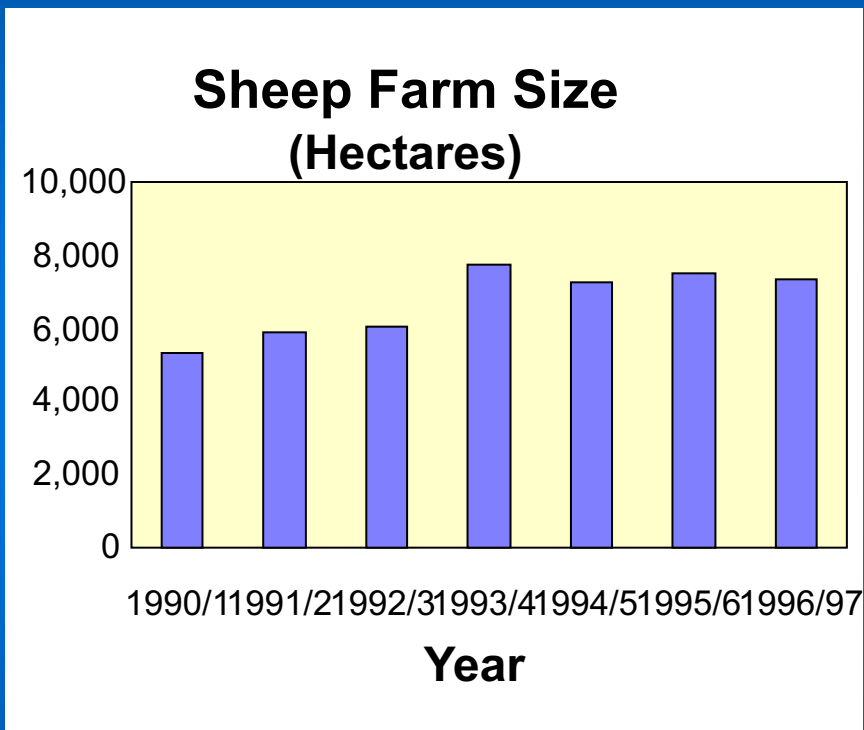


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# Enterprise Size

- see Appendix 5



- Sheep

- ~40% increase since 1990/1

- Others

- slight increases except Mixed

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# Average Flock Size

- see appendix 5
- Sectors
  - Sheep declined
  - Sheep/Beef increased

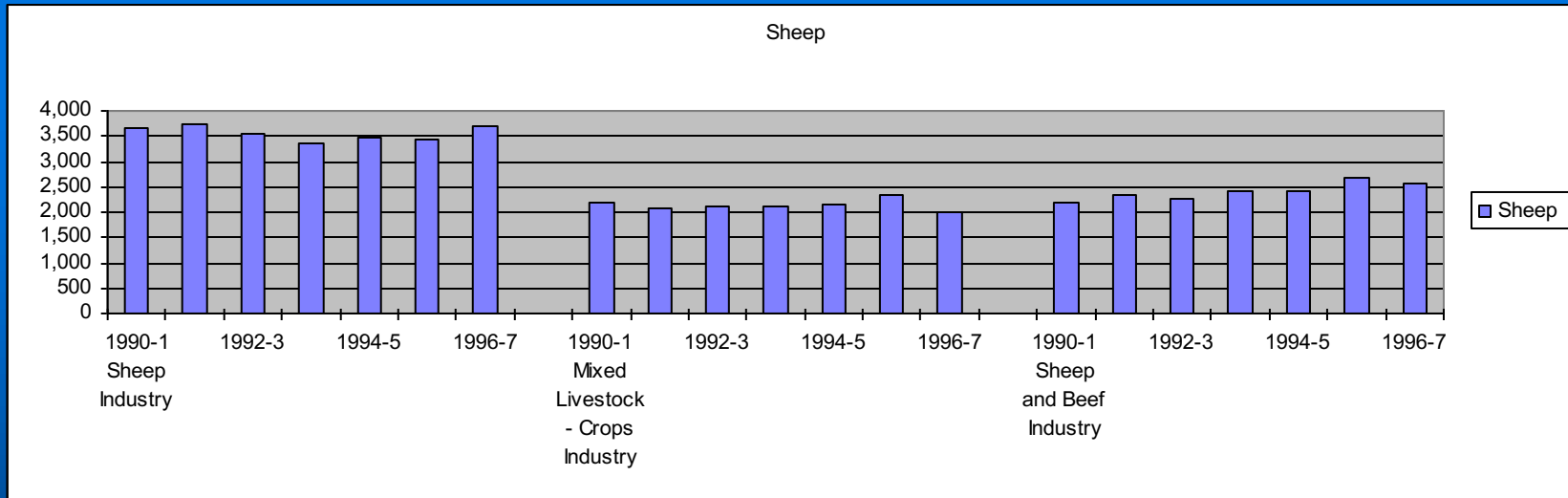
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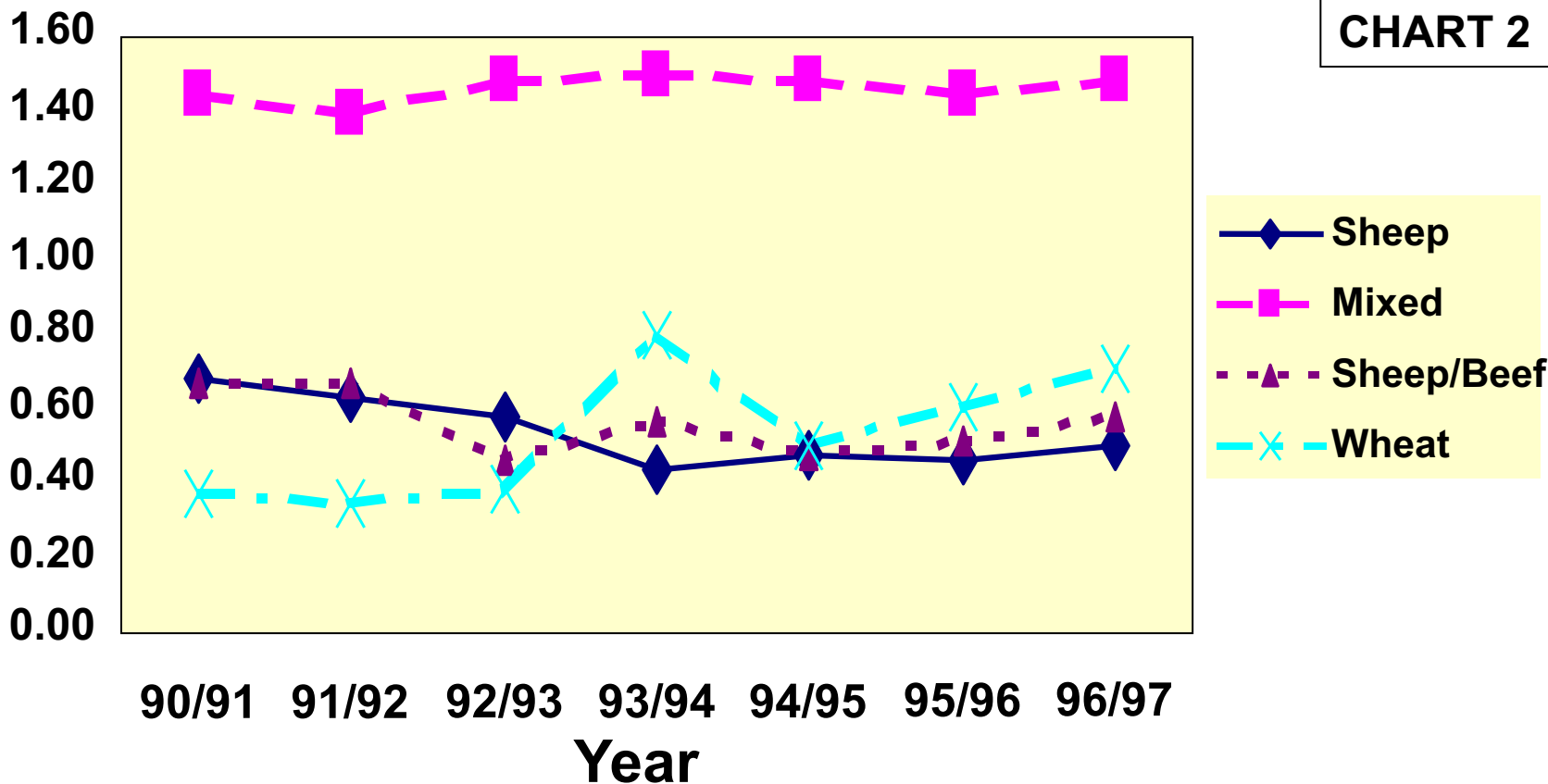


# Sheep Capacity

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## Sheep/Hectare

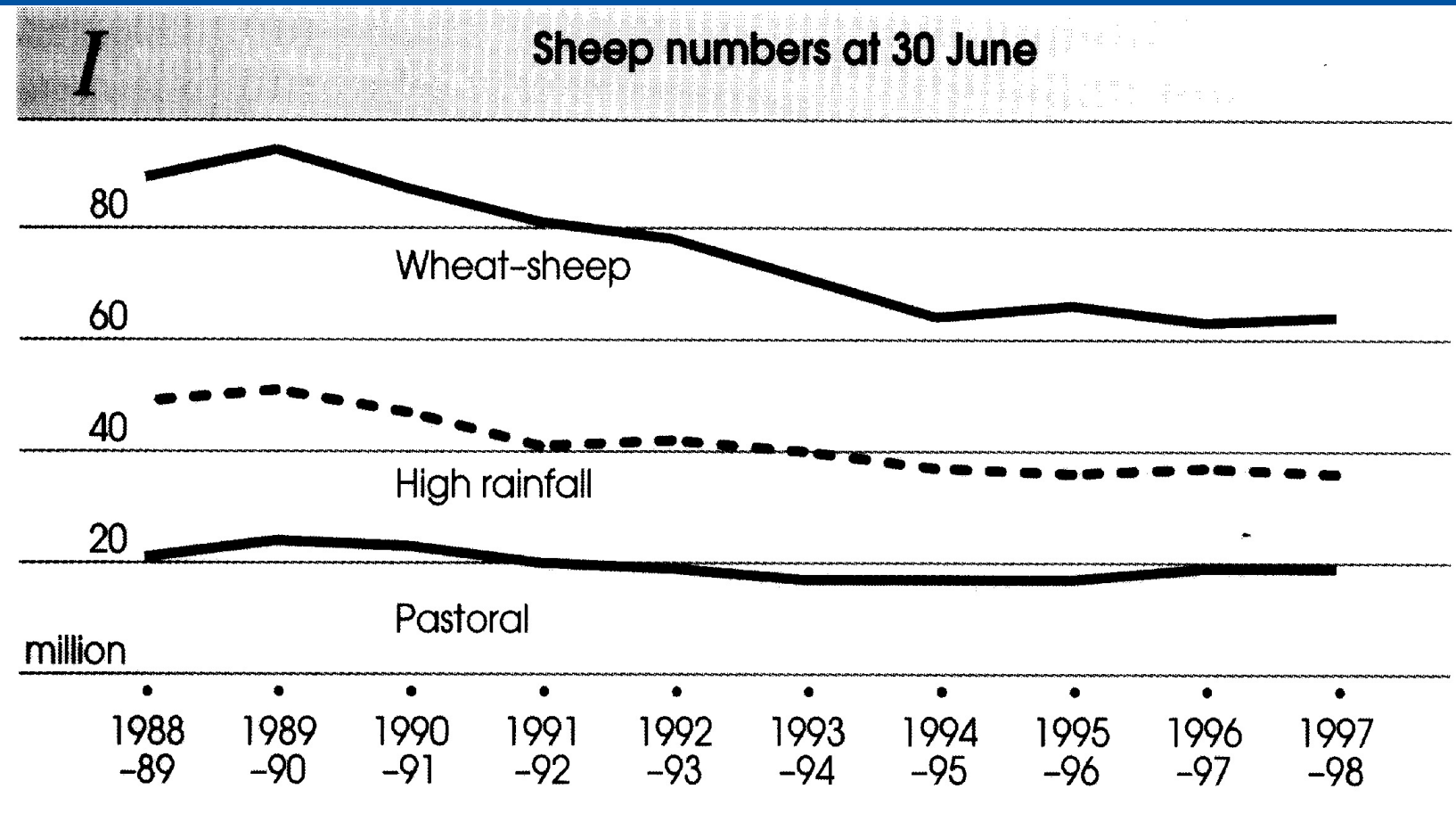
CHART 2





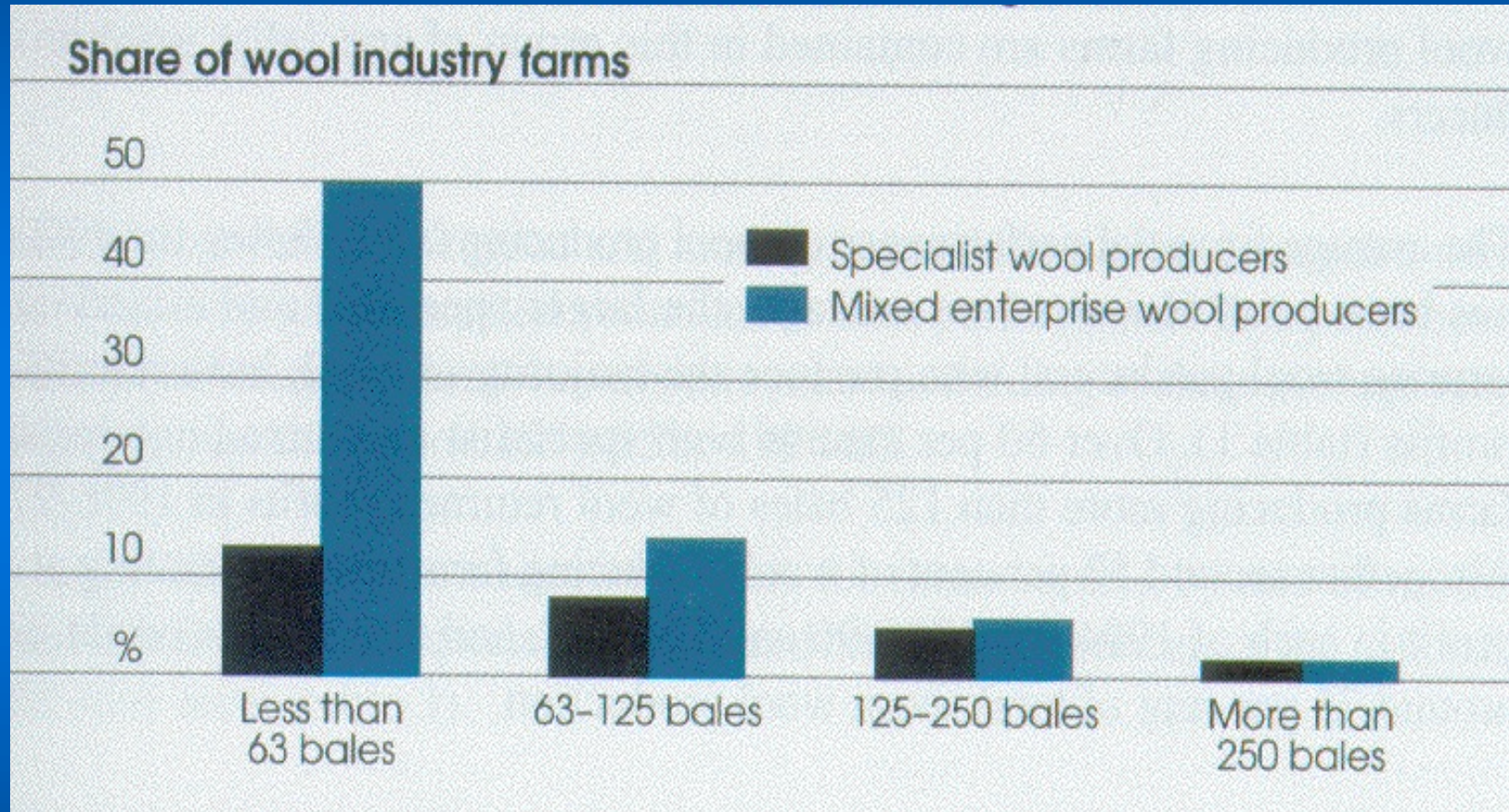
# Sheep Numbers at 30 June

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# Share of Farms (Specialist & Mixed)

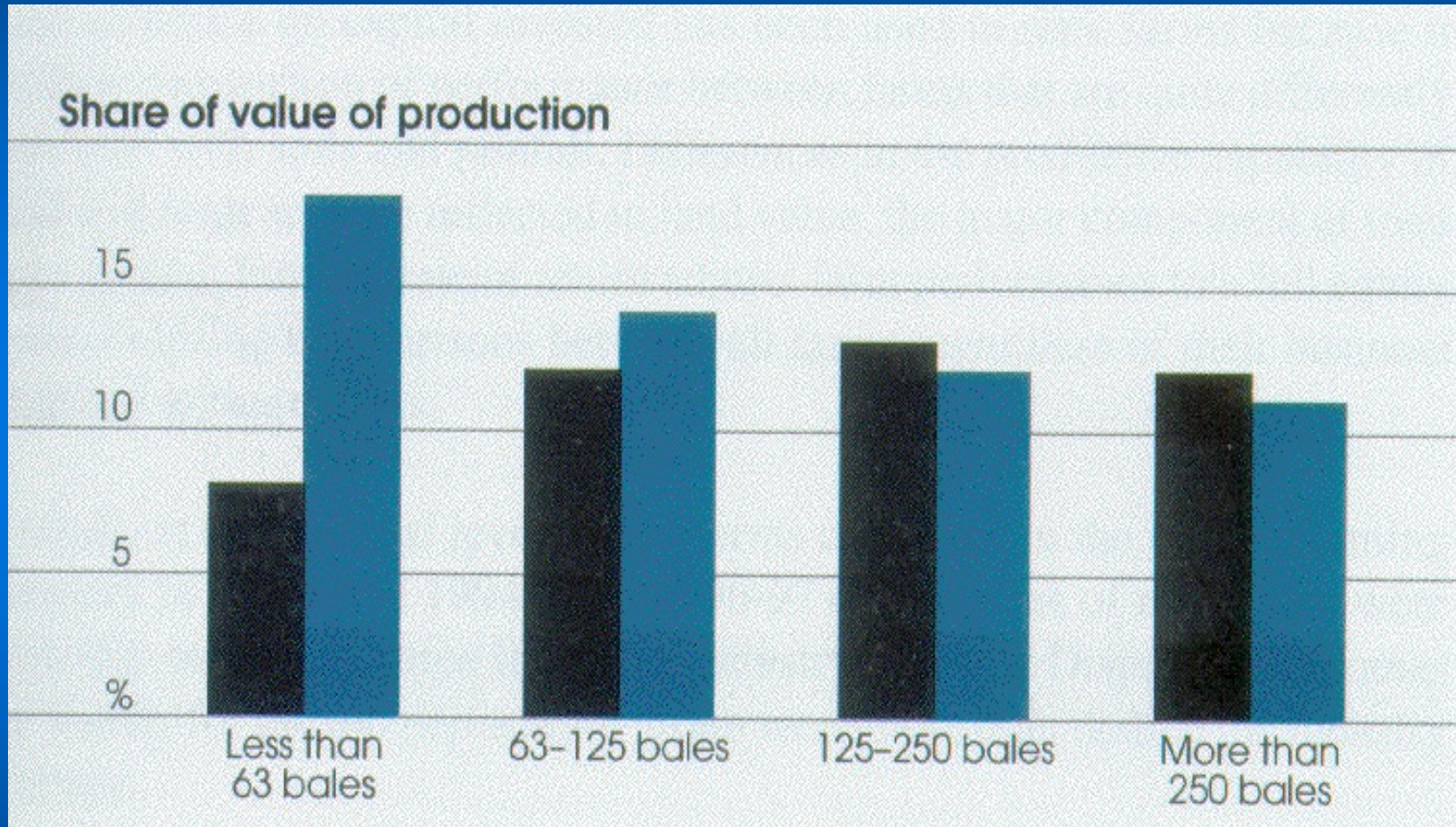


1996-97 figures

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# Share of Value (Specialist & Mixed Enterprise)



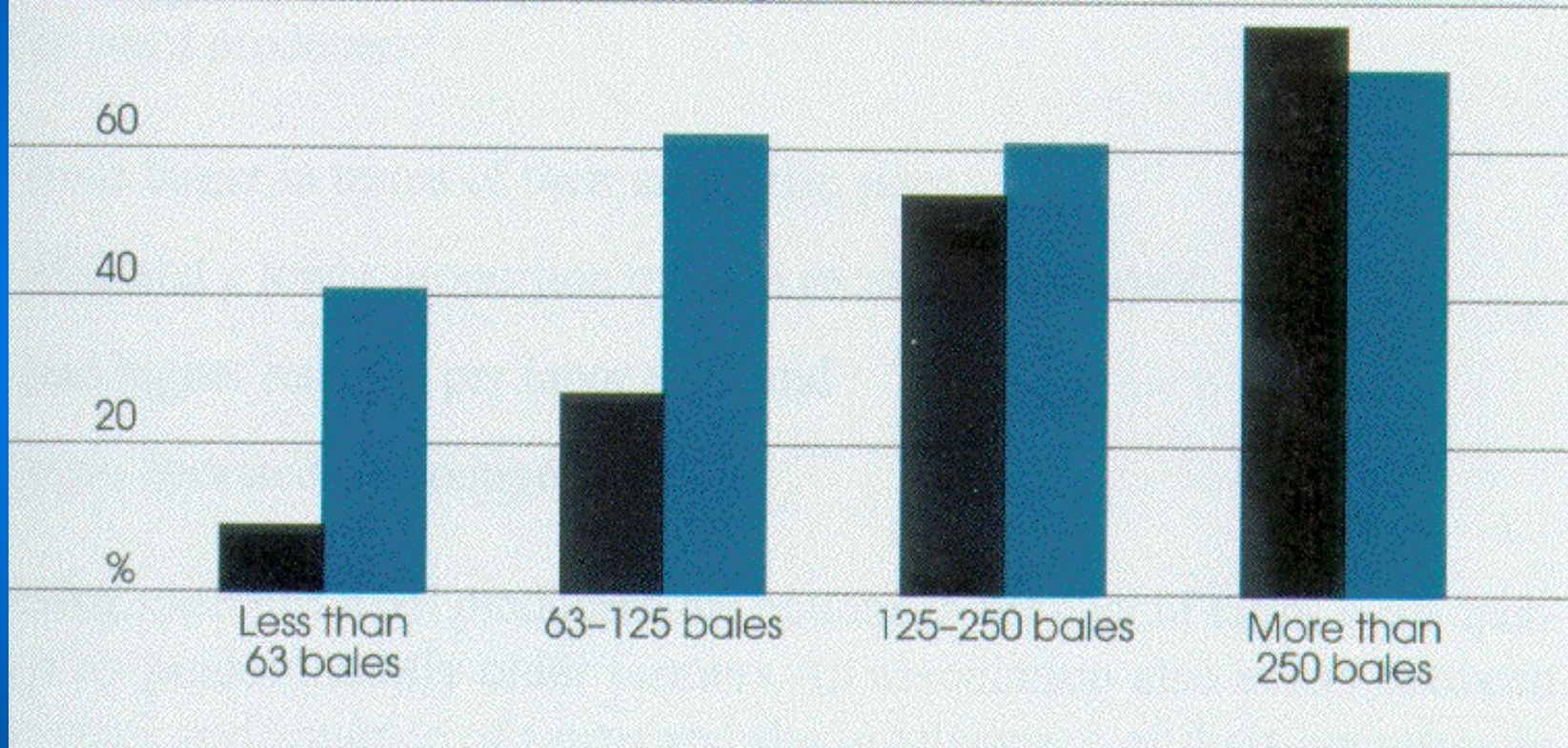
1996-97 figures

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# Farms recording Profits (Specialist & Mixed Enterprise)

Farms in each category recording business profits



1996-97 figures

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# Top Performing Farms

- larger in size of enterprise
- lower proportion of farm receipts from wool
- had higher receipts per labour unit
- were operated by younger farmers
- applies to specialist & mixed

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# Taskforce

- “...3000 sheep are not sufficient for a viable enterprise in the overwhelming majority of situations”
- “The top 20% of woolgrowers...earn rates of return three times the average”
- “As the “supply factories” to the global wool textile industry (woolgrowers must) present a consistent, quality fibre to the wool textile chain at a competitive price”

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# Major References

- **ABARE (1998), Australian Farm Surveys Reports, Stock code FSR 98**
- **Martin, P. (1998) Profile of Australian Wool Producers, ABARE Research Report 98.5**

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