



# LAMB CROP 2022

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# Compare Your Lambing Percentage Online

Data collection and benchmarking are key drivers of improved farm profitability. You can see how your business compares at the click of a mouse.

## Lambing Calculator

The lambing percentage calculator puts your farm's performance in context.

Use it for a clear understanding of where your farm stands among a broader group, region, or farm type.

Once you know where you are, you'll be better placed to know where you're going – so, if you need to, you can take appropriate action to change your course.

Visit <https://beeflambnz.com/data-tools/lambing-calculator> to calculate your lambing percentage compared with the All Classes average and with farms in your region or farm type.

Lambing Calculator
About
Definitions

Spring 2022

All Classes

All New Zealand

**Lambing Percentage**  
For All New Zealand Region, All Classes Spring 2022

Lambing %	% of Farms
<80	1
85	2
90	1
95	2
100	2
105	3
110	4
115	7
120	7
125	7
130	11
135	11
140	15
145	9
150	7
155	4
160	3
165	2
170	2
175	1
180+	1

Source: B+LNZ Economic Service

**Compare Lambing Percentage**  
Add your number of lambs tailed from ewes to compare your ewe Lambing Percentage.

Lambs Tailed	130
Breeding Ewes	100
<b>Your Ewe Lambing Percentage is</b>	<b>130%</b>
Increase Lambing Percentage to	135
With a lamb price of	144.19
<b>Potential revenue change</b>	<b>\$721</b>

Calculate

# Executive Summary

## Lamb Crop -2.6%

The number of lambs tailed in spring 2022 is estimated to decrease moderately – by 2.6 per cent or 588,000 head to 22.0 million head. The reduction is due to fewer breeding ewes (-1.4%) and a lower lambing percentage. Drought conditions for Northland-Waikato-BoP, Southland, and parts of Otago impacted ewe condition at mating. A wet winter and spring across most of New Zealand is an additional factor that impacted ewe condition and lamb survival.

The reduction is seen across both islands with variability between regions due to drought in summer-autumn 2022 contrasted by rebuilding of breeding ewes and more favourable conditions for Marlborough-Canterbury.

The decrease in lamb crop is the eighth season in a row with fewer lambs born than the previous season. Spring 2022's lamb crop is 15 per cent lower than in spring 2014, when the lamb crop was 25.8 million head.

## North Island -3.3%

The total number of lambs in the North Island decreased 3.3 per cent (361,000 head) to 10.6 million head. The decrease is largely driven by drought conditions coupled with fewer breeding ewes.

For Northland-Waikato-BoP, a 10 per cent decrease in lambs is estimated (296,000 head) due to fewer breeding ewes and drought conditions at mating.

The East Coast lamb crop is estimated to be similar to spring 2021 with fewer breeding ewes offset by good conditions at mating. The total lamb crop for the region is estimated to increase slightly – by 0.4 per cent (20,000 head).

Taranaki-Manawatū had a bumper spring in 2021 and with a lower lambing percentage this year has an estimated decrease of 3.1 per cent in lambs tailed (85,000 head).

## South Island -2.0%

The total number of lambs in the South Island decreased 2.0 per cent (227,000 head) to an estimated 11.4 million head.

After several climatically difficult seasons, farmers rebuilt sheep numbers in Marlborough-Canterbury in 2021-22, including breeding ewes (+1.6%), and consequently the lamb crop is forecast to increase 2.9 per cent to 4.4 million head (+122,000 head).

The number of ewes mated and the average ewe lambing percentage were down in Otago-Southland. Drought in Southland was the critical factor in a decreased lamb crop, which is estimated to be down 4.7 per cent (349,000 head) to 7.0 million head.

## Ewes to Ram -1.4%

The number of breeding ewes at 1 July 2022 decreased (-1.4%) on 2021 to 16.1 million head. Numbers in both the North and South Islands decreased, by 2.0 per cent and 0.8 per cent respectively. The largest decrease was in Northland-Waikato-BoP (-4.3%), while in Southland the number of breeding ewes decreased by an estimated 4.0 per cent.

## Lambing Percentage 130.3%

The average ewe lambing percentage for spring 2022 was 130.3 per cent, a decrease of 1.6 percentage points on 2021.

## North Island 130.6%

The North Island ewe lambing percentage averaged 130.6 per cent, down 1.6 percentage points from spring 2021. Northland-Waikato-BoP declined 6.6 percentage points due to another prolonged drought and ewes-to-ram in lighter condition than was desirable at mating. East Coast lambing percentages improved to average 130.7 per cent in 2022 with good autumn conditions for ewes. The average lambing percentage in Taranaki-Manawatū decreased by 3.3 percentage points to 133.0 per cent, which is a good result following a record 2021 lambing percentage.

## South Island 130.1%

The South Island ewe lambing percentage averaged 130.1 per cent, down 1.6 percentage points compared to spring 2021. Marlborough-Canterbury recorded an increased lambing percentage – to 132.2 per cent – while Southland decreased 5.2 percentage points to 131.0 per cent. Otago's average lambing percentage decreased 1.4 percentage points to 127.1 per cent.

## Lambs from Hoggets -2.7%

The number of lambs from ewe hoggets is estimated at 1,036,000, down 2.7 per cent on spring 2021 and equivalent to 4.7 per cent of total lambs. Fewer ewe hoggets were put to the ram (-5.6%) particularly in drought-affected areas. North Island lambs born from hoggets decreased 5.3 per cent while the number of lambs born from hoggets in the South Island was steady at just 0.2 per cent up from spring 2021.

## Export Lamb Processing -1.6%

The number of lambs processed in 2022-23 is estimated to decrease 1.6 per cent to 17.5 million head.

## Export Adult Sheep Processing -2.1%

The number of adult sheep processed is estimated to decline 2.1 per cent to 3.6 million head in 2022-23.

## How We Collect the Data

This paper summarises the results from a survey carried out to estimate the lamb crop for spring 2022. The Survey covers over 500 commercial sheep and beef farms, which are a statistically representative sample of the commercial sheep and beef farms in New Zealand. Beef + Lamb New Zealand's Economic Service Managers based throughout New Zealand collect farm information at various points during the year. The Lamb Crop Survey is used to measure breeding ewe performance (lambing percentage), the number of lambs born and lamb survival, and provide an outlook for supply expectations for the season.

# Overview

## Seasonal Conditions

### Lambing Weather

Climatic conditions at lambing were warm and wet for the top half of the North Island, while the lower North Island faced persistent wet and colder conditions making lambing a challenge. In Marlborough-Canterbury, the weather was relatively settled and dry, and Otago-Southland farmers also reported relatively settled conditions throughout most of spring.

In early October, snowstorms and cold, wet weather swept across the whole country affecting some south island sheep farms. Those most affected tended to be early on in their lambing with new-born lambs susceptible to cold, be lambing ewe hoggets, or be hill country farms because snow hit close to peak lambing for them.

### Lamb Growth Rates

#### Wet weather and lack of sunshine

Lamb growth rates were below average for much of the country due to persistent wet conditions and a lack of sunshine. Exceptions to this were parts of northern North Island and southern South Island although these areas were also limited by pasture conditions.

### Early Drafting Pattern

#### North Island – down, South Island – normal

Farmers across northern North Island and East Coast planned to draft in their usual pattern however, delays for processing space have farmers weighing up options and considering greater use of the store market to balance feed supplies with demand from lambs. Farmers in Taranaki-Manawatū have had slower lamb growth rates over spring and likely will draft fewer or to lower weights to take advantage of published prices.

Falling sheepmeat prices add to farmer concerns and uncertainty.

In the South Island, most farmers expect to draft as per normal with feed conditions during November and being a key influence on drafting decisions. Farmers have a watchful eye on a third season farming under La Niña weather conditions and the potential impact on summer feed, in addition to concerns about availability of processing space.

### Early Schedule Comment

Schedule prices were 70c to \$1.20/kgCW down on the same period in 2021 at \$8.20-8.45/kgCW, with farmers expecting that prices will reduce weekly until beyond Christmas. There is concern among farmers that prices will decline faster than has occurred in recent years, putting pressure on farm budgets.

**Table 1 Estimate of 2022-23 Lamb Crop**

				Northland- Waikato-BoP	East Coast	Taranaki- Manawatu	North Island	Marlborough- Canterbury	Otago	Southland	South Island	NEW ZEALAND
2020-21	Ewes to Ram	(000)	1	1,908	3,931	1,869	7,709	3,331	3,041	2,489	8,861	16,570
2021-22	Ewes to Ram	(000)	2	2,020	3,938	1,920	7,878	3,092	2,871	2,486	8,448	16,326
<b>2022-23e</b>	<b>Ewes to Ram</b>	<b>(000)</b>	<b>3</b>	1,934	3,879	1,909	7,722	3,141	2,851	2,387	8,379	16,101
2020-21	Lambs from Ewes	(000)	1	2,620	5,427	2,534	10,580	3,936	3,759	3,318	11,013	21,594
2021-22	Lambs from Ewes	(000)	2	2,717	5,080	2,618	10,414	4,056	3,689	3,386	11,131	21,545
<b>2022-23e</b>	<b>Lambs from Ewes</b>	<b>(000)</b>	<b>3</b>	2,474	5,070	2,539	10,083	4,152	3,624	3,127	10,903	20,986
2020-21	Ewe Lambing %	(%)	1	137.3%	138.0%	135.5%	137.3%	118.2%	123.6%	133.3%	124.3%	130.3%
2021-22	Ewe Lambing %	(%)	2	134.5%	129.0%	136.3%	132.2%	131.2%	128.5%	136.2%	131.8%	132.0%
<b>2022-23e</b>	<b>Ewe Lambing %</b>	<b>(%)</b>	<b>3</b>	127.9%	130.7%	133.0%	130.6%	132.2%	127.1%	131.0%	130.1%	130.3%
2020-21	Lambs from Hoggets	(000)	1	203	351	182	737	273	148	157	577	1,314
2021-22	Lambs from Hoggets	(000)	2	147	279	139	565	207	182	111	500	1,065
<b>2022-23e</b>	<b>Lambs from Hoggets</b>	<b>(000)</b>	<b>3</b>	94	309	132	535	233	178	91	501	1,036
2020-21	Total Lambs Tailed	(000)	1	2,823	5,778	2,716	11,317	4,209	3,907	3,475	11,590	22,908
2021-22	Total Lambs Tailed	(000)	2	2,864	5,359	2,757	10,979	4,263	3,871	3,497	11,631	22,610
<b>2022-23e</b>	<b>Total Lambs Tailed</b>	<b>(000)</b>	<b>3</b>	<b>2,568</b>	<b>5,379</b>	<b>2,671</b>	<b>10,618</b>	<b>4,385</b>	<b>3,801</b>	<b>3,218</b>	<b>11,404</b>	<b>22,022</b>
<b>1</b>	Statistics New Zealand ewe numbers and lamb numbers											
<b>2</b>	Statistics New Zealand ewe numbers, Beef + Lamb New Zealand Economic Service Lamb Crop Survey											
<b>3</b>	Beef + Lamb New Zealand Economic Service Livestock Number Survey, Beef + Lamb New Zealand Economic Service Lamb Crop Survey											
<b>e</b>	Beef + Lamb New Zealand Economic Service Estimate											

# Region Reports

## Ewes to Ram

### Northland–Waikato–BoP

Breeding ewes to ram declined 4.3 per cent to 1.9 million. Extended drought conditions were the primary contributor. Strong mutton schedules also encouraged farmers to ease feed pressure by culling deeper into their capital stock.

### East Coast

Breeding ewe numbers decreased by 1.5 per cent to 3.9 million compared to 30 June 2021. Farm Class 3 (hard hill country) breeding properties continued to reduce ewe numbers, with a 2.0 per cent decline in ewes that were mated in autumn 2022. On Farm Class 4 (hill country), ewe numbers increased by 1.0 per cent and on Farm Class 5 (finishing) ewe numbers declined by 7.0 per cent.

### Taranaki–Manawātū

Breeding ewes to ram decreased slightly (-0.6%) to 1.9 million head. The ewe flock has remained steady around 1.9 million head for the past three seasons.

A slight decrease was reported on finishing farms (Farm Class 5) due to an increase in trading sheep. This minor decline was offset by hill country and hard hill country farms maintaining or slightly increasing their ewe numbers.

### Marlborough–Canterbury

The number of breeding ewes mated increased 1.6 per cent on 2021 to 3.1 million.

### Otago–Southland

The number of breeding ewes mated decreased slightly in Otago – by 0.7 per cent to 2.9 million head. In Southland, the number of breeding ewes mated decreased 4.0 per cent to 2.4 million head.

Another dry autumn affected southern South Island. For the second year in a row, climatic conditions encouraged a deeper ewe cull, especially in Southland and Clutha Districts where drought conditions were most pronounced.

The spread of tree planting for income from carbon units is beginning to impact on the breeding ewe flock, particularly on hill country with proximity to ports.

## Ewe Lambing Percentage

### Northland–Waikato–BoP

The average ewe lambing percentage declined 6.6 percentage points to 127.9 per cent compared with 2021.

Waikato and King Country experienced another prolonged drought with ewes-to-ram in lighter condition than desirable as a result. Pregnancy scanning results were mixed across the region with Bay of Plenty outperforming King Country and Waikato. Facial eczema negatively impacted stock performance throughout Waikato and King Country. In general, the rate of ewe deaths across the region was average through winter and spring, however there were farms significantly affected by facial eczema with higher ewe deaths.

### East Coast

The average ewe lambing percentage increased to 130.7 per cent in 2022, up 1.7 percentage points compared with 2021. Aside from heavy rain at times, autumn conditions were favourable, which helped lift ewe pregnancy scanning percentages. Many farms experienced better scanning percentages with more multiples. Ewe deaths during winter were reportedly lower in some areas than last year.

### Taranaki–Manawātū

The regional lambing percentage decreased slightly on last year – by 3 percentage points to 133.0 per cent. Decreases on hill and hard hill country farms were

partially offset by an improvement in lambing on finishing farms. This level of lambing percentage is an excellent result considering challenging spring conditions and 2021's record lambing.

### Marlborough–Canterbury

Lambing percentage from ewes was estimated at 132.2 per cent, up one percentage point on the 2021 result.

Farmers reported pregnancy scanning of ewes indicated lambing percentages would be higher-than-normal, with ewes in excellent condition at scanning, however those early favourable results were offset by higher-than-normal ewe losses and lower survival of multiple-born lambs.

### Otago–Southland

In Otago, the average lambing percentage decreased 1.4 percentage points to 127.1 per cent, while in Southland it decreased 5.2 percentage points to 131.0 per cent.

For the second year in a row, a La Niña event brought a dry autumn to southern South Island, which had a noticeable effect on conception and therefore scanning rates. Farmers reported fewer twin-bearing ewes.

Delays in lamb processing during autumn meant some lambs were held on farms longer than planned, which put further pressure on feed supplies before and during mating. Fortunately, plentiful pasture in North Otago and Canterbury meant there was a ready market for store lambs and considerable numbers were moved north for finishing.

## Hoggets to Ram

### Northland–Waikato–BoP

The number of hoggets mated decreased 13.1 per cent compared with last season. Drought conditions meant fewer hoggets were able to reach ideal mating weights. Only 32 per cent of ewe hoggets were mated.

### East Coast

The number of hoggets mated decreased 12.1 per cent from 2021 levels, but better lambing results were expected because they were in good condition at mating.

### Taranaki–Manawatū

More hoggets were mated across all farm classes during autumn (+6.0%). However, weight and condition of hoggets at mating was a challenge for some farmers.

### Marlborough–Canterbury

Although more hoggets were wintered, most were intended for processing as “winter lambs” and the number mated was little changed (up 1.9 per cent) despite good feed conditions in autumn. Farmers recognised hogget lambing as a demanding management option and few were prepared to make *ad hoc* changes to mated numbers based on feed.

### Otago–Southland

Fewer ewe lambs were kept as replacements in Southland and even fewer of those that were kept were put to the ram (-11.1%). In Otago, the number of replacement ewe hoggets also decreased but by a much smaller margin. Three per cent fewer ewe hoggets were mated in Otago, which was less affected by climate and feed conditions.

## Lambs from Hoggets

### Northland–Waikato–BoP

The number of lambs from hoggets decreased 36 per cent compared with 2021 to 94,000 head. This number represents 3.7 per cent of total lambs, which is the lowest proportion of lambs from hoggets in the region since the 2008-09 season that was severely affected by drought in the summer of 2007-08.

### East Coast

Lambs from hoggets account for an estimated 5.7 per cent of lambs tailed (or 309,000 lambs). This estimate is up on 2021 (+10.6%) due to better ground conditions at mating and good hogget lamb survival.

### Taranaki–Manawatū

An estimated 4.9 per cent of total lambs are from ewe hoggets (132,000 head – down 4.9 per cent on 2021).

### Marlborough–Canterbury

Lambs expected from ewe hoggets were estimated at 233,000, up 12.6 per cent on 2021 because more hoggets were mated and survival was good.

### Otago–Southland

The number of lambs born to ewe hoggets decreased by an estimated 2.1 per cent in Otago and 18.2 per cent in Southland. The result is an estimated 178,000 lambs in Otago and 91,000 in Southland.

Tailing of lambs from hoggets had not been completed at the time of this survey so about one-third of the returns from survey farmers were estimated results.

## Total Number of Lambs

### Northland–Waikato–BoP

Total lambs decreased 10.3 per cent on 2021 to 2.6 million (-296,000 head). The decline can be attributed to fewer breeding ewes on hand, and a lower lambing percentage. A dry summer followed by a late autumn drought meant feed conditions were not ideal to support ewes in late pregnancy. The drought was followed by a wet, warm winter, which improved pasture conditions for some farms; however, wet conditions persisted into spring and slowed expected spring pasture growth. Hard hill country (Farm Class 3) farmers reported fewer ewes rearing multiple lambs, attributed to the dry conditions and facial eczema experienced on these farms in summer-autumn 2022.

### East Coast

The total lamb crop is estimated to be 5.4 million head, similar to spring 2021 (+0.4%). Although fewer ewes were mated, ewe and ground condition at mating was favourable, contributing to better pregnancy scanning results when compared with the previous season. Good twinning (ewes bearing twin lambs) lifted the overall lamb crop. Farmers had relatively good results during docking although lamb numbers were lower than hoped for as the East Coast had poor lambing weather and harsh spring storms (causing more deaths than usual).

### Taranaki–Manawatū

The total lamb crop is estimated to be 2.7 million head, down 3.1 per cent on spring 2021. Farmers reported ewe condition at mating to be average, which resulted in pregnancy scanning results lower than the previous season. Fewer triplets were born this spring and farmers reported an ‘average’ number of twins across all farm classes. A handful of storms during spring impacted parts of the region during lambing.



## Marlborough–Canterbury

The total lamb crop was estimated at 4.4 million, up 2.9 per cent on last year.

## Otago–Southland

The number of lambs born in Otago decreased 1.8 per cent to 3.8 million, while the number of lambs born in Southland decreased 8.0 per cent to 3.2 million.

Fewer breeding ewes, fewer lambs from hoggets and a marked decrease in lambing percentage all combined to produce a decreased lamb crop. The total lamb crop in Southland was more affected than Otago.

## Lambing Date and Spread of Lambing

### Northland–Waikato–BoP

The spread and date of lambing was normal according to farmers.

### East Coast

Lambing dates remain largely unchanged. Farmers reported lambing spread was close to normal with some farmers experiencing more variability/spread across different ewe age groups.

### Taranaki–Manawatū

Most farmers reported a typical spread of lambing, but some areas of the Taranaki had a very compact lambing. There were no major changes in mating dates and subsequent lambing date. Many farmers continued the trend of putting a handful of older ewes to the ram earlier than the main line of ewes to help with earlier weaning and culling in October/November.

### Marlborough–Canterbury

Lambing dates returned to normal after being slightly advanced in 2021. Lambing pattern was reported by farmers to be slightly more condensed than usual because ewes were in good health and condition when they were mated.

## Otago–Southland

Farmers reported lambing was spread over a longer period than usual to avoid high impact from adverse weather conditions. Hoggets were typically mated a month later than ewes.

Over the last five years, the mean lambing date for the region has gradually moving earlier in the spring. One driver for this is the aim to send cull ewes for processing before Christmas.

## Lambing Weather

### Northland–Waikato–BoP

In general, lambing weather was wet and warm, however there was one cold snap which affected some farmers in the southern King Country when snow fell in higher elevations. This cold snap also brought three days of frosts in a row towards the end of the first week of October. Isolated wet weather events were experienced across the region and affected some farms.

### East Coast

Early lambing conditions were soggy with persistent wet, cold weather across the region. Hill country farmers struggled to access parts of their farms to check on stock due to wet ground conditions, and those who could get to their paddocks were wading in mud. Cold fronts in October brought more challenges for older lambs in northern areas and came right in the thick of later lambing for the southern parts of Hawke's Bay and Wairarapa.

### Taranaki–Manawatū

The weather during August and September was wet and challenging. Lower Rangitikei and Manawatū in particular had significantly more rain than normal, which resulted in waterlogged paddocks. Two storms swept across the region in October bringing snow to the ranges and hill country from Wanganui to Manawatū.

## Marlborough–Canterbury

Lambing weather was largely dry and settled across most of the region during lambing. The first week of October was the exception because a cold southerly blast struck higher country and later lambing flocks but it caused little trouble to older lambs on the lower country. The worst-affected farms were those about two weeks into lambing, because all lambs were susceptible to cold rain and wind. Later lambing high country farms were relatively unscathed as their lamb drop was only just beginning.

## Otago–Southland

After a dry autumn, winter was comparatively wet and cool affecting utilisation of feed crops and further affecting ewe body condition score on some farms.

Two significant snowfalls occurred during lambing in the south: one in early September catching early lambing mobs, and the other in early October, which had an impact in hill country and on hogget lambing on lowland farms. Apart from these events, weather was generally settled with many farmers reporting it was the easiest lambing for several years.

## Lamb Survival

### Northland–Waikato–BoP

Lamb survival was slightly below average. Fewer ewes with multiple lambs and mixed weather conditions meant that, generally, ewes were better able to mother their progeny. Prolonged periods of wet weather took a toll on some farms, meaning slightly higher losses.

### East Coast

Lamb survival in general was below normal levels due to the wet and cold weather at critical times. However, high scanning rates, better twinning, and good growing conditions earlier in the year meant most farms had good lambing percentages at tailing.

## Taranaki–Manawatū

Lamb survival was reported to be average to slightly better than normal. The storms that hit the region in September mainly impacted later lambing ewes or hogget lambs.

## Marlborough–Canterbury

Overall, lamb survival was near normal but individual results varied widely. Lamb survival was directly affected by bad weather for farms lambing in the first week of October, but significant effects also arose from ewe health issues and ewe deaths. While ewe deaths averaged near normal rates, results were mixed, and some individual farms suffered high losses.

Many farms with higher than usual pregnancy scanning results reported higher rates of vaginal prolapse; a risk that is well documented to increase with litter size.

Wet winter weather, especially in July, added stress for ewes as heat production requirements increased while feed utilisation dropped in muddy conditions. Ewes lost condition, reducing subsequent colostrum production and, hence, passive immunity in lambs. Early lambing flocks in the north of the region were also affected by lambing directly onto sodden ground.

Some individual farms reported abortion outbreaks, which were believed to be caused by toxoplasmosis.

## Otago–Southland

Farmers were optimistic about lamb survival, indicating that lower conception rates had a larger influence on lambing percentage than loss of lambs after birth. The two snow events impacted some farms during lambing. Lambs born to hoggets and some hill and high-country farms were particularly affected by the snowstorms. Fortunately, the snow melted quickly for most.

## Feed Situation

### Northland–Waikato–BoP

The feed situation was generally tight throughout lambing, with hard hill country farms (Farm Class 3) describing their feed situation as tight. Hill country and finishing farmers reported that their spring feed situation was on par with previous seasons.

### East Coast

Feed was tight going into November due to damp conditions coupled with a lack of sunshine. However, mid-November brought sunshine and showers, which improved feed supply and clover was abundant. Ground conditions quickly went from extremely wet to dry, and consequently although feed supply rebounded in mid-November farmers will be monitoring it closely going into summer.

### Taranaki-Manawatū

The feed situation was reported by farmers in November as being three weeks behind normal, due to a wet, overcast October, which slowed grass growth and held back the clover content. In mid-November, the feed situation was improving. Warm, sunny days allowed pasture to recover. Overall, the season was improving by the day.

Spring fertiliser applications were delayed on the lower altitude, finishing farms (Farm Class 5) due to a wet spring. Contractors were delayed cutting silage with some suggestions in the Manawatū and Rangitīkei that the volumes harvested were well down on the 5-year average. Forage and cash crops were delayed due to the wet spring conditions as contractors waited for paddocks to dry before cultivating and planting.

### Marlborough-Canterbury

A slow, cool start to spring meant pasture cover declined to low levels before lambing, making it hard for ewes in late pregnancy to meet required intakes for foetal growth and body condition maintenance. Low leaf

area hampered pasture recovery, even as days warmed, so feed supply remained below target until late October or into November. By mid-November, feed shortages remained notable in the north, from Tasman to Banks Peninsula, while farmers from Timaru to Waitaki districts and in Mackenzie country reported recovery to above average feed supplies.

Feed conservation began late, with contractors reporting many areas three to four weeks behind usual first cut dates. Farmers noted lower yields from baled areas.

Irrigation began in Canterbury from October. Dryland farmers noted grass going to seed early and losing feed value in dry conditions.

### Otago-Southland

Pasture covers were reported to be tight earlier in the season across the region, and spring was slow to get going. However, in late October and November pasture growth rates surged as soil temperatures increased. By mid-November, pasture covers were well ahead of the same time last season, especially on breeding and finishing farms (Farm Classes 6 and 7). Pasture growth exceeded demand because there were fewer ewes and lambs, so farmers made supplementary feed earlier than usual or bought extra stock, often cattle, to help control pasture quality.

Soil moisture levels were near-normal across the entire southern South Island in mid to late November. Periodic rainfall hampered some farming operations, but adequate soil moisture levels were welcomed.

La Niña conditions are forecast again for this summer, the third such forecast in a row. La Niña increases the likelihood of a drier than usual outlook for southern South Island.

## Lamb Growth Rates

### Northland–Waikato–BoP

Lamb growth rates, also known as “thrif”, were described by farmers as being average, however there was quite a range amongst lambs with some being well ahead and some being behind. Lack of growth may be attributed to a lack of sunshine and feed conditions only improving in November. Pasture conditions were poor, with low Metabolisable Energy and fibre content. A warm winter fostered early worm burdens, which contribute to a range in lamb growth rates.

### East Coast

Lamb thrif was well behind what is usually expected at this time of year by farmers. Key reasons for the lack of thrif include wet weather and a lack of sunshine and feed, with some newborn lambs experiencing high worm burdens early in the season.

### Taranaki–Manawatū

As a result of the cold, wet spring, and like the feed situation, lamb thrif was held back and only starting to improve in mid-November. Lambs needed sunshine to lift growth rates and condition. Warmer days from mid-November stimulated clover content and helped lamb growth rates.

### Marlborough–Canterbury

Lamb weight gains were widely reported to be slower than usual, due to low ewe milk output and minimal good feed for lambs receiving insufficient milk. Lambs could not compete with ewes for feed on low pasture covers. Cool weather limited clover production while boosting lamb energy requirements for heat production, leaving little for liveweight gain.

Irrigated farms were able to maintain leafy green pasture as lambs began to graze more. Lamb thrif results followed the feed supply pattern, with below average lamb thrif in Tasman, Marlborough, Hurunui and Banks Peninsula, slightly better than normal in most

other areas and well above average in the Mackenzie high country.

High rates of mastitis on some farms late in spring further limited lamb growth and would increase ewe wastage (as treatment was rarely successfully in sheep).

### Otago–Southland

Farmers considered lambs were growing well with growth rates reported to be better than the previous year for all except hill and high country in Otago. For this group, tighter feed supply and reduced ewe milking ability through lighter body condition impacted lamb growth rates.

Increased pasture covers by the end of November could impact pasture quality in the month before weaning as grasses turn reproductive. In turn, this may affect lamb growth rates if pasture quality is not well managed.

## Early Drafting Pattern

### Northland–Waikato–BoP

Farmers planned to stick to their usual drafting pattern but were hoping to sell a higher proportion of lambs, with some planning to use the store market more than in previous years. Farmers expressed concern about the ability of processors to process lambs with labour issues at the forefront of people’s minds. A forecast of a third consecutive La Niña has farmers on alert and preparing to be proactive if yet another drought occurs.

### East Coast

Drafting plans are varied as farmers weigh alternatives with lower lamb growth rates and concerns over processor capacity due to labour shortages. Farmers indicated plans to sell early lambs at lower than desired weights in order to have them processed before processors are fully booked, while others will hold onto lambs through the Christmas period.

Many farmers reported trying unsuccessfully to have their cull ewes processed, due to delays at processors,

and these delays heighten the concern that processing of lambs will also be difficult. Falling sheepmeat prices add to concerns and uncertainty as well.

### Taranaki–Manawatū

We expect the number of early lambs finished prime will be down due to poorer lamb thrif. Lambs will likely be drafted to slightly lower weights to take advantage of high published prices and to reduce lamb numbers before the summer. Some farmers reported having weaned lambs earlier than normal, which then enables earlier culling of ewes and freeing up of pasture for lambs. Logistics issues at processors were reported by farmers, which adds tension to the start of summer.

### Marlborough–Canterbury

Drafting of “old season” lambs (hoggets) was limited by available capacity as processing of non-replacement calves ramped up. Booked processing numbers were frequently reduced at drafting time, leaving extra “old season” lambs on farm as lambing approached. Farmers reported financial losses as tooth eruption caused “winter lambs” to be classified as lower value mutton without recompense.

Drafting plans depend on rainfall patterns until Christmas. Useful falls across most of the region from 18-21 November allayed fears of drought that could have led to store lamb sales or early drafts of prime lambs at light weights (space permitting). If sufficient rain continued to fall then lambs could be held to reach usual processing weights but a change to hot, dry, windy weather would reverse those decisions.

Many farmers remained undecided about the relative economics of selling store lambs pre-Christmas or finishing those animals into 2023. Early store sales would reduce costs and animal health risks, but store lamb prices were falling quickly, in line with declining processor prices.

## Otago–Southland

Most farmers keep to their usual schedule when deciding on timing of drafts for processing. However, fewer lambs and plenty of feed, together with rapidly declining published processor prices prompted many farmers to consider drafting more lambs in the first quarter this season.

Future rain events can have a major effect on decision making around lamb drafts. For the third season in a row, farmers are keeping watch on developing La Niña climate conditions. In addition, logistics for processing could be challenging this season as there appears to be a shortage of seasonal staff for processors. Some farmers have already reported difficulty in securing processing space for cull ewes before Christmas. The impact of COVID-19 remains both on and off-shore.

## Number and Weights in First Quarter – Oct-Dec

### Northland–Waikato–BoP

Farmers expect fewer lambs will be processed before Christmas, primarily because there are fewer lambs on the ground. Throughput will also be influenced by slower lamb growth rates and processing space, which was at a premium in November, meaning farmers may not be able to send all the lambs they want to before Christmas.

### East Coast

Farmers expect fewer lambs will be processed prior to Christmas than in a typical year, more than 2021 which was impacted by drought. The lambs that do leave farms prior to Christmas will likely be at lighter weights therefore decisions must be made as to the feed situation and finishing potential.

The feed situation improved mid-November, which would allow lamb weights to be lifted. However, processor space is a serious concern and may drive some farmers to send lambs earlier (and consequently lighter) under pressure.

## Taranaki–Manawatū

A similar number of lambs to 2021 will likely be presented this quarter. Lower lamb growth rates through spring and below average lamb thrift will mean some lambs are processed at lower weights as farmers send them to avoid expected delays at processors. Carcass weights are expected to be down on last year for the first quarter. Other farmers will hold lambs to increase weights and likely send from January.

### Marlborough–Canterbury

Early weaning properties in Marlborough noted lambs were 2kg lighter than usual this spring. If rainfall and pasture growth decline, then farmers across the region would aim to process as many lambs as possible this quarter and accept lower carcass weights. However, if reliable rain eventuates then they were likely to reduce pre-Christmas sale numbers in favour of heavier weights, despite falling prices per kgCW, so long as the total price per head remained higher.

### Otago–Southland

A significant proportion of first quarter processing in southern South Island is “old season” lamb. Rapid reductions in schedule prices may encourage farmers to draft more lambs in the first quarter of the season, particularly if a dry summer becomes more apparent as the season progresses.

## Comment on Early Processing Prices

### Northland–Waikato–BoP

The current schedule for new season lambs was around \$8.30/kgCW in November, around \$1.20/kgCW (12.5%) below the same time last year. Processors warned buyers to advise farmers that processing space is limited. Processors also advised that published prices would decrease weekly by 10-20c/kgCW until Christmas at least. Several farmers have prepared by making alternative plans, potentially selling more lambs than usual on the store market to other farmers (depending on store market demand).

## East Coast

The current pricing for new season lambs was around \$8.40-8.50/kgCW, \$1.00-1.20/kgCW below the same time last year. Farmers expect prices to continue to drop throughout summer in addition to being concerned processing throughput would be difficult as processors were not operating at full capacity due to labour shortages. Many farmers were unsuccessful in booking in their cull ewes and felt this may reflect potential processing space for lambs when lambs are at finishing weights.

### Taranaki–Manawatū

Both hard hill country and hill country farms indicated they will be selling fewer prime lambs in the first quarter. The finishing farms indicated they will be selling more prime lambs.

With published prices for prime lamb dropping weekly, and meat companies’ short-term forecasts indicating the markets are not positive, there was added tension to the start of the new season. Prime lamb schedules were at \$8.30-8.45/kgCW, down 70c on the same time last year. Farmers’ expectations for January were \$6.50/kgCW.

There were a number of reports from meat companies facing staffing and logistics issues, which does not bode well heading into Christmas.

### Marlborough–Canterbury

Prime lamb/hogget processing was reduced through spring due to the conflict with non-replacement calf processing. Farmers who still had “winter lambs” would have them processed as lambs if they still qualified but some were too mature.

While farmer intentions differed depending on individual circumstances, the total number of prime lambs that farmers intended to sell prior to Christmas is expected to be similar to 2021. Slow lamb growth will likely be the biggest influence on new season lamb sales, affecting numbers sold (i.e. if lambs did not reach desired weights) or carcass weights, which are expected to be

lower than usual, if drafted numbers were maintained. Considering the poor start to spring and November rains encouraged farmers to keep lambs, first quarter processing was estimated to be down slightly on 2021.

### Otago–Southland

On average, farmers noted they intend to send more lambs for processing in the first quarter than they did last season.

Published lamb schedule prices were \$8.20-8.30/kgCW in mid-November 2022, around 8 per cent lower than at the corresponding time last season.

There is concern that prices will decline faster than has occurred in recent years, putting pressure on farm budgets already squeezed with fewer lambs to sell.

## General Comment

### New Zealand Overview

There are several key themes reported by farmers across New Zealand.

- Farmer morale is generally low due to the onslaught of government regulation creating significant uncertainty and concerns for the viability of the sector and rural communities. Sheep and beef farmers feel besieged and underappreciated for their contribution to food production, significant tranches of native vegetation, ongoing efforts to improve the environment and contribution to the New Zealand economy and society. They feel that all those contributions go unnoticed. The economic impacts of proposed or legislated environmental changes appear to be in excess of what is needed to achieve desired environmental outcomes.
- Delays in livestock processing have been a hurdle for some farmers this spring. Farmers are planning ahead and also seeking to strengthen relationships with buyers for processors in order to move stock when needed. Labour shortages for the red meat sector are an ongoing and widespread issue.
- La Niña is back and farmers nationwide are planning for the season wary of potentially dry weather. Feed shortages and tight pasture covers were reported for spring, and feed conservation was hampered by wet conditions in November. Combined with La Niña, concerns are for limited feed in summer and autumn unless favourable rains and sunshine are in abundance in December.
- Thousands of hectares of productive sheep and beef farmland is being converted into carbon forestry to offset greenhouse gas emissions and in response to government policy settings but inflating pricing framework. B+LNZ and many other organisations have called on the government to limit offsetting of emissions using forestry. The

recent Government proposal to price agricultural emissions whereby government modelling shows a 20 per cent decrease in sheep and beef production alarmed farmers and has caused some to reconsider their farming future.

- The outlook for sheepmeat is positive this season, albeit with farm gate prices that are robust but lower than last season. For those farmers with a higher proportion of sheep revenue the decrease in sheepmeat (lamb and mutton) pricing will make an impact. This includes Southland and many hard hill or hill country farms. Farmers are cautious about on-farm inflation levels for the coming season because they expect prices for inputs in all areas of expenditure to increase.

### Northland–Waikato–BoP

Farmer morale is low across the region. A wet spring reduced lamb thrift and farmers are concerned with lower prices this season. The continued barrage of demands on the agricultural sector and in particular the sheep and beef sector with the Government's proposed agricultural emissions pricing policy, is at the forefront of farmer minds creating angst and uncertainty.

A remarkable number of sheep and beef farms came onto the market this spring throughout the region, in particular King Country, with farmer vendors deciding it is easier to stop farming than to operate under escalating regulation. Farmers of all stages and capability are considering exiting the industry. There is a strong likelihood that their farms could sell to blanket pine plantations, which will impose wider issues through the whole community, decimating small rural settlements and related industries.

According to the NIWA climate outlook for November 2022 to January 2023, a La Niña event will have a meaningful influence on the northern North Island. Temperatures are very likely to be above average, with more north-easterly winds and marine heatwave conditions resulting in high heat and humidity. Rainfall totals are likely to be near normal for the season as a

whole but of concern for the region's farmers is a 35 per cent chance of rainfall being below normal and an increased risk for dry spells, like what was experienced in 2020-21 and 2021-22.

Continued poor wool returns and increased costs of shearing have resulted in more farmers planning to sell lambs 'woolly', however the shearing pattern for ewes is likely to remain the same because of animal health benefits.

### East Coast

Although high lambing percentages indicate a successful season, many farmers are experiencing low morale after high lamb deaths and the poor timing of government policy announcements. At a time of year when stock numbers on farm are at their highest, farmers' focus should be on farm, but their attention is constantly being drawn off-farm to policy issues and consideration of the flow-on impacts on their community. Farmers feel targeted and frustrated that their environmental efforts are not being recognised by government and the public.

Many farmers are frustrated with growing pest invasions on their properties. Where neighbouring farms have sold into pines, farmers are worried about deer and other pest populations affecting their livestock and feed supply. Farmers are extremely worried about the impact of wholesale planting of pine trees for carbon on their rural communities and for the health of the economy.

Southern Masterton is on track to receive their highest annual rainfall this calendar year. Other pockets of the region are in similar situations. In early 2022, Wairoa/northern Hawke's Bay farms had two severe storms with flooding, which affected ground and stock conditions and from which they have not yet recovered.

High on-farm inflation is a concern for farmers and is unable to be balanced with good beef and lamb prices.

## Taranaki–Manawatū

Forestry continues to be a challenge to pastoral farming, particularly hill country. Historically high carbon prices, with spot prices at over \$80/t, suggest the trend of land use change from farming to forestry is likely to continue.

Farmer reports suggest COVID-19 and staffing logistics at processors continue to be a challenge for the sector. Prudent planning and good agent relationships will be paramount this season for farmers to get adequate and timely processing space.

Rising costs over the past 12 months has put pressure on farm profits. Fertiliser costs have risen sharply over the past year and fertiliser usage, especially nitrogen, will be reduced on farm this season.

Government regulation has continued to impact farmer sentiment with a number of policies on freshwater, winter cropping and pricing of greenhouse gases all hitting the sector at once.

The strong wool industry continues to struggle. Farmer returns have increased slightly over the past few months however increased shearing costs have farmers feeling despondent over the future of wool. In recent years, some farmers have transitioned to Wiltshire or other shedding sheep breeds to reduce workload and costs.

## Marlborough–Canterbury

Extremely wet conditions in winter, especially July, affected soil structure and subsequent pasture performance or re-grassing on some farms. Compaction was common, especially on grazed winter crops, and this was only partially alleviated by subsoiling and similar husbandry operations.

Inadequate processing space for “winter lambs” caused anger and stress for some lamb finishers, especially those whose contracted drafts were reduced or delayed. Many farms were caught with maturing lambs that lost value as teeth erupted, which meant they were no longer classified as lambs. Trading stock that were held longer on farm limited feed supply for lambing ewes,

reduced ewe condition and lamb survival or performance. Some stock would be sent as mutton to get them off the farm, while other farmers were considering keeping better quality ewe hoggets to sell as two-tooth breeding ewes early in 2023. Many farmers were reviewing winter lamb finishing policies as they did not want a repeat situation in 2023.

Rapidly declining published processor prices for lamb in October and November added to farmer frustration with delayed drafts. Prices were well below 2021 levels and expected to fall further. The trend appeared to be related to general market conditions in a high inflation environment rather than the traditional price plummet associated with the end of pre-Christmas chilled lamb shipments. Farmers were hoping for relatively stable prices into the new year at around \$8/kgCW.

Calf rearers raised fewer dairy-origin calves this year, attributing this to impracticality of new feeding rules, high feed costs and insufficient profit as finishers did not offer much increase in contracted prices. Weaner cattle were expected to be in short supply in 2023.

Feed crop establishment for summer and winter 2023 was hampered by weather across the region. Marlborough farmers had difficulty with early spring sowing due to very wet conditions while later sowing further south was affected by dry soil conditions. November rains may alleviate stress and boost crops, but farmers commented that the region was “always only two weeks away from drought” if hot, dry, north-west wind conditions arose.

Ewes were likely to wean at below target body condition due to tough winter-spring conditions and would need good feed to rebuild for next mating.

Supplementary feed supplies were variable in November. Farms with better winter conditions had feed on hand from the previous season, when large amounts were made. Others used large amounts of conserved feed in wet weather when feed utilisation plummeted, and these farms were now short of supplement due to a late start to feed conservation. Summer weather would

determine how well feed stocks were replenished before next winter.

Wool prices for halfbred and crossbred flocks remained discouraging. Shearing was a loss-making exercise on crossbred farms, as shearing costs outweighed wool value, while some halfbred flocks would break even. Some farmers were considering switching to wool-shedding breeds.

## Otago–Southland

The Government’s response to pricing agricultural greenhouse gas emissions is likely to have profound impacts on sheep and beef farming, rural communities, and the regional economy. The inability to claim sequestration capability for several classes of woody vegetation found on sheep and beef farms will drive further planting of exotics.

Land-use change to plantation forestry is gathering momentum in southern South Island. The number of whole farms sold to forestry interests is increasing with a corresponding decrease in sheep and beef stock units as the land becomes unavailable for grazing.

There has also been a move to planting trees on less productive parts of farms that intend to continue farming sheep and beef.

Farm profitability is under pressure this season with significant reductions in sheep revenue because of falling prices and fewer lambs to sell. Profit is forecast to fall due to increased input prices.

Farmer morale is at a very low level. The incessant stream of regulatory change and new compliance costs continues to erode sheep and beef farmers’ confidence. A downturn in profitability will spur more farms to consider selling to forestry interests.

# Lamb Processing 2022-23

## First Quarter-Oct-Dec

Table 2 Export Lamb Processing for Oct-Dec

Export Lambs Processed October - December						
	(000) Head			% of Total		
	2020-21	2021-22	2022-23e	2020-21	2021-22	2022-23e
Northland-Waikato-BoP	396	377	330	22.9%	24.0%	23.3%
East Coast	1,026	852	900	27.2%	23.2%	24.7%
Taranaki-Manawatu	894	841	845	25.0%	24.5%	24.6%
<b>North Island</b>	<b>2,315</b>	<b>2,070</b>	<b>2,075</b>	<b>25.5%</b>	<b>23.8%</b>	<b>24.4%</b>
Marlborough Canterbury	1,309	1,232	1,215	27.1%	24.3%	23.8%
Otago-Southland	865	912	917	19.8%	22.8%	23.7%
<b>South Island</b>	<b>2,175</b>	<b>2,144</b>	<b>2,132</b>	<b>23.6%</b>	<b>23.6%</b>	<b>23.7%</b>
<b>New Zealand</b>	<b>4,490</b>	<b>4,214</b>	<b>4,207</b>	<b>24.5%</b>	<b>23.7%</b>	<b>24.1%</b>

e = estimate

**Source: Beef + Lamb New Zealand Economic Service**

Overall, the number of lambs processed during the first quarter of the 2022-23 season – from October to December – is expected to total 4.2 million head, down 0.2 per cent on 2021-22.

It is estimated that 24.1 per cent of the season's total export lamb processing will occur in the first quarter, similar to the previous season's 23.7 per cent.

In the North Island, processing in the first quarter is estimated to increase 0.2 per cent, or 5,000 lambs, on 2021-22 to 2.1 million head.

In the South Island, processing in the first quarter is estimated to decrease 0.6 per cent, or 12,000 lambs, to 2.1 million head.

Processing trends in the first quarter reflect the trends in the 2022 lamb crop combined with feed conditions across the country.

## Full Season Outlook

### Export lamb processing -1.6%

The number of lambs processed is estimated to decrease 1.6 per cent from 17.8 million head in 2021-22 to 17.5 million for 2022-23.

### North Island -2.2%

In the North Island, the number of lambs processed is estimated to decrease 2.2 per cent (190,000 head) to 8.5 million head.

### South Island -1.0%

In the South Island, the number of lambs processed is estimated to decrease 1.0 per cent (87,000 head) to 9.0 million head.

### Carcase weights +0.2%

The average carcase weight of lambs processed is expected to be steady (+0.2%), from 19.05 kg per head in 2021-22 to 19.08 kg in 2022-23.

### Export adult sheep processing -2.1%

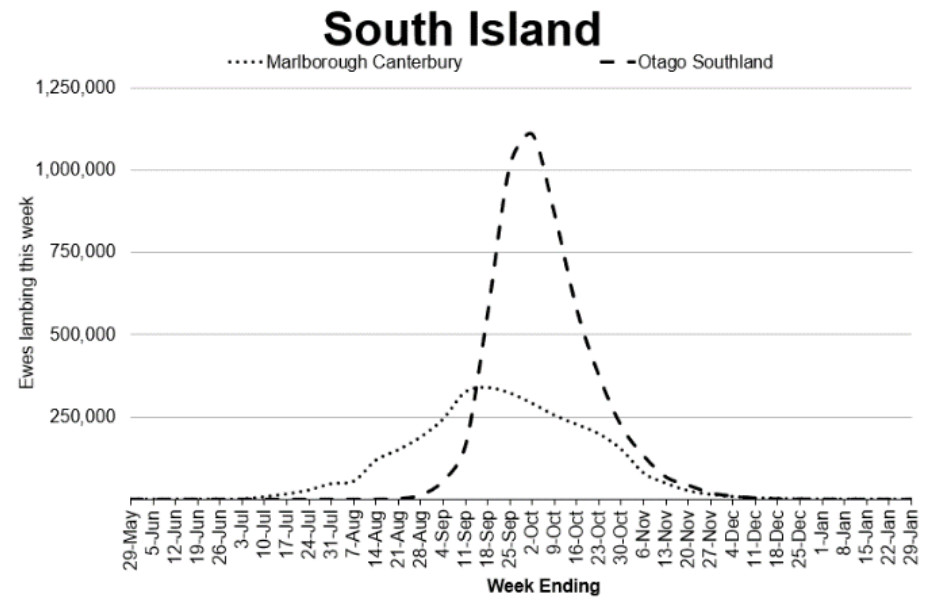
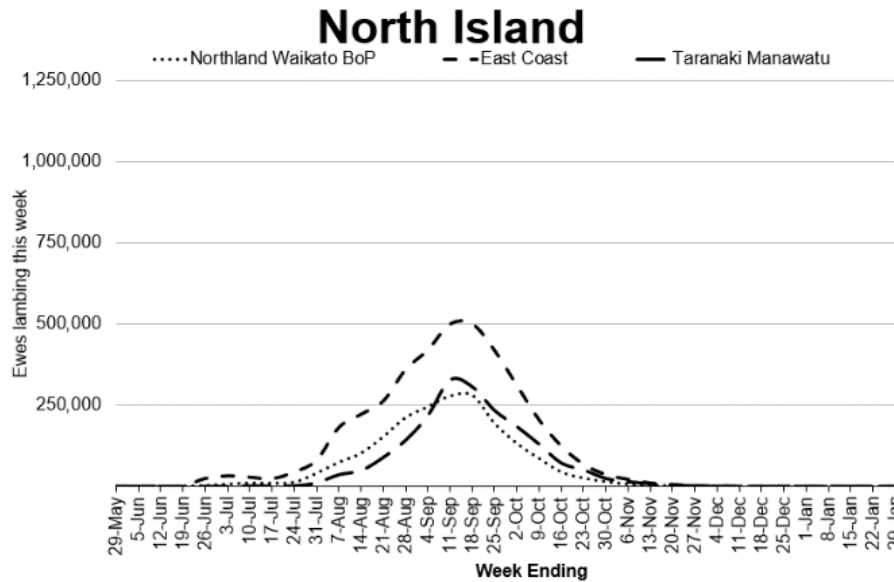
The number of adult sheep processed in New Zealand is estimated to decline 2.1 per cent to 3.6 million in 2022-23.

### Sensitivity

These estimates are sensitive to feed availability and prices offered by meat processors. If feed supplies tighten or price incentives are offered, the number of lambs processed early will tend to increase.



# Ewe Lambing Dates by Region in 2022



Variation in ewe lambing dates between regions is largely due to differences in pasture availability in response to geographically different climates. This is a management response by farmers to ensure that ewes are lambing when feed availability and weather conditions are typically good to provide lambs with the best possible start.

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