

The ABC of learning on the Cicerone Farm

A recent planning day was held where members discussed what they wanted to see happen with the 206 hectare Cicerone central learning Farm at Chiswick. We have a lease on the land until December 2003 with a possible option for another five years. Our overall aim is to demonstrate an improving resource for long term viability of both the farm and its operator

Members voted to sub divide the area into three separate farmlets and run a different grazing system on each. It was decided to call the farmlets A, B and C to avoid any biased views associated with the meaning of a specific term and it also fosters the idea that we are learning and will progress from there as results become available.

The farmlets are on one block of land so will be subject to the same rainfall, same temperatures, same wind, same bloodlines of grazing sheep and so on. We have utilised several farm consultants to ensure that soil types, drainage and topography are known and the farmlets will be as equal as possible when we start the measurements. It may be that the paddocks linked together as Farm A are not adjacent but this inconvenience is necessary to ensure an equitable sub-division.

Members also decided that, as people were interested in all three farmlets, one farm management team to oversee all the inputs to each farmlet was better than having separate teams for each. It also means that input decisions can be made to ensure the differences in the short term.

Each farmlet is to have a drought management strategy and business management as well as farm management tools. We are looking at a maximum return on investment for each farmlet. We are also looking at the sustainability of the three systems

Farm A

- High production using high input strategies
- High legume content
- 200 cwt fertiliser (20 kg P per year)
- Increasing soil P
- Over 15 DSE per hectare
- Condition score as per CSIRO guidelines
- Cultivation allowed to put in new pastures
- Flexible rotational grazing using ProGraze principles
- Number of paddocks 8

Farm B

- Medium input strategies
- Flexible rotational grazing based on the ProGraze System
- Minimum P level of 10-15ppm
- 6-7 DSE per hectare
- No cultivation
- Clover may be broadcast at appropriate times and with appropriate stock management
- Vulpia control
- Number of paddocks 8

Farm C

- Same treatment as Farm B but with the following differences
- Twice the number of paddocks ie 16
- 6-7 DSE per hectare
- Longer rest periods for each paddock
- Mobs may be combined during a drought
- Flexible rotational grazing

Thus Farms A and B can be compared as they will have differing treatments but the same grazing management. Farms B and C can be compared as they will have the same treatments but differing grazing management.

Vizard's Vision

as preached at the Wool Profit Day

At the recent Wool Profit Day in Armidale producers were asked "Why do you grow wool?" Speaker Graham Peart said that one producer told him it was "to keep the mutton warm". But really it is more to do with income and lifestyle and the two are closely linked. In these days low wool prices also means our income is down and so is our standard of lifestyle. When things go wrong we need to know what is wrong before we can fix it.

Andrew Vizard of the McKinnon Group told producers that wool price is one consideration but there is little we can do about that. But we can do something to lower our cost of wool production and add value to our wool. He said producers *must be prepared to change and be innovative* and by adopting proven technologies we may be able to increase our income per hectare.

As farmers we need to adopt a hard nosed business approach to our work and our property. How much does it cost in terms of our labour to produce each kg of wool? It is important to have an overall plan and set some targets.

Andrew Vizard bought a farm and he set up a three stage plan to improve its income:

1. To make better use of the existing feed base (so no cash was needed to make these improvements)
2. Increase pasture growth and stock numbers (as cash became available)
3. Grow more productive sheep.

Existing feed base Make better use of your annual growth and combine it more efficiently with the pattern of animal feed demand. When do you lamb? When do you shear? What is your flock structure? Are you making the best use of the pasture? On the Vizard property they found that switching from autumn to spring lambing, when feed demand was highest but grass growth was also fastest, gave them the ability to run an extra 500 wethers per 1000 ewes. He suggested we should check out the times for this area. Have a look at

ProGraze and see what it tells us for our own stock management .

The time of shearing can be used to help control staple strength if you can combine shearing with the environmental factors which affect staple strength... shear at the point of break. Shearing time can be adjusted to get rid of cast for age animals prior to the time of peak feed demand.

Look at Best Practice for worm control and feeding policy. What is best for this area? None of these practices cost money but can be used to generate more income because there is a more efficient utilisation of the natural resources.

Increase pasture growth What quantity of pasture do you need to run the number of animals you have and the type of animals? What is the best pasture for this area in terms of

sustainability and feed quality? Do you need to add fertiliser? You must have planned grazing management so you don't eat out a pasture and need to spend extra money to either feed stock or replace a degraded pasture.

Productive sheep The sheep must be productive. What market are you targeting for your wool? We need to increase the clean fleece weight per animal and grow the type the market wants ... 18 to 19 micron seems to be the general trend. We also need to improve the wool quality traits such as staple strength. We should look at improving the genetic merit of the flock by using proven superior sires. You may need to cull fairly heavily. You may be able to select a nucleus of ewes who grow more

fleece with a lower fibre diameter and use a top quality superior ram from a Sire Evaluation scheme on this nucleus and build up from them.

Use progeny testing and benchmarking as tools to help with your flock management.

By following these simple guidelines the Vizard farm has increased the wool income from \$140 per hectare in 1991 to \$340 per hectare in 1999.

We can share Andrew Vizard's philosophy by learning what the potential is for this area and making use of that information and being prepared to change.

THE WORLD WIDE WEB

An excellent search engine for internet searches is **Error! Bookmark not defined.**

Thinking of diversifying from wool to milk... sheep milk that is
or meeting a niche sheep-meat market then have a look at
the WA Department of Agriculture's web site at **Error! Bookmark not defined.**

The Rural book, a comprehensive guide to Commonwealth services is located at
<http://www.dpie.gov.au/rural/book/home.html>

The Farmer's ABC of the GST is to be found at **Error! Bookmark not defined.**

Rural Training Council of Australia is at www.rtca.farmwide.com.au

OJD on the net at <http://www.agric.nsw.gov.au/Sheep/Health/ojd>

WoolMark is at www.wool.com.au

National Business Bulletin is at **Error! Bookmark not defined.**

The Cicerone Project is at **Error! Bookmark not defined.**

*****Disclaimer Articles in this newsletter do not imply agreement by *****
or endorsement by the Cicerone Board or membership in general

CHAIRMAN'S REPORT

“Grantham”

**Uralla
NSW 2358**

Ph: (02) 6778 4659

Fax: (02) 6778 3315

Email: huthsuth@northnet.com.au

29 July, 1999

Welcome to our first Annual General Meeting.

Andrew Grace – Woolmark Company,
Cicerone members and other interested groups
and individuals.

I will attempt to be brief yet cover everything
in sufficient detail for all of you to be satisfied
with the progress we have made to date. Just to
be sure I will answer any questions at the end
of this address.

Cicerone was an idea that actually began
around two years ago and has slowly
developed into what we believe will be a
revelation in defining the relationship between
producers and the research community and
speeding up the innovation and adoption
process.

To be succinct, the mission of Cicerone best
defines what we are about. “We are a New
England based producer group, dedicated to
improving the viability of grazing enterprises
through producers actively participating in
relevant research and learning”.

To achieve this objective in a manner that is
lasting means that we simply couldn't erect
some fences run some stock into some
paddocks and start measuring all sorts of
things. It has taken us longer than we
anticipated but we have consulted with a large
number members, other producers we hope
will become members, a myriad of R & D and
extension organisations - to create a model that
is applicable not just this year and next year
but in 20 or 30 years time.

This has meant that we had to spend longer
planning and consulting rather than doing but
we knew we had to get it right or the future
credibility and usefulness of this project would
be placed in jeopardy.

In November last year Cicerone signed an
agreement with CSIRO for the lease of 206
hectares of Chiswick and a funding agreement

with the Woolmark Company until June 2000.
Both of these agreements are significant
landmarks for Cicerone as both are integral for
us to achieve our mission.

Thanks to CSIRO we now have close to 1,000
sheep. We took delivery, if I can call it that,
of the first lot of sheep in late May this year and
some more since. These sheep were not made
available to Cicerone under any agreement but
I believe reflect the goodwill of CSIRO to this
project.

From an administrative perspective we have
appointed a part time Executive Officer,
Caroline Gaden, in October last year. Caroline
has been the horsepower behind many of the
ideas that the members or the Board wish to
progress. I cannot thank Caroline often enough
for her dedication and professionalism.

In March this year we also appointed a part
time Farm Manager, David Wilkinson, who
was like a Minister without a portfolio as at
that stage we actually had no livestock to
manage. David will be a great asset with his
knowledge of the Cicerone farm land and his
ability to relate to the staff at CSIRO and
producers.

In addition to these part time appointments we
have overseen Cicerone's Incorporation, our
licensing to perform research on animals under
the Animal Welfare Act and formalising
Animal Ethics Committee procedures.

During the normal course of business Caroline
and the Board have been organising the
Cicerone Newsletter, developing promotional
flyers and posters for use at field days to
heighten the awareness of Cicerone and what
we are doing.

We have organised field days and seminars on
a wide range of subjects or issues including;

- ◆ Footrot – July last year and January this year,
- ◆ Internet day – February this year,
- ◆ Weeds ID day – March,
- ◆ Wool Stockpile day – May,
- ◆ Farm Planning day in June, and
- ◆ Marketing your wool clip day – earlier today.

The Cicerone Farm, based on Chiswick, forms an important part of our long-term plans. On this area of land we hope to be able to demonstrate to producers the benefits of adopting practical research with a mind to improving our long-term sustainability and profitability. In June we held a Cicerone farm planning day at which we explained the processes that we were going through to develop the farm. Importantly the members present on the day decided that this area of land should be run as 3 mini farms or farmlets. Each mini farm is around 76 hectares or just under 200 acres.

Each farmlet is to have a producer steering committee. These producers will make the important management decisions that will determine the performance of their farmlet toward achieving a desired objective. They will not be charged with the management of the farms on a day to day basis. The three farmlets will be termed A, B and C to remove any connotations from their names and essentially they will manage to the following objectives;

- ◆ Minimum cost (A),
- ◆ Maximum Productivity (B), and
- ◆ A hybrid of the above (C).

The third farm I mentioned may include aspects of HM, time controlled grazing and Grazing for Profit principles.

A meeting has been organised for 26 August to enable the producer steering committees to further this process. Please note that each farmlet will receive an equal allocation of land based on soil type, the state of the pastures, fertiliser history and other important physical parameters.

The producer members will then be able to decide how best to use these areas of land as a

tool to help them improve the long-term performance of their business.

Cicerone has also received funding to conduct an on farm experiment around the identification and control/ eradication of footrot. As most of you will appreciate footrot is a fairly recent phenomenon in the New England even though it may have been here for years. The aim of this particular experiment is threefold;

- ◆ DNA fingerprinting of various strains of both virulent and benign footrot to see if differences occur. We hope this will lead to a better testing procedure and more accurate diagnosis of “infections”,
- ◆ To see if it is the climate of this area that may cause it to express differently, and
- ◆ To see if the recommended spelling time of one week is too short for the field benign strain.

The research is to be conducted on the old Big Ridge sites of Chiswick. There will be 10 groups of sheep with 10 sheep in each group. I won't go into detail about the logistics of how the experiment will be run as more detail is provided on the displays around the room.

Suffice to say that the objective is that all interested groups (the RLPB, the Dept. of Ag. and producers) will have a better understanding of what we're dealing with and how best to approach the problem in the New England in the future.

Finally I have a long list of “thank yous”: I would like to thank the Board - Kim Barnet, Tim Wright, Lachlan Fulloon, Hugh Beattie, Jim Scott, Rob Woolaston, Clare Edwards and Sonia Williams - for their expertise and input over the last 12 months.

We have confronted, debated and discussed many issues and seen a strengthening of the understanding between all of those involved. Caroline Gaden and David Wilkinson deserve special thanks for their approach and assistance during this process.

I would like to thank the Woolmark Company for their foresight and understanding in giving us the latitude to create a project that we

believe will have a lasting impression on the local landscape and hopefully the wider wool industry.

CSIRO for the assistance that they have given Cicerone which has been far and above that required under any agreements. In particular Rob Woolaston for his support of the concept from day 1.

Jim Scott for his efforts to encourage other groups to become involved in Cicerone.

The members for your patience and support whilst we started Cicerone from the ground up.

And to all of those other organisations and individuals that have lent Cicerone both tangible and intangible support over the last couple of years.

My time as Chairman of Cicerone has been fulfilling even though at times it seemed we were going around in circles. I have enjoyed the challenge and hope that Cicerone is the better for my involvement. If we as producers are to survive the next 10 years we will need to do a lot of things differently. I hope that Cicerone will be the start of a solid working relationship between producers, researchers and extension staff to work towards this end.

The recent Marketing Your Wool Clip day held by Cicerone was most successful and the speakers notes were well received by those who attended. There are half a dozen copies left over. These are available for **members** who missed the day. Ring 6778 3871 to let Caroline know if you'd like a copy.

If you are interested in Cicerone organising a training course for Managing Farm Safety (as per the enclosed leaflet) please ring Caroline on 6778 3871 and let her know.

Information is also enclosed about the NSW Agriculture Merino Breeding and Selection - a Commercial focus workshop. Again please advise Caroline if you are interested.

A look at the past: Just 10 years ago in 1989 who would have thought that today agriculture would fall to just 2.9% of GDP.. At the beginning of the century it was 23%.

A look at the future: Just 10 years from now in 2009 who would believe that the export of Services exceeds the total exports of all Agriculture and Minerals

Taken from the July 1999 issue of National Business Bulletin

Did you know that in November 1997, of the total of 8437.7 thousand people in the workforce there were 441.0 thousand employed in Agriculture, Forestry and Fishing, with below average prospects for longterm employment growth. (Source ABS Labour Force Survey Cat No 6203.0)

You can't solve problems using the same thought processes which created them Albert Einstein

WOOL from a consumers perspective.

These days we have become used to hearing how the beef industry has developed a grading system based on the wants and needs of the consumer. Unless the wool industry follows suit, problems could well continue to exist for some sectors.

Jim Williamson is a wool spinner, a first stage consumer in the chain. At the recent Wool Profit Day he told wool producers that merino wool is the best wool in the world but it can be improved and Jim confided his wish list:

- a) Price stability ... there is a long time lag from buying the wool to the finished garment arriving in the shop, this is not a problem with synthetic fibres.
- b) Contamination is still the biggest cost with vegetable matter, skin pieces and poly-prop continuing to contaminate the bales.
- c) Fibre strength as this translates into yarn strength and then fabric strength.
- d) Wool testing for woollens as well as worsteds

Jim commented that the spinner has to guarantee his product to his customers and he thinks the growers should guarantee their product too.

Peter Wilkinson is a chief buyer for David Jones so he sees what the ultimate consumer, the garment buyer, is looking for. The retailer has to predict what consumers will buy in 6 to 12 months. He advised that the designers prefer wool and the people at the top end of the market can afford and will buy wool.

He commented that the most profound change in Australia in the last 20 years has been the return of women to the workforce. These women need convenience and they need to be able to throw the jumper into the washing machine, if it can't be machine washed, the customer will not buy the garment.

Wool blends are probably the way ahead according to Peter Wilkinson

who said the addition of just 2% lycra to wool made a far superior fibre for suits. He also suggested that as the consumer becomes more concerned with issues of health and conservation we should promote wool as having the advantages of a natural fibre.

Where is our wool going?

August saw some major developments in the world of wool. In Japan, the worlds first pure Australian Merino Wool carpet went on the market in 500 stores across the country. Using wool which is 25-26 micron, the carpet needs 1.4 kg clean for each square metre. Growers hope the current consumption of 70,000 kgs will double by 2002.

Textile Developments Pty Ltd, the people who gave us denim wool, have followed up with a wool blend towel which has 22% wool content and can be washed in hot or cold water and is said to last longer than conventional towels.

NSW producers who are growing the wool and then making and marketing 100% pure wool garments include Tableland Wool and also Woolaby with their 100% wool rugby jumpers

What great promotion of SportWool Pro by ultra marathon runner Pat Farmer on his gruelling 14500 kms quest round Australia and just how much of this SportsWool is going to end up dyed red and be cheering on the stands of Old Trafford, former home of the legendary Bobby Charlton and George Best and current home to the successful Manchester United soccer club where an adult supporters shirt costs £45 and a child's one is worth £33. The replica soccer kit

market for all clubs is worth £210 million a year in the UK alone.

Compiled by Caroline Gaden from notes taken at the Wool Profit Day and from snippets from recent issues of the Country Leader, The Land and The (British) Weekly Telegraph

Interested in growing olives? You may like to get in touch with the newly formed "Northern Tablelands Olives Association" The contact person is Sandra Stoddart on 6772 5062 or mobile 0412 779 819

The Cicerone Project Inc.

MERINO WETHER TRIAL

is to be held on the

Cicerone Farm at Chiswick

A progressive wether trial with new annual intakes

Intake to be middle October **Number** of wethers per team: 12

Disease: Wethers to be from flocks with MN1 status

(MN2 when area becomes 'protected')

Before delivery must be inspected for footrot by RLPB

Age: approx 12 months **Shearing:** Sept/Oct

Trial shearings: 2,3,4,5years **Disposal Age:** off shears at 5

Details of the trial can be obtained from either

Kim Barnet (Cicerone Board member) on 02 6777 2885

Bob Marchant (NSW Agriculture, Armidale) on 02 6773 7288

Trial entry forms and guidelines can be obtained from

Caroline Gaden at 02 6778 3871

ENTRIES CLOSE MIDDLE OF SEPTEMBER

Measure Compare Learn Adopt

THE CICERONE WETHER TRIAL

Background

The past three wether trials run in the New England have been 1978-81, 1984-87, 1995-97, with another aborted in 1980 due to footrot. The last trial commenced under extreme conditions during the severe 1994 drought.

The past trials have been on commercial properties but due to problem of disease (OJD and Footrot) and fear of disease no commercial properties would be willing to host a wether trial. NSW Agriculture has been concerned about the future of wether trials.

Relevant current bloodline comparison of fine and superfine merinos is lacking in the Australian industry.

Current bloodline comparisons of 67 trials conducted around the whole of Australia

from 1987 to 1998 have averaged 21.6 microns and only 3 bloodlines under 20 microns with the finest at 19.2 microns. This information is basically history of the productivity 10 to 15 years ago and does not account for changes in bloodline productivity in more recent times.

New England is an important area for fine and superfine wool and is becoming the most important fine/superfine merino seedstock and breeding area in Australia because of the range of bloodlines. There is no data on this area as insufficient has been collected.

The issue of producers targeting specific market segments is not really understood. This is dynamic, important and constantly changing. There is the opportunity to encourage producers to target production towards a market segment as well as discovering more productive bloodlines.

There is also an opportunity to fill the gap by running continual or rolling wether trials with an intake of wethers each year, and running the wethers at the CICERONE Central Farm for information and educational purposes.

Fleece Evaluation

The idea will be to replicate, as closely as possible, a valuation process used prior to auction sale. This may change as selling methods change, but must represent current industry practise.

As with the whole wether trial, as technology or methods evolve, the wether trial should take them up or evaluate.

When shearing is carried out small samples (midside) of each fleece are to be retained. Individual fleeces will be evaluated as well as the team to be

evaluated as a whole wool clip. Skirting and bellies would need to be assessed as usual.

The small fleece samples are to be arranged in a sample box with dividers between each sample (eg dividers as in a wine box). Each fleece is then individually assessed.

Following shearing 2 wool exporters/processors representing the key market segments, will inspect the samples. They will assess each fleece sample and the whole team, and type and value each lot as they would on the show floor of a wool store prior to a wool sale. An industry representative (possibly a broker) would also type the samples for AWEX-ID.

Relevant measurements to be displayed will include length, strength, POB, fibre curvature and possibly FDCV% (fibre diameter co-efficient variation%). The final valuations will then be calculated with values for the 2 exporter/processors, as well as the industry description.

Market Segments

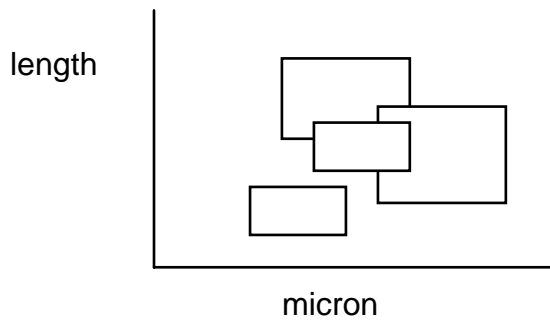
Targeting market segments, as said earlier, is becoming evermore important. Having 2 members of differing segments of the wool market means producers can see how their wool compares for the segment they are targeting. If producers don't know where to target their wool this will be an opportunity for them decide where they wish to target their clip.

This is not to create competition between the segments of the market, rather for producers to be able identify the market they are producing for and learn what that segment requires from the producer for better quality end product

To quote Allan Grace at the Cicerone "Marketing Your Wool Clip" day on 29th July 1999, "producers should be conscious of where their wool is going".

A model of wool market segments needs to be established similar to the one developed by Bob Gaden to show beef producers which market segments are interested in which cattle types. The Wool Industry doesn't have such a model or guide for producers to use to identify these segments. The wether trial can be used to develop this model and further educate producers of these segments.

EXAMPLE:



Field days

Once all shearing data is finalised a field day or open day will be held at the Cicerone Central Farm. It could be held a week or month after shearing or when wethers are in half wool (better to be held before ram buying season).

TASMANIAN TOPICS

Tasforestry where money grows on trees..... Tasforestry is a privately owned company which provides a clean green socially acceptable investment by growing *Eucalyptus nitens* (The Shining Tree) plantations on unused farming land dotted round northern Tasmania. Their sales have increased from \$1.7 million in 1997 to over \$12.3 million in 1998 and an expectation to double that this coming year. They don't use prime land but the shoulders of hills to keep the tree's feet dry! Taken from The July 1999 issue of the National Business Bulletin

Tasmania is the place for buried treasure as **truffles** have been introduced to supply a need in the gourmet food market. Tasmania's wines cheeses and seafoods are legendary and the list of farmed produce is impressive in variety and quality. "There's a lot of small entrepreneurs out there who are prepared to give things a go" according to Master Chef John T. Bailey. (From The Qantas Club magazine Winter 1999)

Wouldn't it be great if more of our local producers became entrepreneurs and got together to organise **goUrmet FOOD AND FARM weekends** for the Sydney folk who have the income and are looking for ways to spend it. Fly to Armidale or Tamworth and enjoy a weekend of farm experiences with great locally produced food. Congratulations to those who are already doing some of this through their Farm Stays.

The future of red meat in the food revolution

The market for red meat is changing much faster than we realise and the industry has to face up to some challenges if it wants to maintain its market share. This article looks at some of those challenges and what the industry is doing to ensure a place in the future.

The future

The pace of change continues to quicken and there have been very rapid changes in the space of just one lifetime. The career from which our children will retire probably has not yet been invented; the future is more difficult to predict; we will have less time to adjust; the last 15 years has seen more turbulent change than ever before. In the post war period we had full employment and home ownership was considered important. Now we have winners and losers, family values are changing; there have been changes in people's behaviour; people have multi-jobs and the boundary between 'work' and 'leisure' is disappearing.

Couples are having fewer children with the average dropping from 2.8 in 1965 to 1.8 now. In 70% of families both parents work, we spend less time on social activities, we spend less time on recreation, we spend more time on recuperation.

We are no longer a uniform society. Reg Bryson, Director of advertising agency Campaign Palace has identified five distinct sectors within Australian society, there is no such thing as one 'typical' Australian anymore and the market can no longer be viewed as a collective mass. As a consequence, eating patterns have changed and there has been what market researcher Liz Dangar terms a "food revolution".

Multiculturalism has had an enormous effect. 25% of Australians were not born here and 1 in 5 households in Melbourne don't speak English at home. Eastern type cuisine is taking over from Western style meals.

There are new products on the market.... 41% of Australian households use dried tomatoes, 47% use pesto 10 years ago these things didn't exist on the supermarket shelves. Now

70% of households own a wok, one third of teenage girls won't eat red meat.

There are around 240 different ethnic groups in Australia so we are now getting a mixing of cuisines. The typical weekly menu will have more variety and is likely to include pizza, pasta, stir fry and steak. Food is becoming more interesting ... just look at the proliferation of TV food shows and food magazines.

In the 1960s over 90% of people ate a hot breakfast, these days 20% of people eat breakfast on the way to work dashboard dining is here to stay.

Reg Bryson has identified five major forces in people's choice of food:

1 Choice and variety :

There has been a real increase and we need to make sure red meat is fashionable.

2 Health and diet consciousness:

70% of consumers have lowered the amount of fat in their diet. The fat in red meat is visible and this is a negative for many consumers. They are also concerned about antibiotics in chicken meat and about caging of the birds in battery farms and as a result chicken sales are faltering.

There is deliberate misrepresentation by the animal welfare people with sensationalist headlines, such as the problems associated with char grilling (the research was actually done on chicken). The red meat industry needs to get the real facts out to consumers, dietitians and health professionals.

Consumers attitudes have shifted. In the early 1990s over 52% claimed that food integrity was an issue.

It has now risen to over 80% of consumers who are concerned with issues such as over-processing, freshness, use of preservatives and gene technology... consumers want to know what they are eating.

3. Lighter eating trends:

There is more inclination to snack and browse and Asian cuisine is gaining in popularity.

Cooking skills are giving way to skills in food assembly.

4. Prepared meals:

There is a boom in prepared meals...and the most dramatic change is still to come. Fast food is on the decline but there is an increase in the popularity of prepared foods. Retailers are remodelling their stores to cater for 'home meal replacement'. Beef and lamb must be part of this to ensure the future for producers.

The city worker decides on the make-up of their evening meal after 4.00pm ... in the US 40% of meals eaten in the home are prepared outside the home. In Australia the figure is 21% and growing rapidly. Houses are now being built without a kitchen. On Sydney TV one company is advertising four meals home delivered for \$100 and this trend towards home delivery will increase. The Marie Claire cookbooks should be essential reading for meat producers so you can see where the consumers are heading.

5. Convenience:

The currency for the 90s is **TIME**. We have less time and more choice. Now 66% of mothers are working outside the home. In the 1960s it took two and a half hours to prepare the evening meal. Now it is down to 15 minutes. Have you noticed how preparation time is now a feature of advertising? Kelloggs are working on a product that can be opened, unwrapped and eaten with one hand.

How well prepared are we as a red meat industry?

We've resisted change up to now. That is not virtuous, it is downright dangerous.

The image of the industry needs addressing as words like butcher, slaughterhouse, abattoir are not words which appeal to consumers. We can no longer market beef and lamb as big red chunks of meat. Names such as chump, chuck, shin and rump are not conducive to the buyer who wants a **MEAL SOLUTION**. The Canadians have renamed all their meat cuts by a cooking method ie a grilling piece or a casserole piece.

Food is no longer just fuel for the body, it is also a fashion statement, an entertainment and

it must appeal. The community will become more favourably disposed towards red meat... look at what the dairy industry has done with milk, all the different varieties..... beef and sheepmeat must head in the same direction... food will be increasingly about pleasure and enjoyment.

The future for red meat

David Crombie, Chairman of MLA explains that beef and lamb must become part of a meal solution. It will be a long journey. Pathway accountability will be an important concept. We must meet consumer expectations.

At the Beef Beyond 2000 seminar he told producers that MLA is a producer owned company which is now concentrating on three main areas, market access, building demand and improving the efficiency of supply.

Access to overseas markets is critical to survival as 65% of beef produced is exported. There is no such thing as fair play or a level playing field, it is "dog eat dog" as Clinton's lamb decision showed. MLA is putting a lot of their resources into this area.

Building demand locally is also important. The real purchasing power of the consumer is not increasing and we need to look at our declining market share. Domestic consumption of lamb has declined from 14kg per head in the 1980s to 11kg per head by 1996. Domestic consumption of beef is declining at the rate of \$180 million per year. We must offer value for money and meet consumer expectations and this is the whole thrust of Meat Standards Australia (MSA) grading for beef which will be launched in Sydney on 10th October.

The Easy Mince campaign appeals to children and Mince sales have increased by 10% as a result.

To improve the **efficiency of supply** we must target specific markets and new technology like gene markers will be important to improve targeting for markets. A value based marketing system which ensures producers are paid accurately for what they produce will be essential.

Information must flow up and down the marketing chain.

There will be less processors, the big will get bigger, they'll be food factories with more value adding. The smaller processor will survive by becoming more specialised and becoming part of a vertical alliance. Northern NSW lamb producers have taken up one of these marketing opportunities through the New England Lamb Alliance

Butchers will become specialised and take up MSA.

Price competition will continue with pork and poultry. We should not try to compete on price alone. Red meat is superior and more versatile.

Production response

Cattle with a larger frame, high yield, low costs will be purpose bred for export, smaller fast growing animals will aim at the top market

segments, ie they will be streamed into specialised markets as part of an alliance. These alliances are probably where the future for the family farm will be found.

The AGM of MLA is to be held on 24th November at Albury. Chairman David Crombie wants all producers to make sure they are enrolled and then go and have their say.

*This article has been compiled by **Caroline Gaden** from talks given by:*

David Crombie, Beef Beyond 2000, Orange, August 1999

John Webster, Beef Beyond 2000, Orange, August 1999

Liz Dangar, NSW Agriculture Beef Industry Conference, Armidale, November 1998

Reg Bryson, Meat Profit Day, Armidale, November 1997 and from a paper by

Chris Shands, "A lamb is a lamb - or is it?" in The Country Web No.20, Spring 1999

David Crombie called on producers to take the initiative and recognise the culture shift.

He advised that we should "romance beef it's nutritious, delicious and convenient."

The industry should create new and innovative products. The industry should be positive and be united.

As John Webster, General Manager Beef Industry Services, MLA, points out, Australia leads the world in consumer based research into beef with 200,000 consumer taste tests conducted on 20,000 retail cuts using five different cooking methods. The resulting MSA grades of "tenderness guaranteed" (green sticker), "premium tenderness" (purple) and "supreme tenderness" (gold), combined with a recommended cooking method label, will ensure we'll be able to say with confidence that *if you cook this piece of meat this way it will eat as described, no 'ifs', no 'buts', no 'maybes'.*

David Crombie explained that MLA can't deliver the profits; MLA can't shield producers from commercial reality; MLA can help with the tools for selection and for profitability and he promised that MLA will try to focus on building demand and market access.

Marketing Your Wool Clip Day

Thank you to all who took the time to help the UNE Ag Extension students with their surveys. They are very grateful for your time and input. "Things financial" were what most of you were interested in and we will organise a day on "things financial" early next year.

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