

MLA and AWI Wool and Sheepmeat Survey Report - Sheepmeat

October, 2021

Prepared by Kynetec

Contents

Executive Summary	3
Background and Purpose	4
Methodology	5
Survey Respondents	8
MLA Sheep Producing Regions	12
National Results	13
Results by State	17
Results by MLA Reporting Region	21
Regional Snapshots	31

Executive Summary – Lamb Production

Number of breeding ewes on hand

41,764,360 total breeding ewes on hand
 30,259,219 Merino breeding ewe flock, 72% of total breeding flock
 11,505,141 total non-Merino breeding ewes on hand, 28% of total breeding flock
 Within the Merino flock, 72% for Purebred Merino lamb production and 28% for other lamb production

Ewe flock intentions for next 12 months

51% increase
 44% maintain
 5% decrease

Intended method for achieving ewe flock increase

39% Retain more older ewes than normal
 55% Retain more replacement ewes than normal
 30% Purchase more additional ewes than normal

Number of lambs on hand

29,354,794 total lambs on hand
 15,056,652 total Pure bred Merino lambs, 51% of total lamb flock
 14,298,142 total non-Merino lambs, 49% of total lamb flock

Expected lamb sales in the next four months (1 Nov 2021 – 28 Feb 2022)

13,058,307 total lamb sales in the next four months
 4,126,459 total Pure meat sales (32% of total lamb sales)
 3,503,840 total First cross sales (27% of total lamb sales)
 3,148,899 total Merino sales (24% of total lamb sales)
 2,279,109 total of all other breeds sales (17% of total lamb sales)

Number of lambs marked in the past four months (1 Jul – 31 Oct)

21,869,935 total lambs marked in the past four months
 12,098,061 total Merino lambs marked (55% of total markings)
 9,771,874 total non-Merino lambs marked (45% of total markings)

Number of ewes joined to produce those lambs

21,555,901 total number of ewes joined to produce those lambs
 12,962,719 total Merino lambs joined (60%)
 8,593,182 total non-Merino lambs joined (40%)

Marking rates

93% National Merino marking rate
 114% National non-Merino marking rate

Background and Purpose

Survey Background

The Wool and Sheepmeat survey has been running in various formats for the past 18 years. The survey has been running in its current format since June 2010, following discussions with MLA's Lamb Forecasting Advisory Committee (LFAC), where MLA decided that they needed to use a more vigorous methodology going forward.

Due to the success of the survey, a management agreement between MLA and AWI was negotiated and AWI signed on for the next wave in October 2010.

Since October 2010, MLA, AWI and the LFAC have worked closely to further develop the model, sample and breed code frame for the now combined Wool and Sheepmeat survey.

Kynetec took over from Axiom in October 2016 and have been working closely with MLA and AWI to increase the number of respondents and the amount of data collected by streamlining the online and mail-out surveys.

Purpose of the research

The project provides MLA and AWI with an accurate representation of flock population, demographics, sheep meat and wool supply information and producer production intentions during key production periods throughout the year.

The survey enables MLA and AWI to provide the Lamb Forecasting Advisory Committee (LFAC) and the Australian Wool Production Forecasting Committee (AWPFC), with solid forward looking information to assist industry projections.

Although information gathered has been extremely useful in flock and production forecasts, MLA and AWI are continuing looking to add further value to the study by better aligning the sample collected with industry production structure and making better use of the results in various internal and external publications.

Methodology [1/3]

Sampling

The MLA and AWI Wool and Sheepmeat survey for October 2021 was built around the collection of an industry representative sample of sheep producers across all sheep growing regions of Australia. In order to achieve a representative sample, sheep producers were sampled with strong representation within each MLA defined sheep production region. A total number of 1,698 survey responses were achieved in October 2021, below the response levels achieved from June 2021 at 1,720 surveys but up from 1,678 surveys achieved in October 2020. Australia Post was experiencing severe delays in their letters and parcel deliveries over the September / October survey period due to Covid-19 with less domestic flights, increased deliveries for online orders and staff safety procedures. Similar postal delays were expected in the October 2021 survey so a change from mail to phone methodology was undertaken to ensure that a robust sample of at least 1,700 surveys could be achieved in a timely manner (further details below). The change in method from mail to telephone resulted just over 500 surveys being completed by telephone in October 2021.

Given many large producers have multiple properties in different regions and states and their possible impact on weighting, we reported the results based on number of properties rather than respondents. As a result, 2,657 properties were included in the survey.

Data Collection

Three survey methodologies were adopted in order to collect the target sample:

- 1. Online web based survey:** This methodology was presented to potential respondents using two different communication tools (email survey links and website survey links).
 - I. Website survey links:* Two survey links were given to MLA and AWI to place on their website and to include in selected external communications with producer stakeholders e.g. Friday Feedback and Feedback magazine. Copies of these links were also sent to members of the Lamb Forecasting Advisory Committee (LFAC) to include in their email signatures and place on their websites during October. A total of 22 respondents completed the survey via this method (1% of the total sample).
 - II. Email survey links:* A link to the survey was created for email purposes so Kynetec could track the number of completes and partial completes throughout the survey period (1 to 31 October 2021) and send reminder emails accordingly. A total of 17,022 emails were sent to MLA and AWI members via the email addresses provided by MLA and AWI databases. Of those 3,395 emails bounced, giving a total emails delivered of 13,627. A total of eight reminder emails were sent to non-respondents with a significant number of completes achieved after each reminder. The email survey link returned a total of 1,165 completed responses (69% of the sample).
- 2. Mail-out survey / Telephone Survey:** A mail survey not undertaken in October 2021. Rather, mail respondents to the last four surveys were contacted by telephone and were offered the opportunity to complete the survey over the phone. The mail budget was used to fund this telephone survey of mail respondents so there was no impact on the project's overall budget. A total of 511 producers responded by this methodology (30% of total sample. In addition, in order to boost the sample of very large sheepmeat and wool producers, approximately 100 calls were made to MLA's top 50 sheep levy payers to do the survey over the phone (as is standard practice each survey). As a result of telephone calls and the online survey, a total of 9 very large producers were included in the survey (Ewe flock size >20,000 head).

Methodology [2/3]

Weighting

Breeding ewe and lamb estimates were developed by weighting the number of respondents by both state and flock size to the number of farm businesses with breeding ewes. Wether estimates were developed by weighting the number of respondents by state to the number of total farm businesses with sheep and lambs.

As with all Wool and Sheepmeat surveys since February 2018, the ABS population of producers used for weighting the survey data is regularly adjusted to account for the significant number of smaller producers (flock sizes of less than 250 head) that were excluded from the ABS census and surveys due to the \$40,000 EVAO cutoff. A comparison of the adjusted producer populations used for breeding ewe and lamb estimates for the last three years of Wool and Sheepmeat surveys is below. Note that although ABS has released new producer population numbers for 2019/2020, these were not used for weighting the October 2021 survey results as the ABS data was already 12 months old and indicated a decline in the producer population in 2020. Weighting 2021 results to the lower producer population of 2020 was not considered appropriate so ABS's higher 2018/2019 producer populations were used instead.

The producer populations will be reviewed again when the 2021/2022 ABS data becomes available in May 2022.

State	Breeding Ewe Producers used for Feb, June & Oct 2018	Breeding Ewe Producers used for Feb, June & Oct 2019	Breeding Ewe Producers used for Feb & June 2020	Breeding Ewe Producers used for Oct 2020 , Feb 2021, June 2021 & Oct 2021
Australia	35,947	37,238	37,668	37,121
New South Wales/ACT	13,725	14,075	14,088	13,800
Victoria	9,173	9,473	10,010	9,815
Queensland	1,410	1,497	1,523	1,625
South Australia	5,414	5,827	6,073	5,724
Western Australia	4,906	5,000	4,710	4,807
Tasmania	1,318	1,387	1,264	1,349

Methodology [3/3]

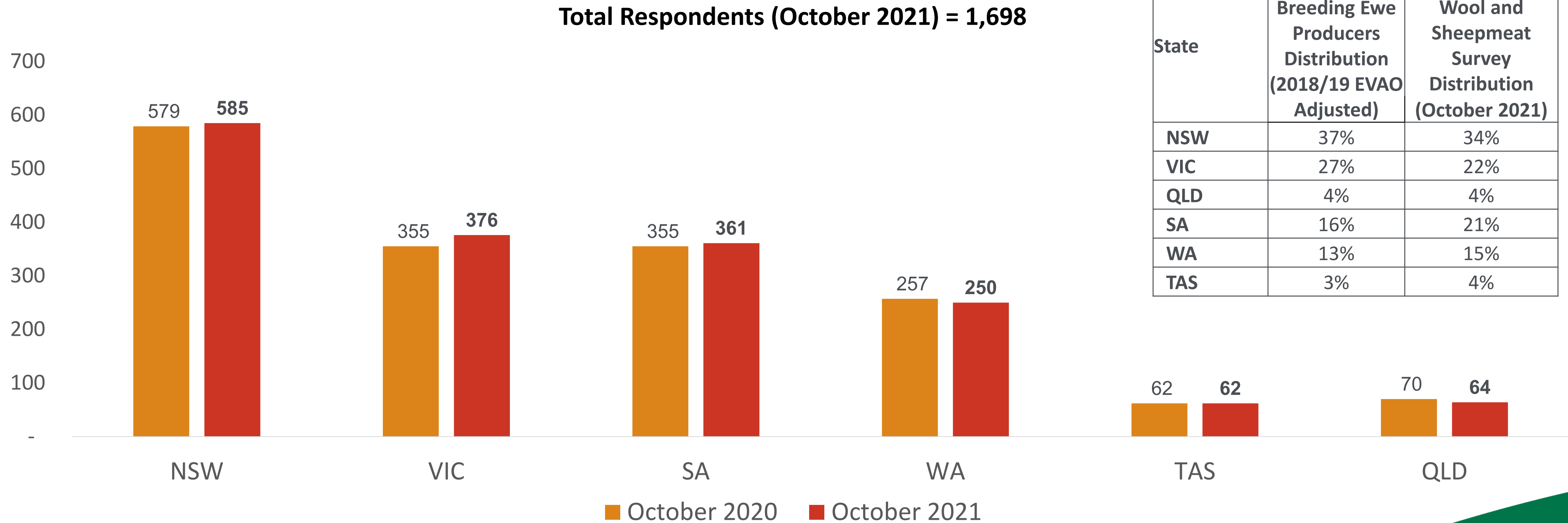
Statistical significance

The total research sample of 1,698 will give the results of this study a margin of error of $\pm 1.6\%$ at a 95% confidence level based on 37,121 breeding ewe producers in Australia (ABS 2018-19 Survey adjusted for \$40,000 EVOA cutoff). This is basically saying that if you conducted the same survey 100 times, 95 out of the 100 sheep producers should yield results within $\pm 1.6\%$ of the published number or percentage. However, the % of error increases as the sample size decreases (e.g. at the state and regional level).

- New South Wales $\pm 2.80\%$
- Victoria $\pm 3.50\%$
- Queensland $\pm 8.50\%$
- South Australia $\pm 3.50\%$
- Western Australia $\pm 4.30\%$
- Tasmania $\pm 8.70\%$

Survey Respondents [1/4]: By State

The proportion of the total number of respondents (n=1,698) surveyed in each state was closely aligned with the ABS Survey producer distribution by state (see table below). The ABS perform a substantial yearly survey of 35,000 agricultural businesses between Census years in order to continually track agricultural production and producer population. Although it is a survey, it is still indicative of the industry structure and sheep producer distribution and will be used to update state sampling structures in future surveys.



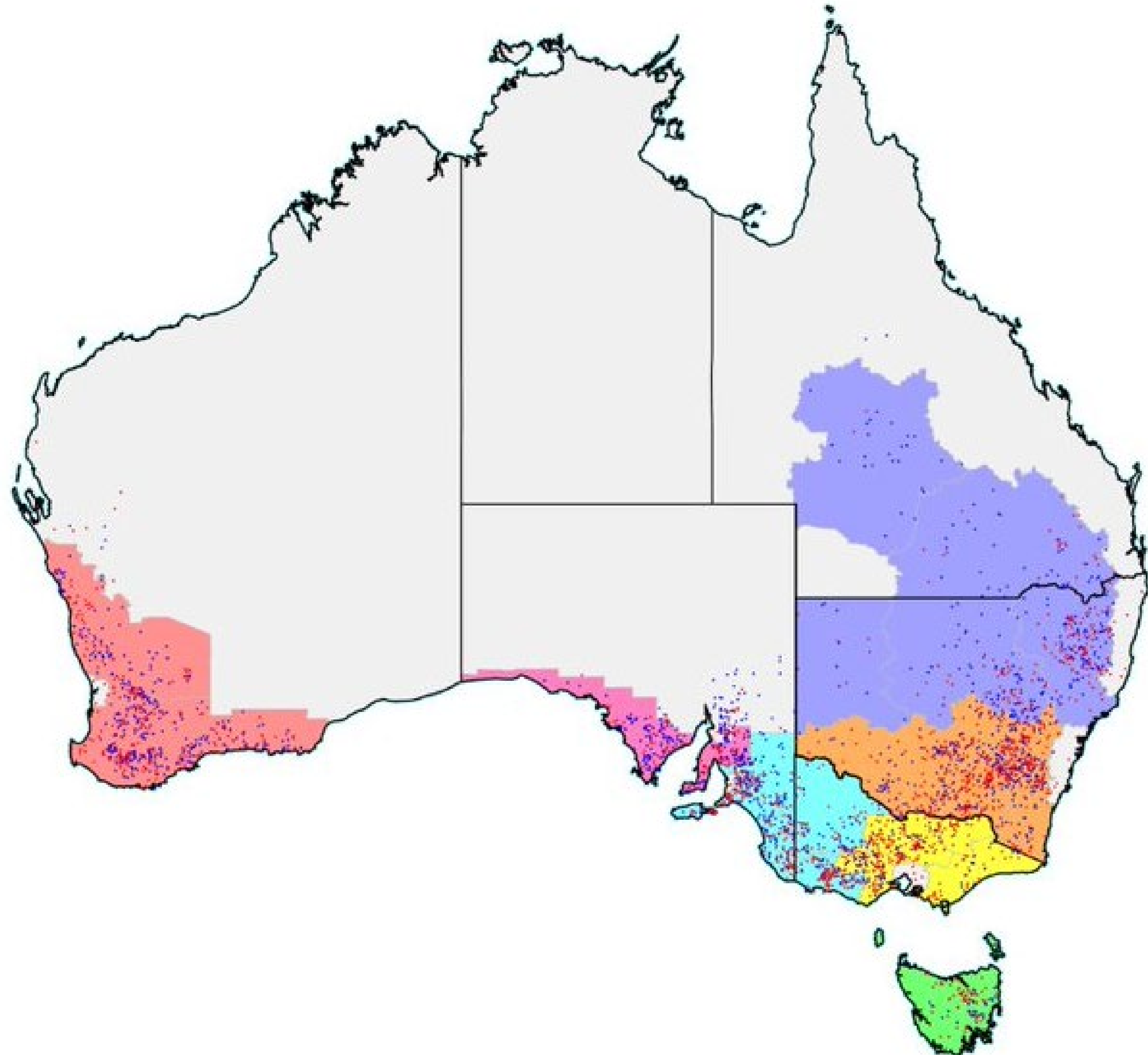
State	ABS Survey for Breeding Ewe Producers Distribution (2018/19 EVAO Adjusted)	MLA and AWI Wool and Sheepmeat Survey Distribution (October 2021)
NSW	37%	34%
VIC	27%	22%
QLD	4%	4%
SA	16%	21%
WA	13%	15%
TAS	3%	4%

Survey Respondents [2/4]: Total Flock Counts (Merino & Non-Merino)

Merino and non merino flock count by Postcode

- MLA Reporting Regions**
- Central NSW
 - East Vic
 - Northern NSW/Qld
 - SA Peninsula
 - Tasmania
 - Western Australia
 - Wimmera Mallee Murray

- Merino flock count by Postcode**
1 Dot = 1
- Non merino flock count by Postcode**
1 Dot = 1



Total flocks: n: 2,657
Merino: n: 1,542
All other: n: 1,146

Survey Respondents [3/4]: Merino Flock Counts

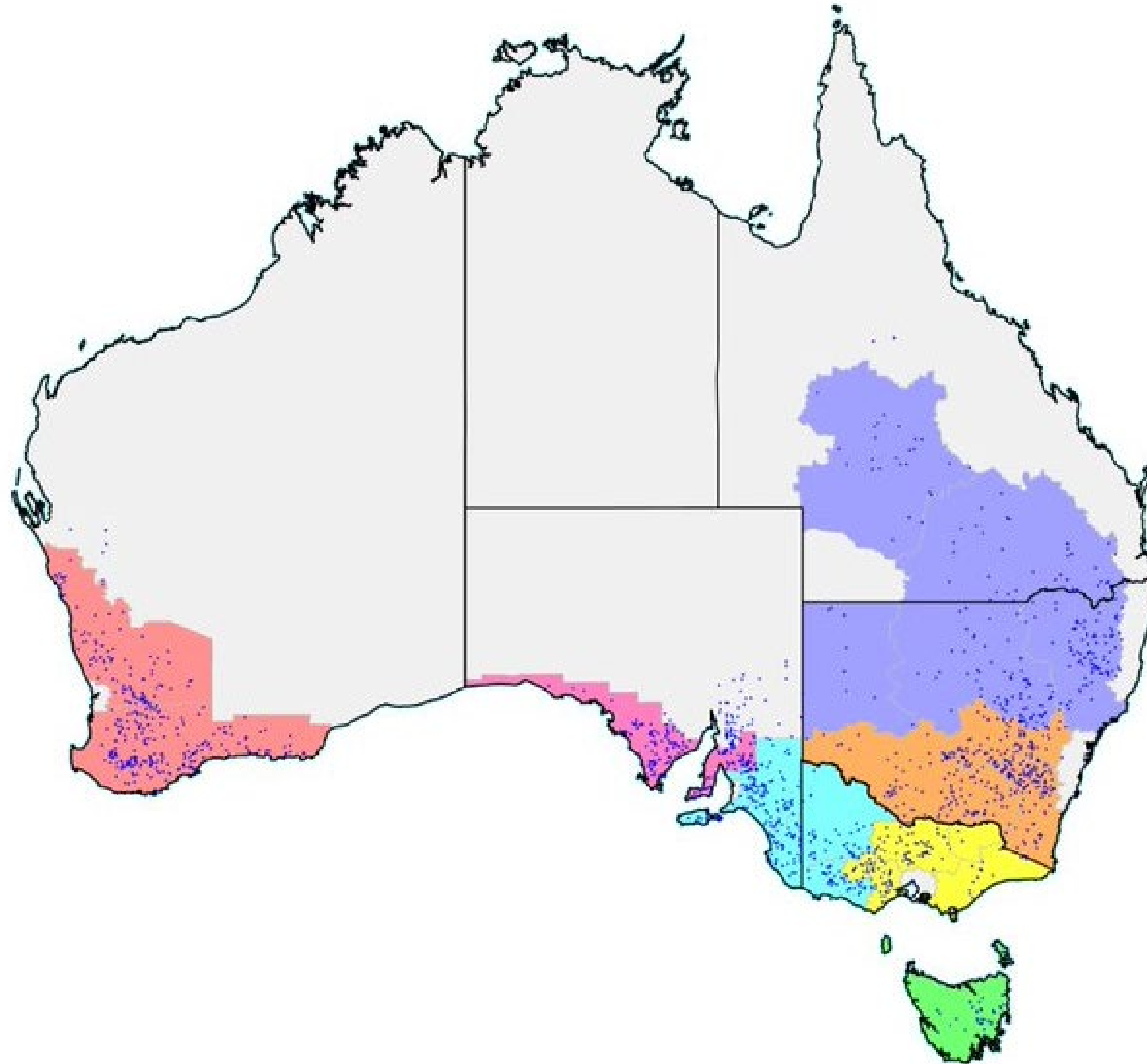
Merino
flock count
by Postcode

MLA Reporting Regions

- Central NSW
- East Vic
- Northern NSW/Qld
- SA Peninsula
- Tasmania
- Western Australia
- Wimmera Mallee Murray

Merino flock count

1 Dot = 1



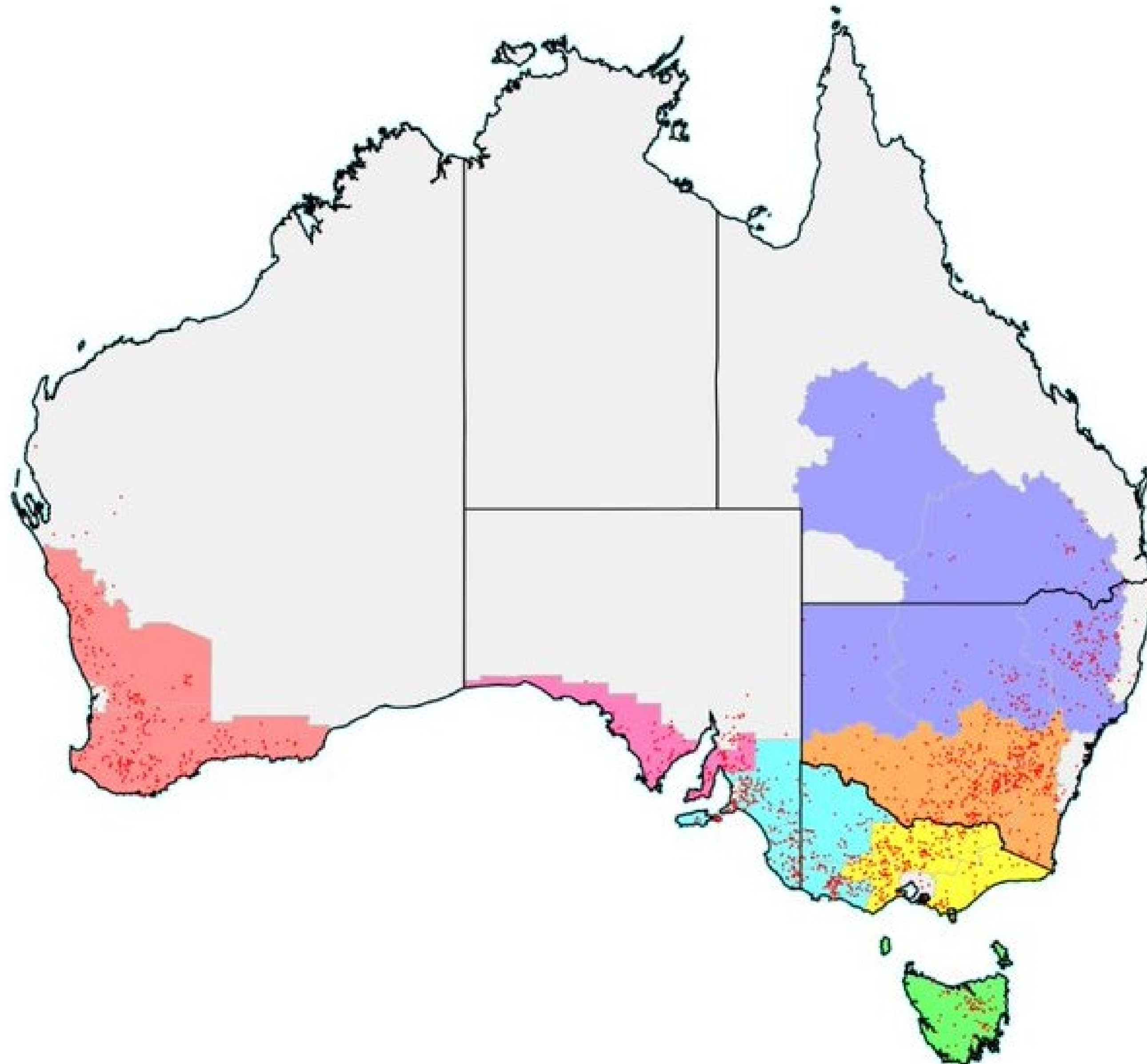
Merino properties: n= 1,542

Survey Respondents [4/4]: Non-Merino Flock Counts

Non merino
flock count
by Postcode

- MLA Reporting Regions**
- Central NSW
 - East Vic
 - Northern NSW/Qld
 - SA Peninsula
 - Tasmania
 - Western Australia
 - Wimmera Mallee Murray

**Non merino flock count
by Postcode**
1 Dot = 1

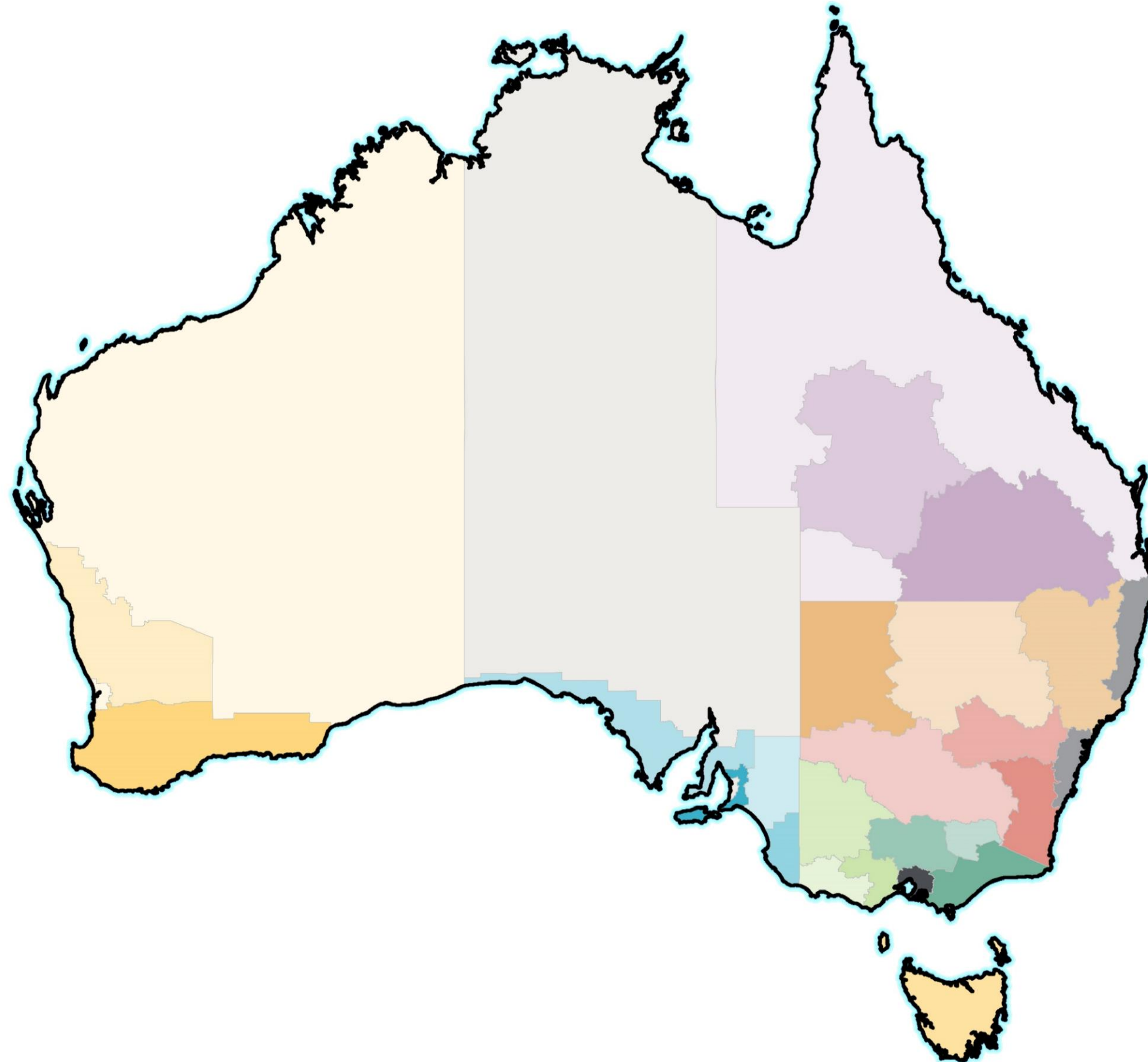


All other properties: n: 1,146

MLA Sheep Producing Regions

MLA Regions

- MLA Regions**
- Barwon & Central Highlands
 - Central Midlands
 - Central Midlands Extra
 - Central Qld
 - Central Qld Extra
 - Central West
 - Eyre Yorke and North
 - Eyre Yorke and North Extra
 - Gippsland
 - Hunter and Northern
 - Hunter and Northern Extra
 - Loddon and Goulburn
 - Murray and Murrumbidgee
 - Murray Lands
 - North Western
 - Outer Adelaide
 - Ovens Murray
 - South East
 - South Eastern
 - South Eastern Extra
 - Southern Qld
 - Tasmania
 - WA South
 - Western District
 - Western Division
 - Wimmera and Mallee



Due to seasonal and growing condition variability throughout Australia and even within states, Australia was divided into 26 sheep producing regions so that sheep numbers and flock demographics could be reported at a regional level.

Of the 26 sheep producing regions, 7 are located in NSW, 7 in Victoria, 5 in SA, 3 in WA, 3 in Queensland and 1 in Tasmania. These producing regions are likely to change as the flock distribution changes.

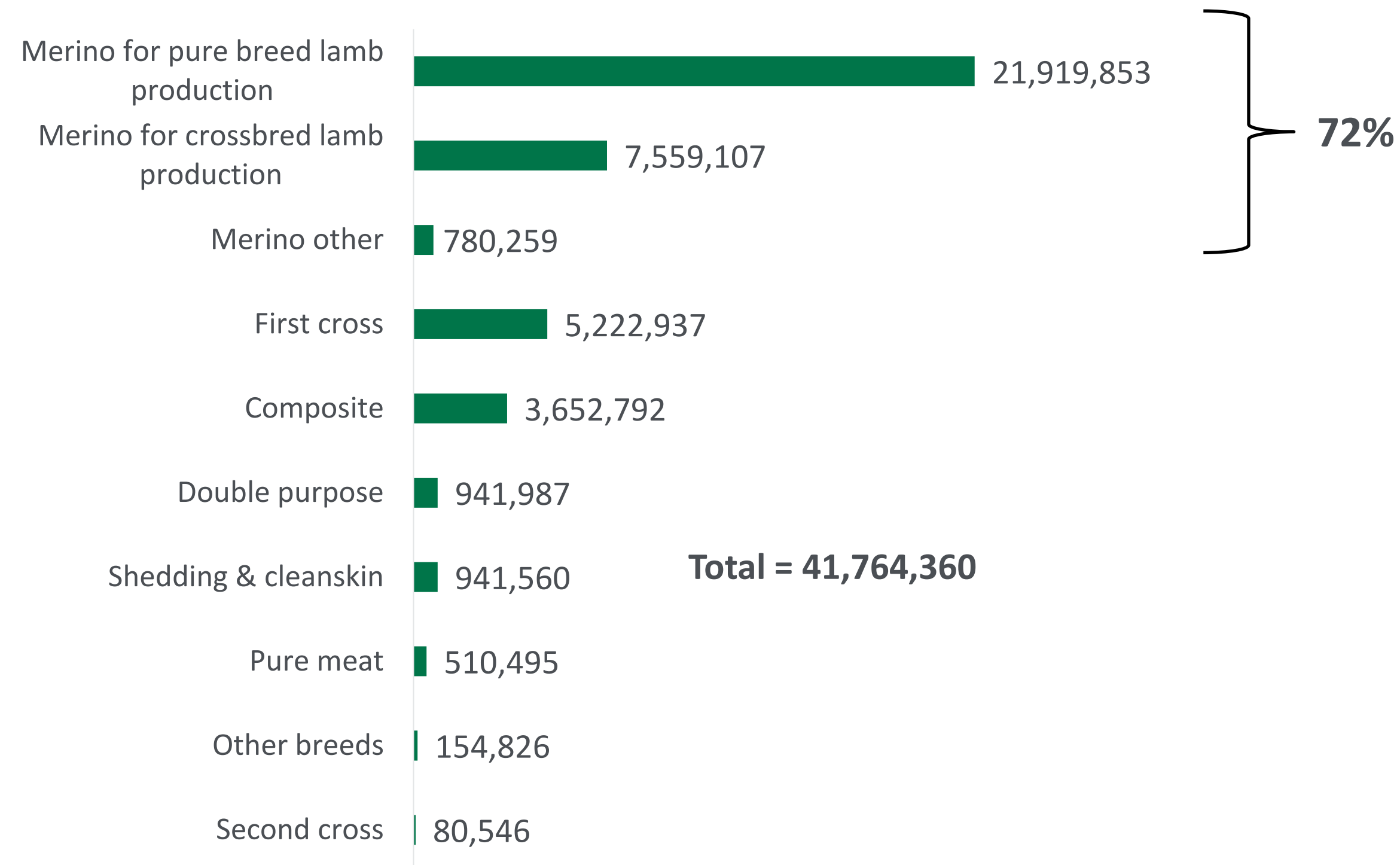
National Results

Ewes on hand and Lambs on hand - Australia

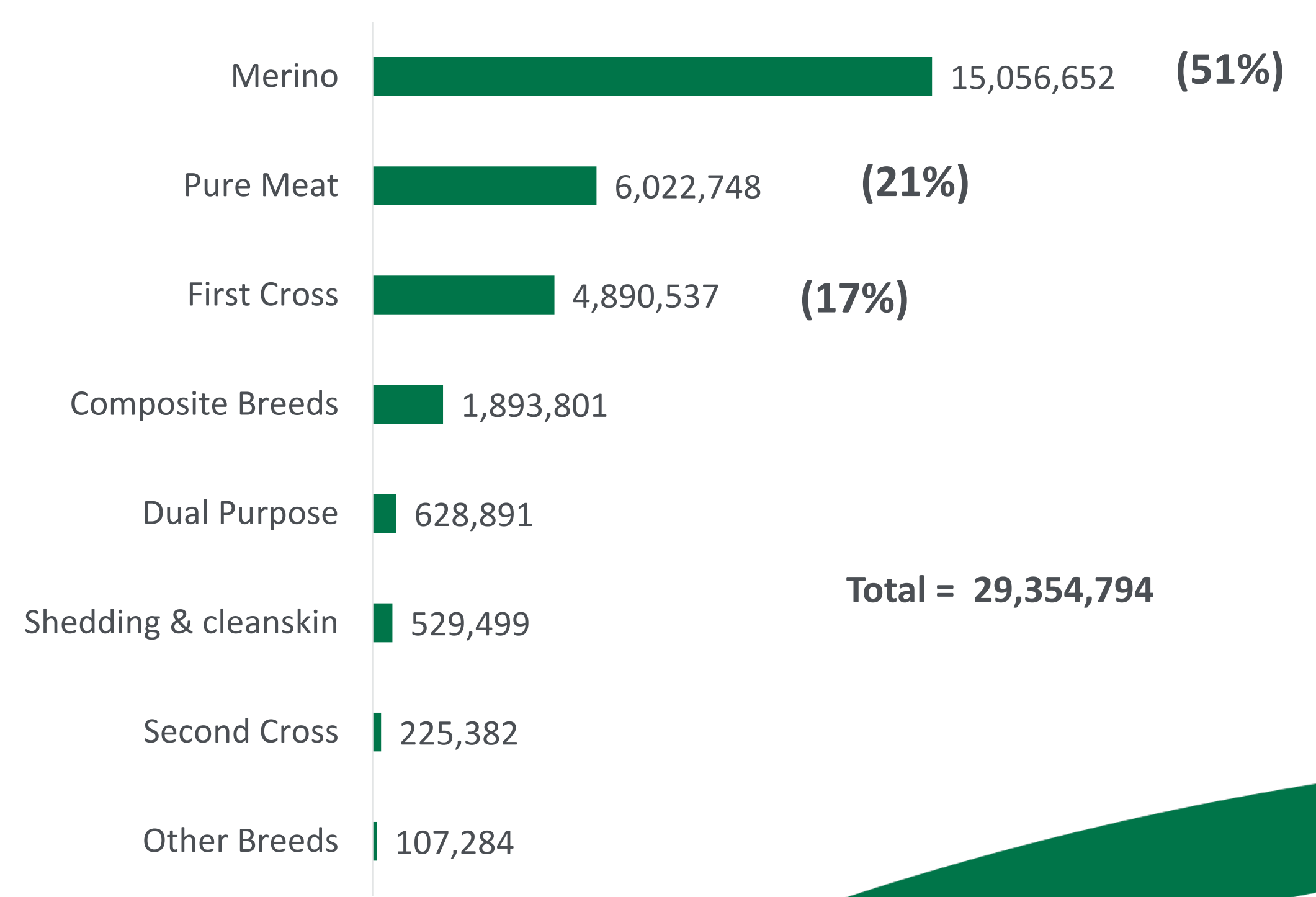
Merinos accounted for **72%** of the total breeding ewe flock at **41.8 million head**. Merino breeding ewes were further divided into Merino ewes for pure bred Merino production and Merino ewes for crossbred production and 'other' Merinos, accounting for 72%, 25%, and 3% of the merino flock, respectively.

There were **29.4 million** lambs on hand at 31 October 2021. Merinos made up 51% of the total lamb flock, at **15.1 million head**, followed by Pure Meat and First Cross lambs (accounting for 21% and 17% of the national lamb flock respectively).

Number of ewes on hand



Number of lambs on hand



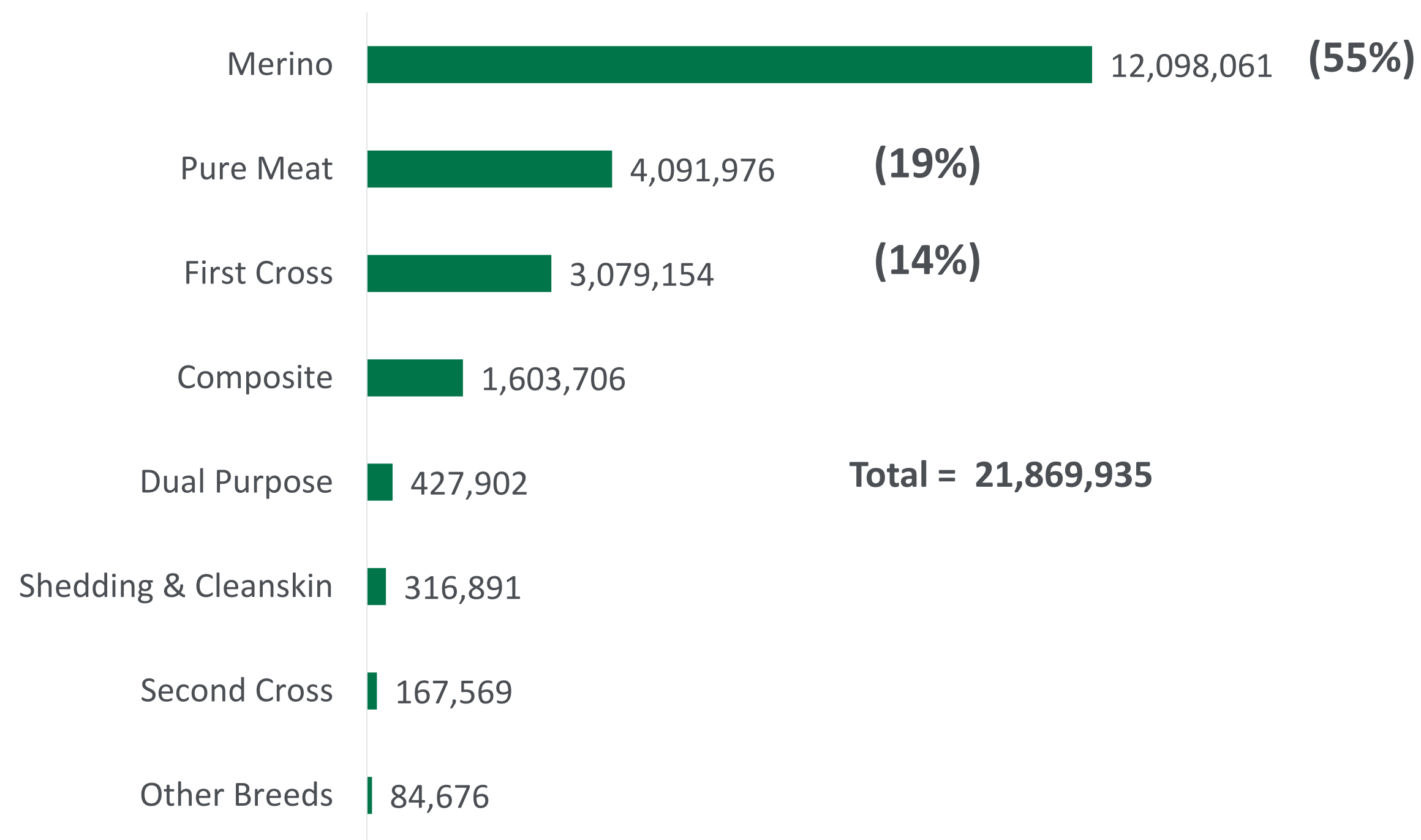
Sample base (properties) n=2,657

Lambs marked in the past four months (1 Jul – 31 Oct 2021) and Ewes joined to produce those lambs - Australia

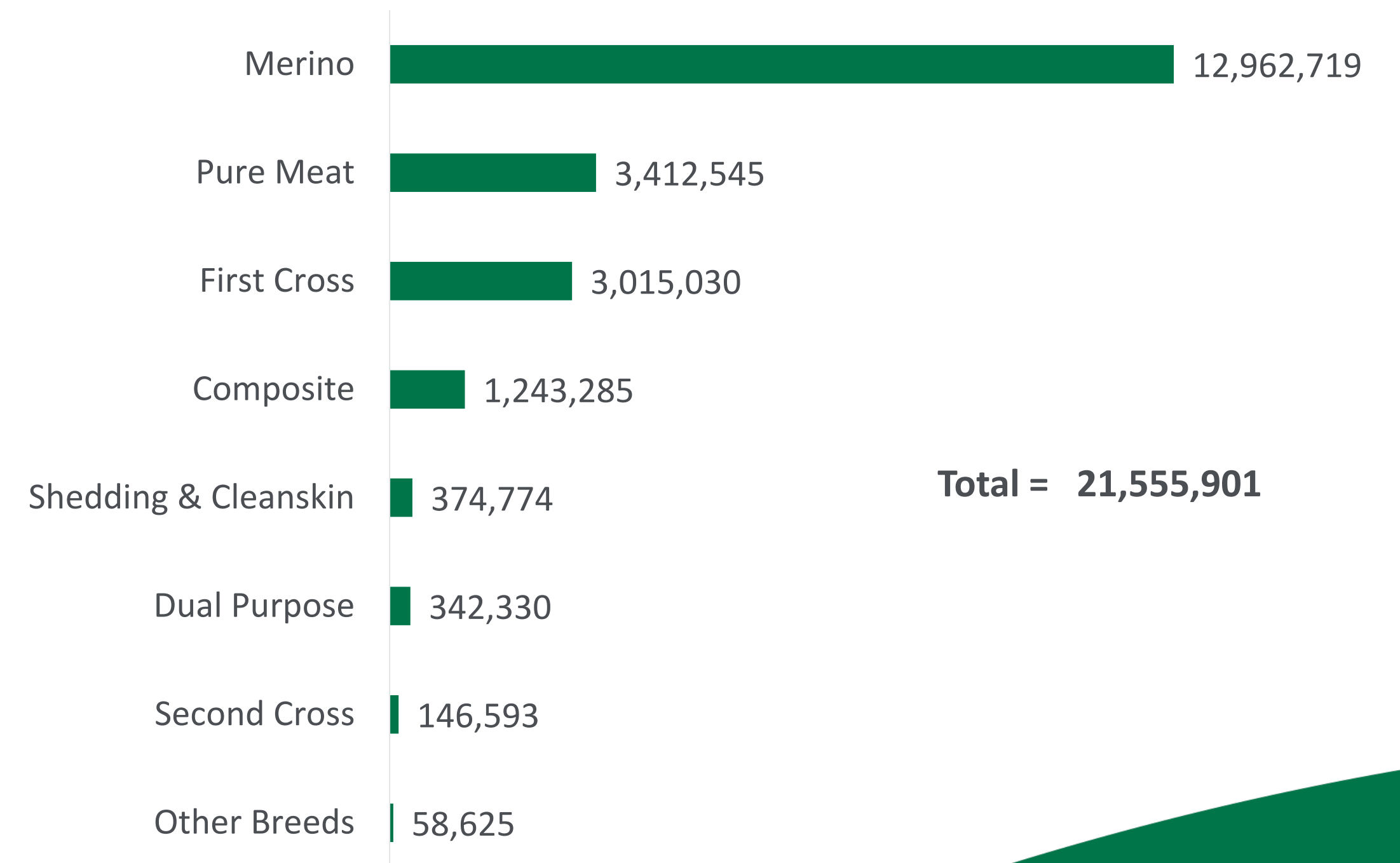
There were a total of **21.9 million** lambs marked in the four months (from 1 July to 31 October 2021). Merinos accounted for the largest proportion of lambs marked in the past four months at 55% Pure meat and First cross breeds accounting for 19% and 14%, respectively.

A total number of **21.6 million** ewes were joined to produce the lambs that were marked in the past four months. National Merino marking rates were well below that of non-merino breeds at 93% and 117% respectively.

Lambs marked in the past 4 months (1 Jul to 31 Oct)



Ewes joined to produce marked lambs (1 Jul to 31 Oct)



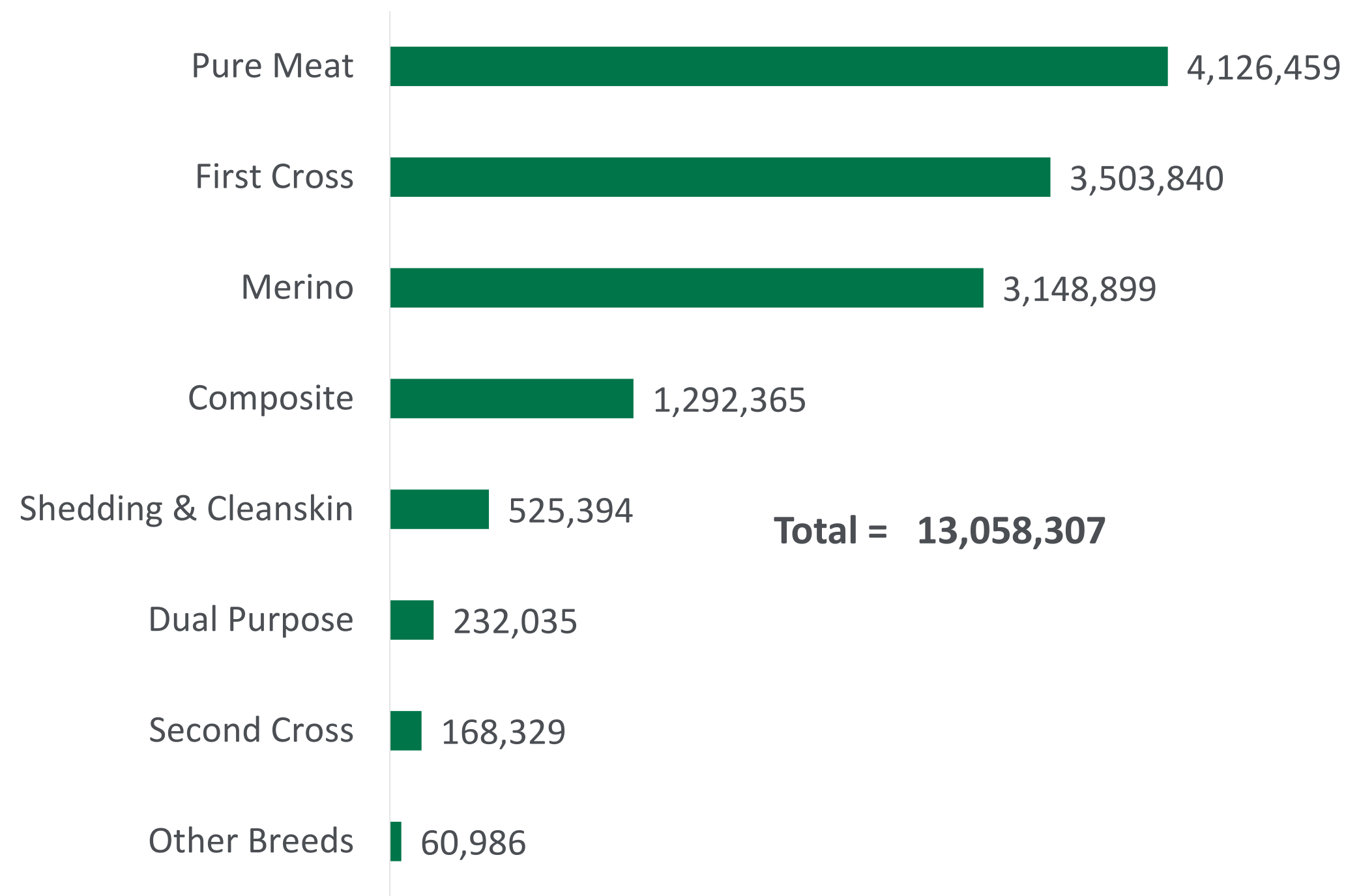
Sample base (properties) n=2,657

Expected lamb sales in the next 4 months - Australia

A total number of **13.1 million lambs** are expected to be sold in the next four months (31 October 2021 – 28 February 2022), approximately 44% of the total number of lambs on hand (29.4 million). Of these: Pure Meat, First cross and Merino breeds are expected to account for 32%, 27% and 24% of lamb sales respectively.

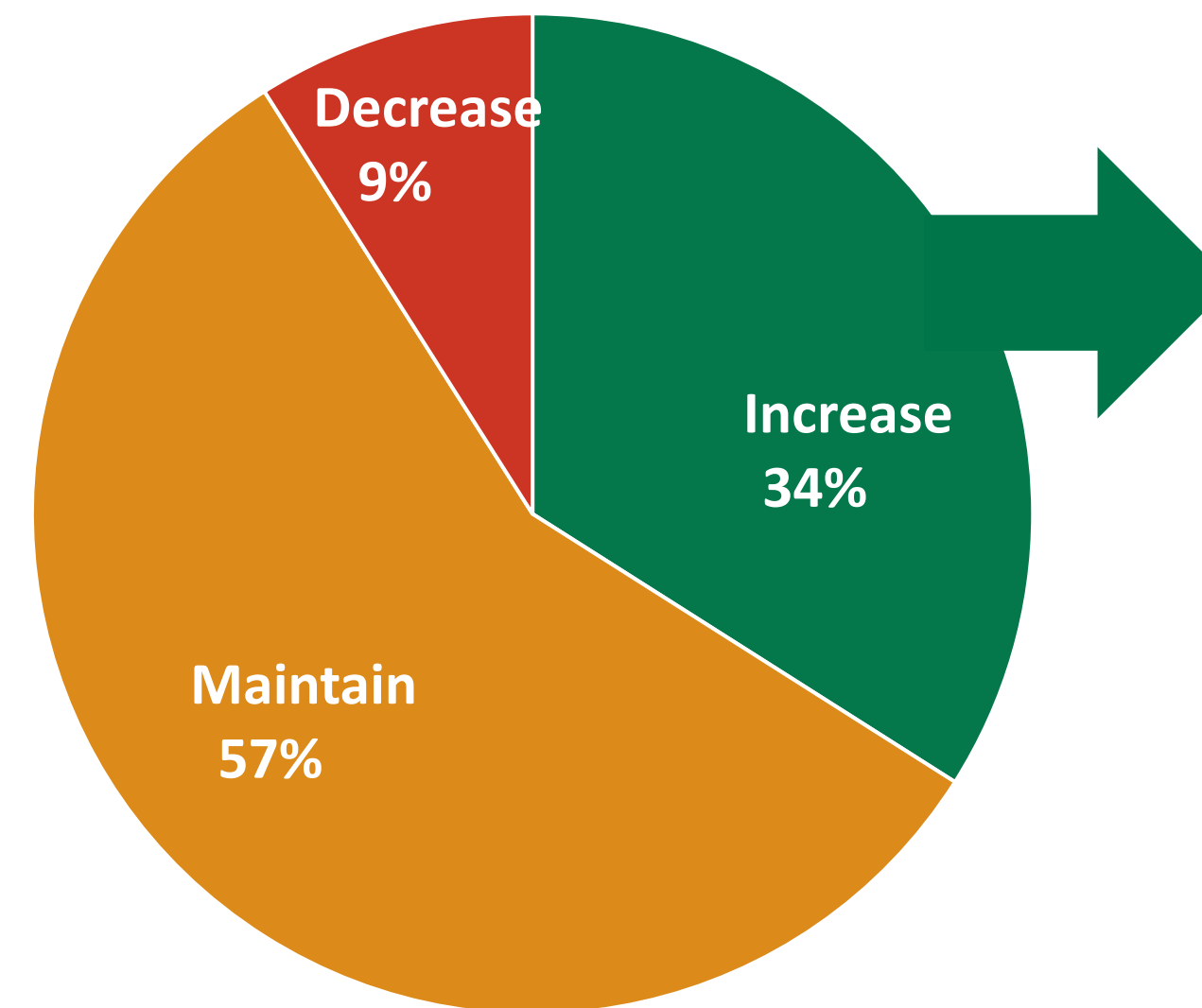
These results are consistent with producer ewe flock intentions for the next 12 months and method of achievement, with 34% of producers are looking to increase their ewe flocks, largely through retaining more replacement ewes than normal (55%) or retaining more older ewes (39%).

Expected lamb sales in the next 4 months



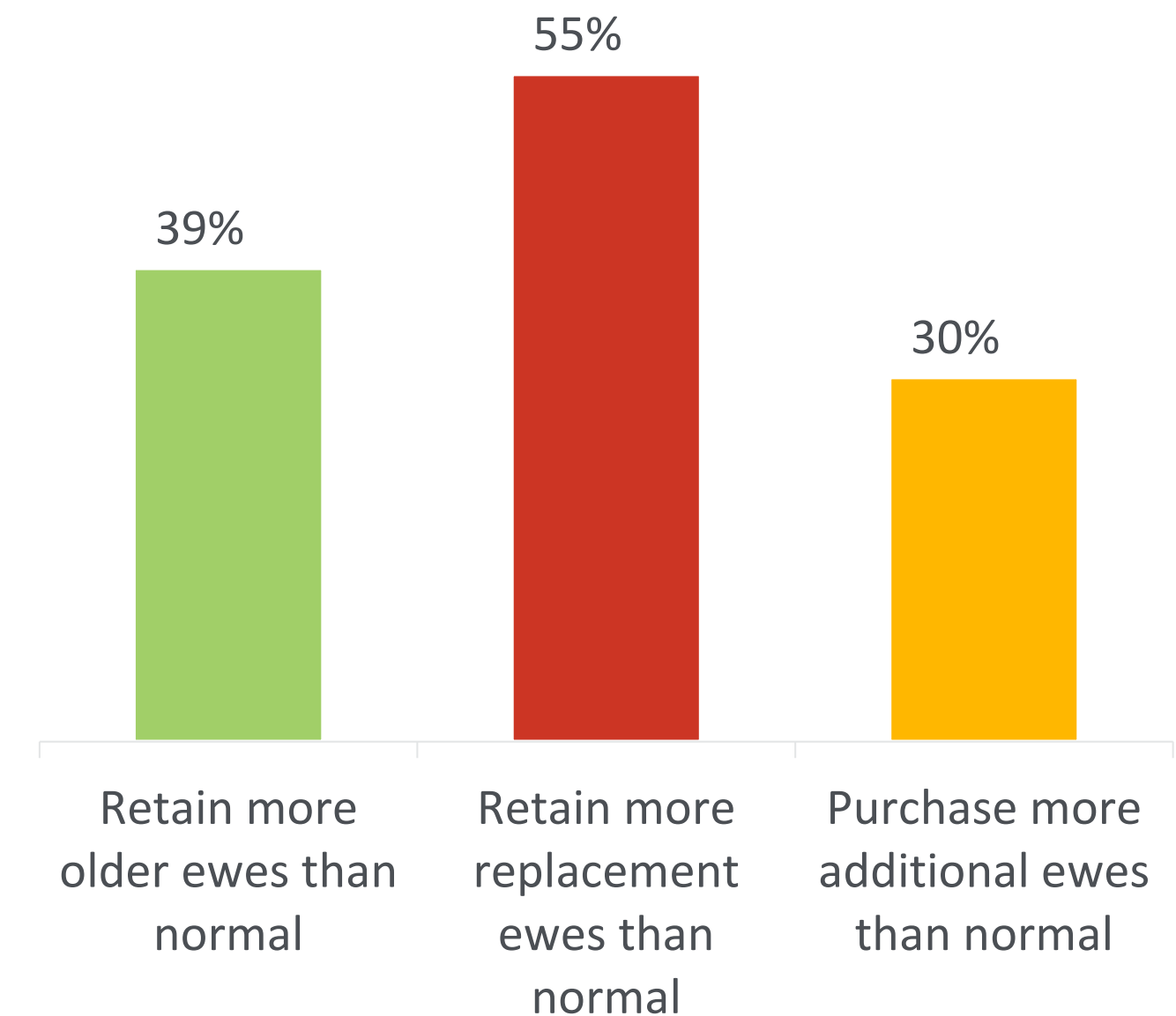
Sample base (properties) n=2,657

Ewe flock intentions



Sample base (respondents) n=1,574

How to achieve increase

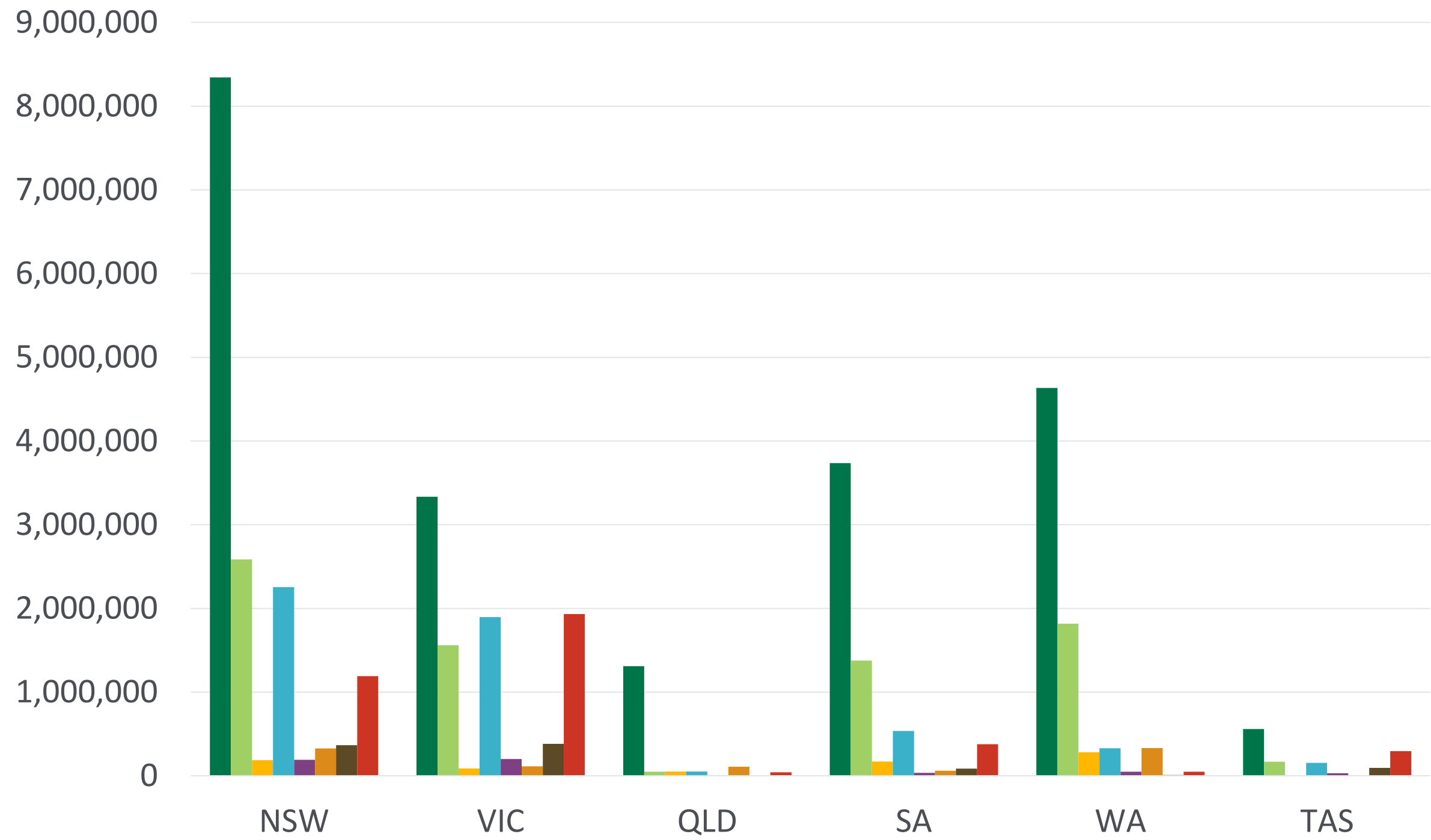


Sample base (respondents) n=539

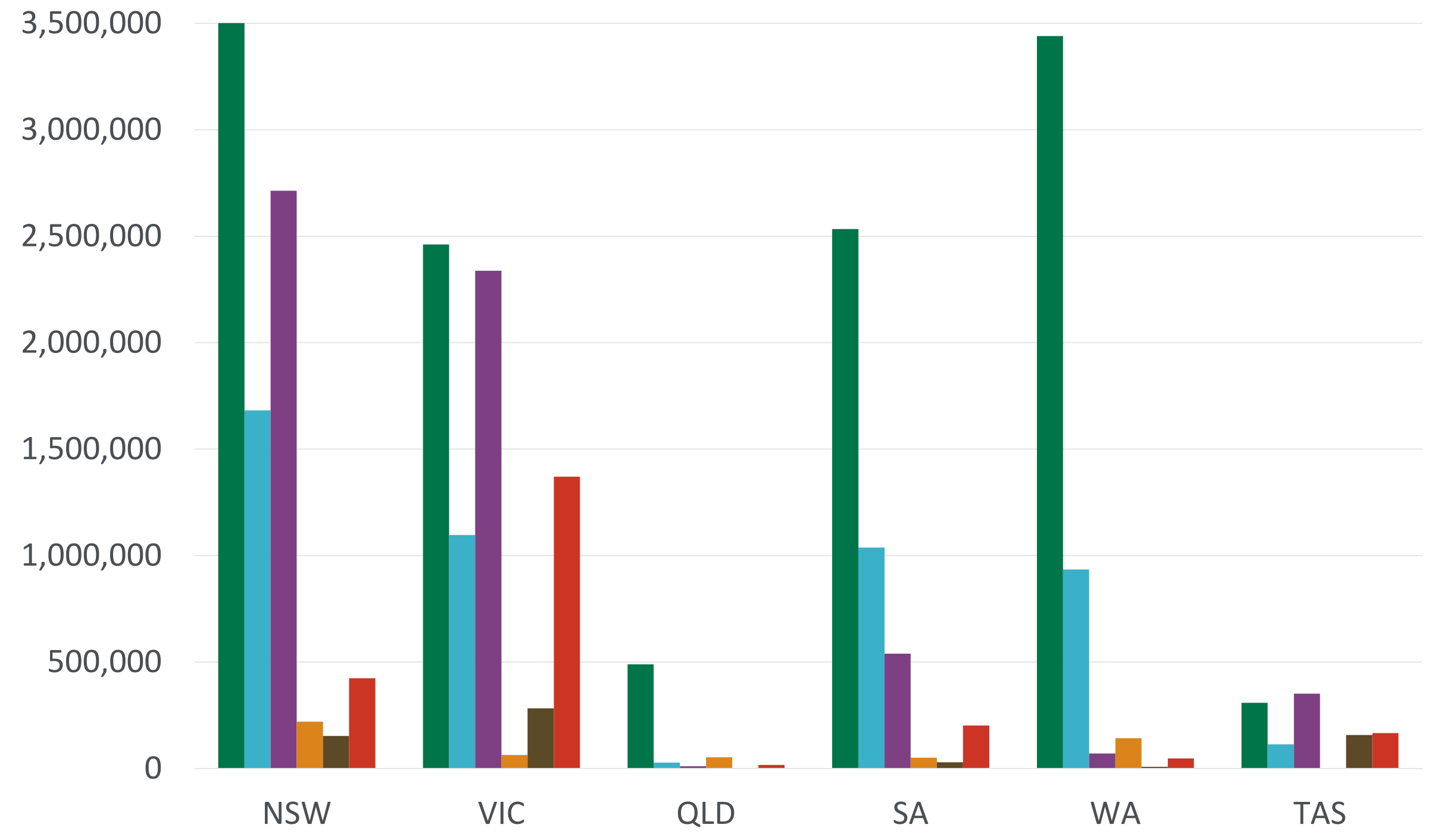
Results by State

Ewes on hand and Lambs on hand - State

Ewes on hand



Lambs on hand



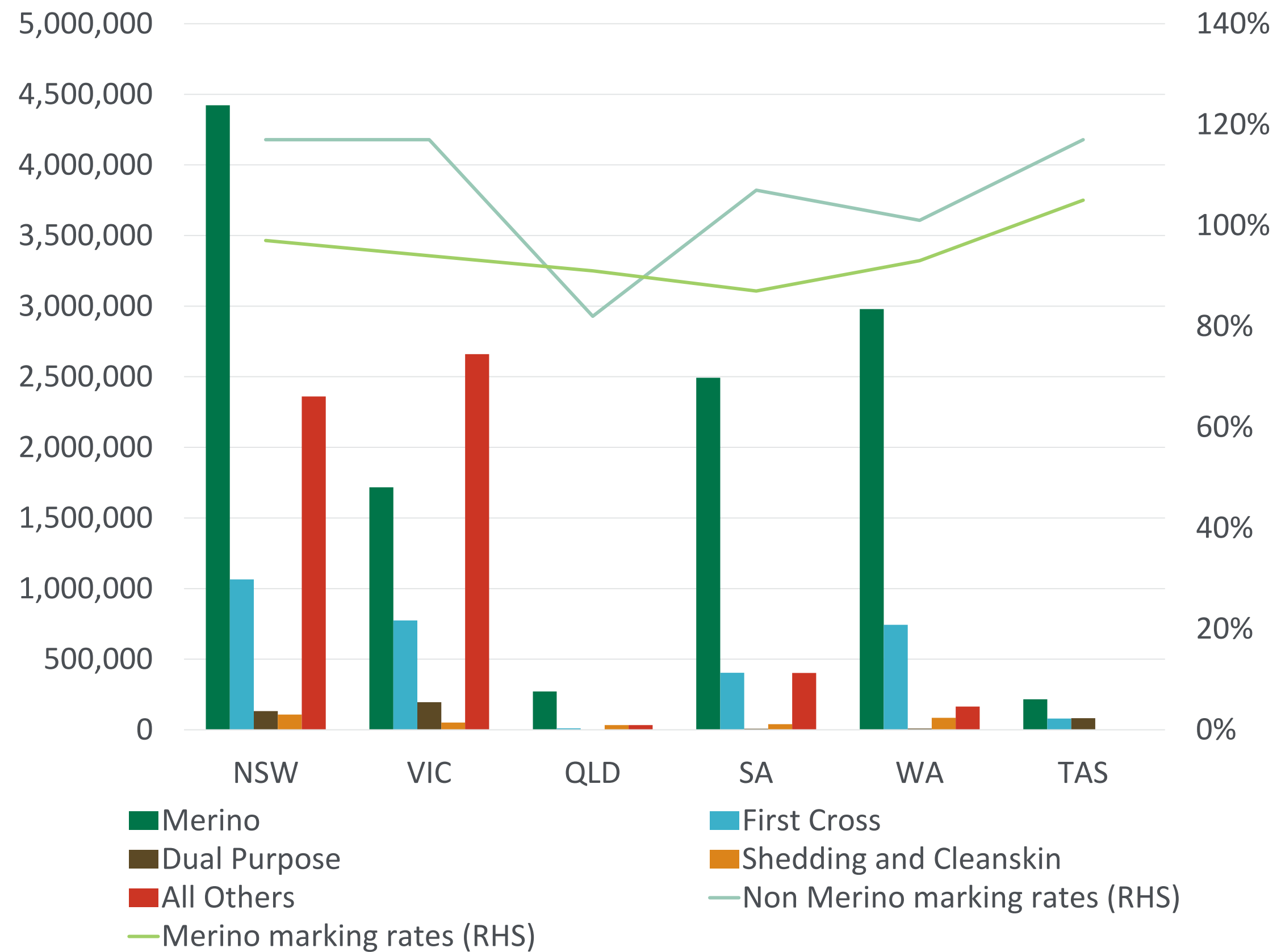
- Merino for Pure Lamb Production
- Merino for Crossbred Lamb Production
- Other Merino
- First Cross
- Pure Meat
- Shedding & Cleanskin
- Dual Purpose
- All Others

- Merino
- First Cross
- Pure Meat
- Shedding and Cleanskin
- Dual Purpose
- All Others

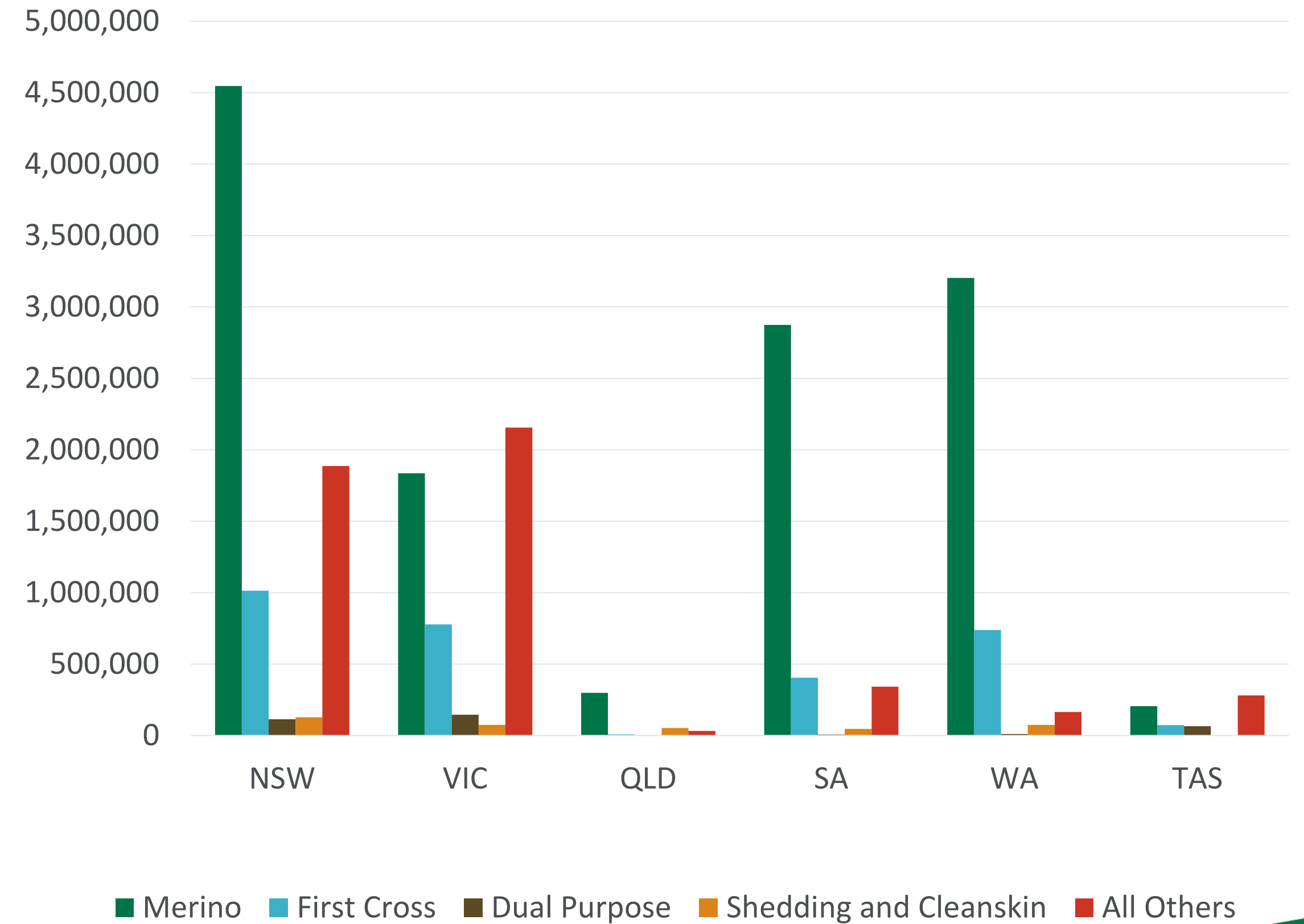
Sample base (properties) n=2,657

Lambs marked in the past four months and ewes joined to produce those lambs - State

Lambs marked in the past 4 months
(1 July 2021 – 31 October 2021)



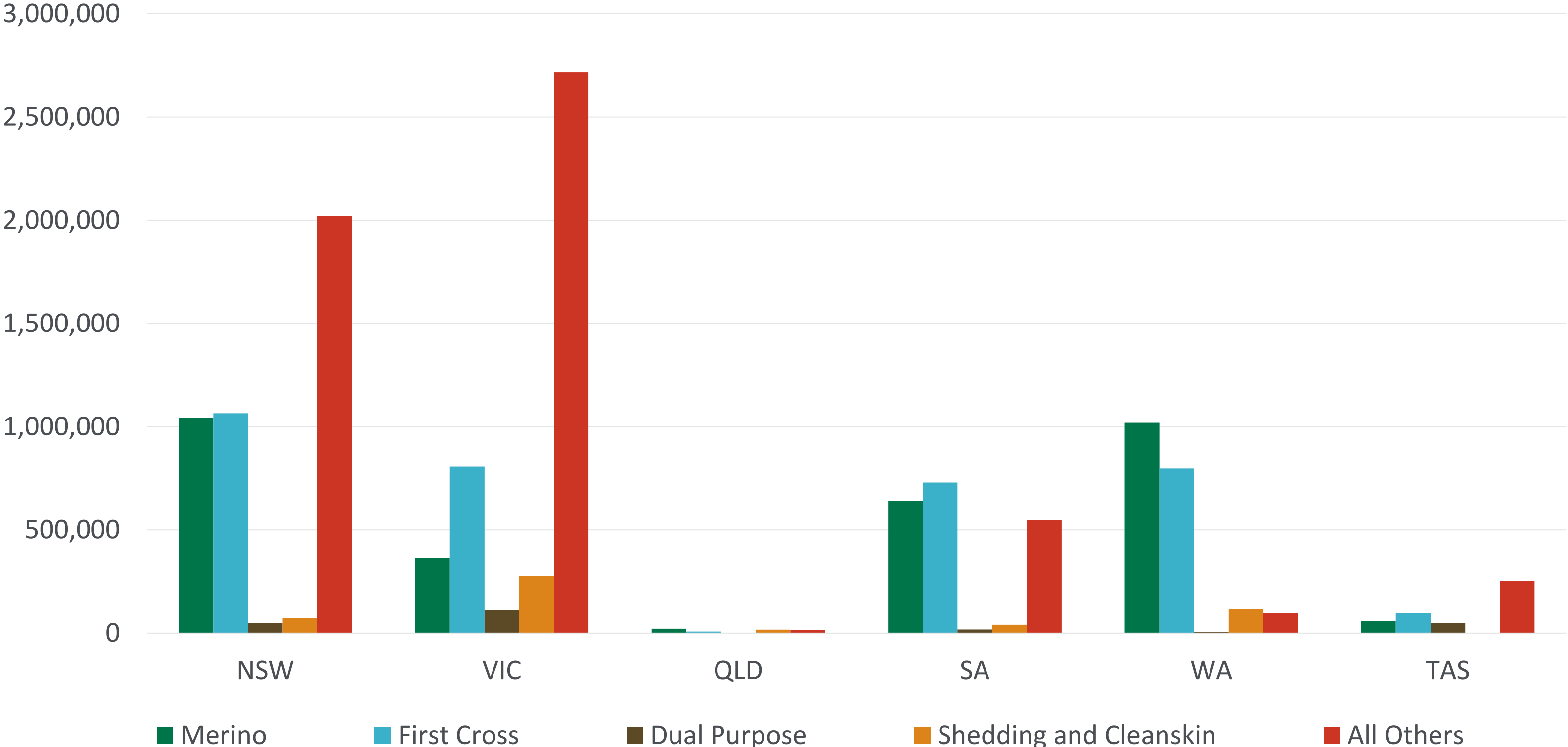
Ewes joined to produce those lambs in the past 4 months
(1 July 2021 – 31 October 2021)



Sample base (properties) n=2,657

Expected lamb sales in the next four months – by State

Expected lamb sales in the next 4 months (1 October 2021 – 28 February 2022)



Sample base (properties) n=2,657

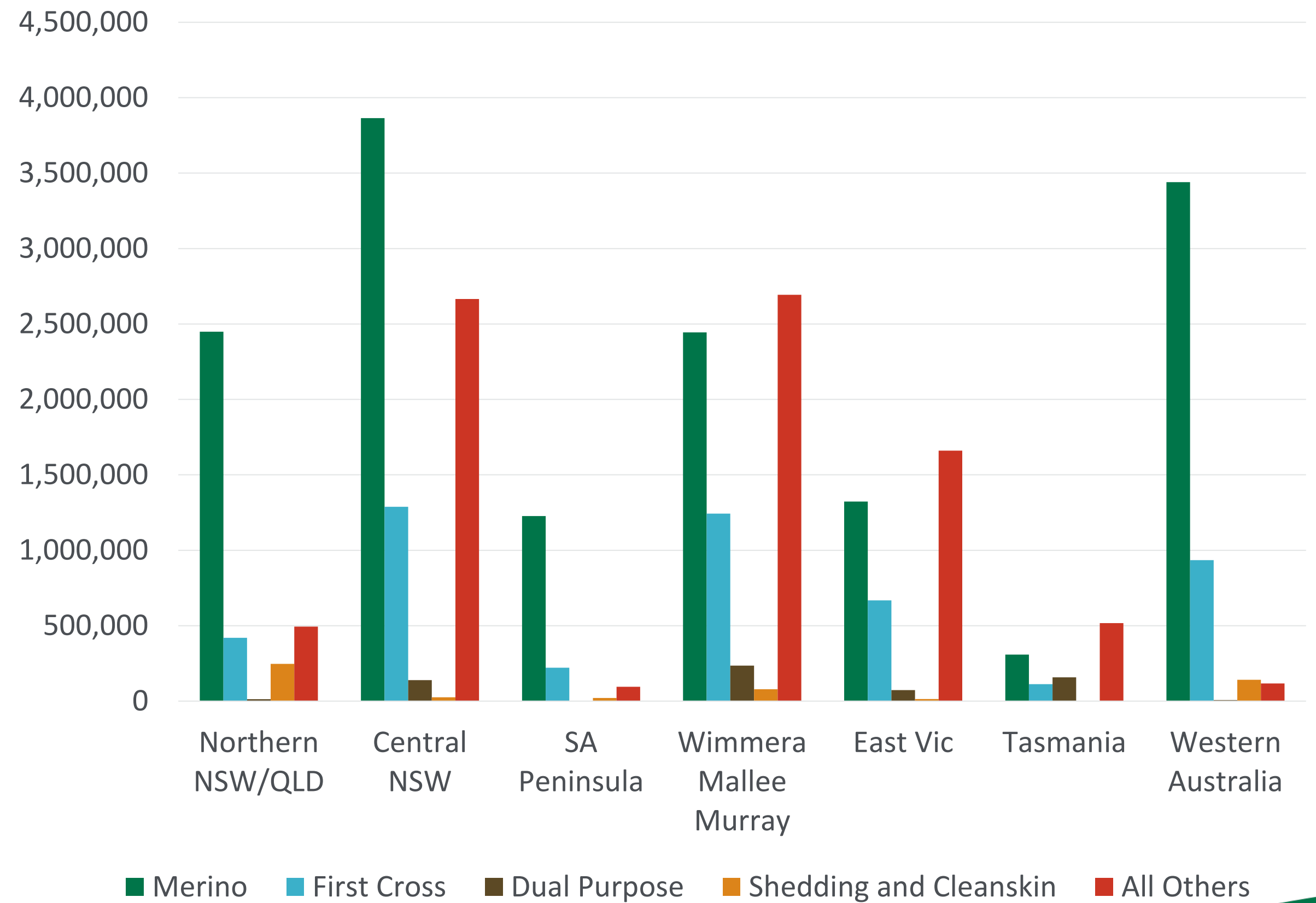
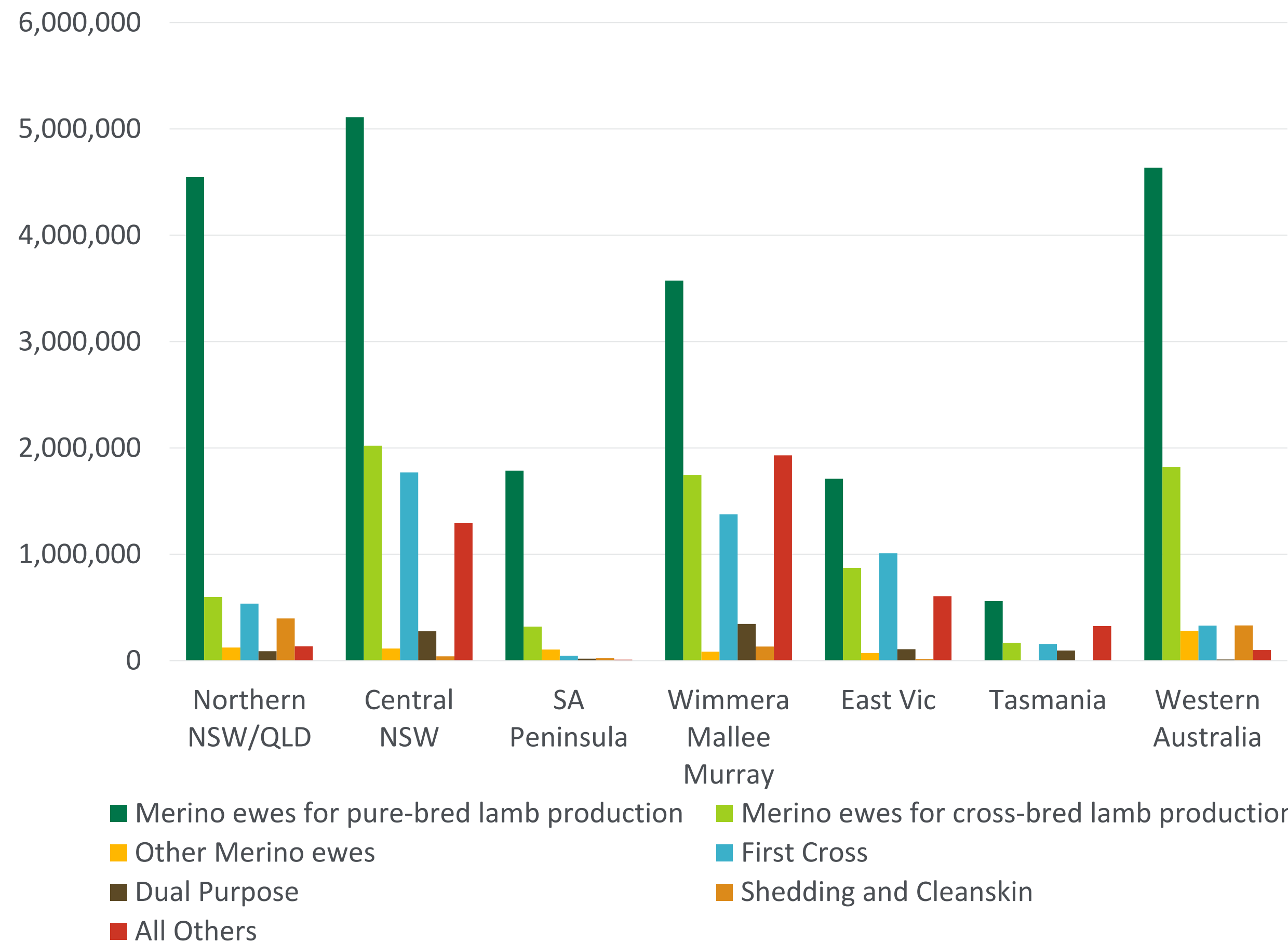
Results by MLA Reporting Region

Ewes on hand and lambs on hand 31 October 2021

- by MLA reporting regions

Ewes on hand

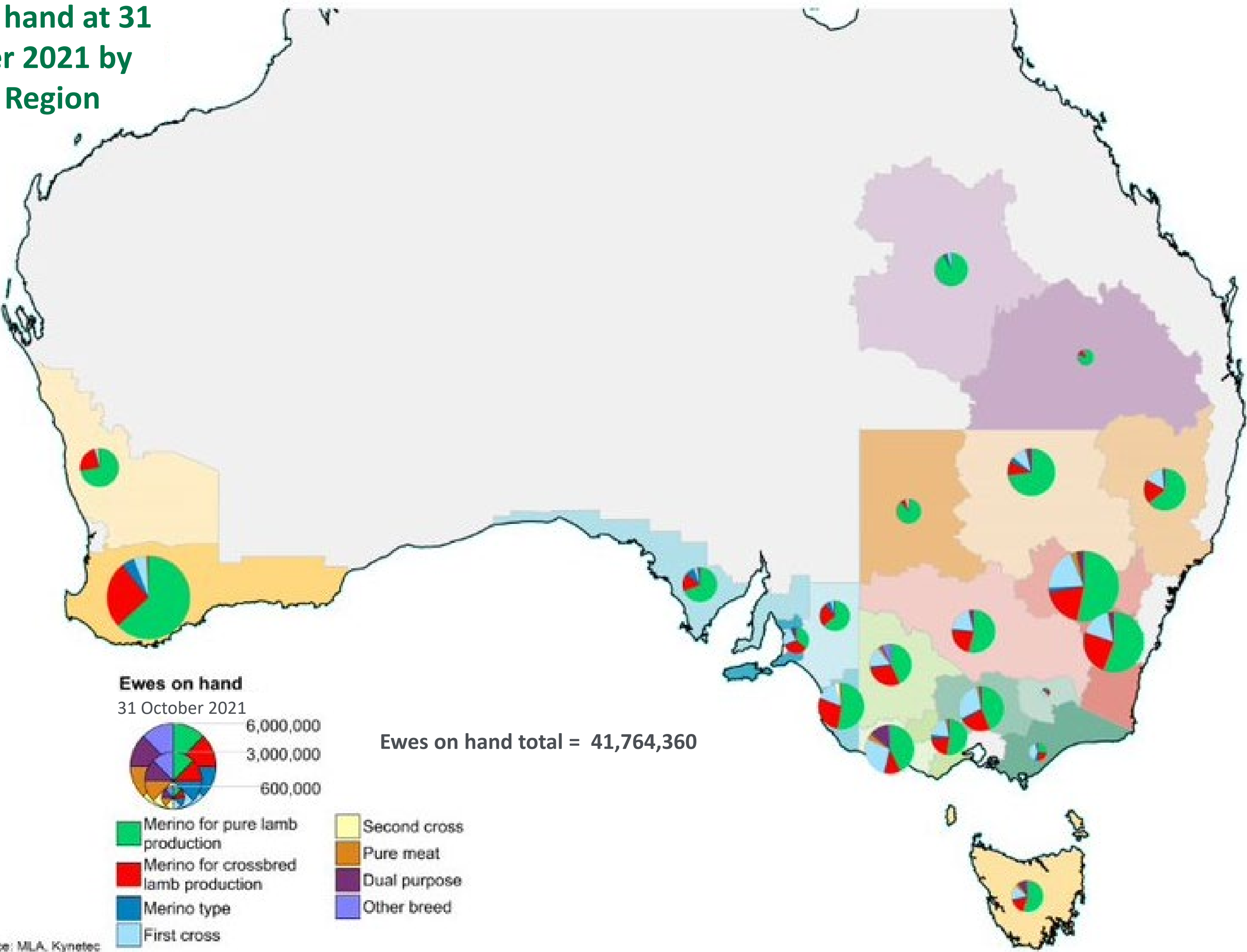
Lambs on hand



Sample base (properties) n=2,657

Ewes on hand – MLA reporting regions

Ewes on hand at 31 October 2021 by MLA Region



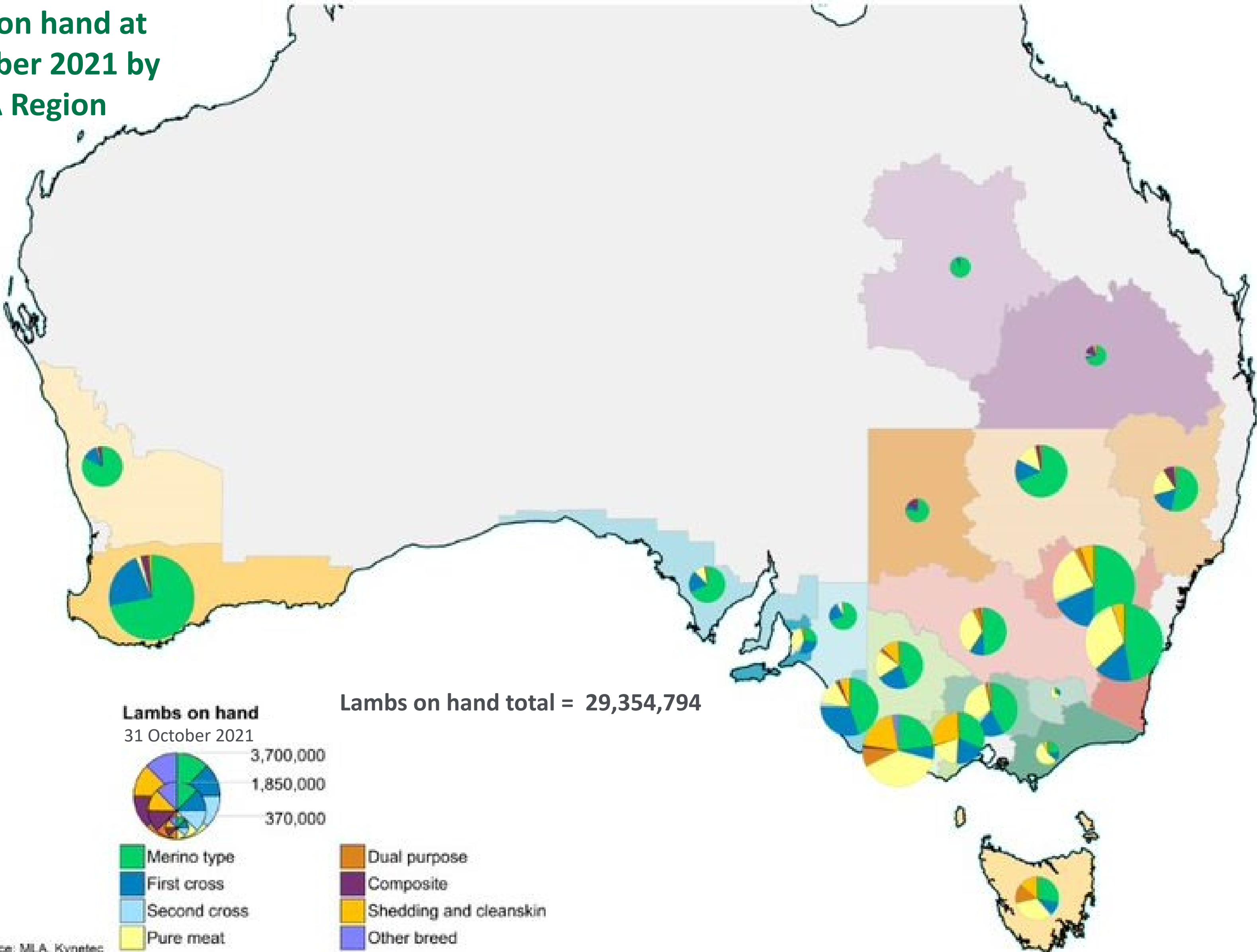
The breeding ewe population was largest in WA South (5.9 m), Central West (4.7 m) and South Eastern (3.7 m).

When considering regions with over 40,000 ewes Eyre Yorke and North Extra (98%) and Central QLD (96%) had the highest percentage of merinos in their flock followed by Murrumbidgee (95%) and Eyre Yorke and North (94%) (Merino for Pure lamb, Merino for cross lamb production and Merino other).

Conversely, when considering regions with over 40,000 non merinos, the largest percentage of non-merino ewes was in Western District (66%), Ovens Murray (61%), Gippsland (51%), and Tasmania (44%).

Lambs on hand – by MLA reporting regions

Lambs on hand at
31 October 2021 by
MLA Region



In line with a larger ewe flock population, the number of lambs on hand at 31 October was greatest in WA South at 3.7 million. This was followed by the Central West region, recording around 3.4 million head.

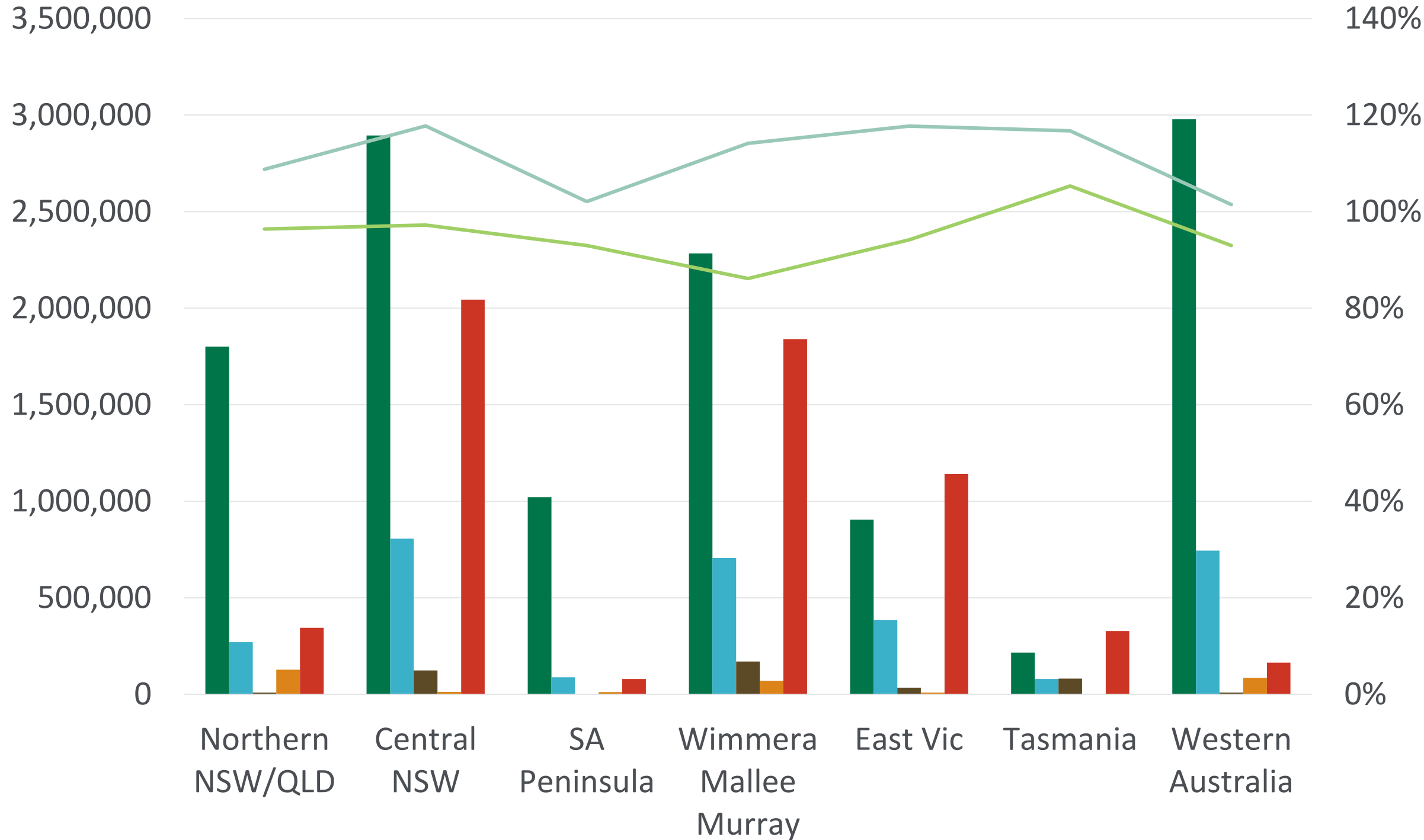
Although Merinos tended to be the most dominant breed of lamb across almost all regions, a large proportion of flocks in some regions were made up of first cross and pure meat breeds. In Outer Adelaide (30%) and South East (30%), First cross lambs comprised a significant portion of the lamb flock while Pure meat in Oven Murrumbidgee and Gippsland comprised of 64% and 57% of the total lamb flocks, respectively.

NSW had the largest Merino lamb flock at around 5.8 million head, accounting for 53% of the 11.0 m total NSW lamb flock. In QLD however, Merinos accounted for 82% of the total lamb flock (489 thousand of 597 thousand head).

21.12.0005 Source: MLA, Kynetec

Lambs marked in the past 4 months and Ewes joined to produce those lambs – by MLA reporting regions

Lambs marked in the past 4 months 1 July – 31 October 2021



Ewes joined to produce those lambs in the past 4 months 1 July – 31 October 2021



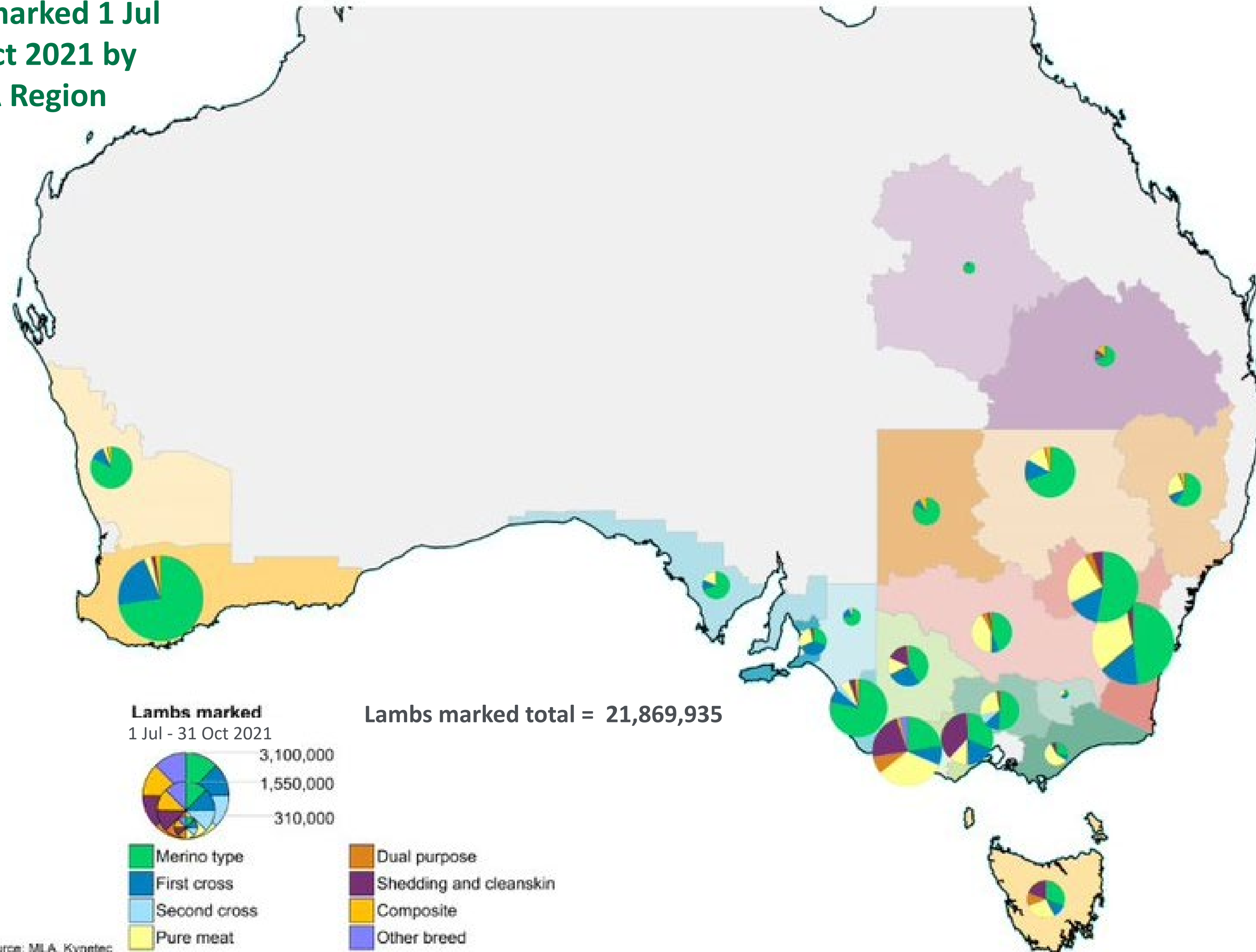
■ Merino
■ Dual Purpose
■ All Others
— Merino marking rates (RHS)
■ First Cross
■ Shedding and Cleanskin
— Non Merino marking rates (RHS)

■ Merino ■ First Cross ■ Dual Purpose ■ Shedding and Cleanskin ■ All Others

Sample base (properties) n=2,657

Lambs marked in the past four months

Lambs marked 1 Jul
- 31 Oct 2021 by
MLA Region

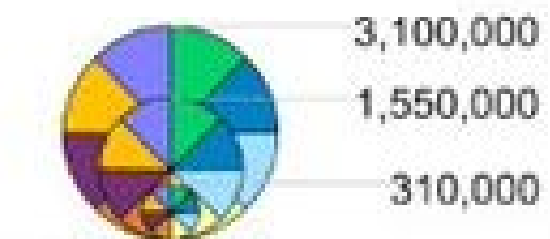


Around 21.9 million lambs were marked over the past four months.

WA South, South Eastern and Central West accounted for a large number of new lambs, with markings of 3.1m, 2.9m and 2.2m head respectively.

Lambs marked
1 Jul - 31 Oct 2021

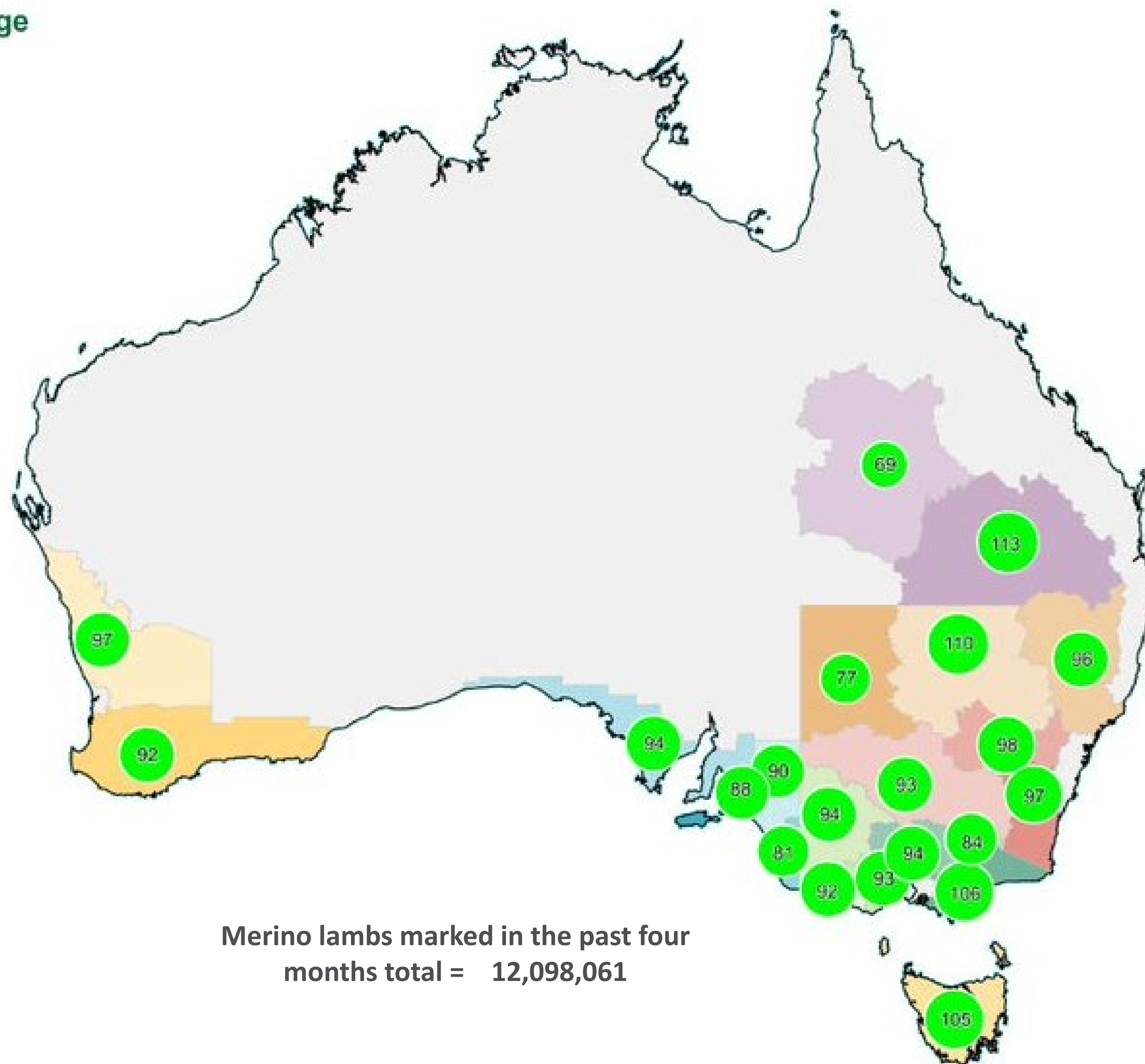
Lambs marked total = 21,869,935



- Merino type
- First cross
- Second cross
- Pure meat
- Dual purpose
- Shedding and cleanskin
- Composite
- Other breed

Merino lamb marking rates – by MLA regions

Lambs marked percentage of merinos by MLA Region



Merino lambs marked in the past four months total = 12,098,061

The highest Merino marking rates were recorded in Southern Qld (113%) and North Western (110%). Conversely, the lowest marking rates were recorded in Central Qld at 69%.

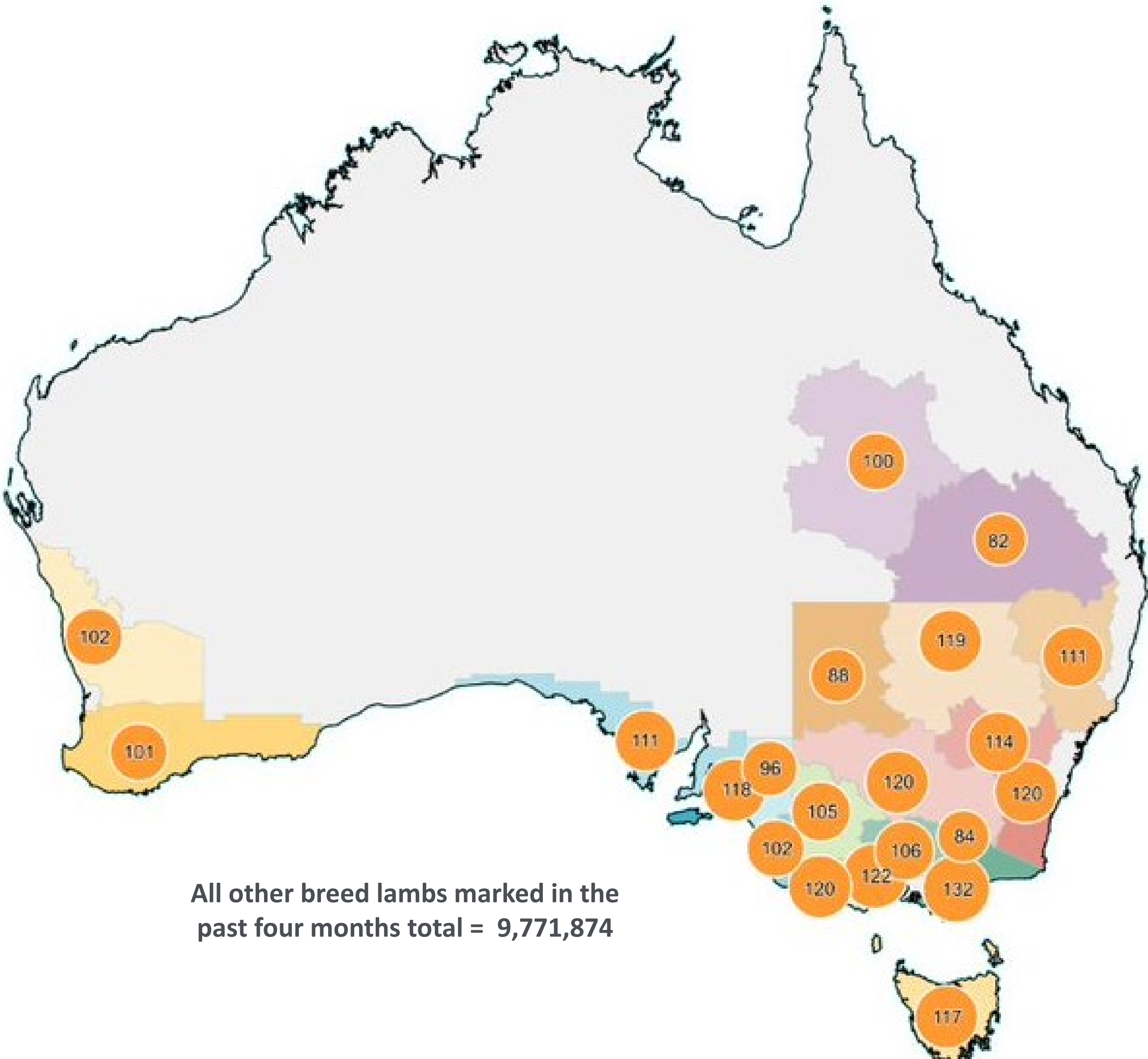
Nationally the Merino marking rate was 93% and on a state basis, SA had the lowest marking rate at 87%, while Tasmania and NSW recorded the highest Merino marking rates of 105% and 97% respectively.

Note: These marking rates are for the period between 1 July to 31 October 2021 and are not an accurate representation of annual marking rates.

21.12.0005 Source: MLA, Kynetec

All other breed lamb marking rates – by MLA regions

Lambs marked percentage of non merinos by MLA Region



All other breed lambs marked in the past four months total = 9,771,874

Of the regions with greater than 40 thousand head of non-merino lambs Gippsland and Barwon and Central Highlands recorded the highest marking rates for non-Merino lambs at 132% and 122% respectively.

On a state basis TAS, NSW and VIC (117%) recorded the highest non-merino market rates. In contrast, the lowest non-merino marking rates was seen in QLD (82%).

Note: These marking rates are for the period between 1 July and 31 October 2021. As this is outside of the peak lambing period in some regions this year, these are not representative of the average annual marking rates.

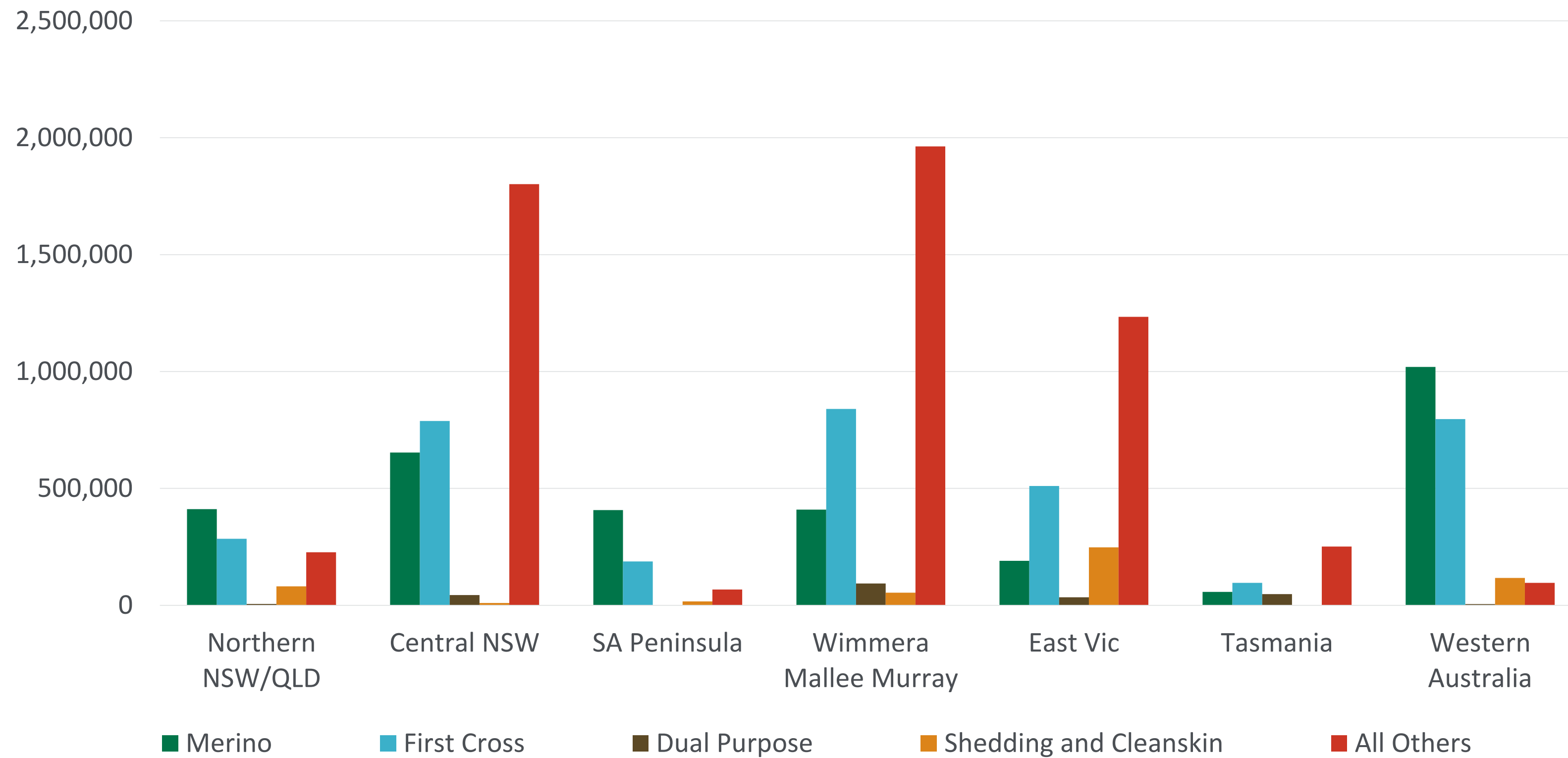
Non merino lambs Percentage marked

- 100
- 50
- 10

21.12.0005 Source: MLA, Kynetec

Expected lamb sales in next four months (1 November 2021 - 28 February 2022) – by MLA reporting regions

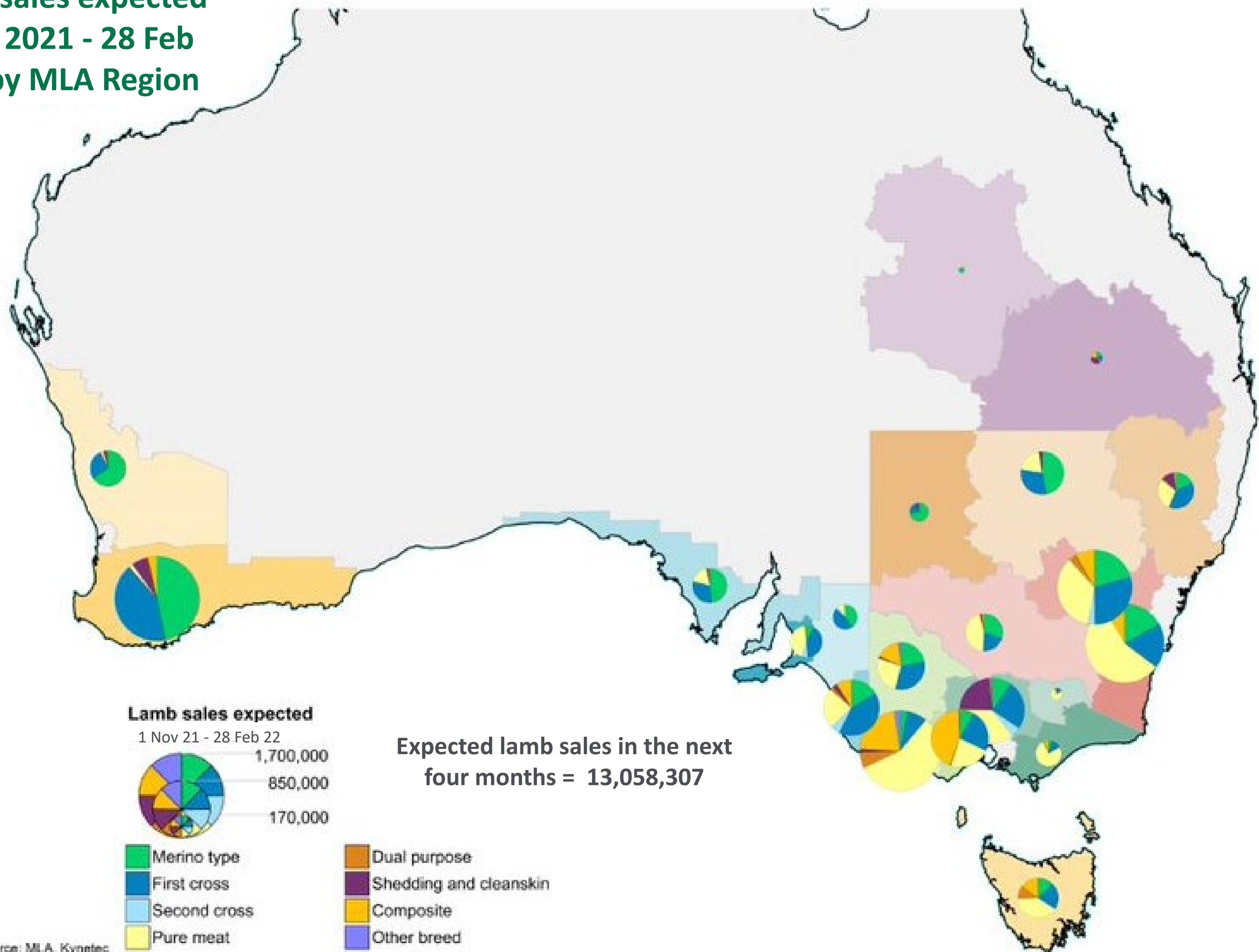
Expected lamb sales in the next 4 months 1 Nov 2021 – 28 Feb 2022



Sample base (properties) n=2,657

Expected lamb sales in next four months

Lambs sales expected
1 Nov 2021 - 28 Feb
2022 by MLA Region



Over the next four months (1 November 2021 to 28th February 2022), most lamb sales are expected to occur in WA South (1.7m) Western District (1.5m), South Eastern (1.5m).

Merino's are expected to account for 24% of national lamb sales, with the proportion higher in WA and SA (50% and 35% respectively). Pure Meat and First cross breeds will account for 32% and 27% of lamb sales, being highest in NSW and VIC.

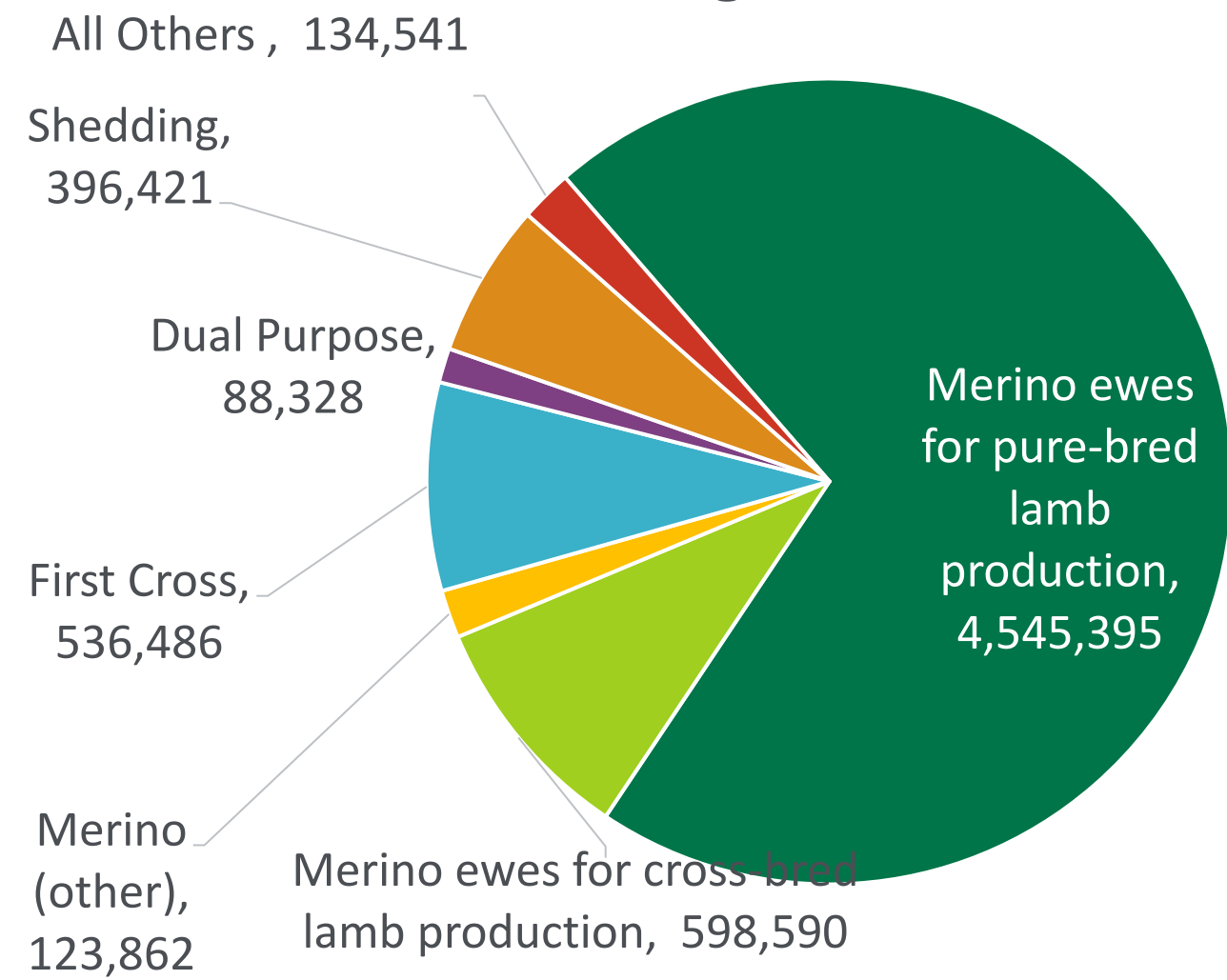
NSW and VIC are expected to account for 33% and 33% of total lamb sales over the next four months, with around 4.3 million lambs expected to be on offer in both states. This is followed by WA and SA at 16% and 15% of total lamb sales, respectively.

Sample base (properties) n=2,657

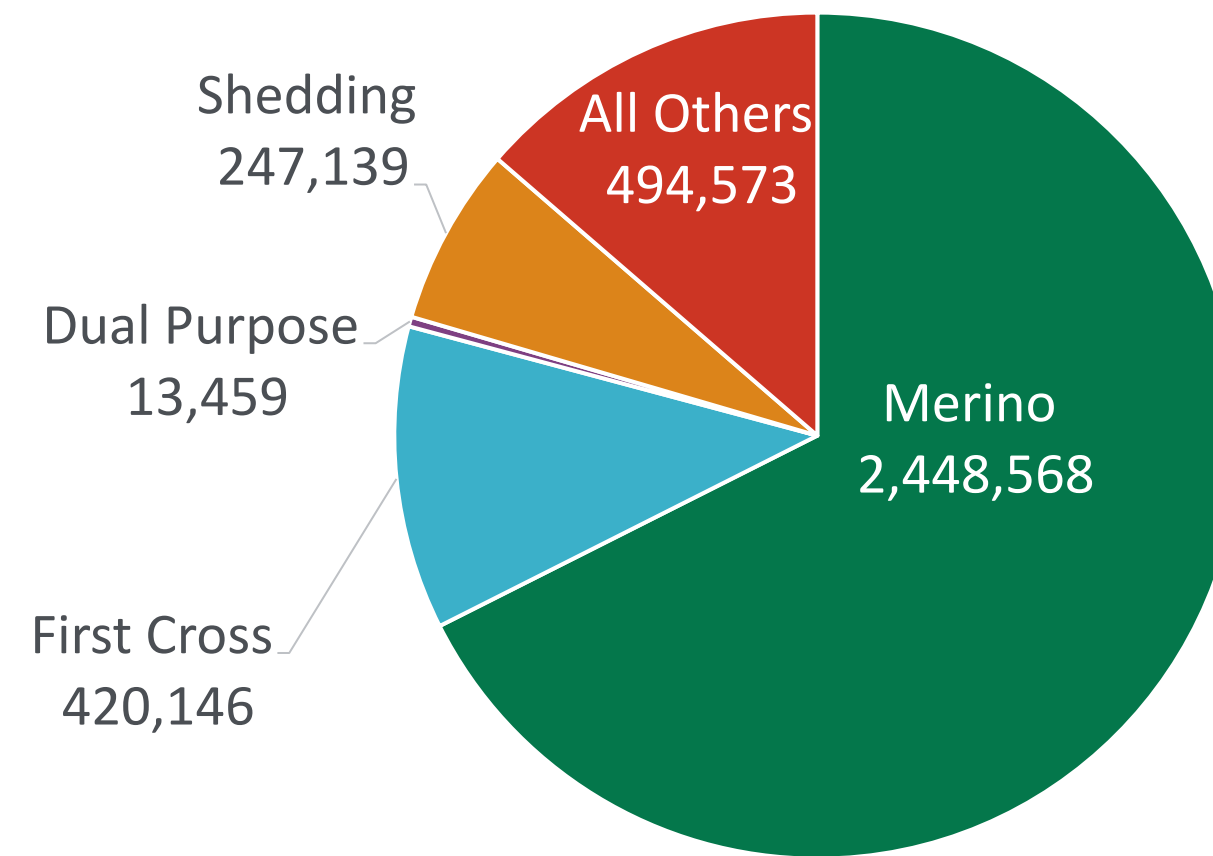
Regional Snapshots

Northern NSW/QLD

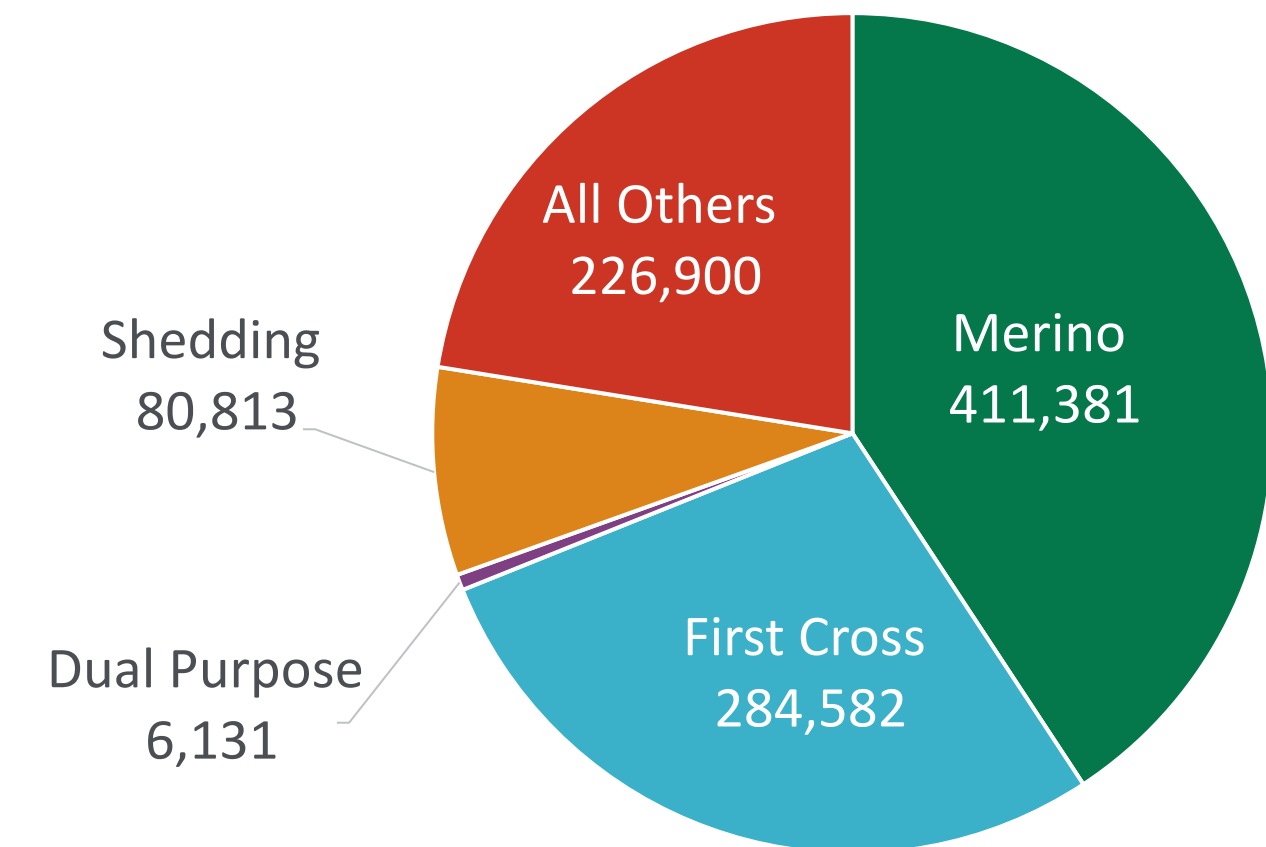
Breeding ewes on hand



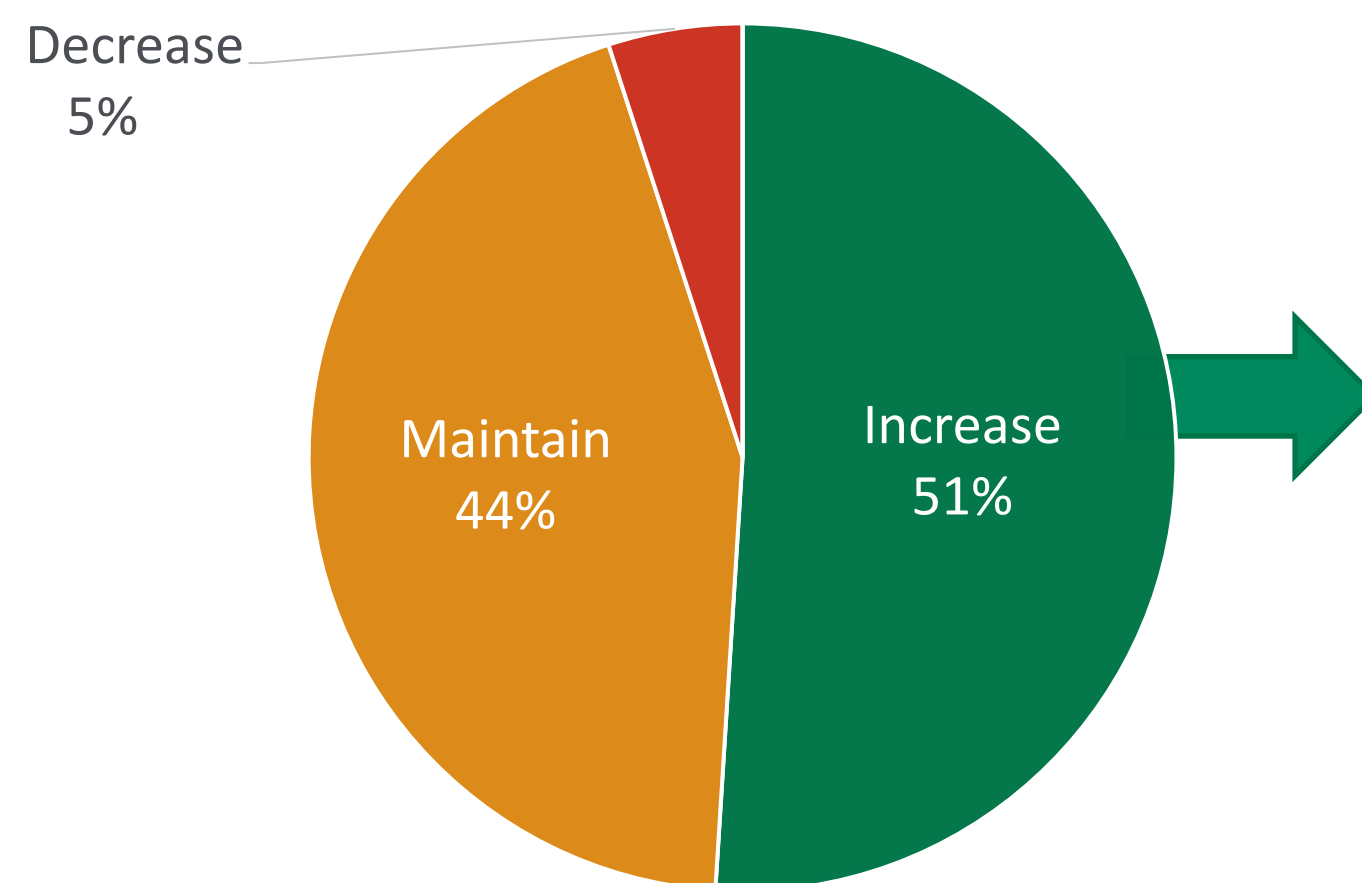
Lambs on hand



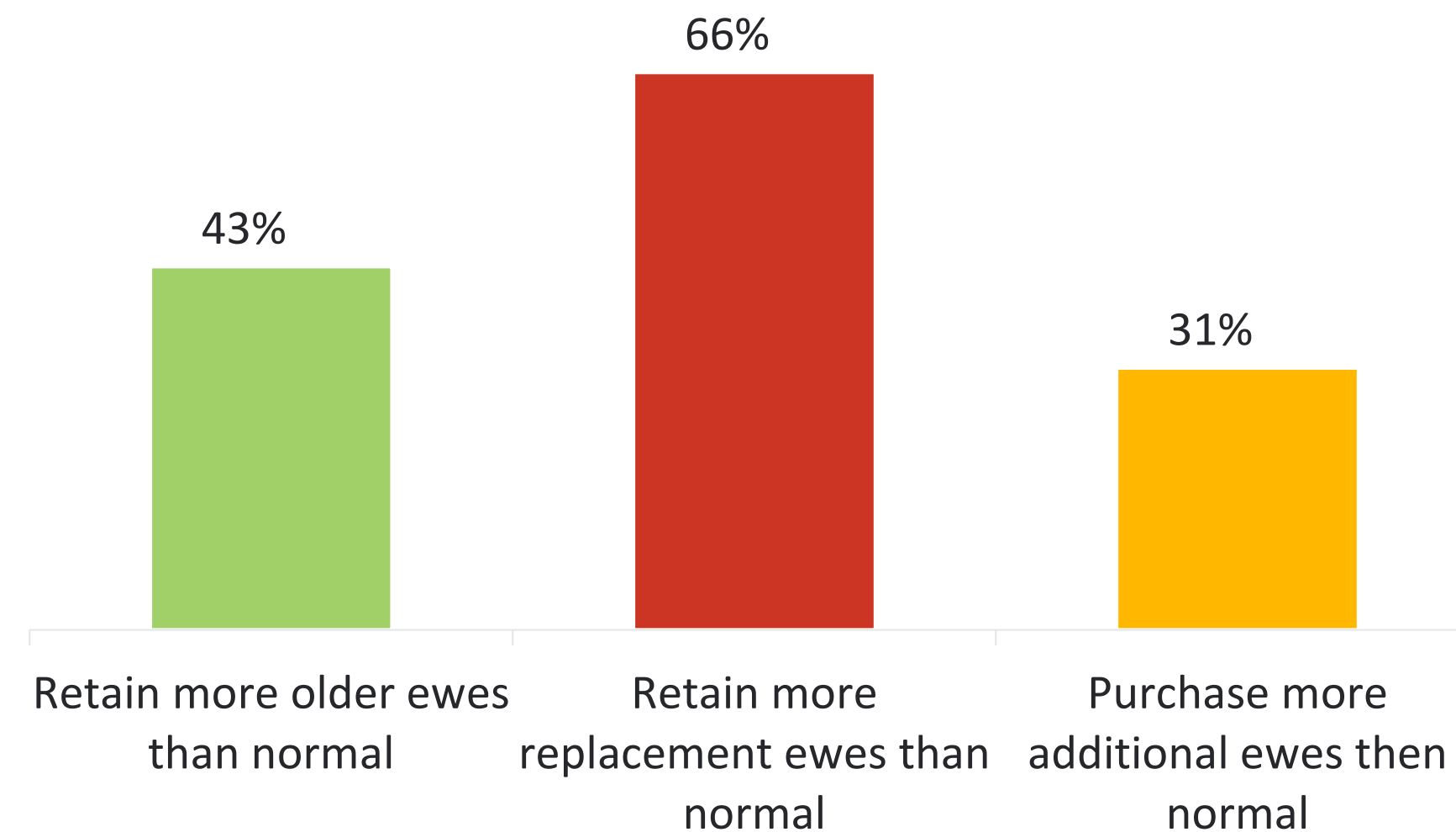
Lamb sales in next 4 months



Ewe Flock intentions



How to achieve increase

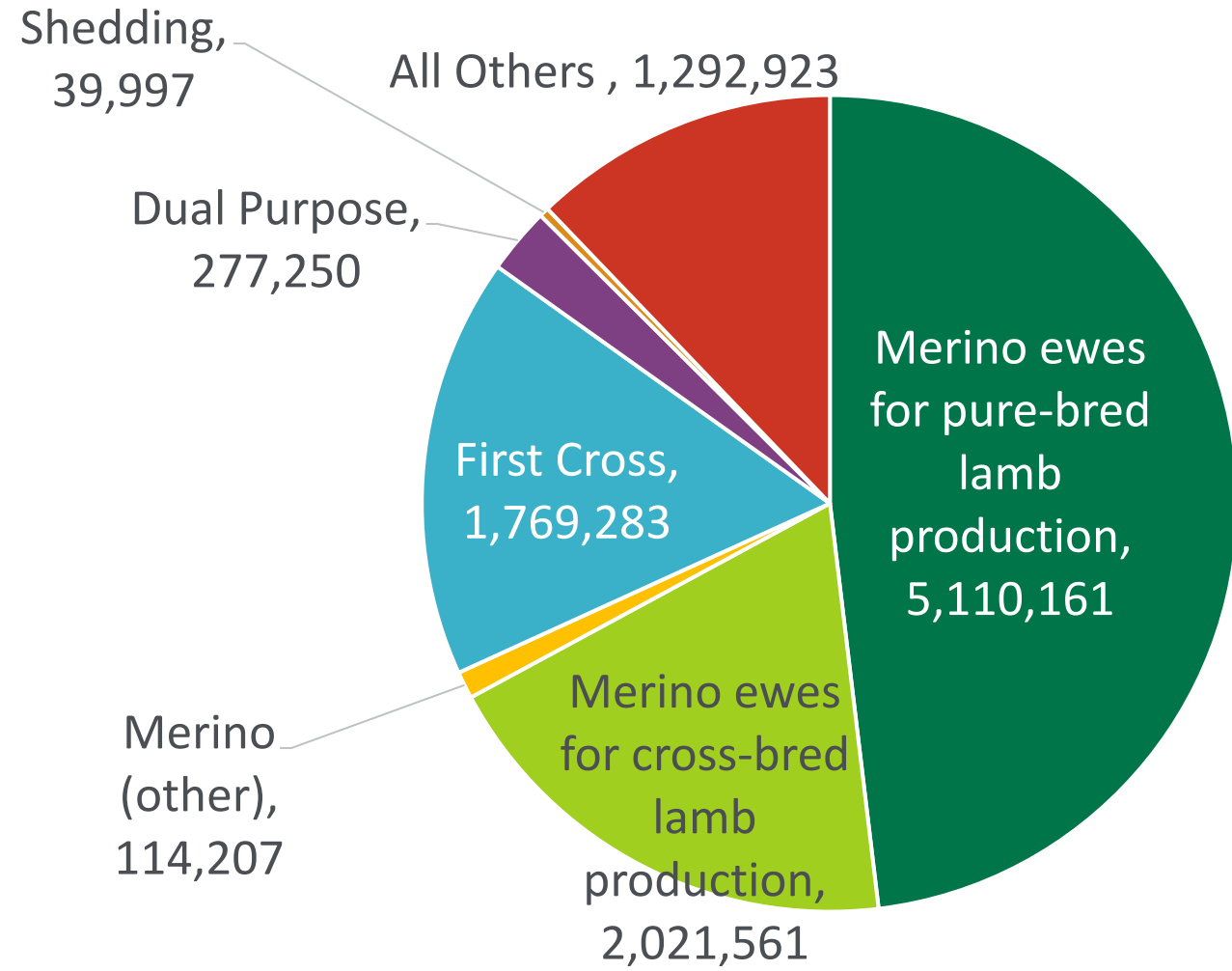


Totals

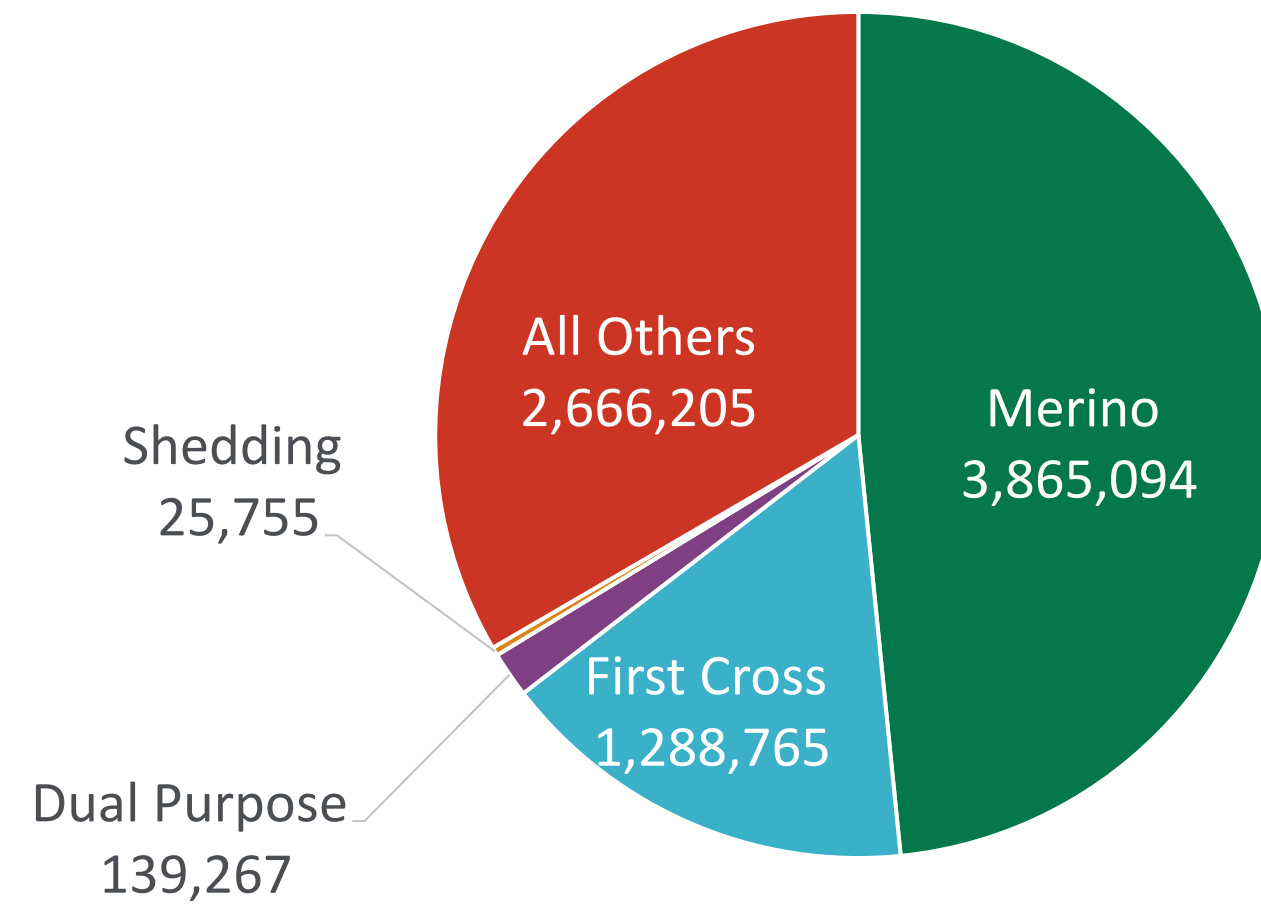
Breeding ewes on hand	6,423,623
Lambs on hand	3,623,885
Expected lamb sales in the next 4 months	1,009,807
Lambs marked in the past 4 months (1 Jul – 31 Oct)	2,552,738
Number of ewes joined to produce marked lambs	2,559,556

Central NSW

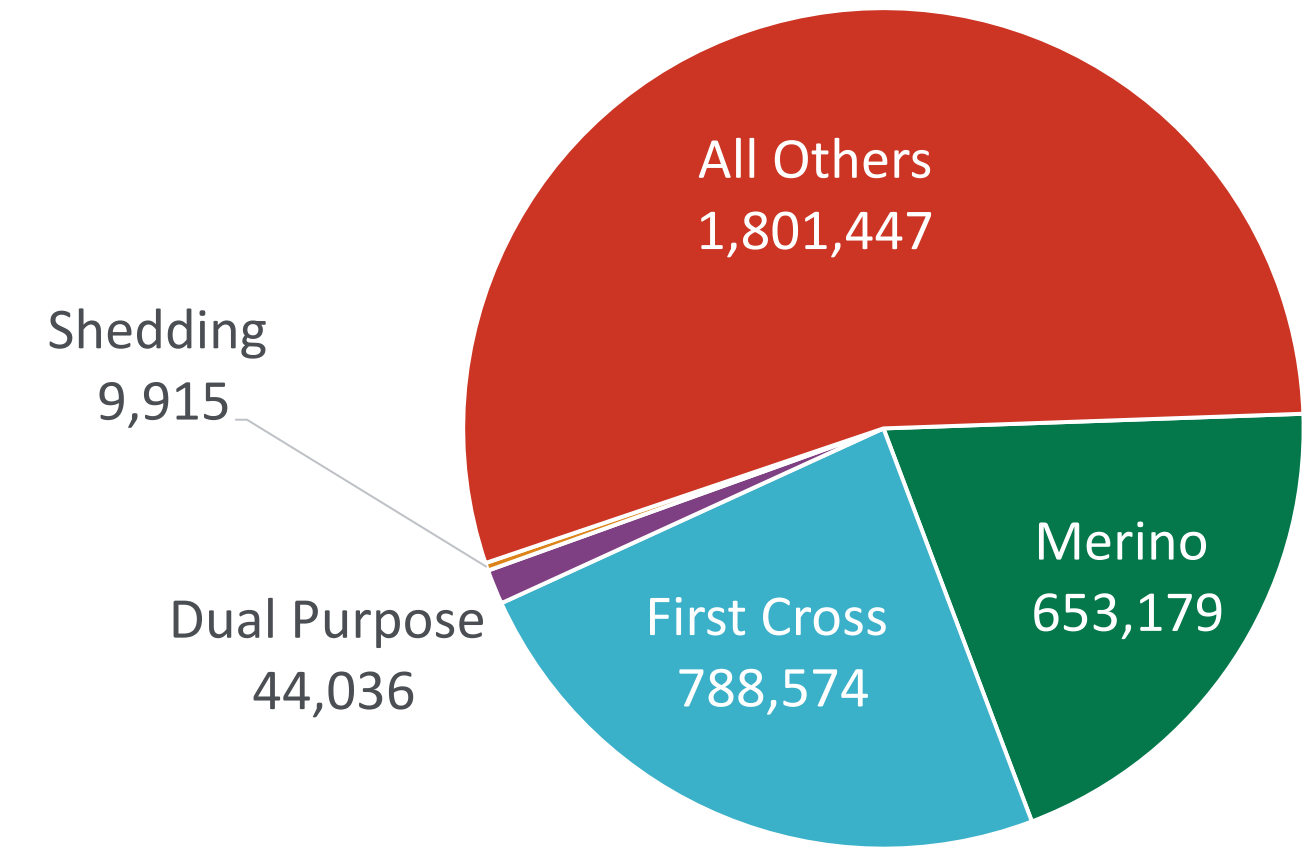
Breeding ewes on hand



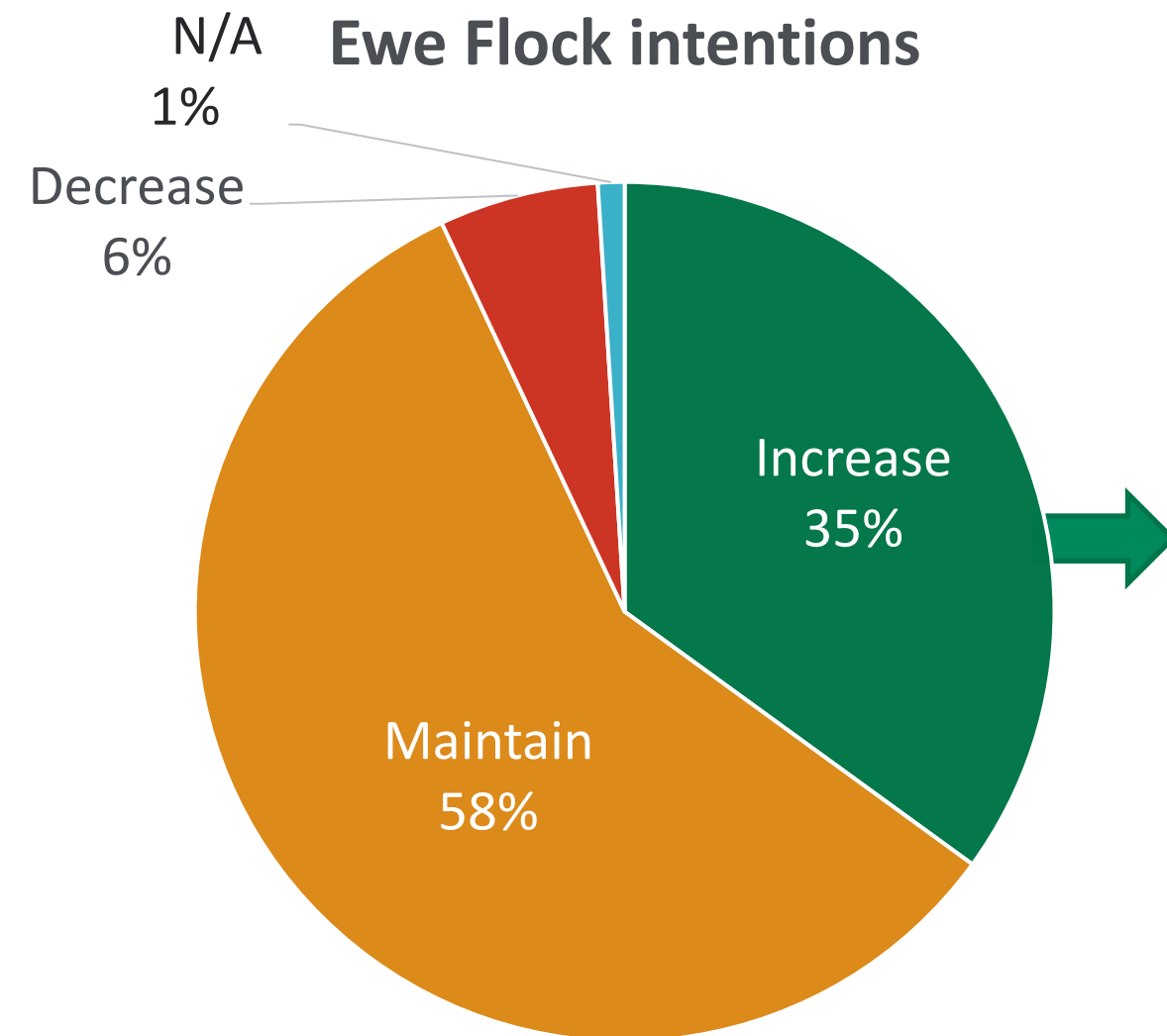
Lambs on hand



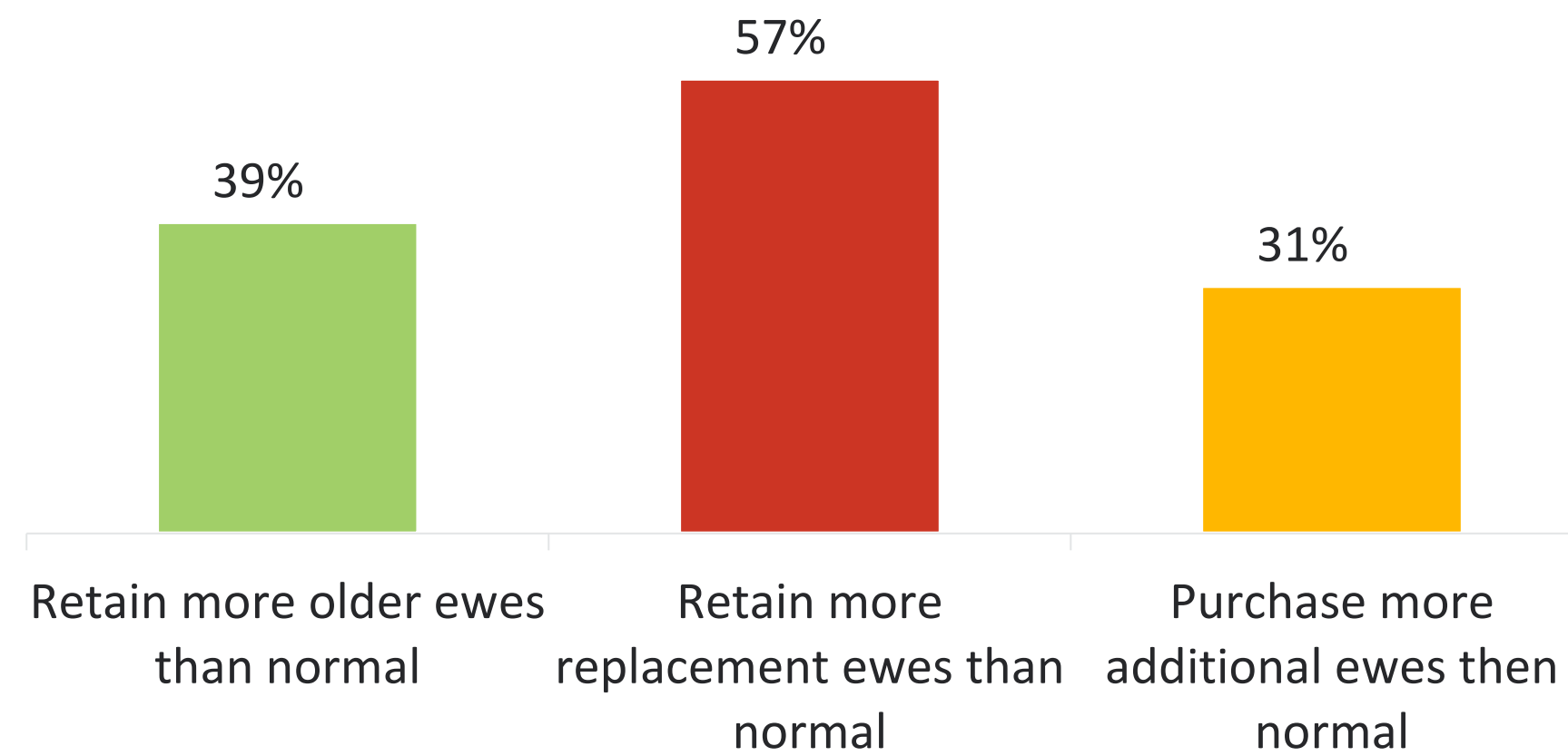
Lamb sales in next 4 months



Ewe Flock intentions



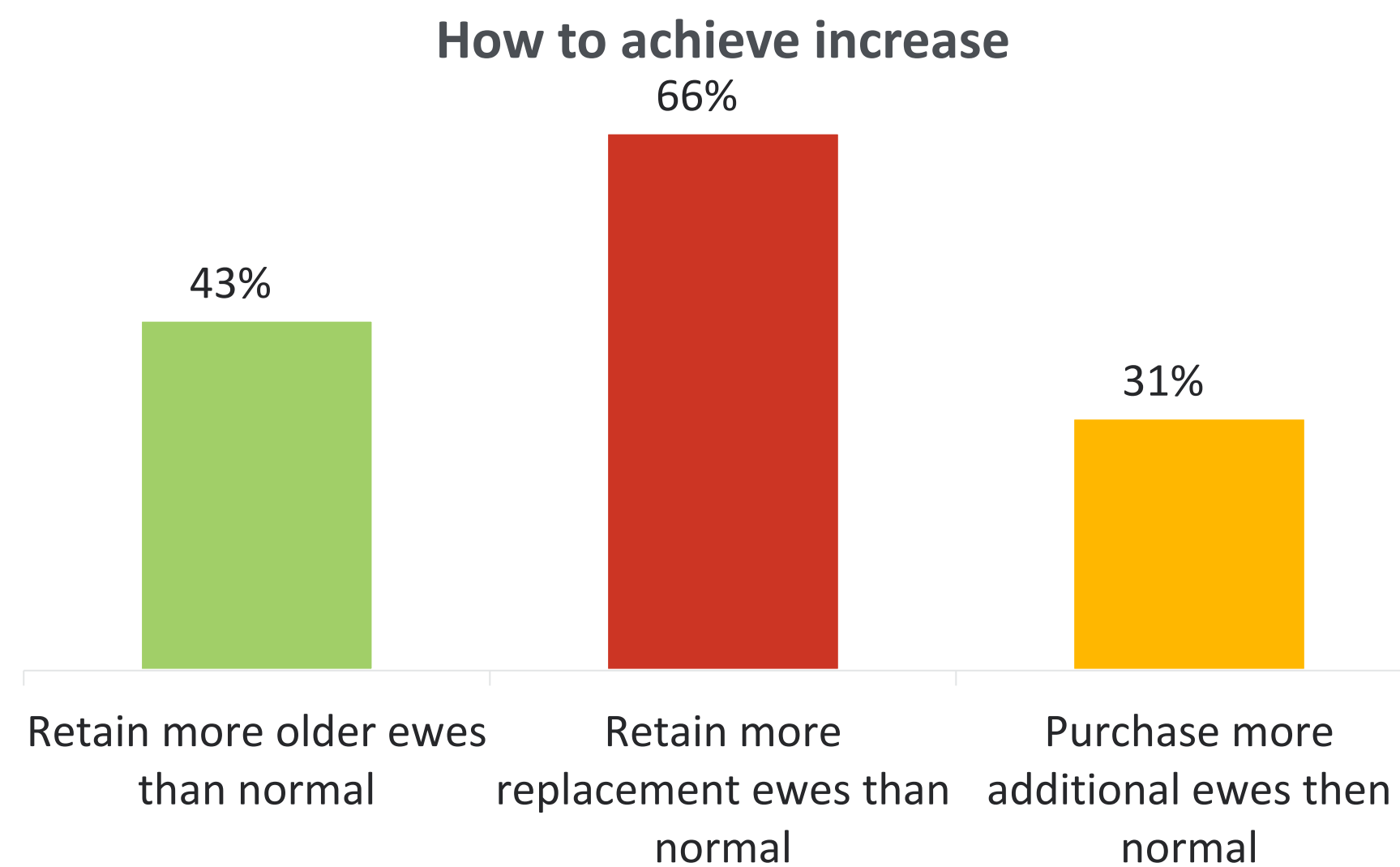
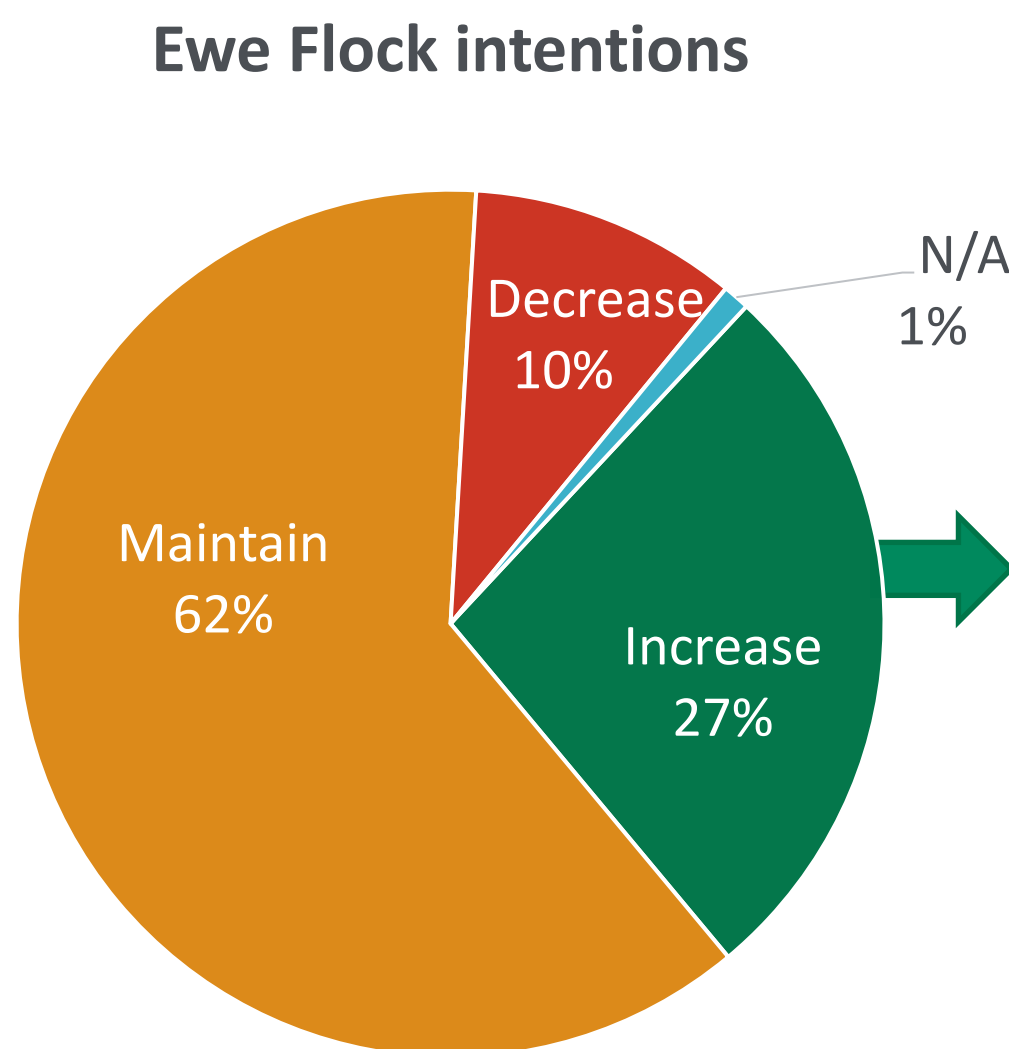
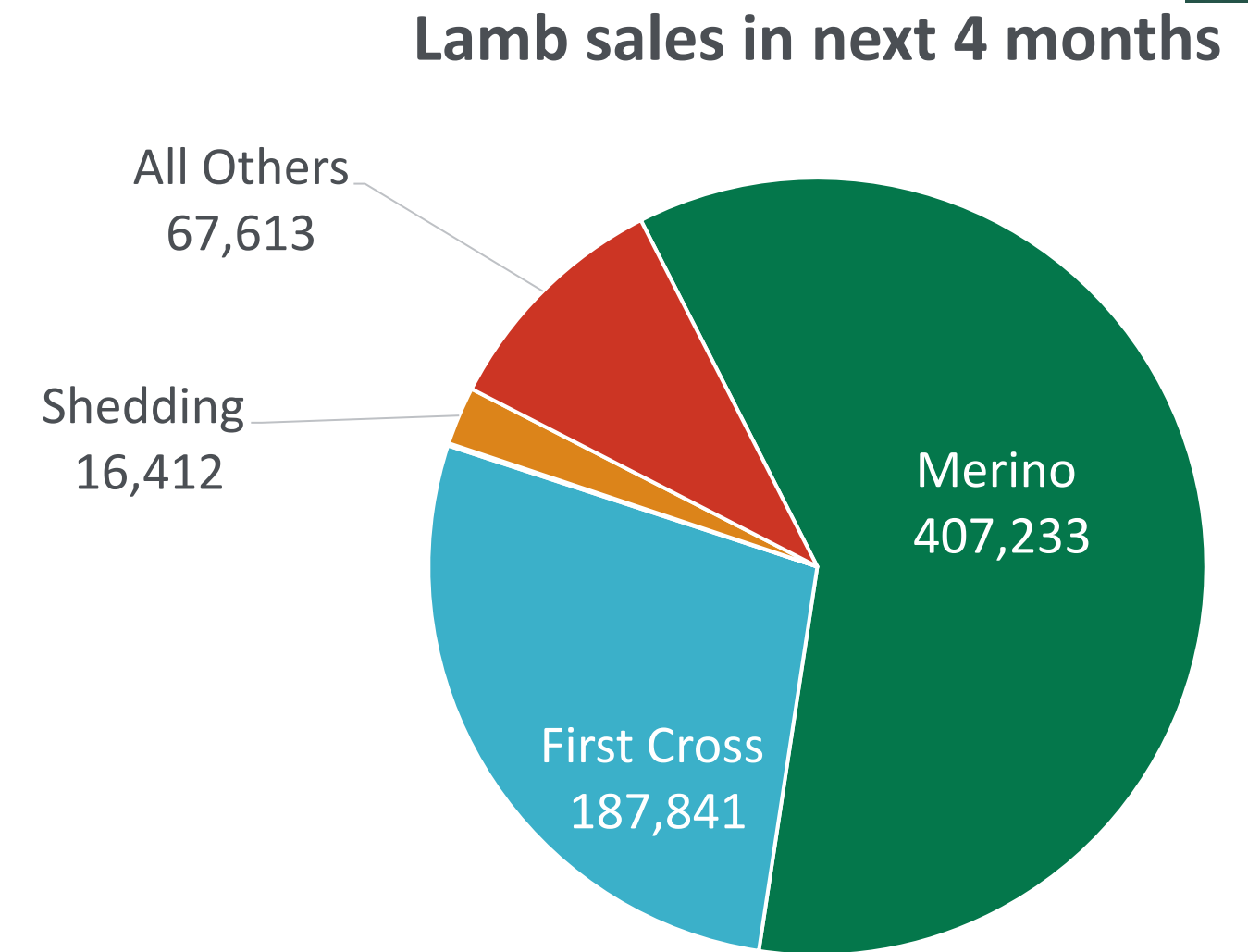
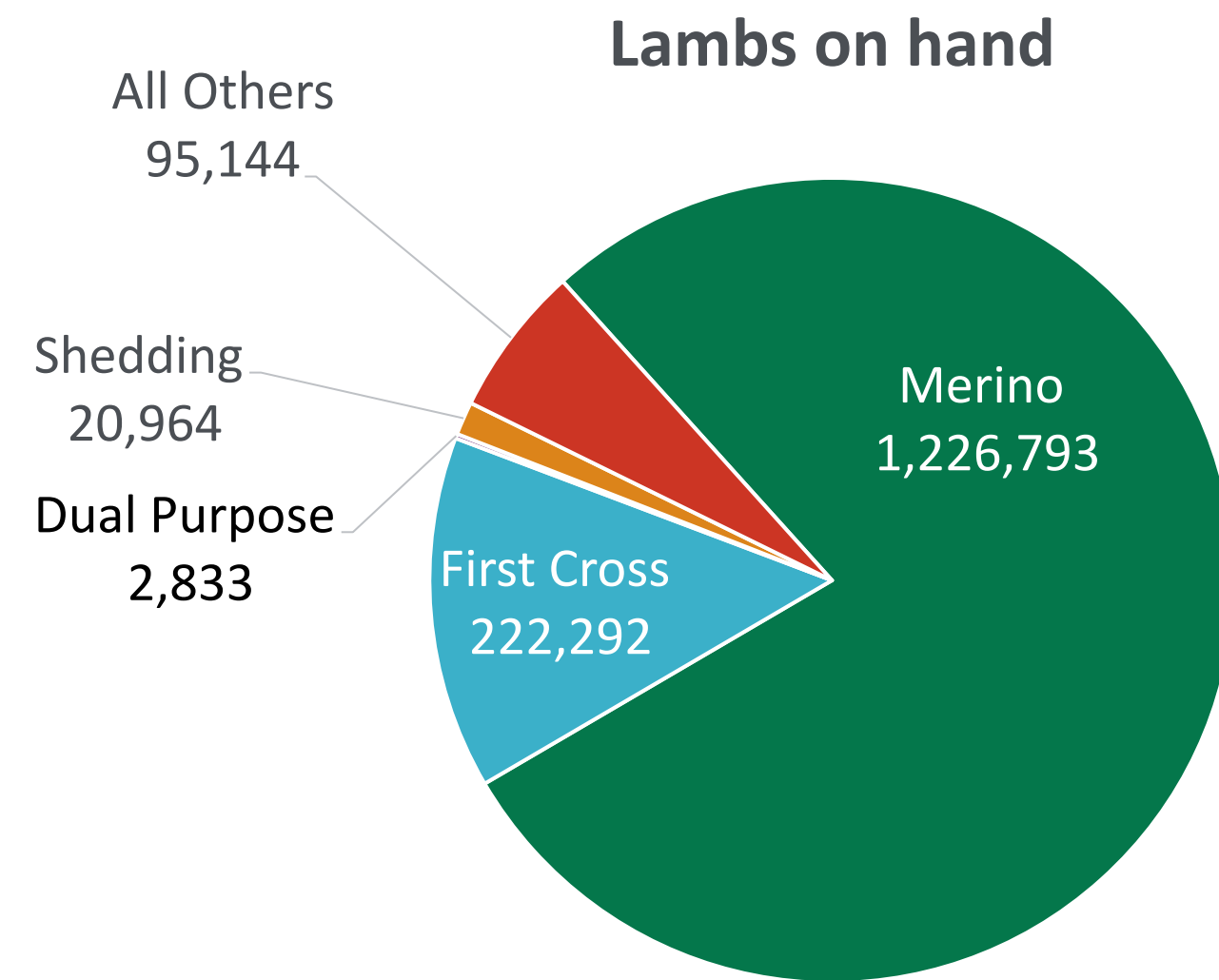
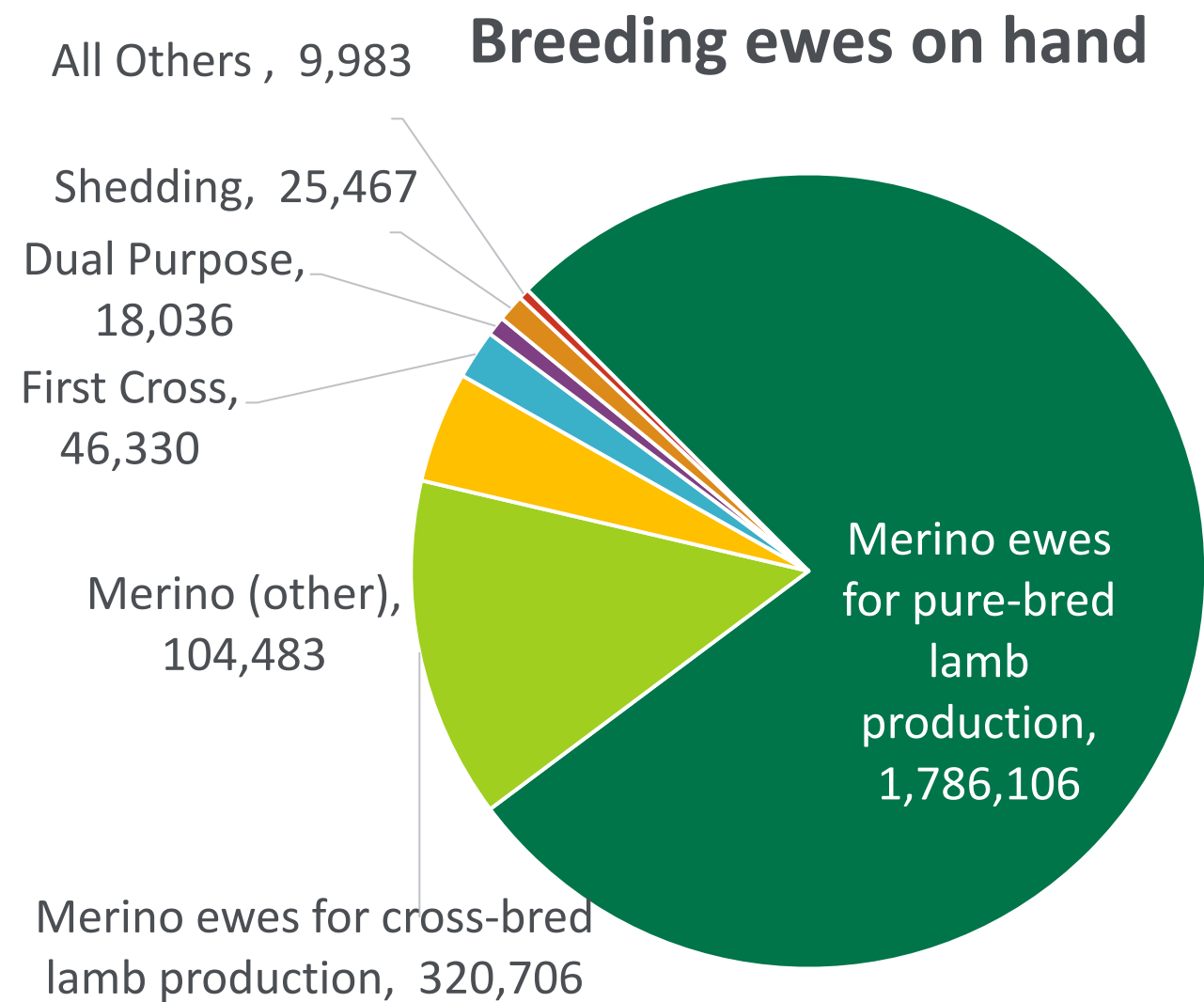
How to achieve increase



Totals

Breeding ewes on hand	10,625,382
Lambs on hand	7,985,086
Expected lamb sales in the next 4 months	3,297,152
Lambs marked in the past 4 months (1 Jul – 31 Oct)	5,880,260
Number of ewes joined to produce marked lambs	5,512,558

SA Peninsula

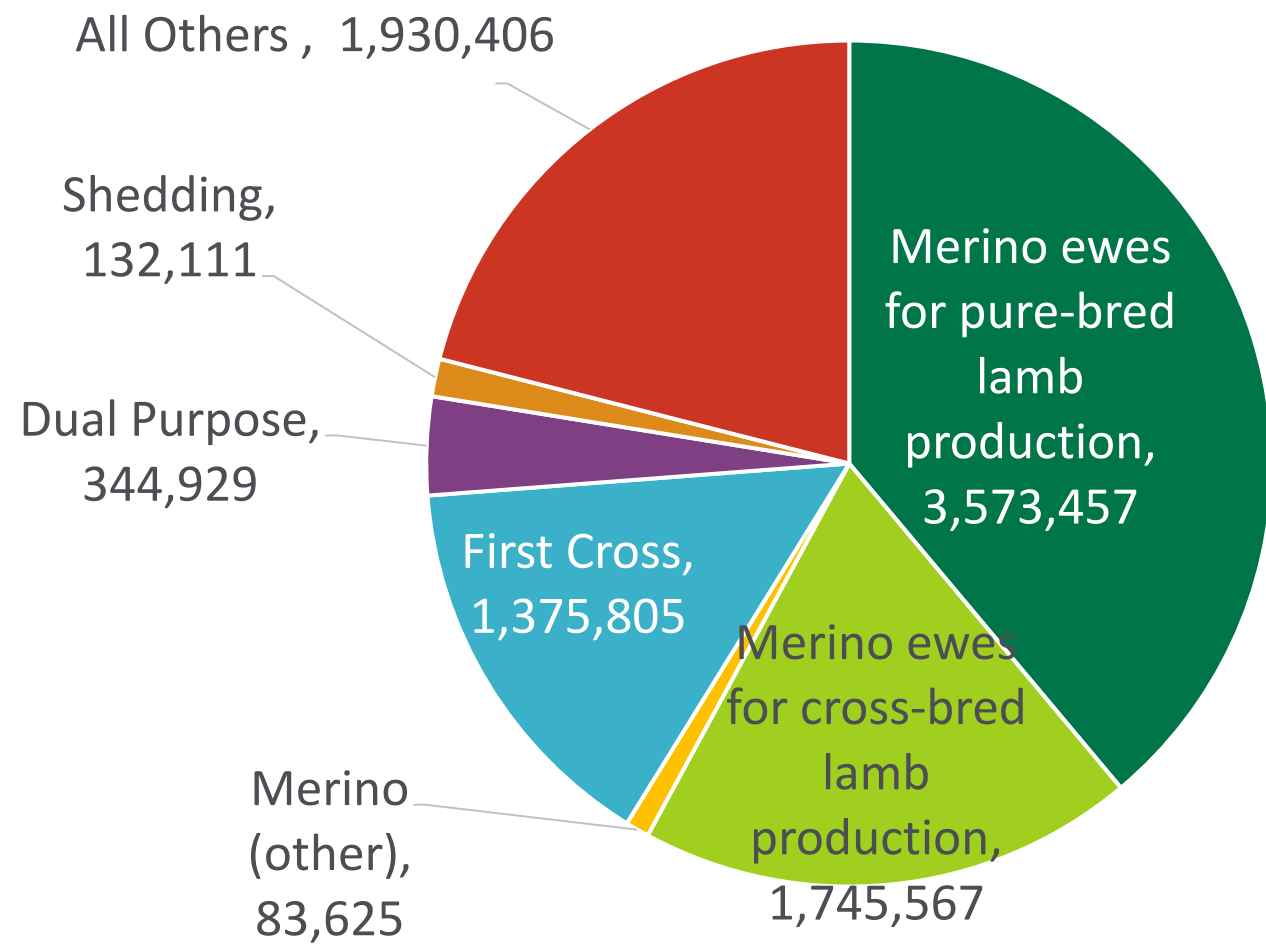


Totals

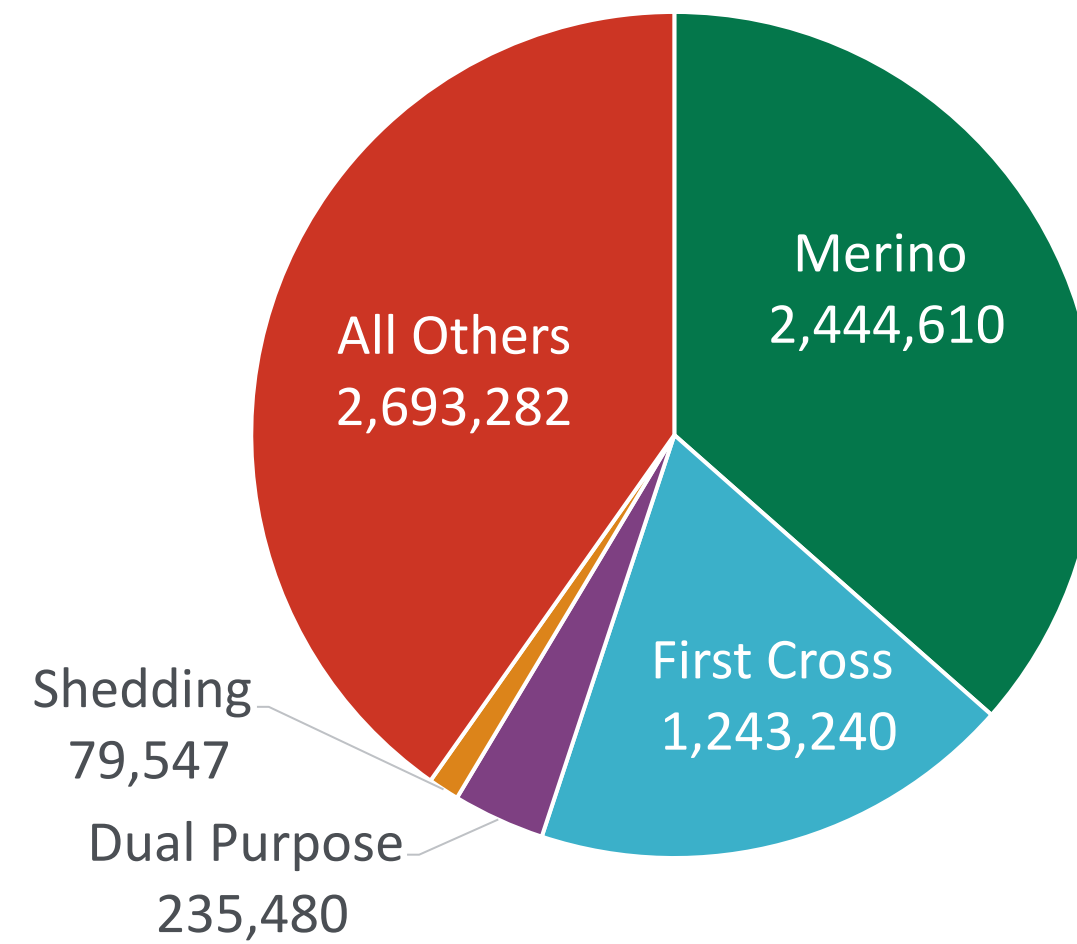
Breeding ewes on hand	2,311,111
Lambs on hand	1,568,025
Expected lamb sales in the next 4 months	679,779
Lambs marked in the past 4 months (1 Jul – 31 Oct)	1,201,711
Number of ewes joined to produce marked lambs	1,275,121

Wimmera Mallee Murray

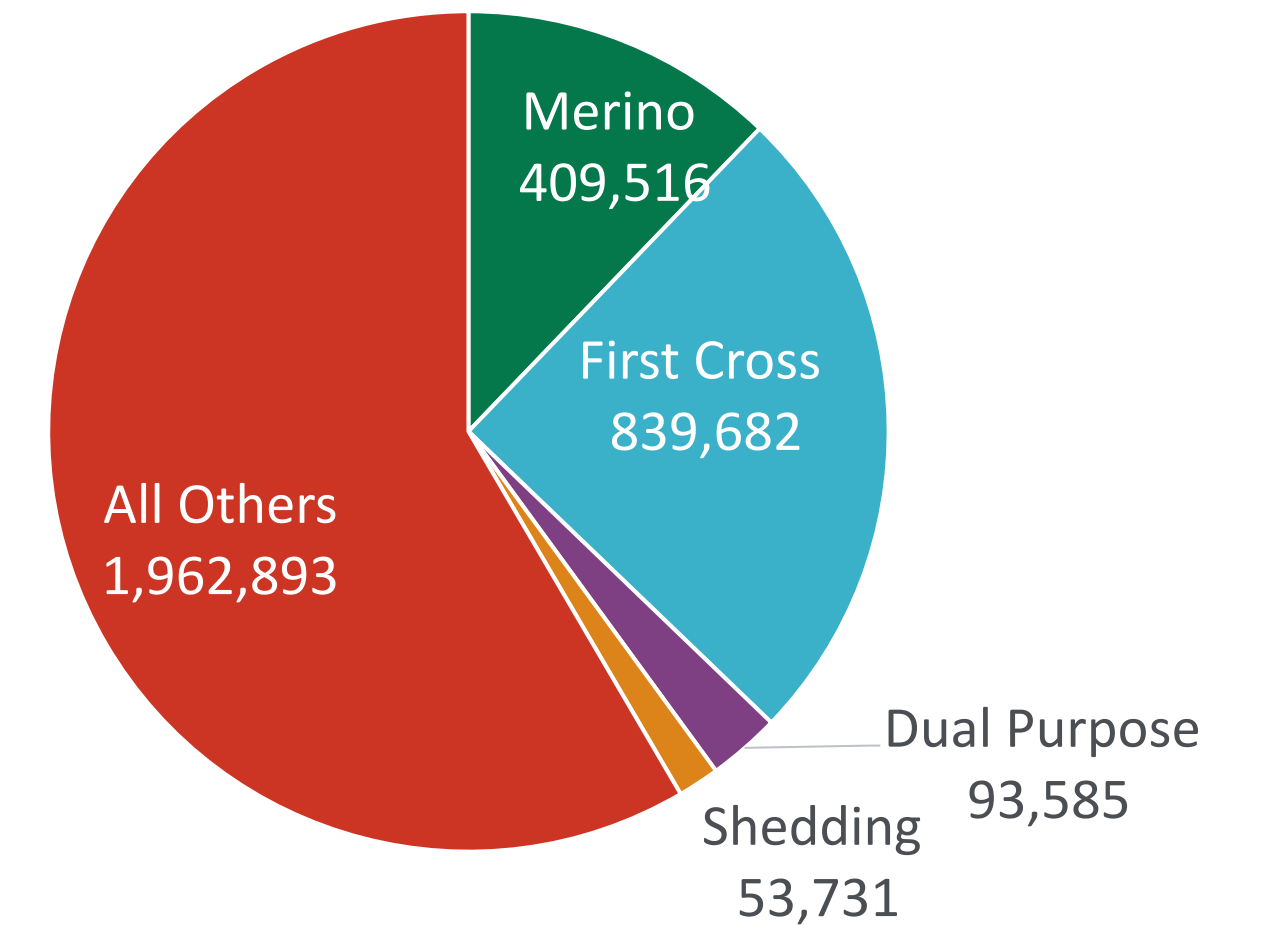
Breeding ewes on hand



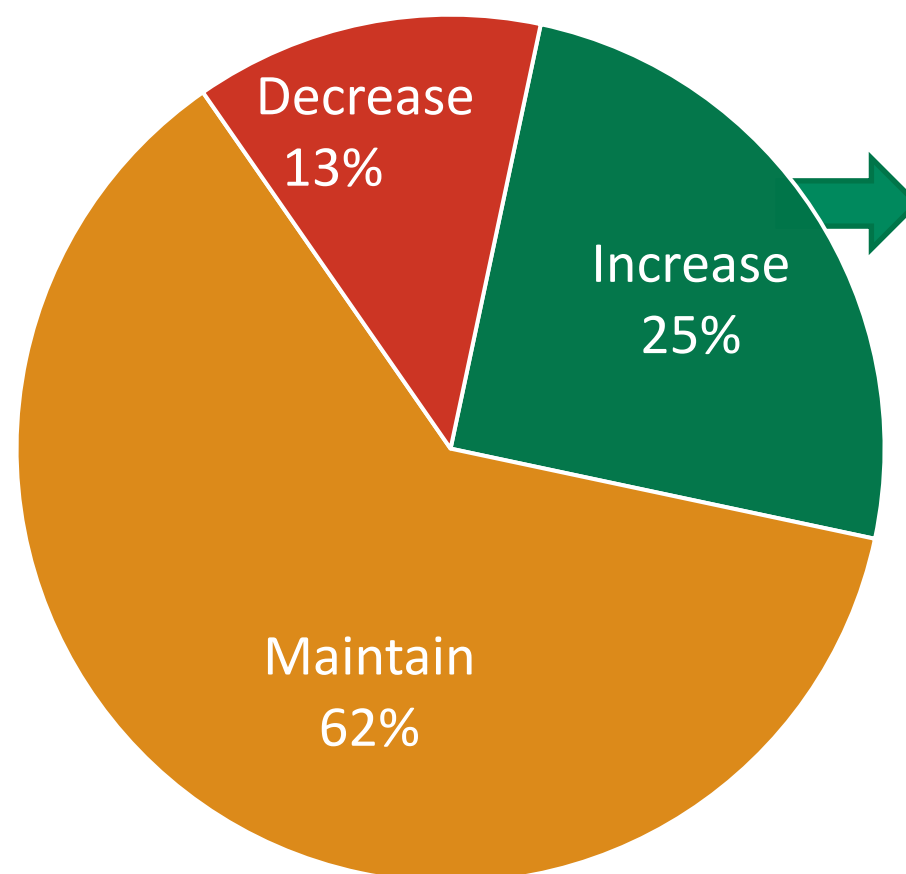
Lambs on hand



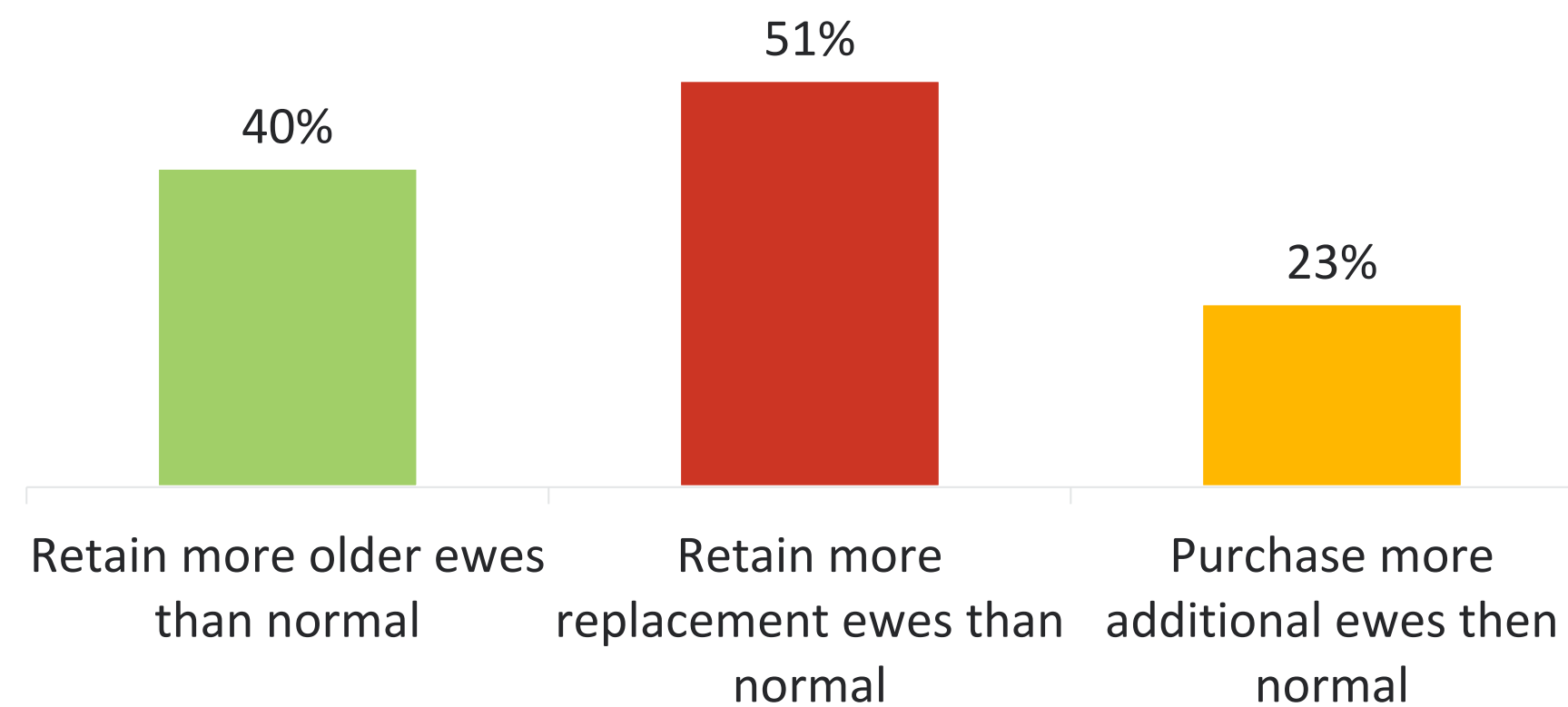
Lamb sales in next 4 months



Ewe Flock intentions



How to achieve increase

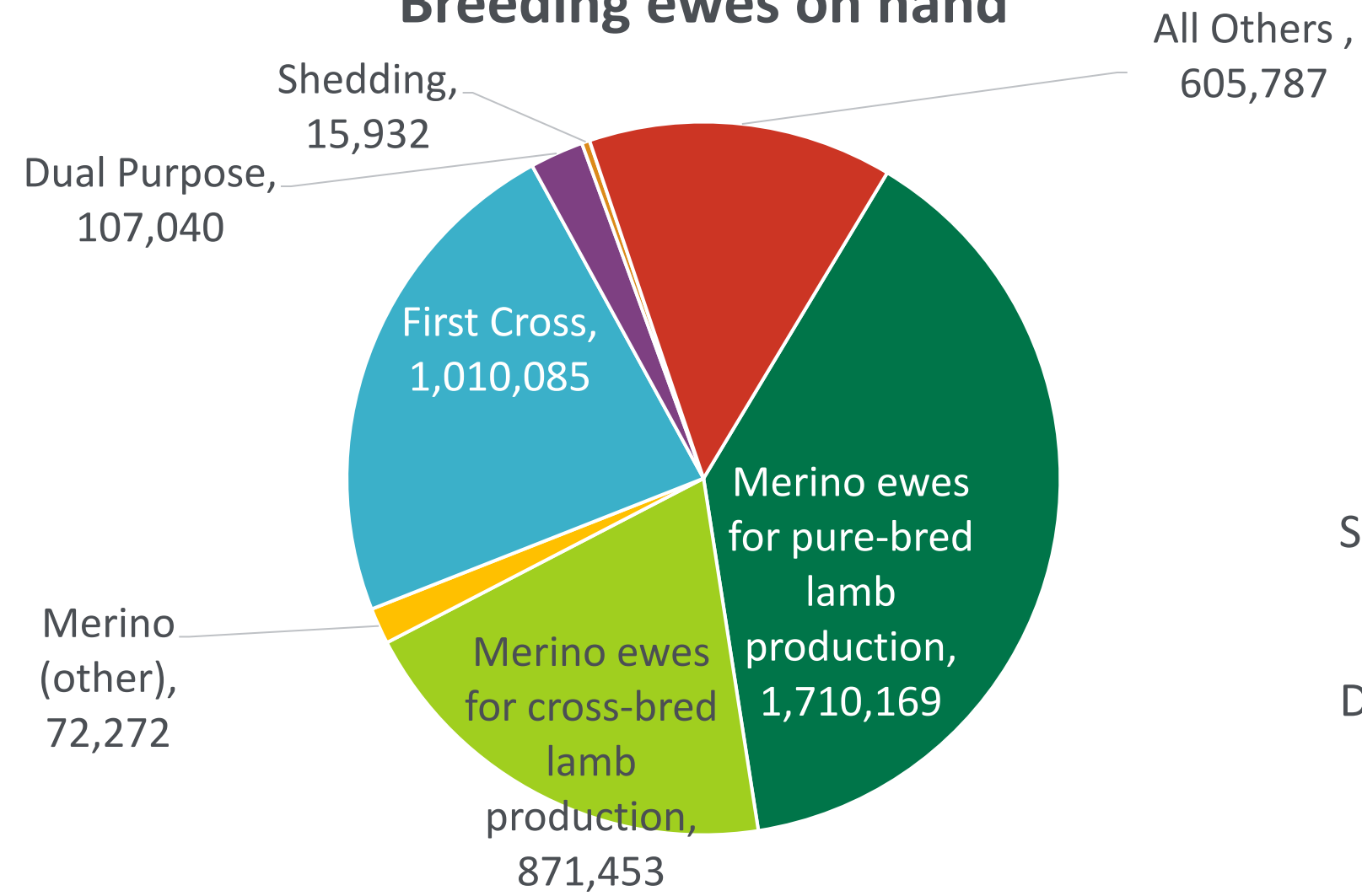


Totals

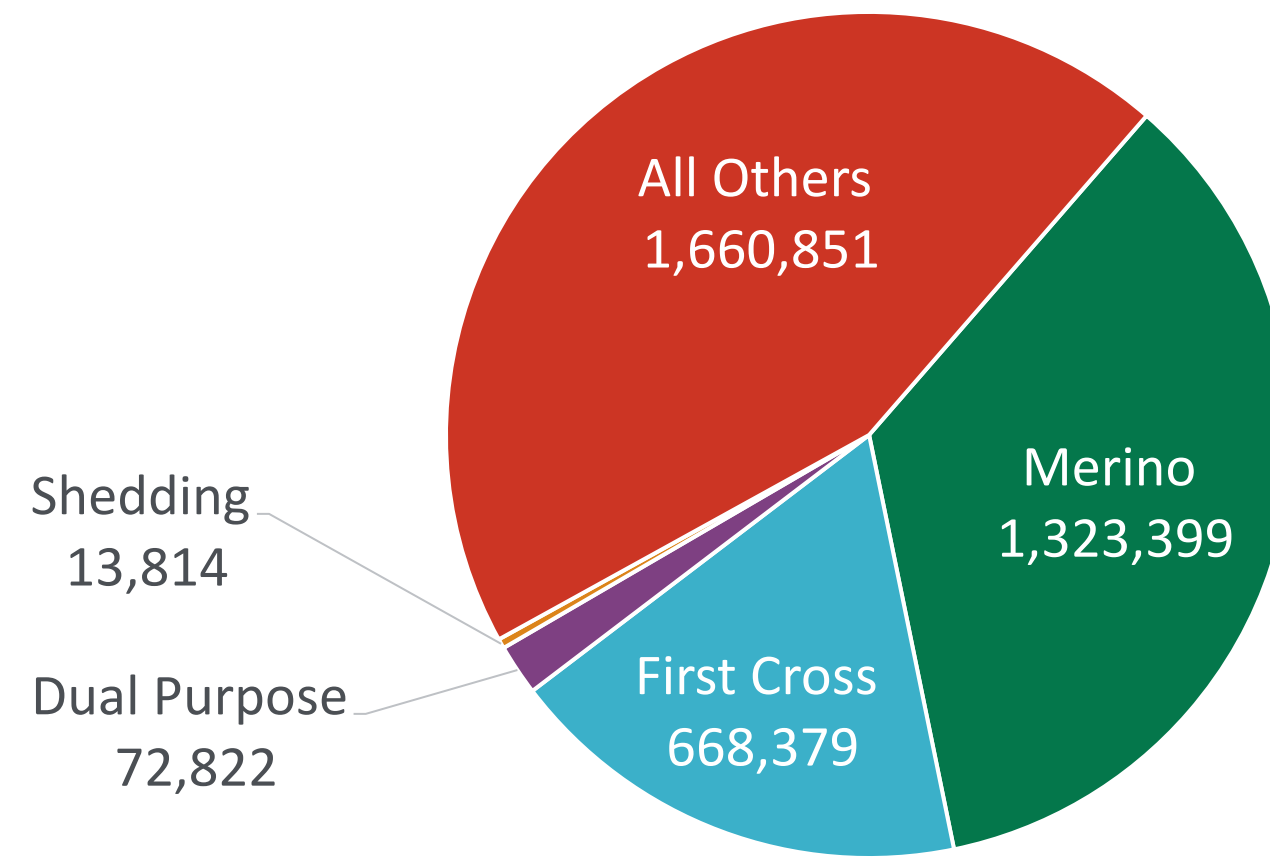
Breeding ewes on hand	9,185,900
Lambs on hand	6,696,159
Expected lamb sales in the next 4 months	3,359,407
Lambs marked in the past 4 months (1 Jul – 31 Oct)	5,068,701
Number of ewes joined to produce marked lambs	5,091,807

East Victoria

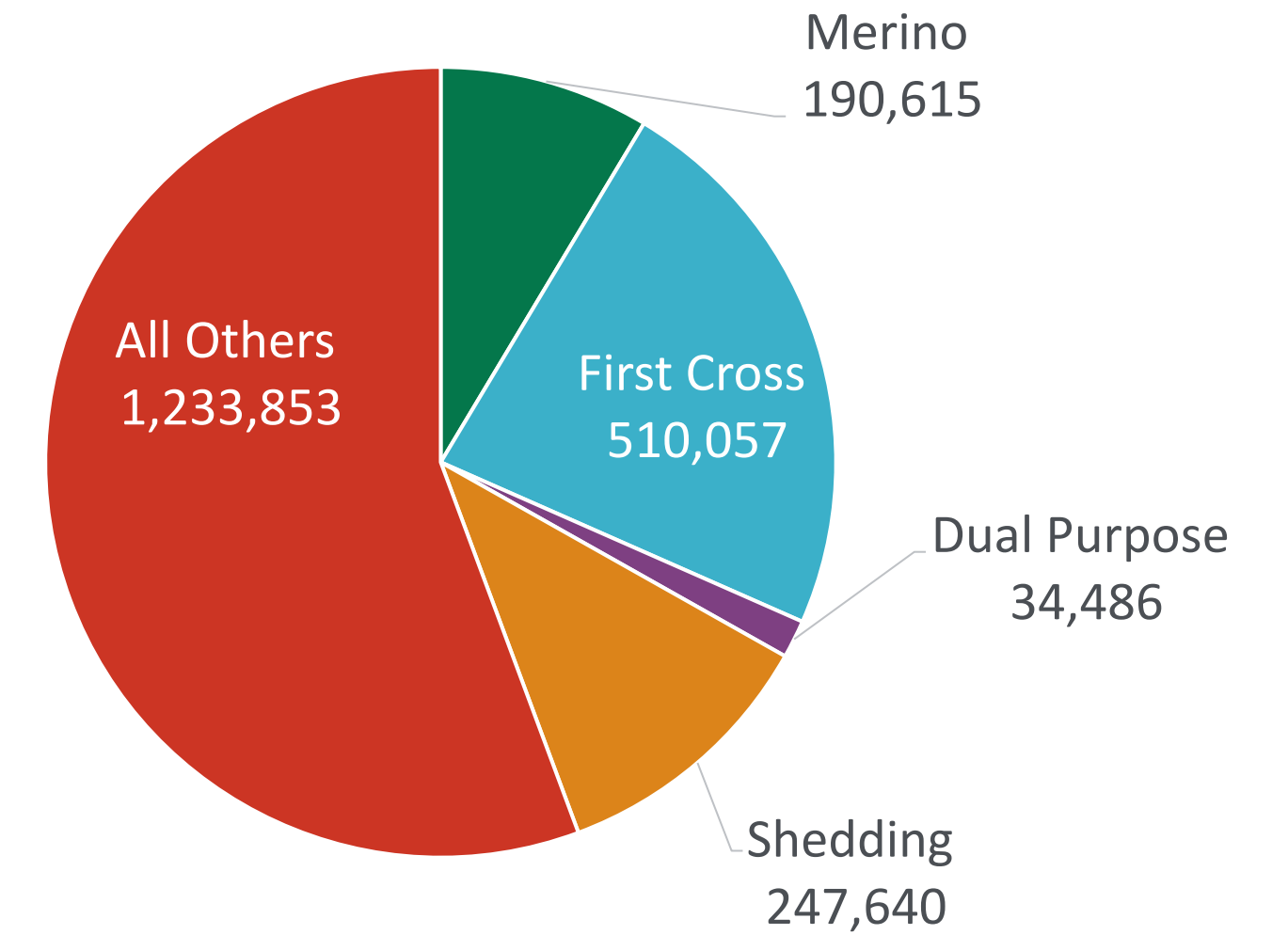
Breeding ewes on hand



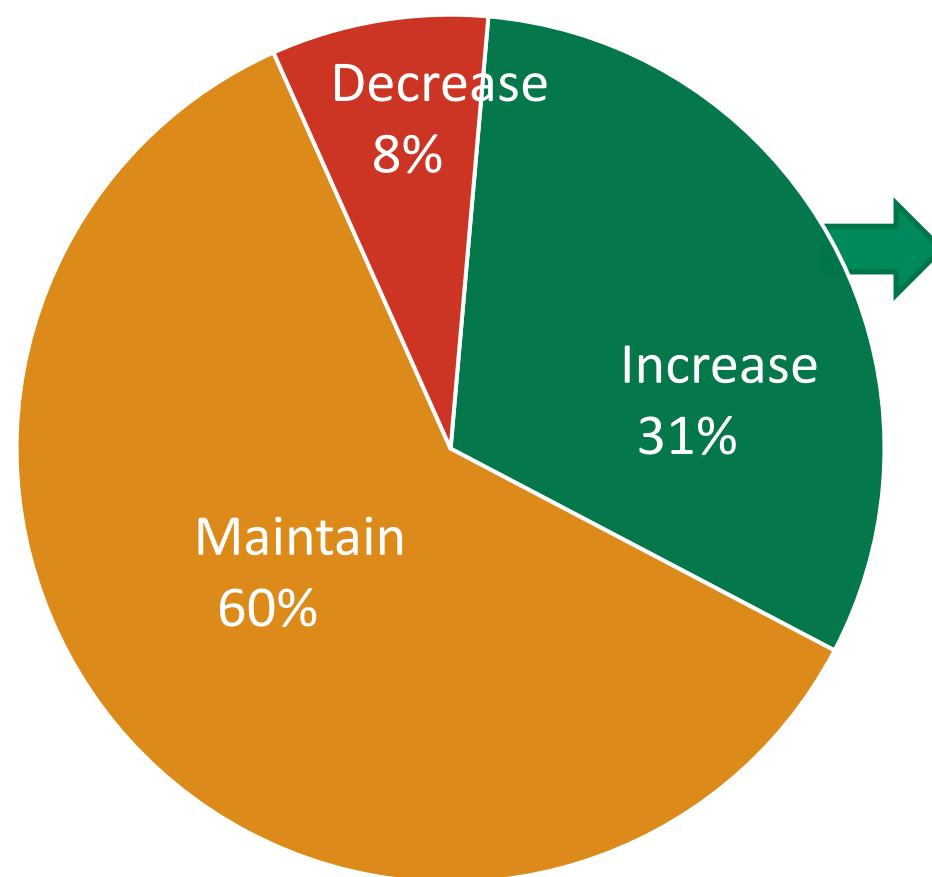
Lambs on hand



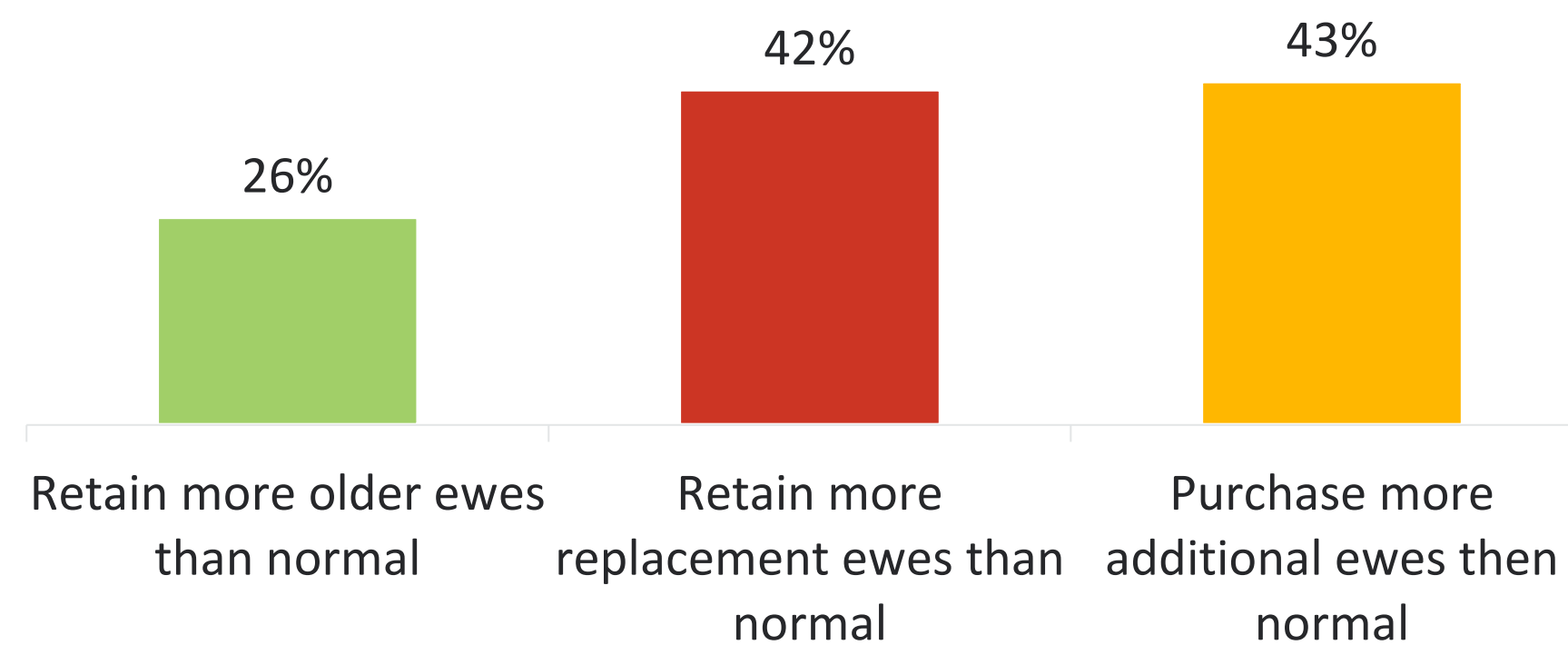
Lamb sales in next 4 months



Ewe Flock intentions



How to achieve increase

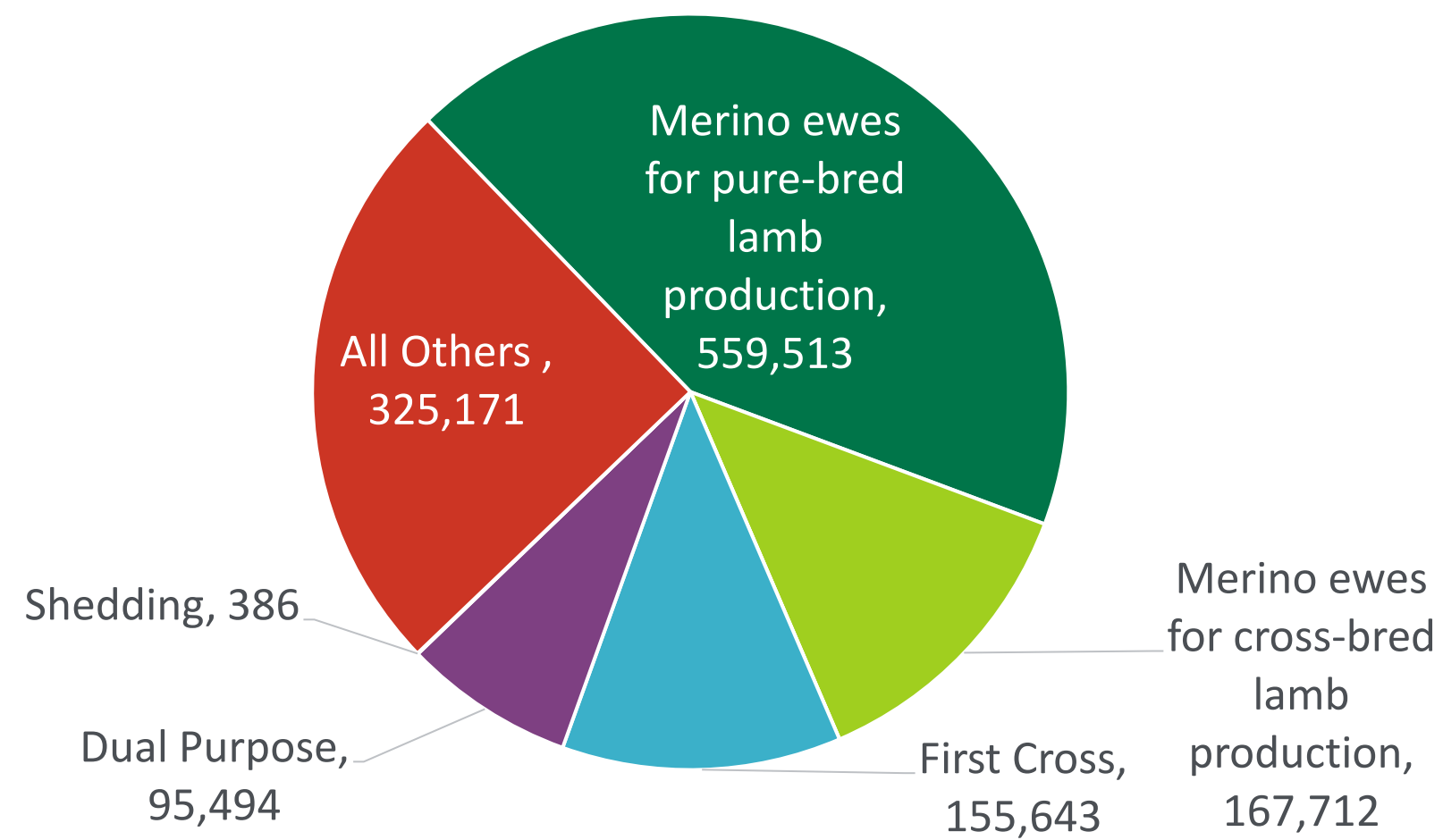


Totals

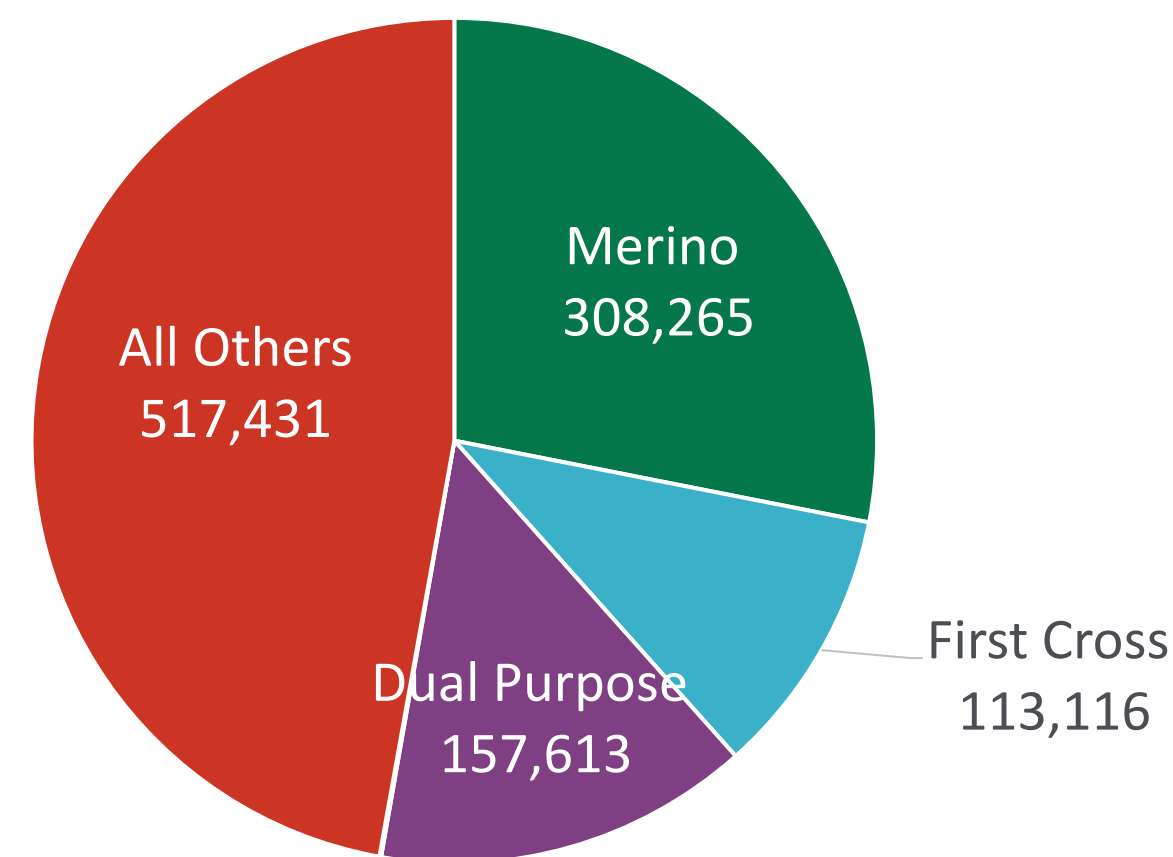
Breeding ewes on hand	4,392,738
Lambs on hand	3,739,265
Expected lamb sales in the next 4 months	2,216,651
Lambs marked in the past 4 months (1 Jul – 31 Oct)	2,474,428
Number of ewes joined to produce marked lambs	2,294,539

Tasmania

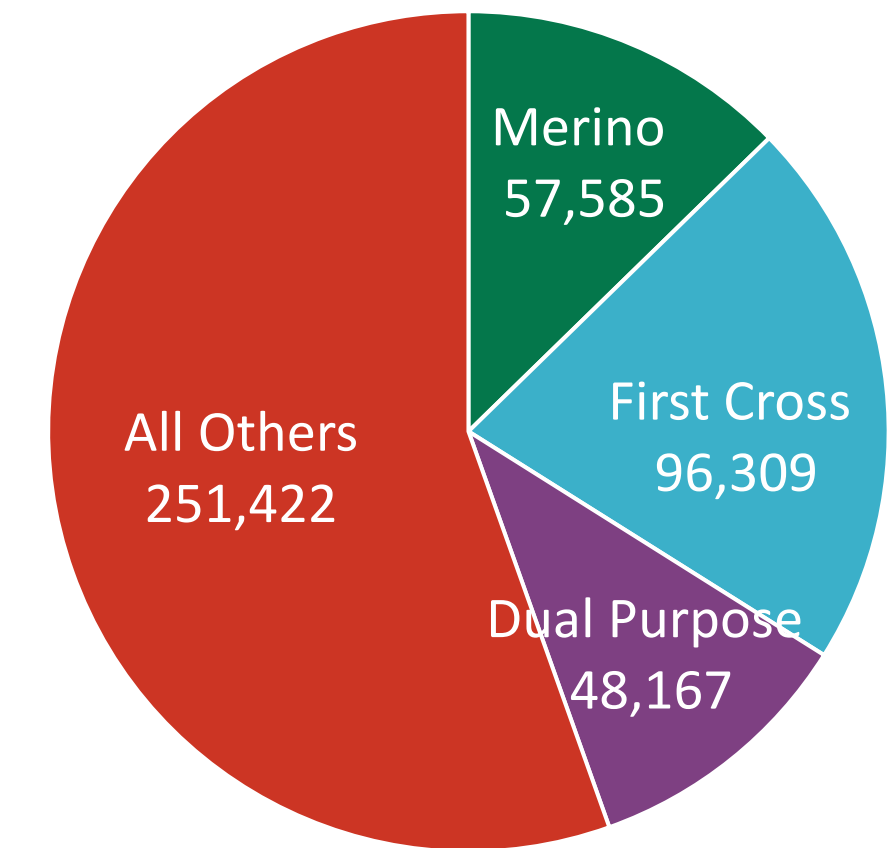
Breeding ewes on hand



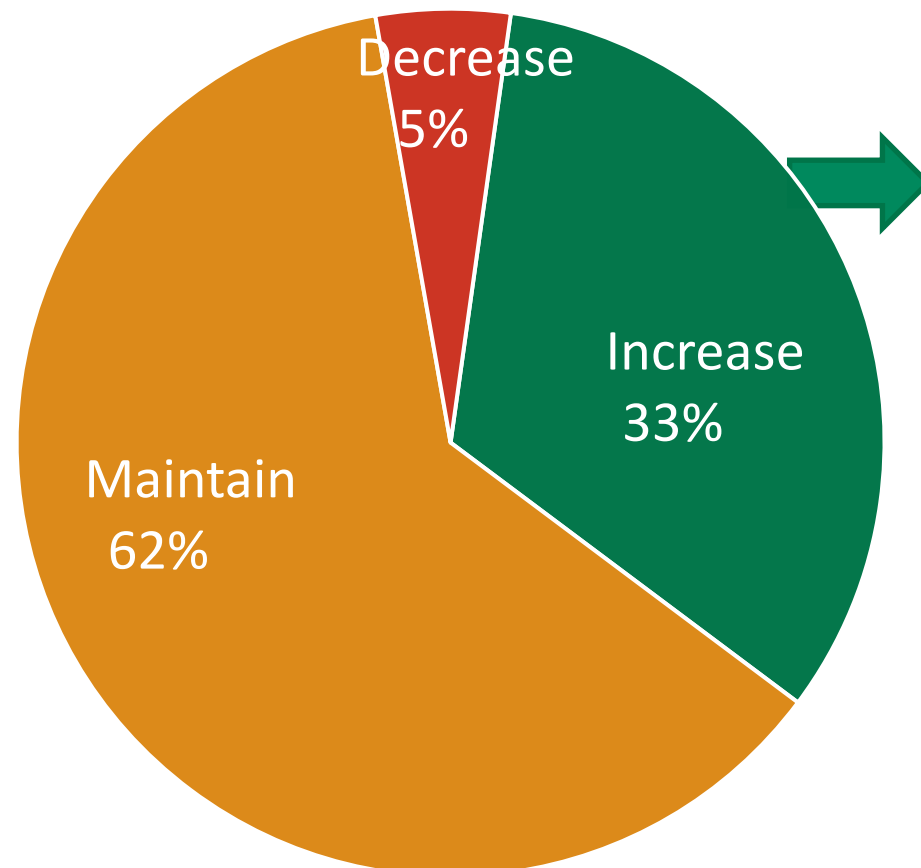
Lambs on hand



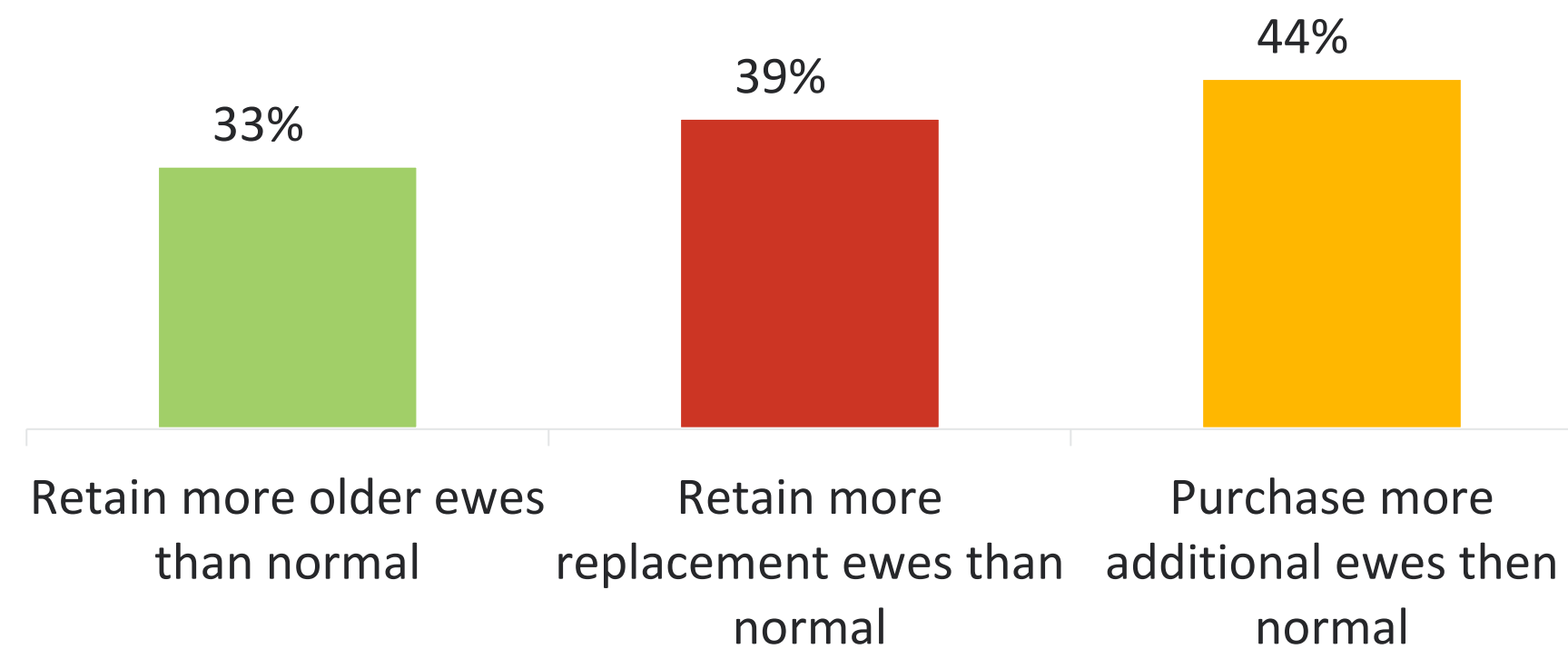
Lamb sales in next 4 months



Ewe Flock intentions



How to achieve increase

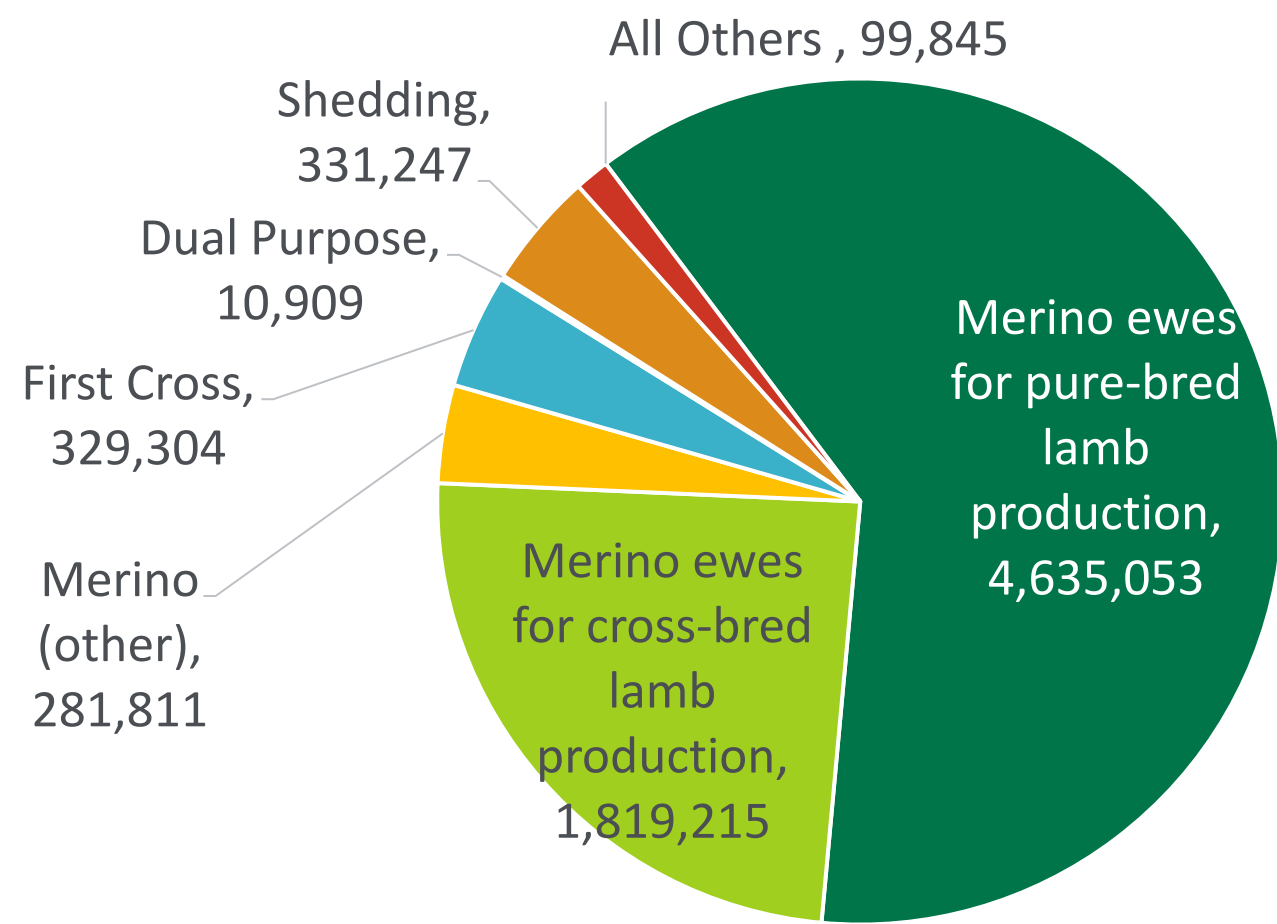


Totals

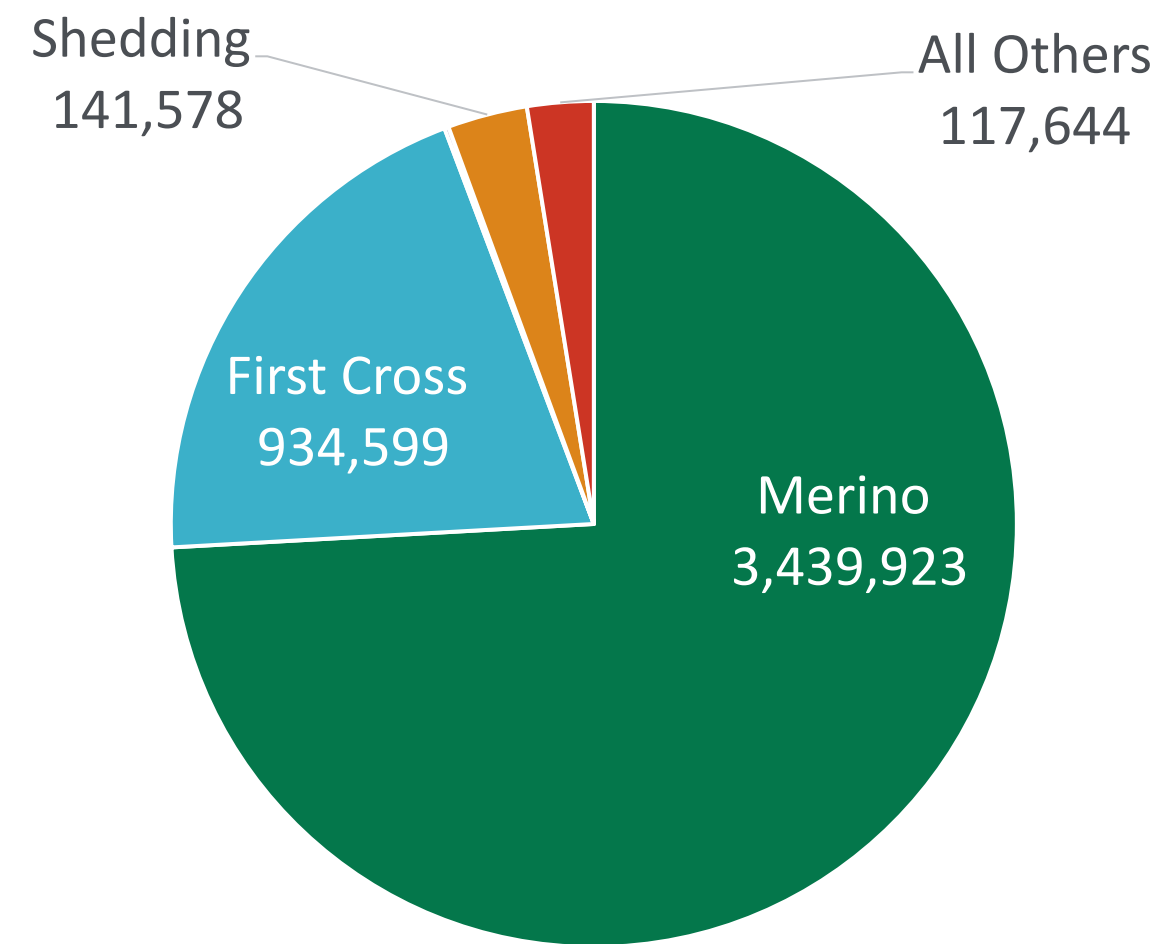
Breeding ewes on hand	1,303,919
Lambs on hand	1,097,126
Expected lamb sales in the next 4 months	453,483
Lambs marked in the past 4 months (1 Jul – 31 Oct)	705,666
Number of ewes joined to produce marked lambs	624,651

Western Australia

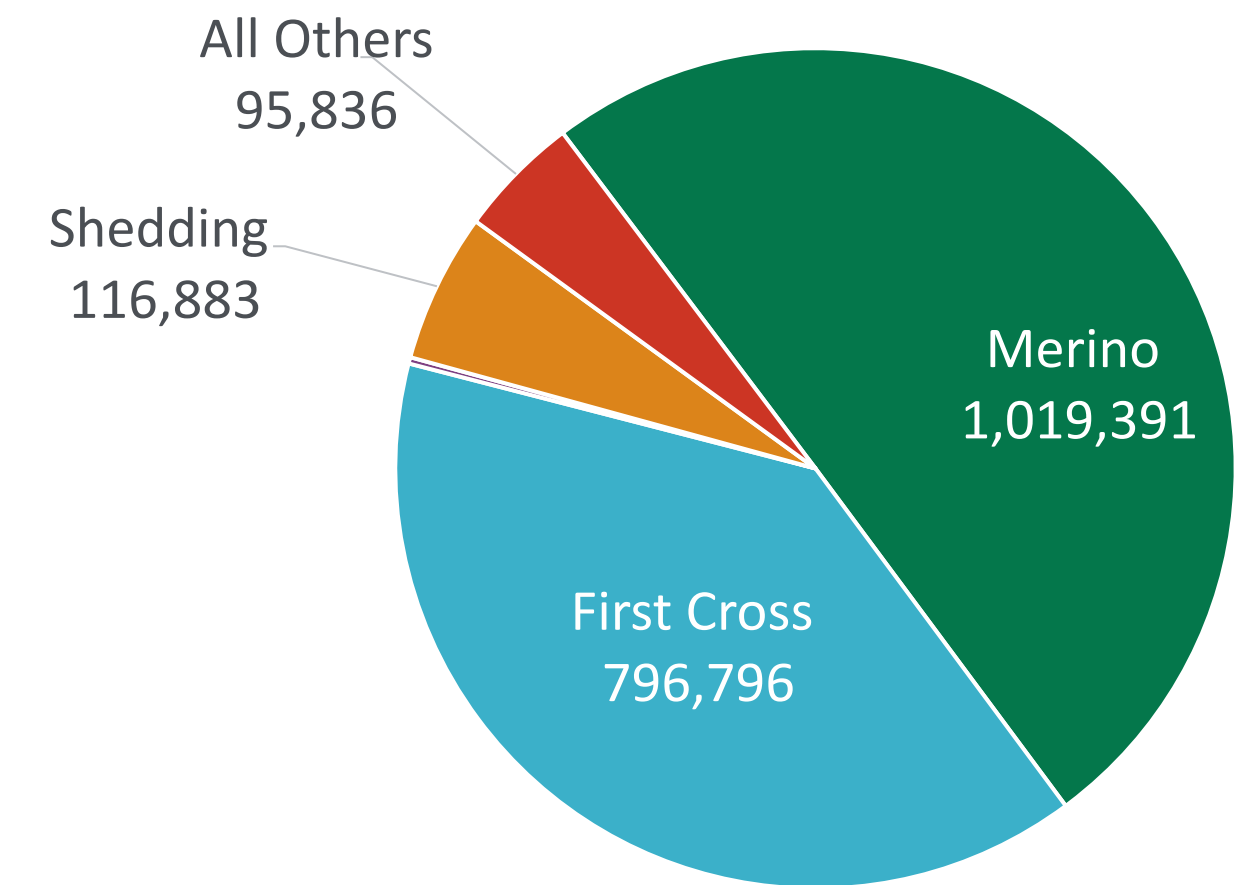
Breeding ewes on hand



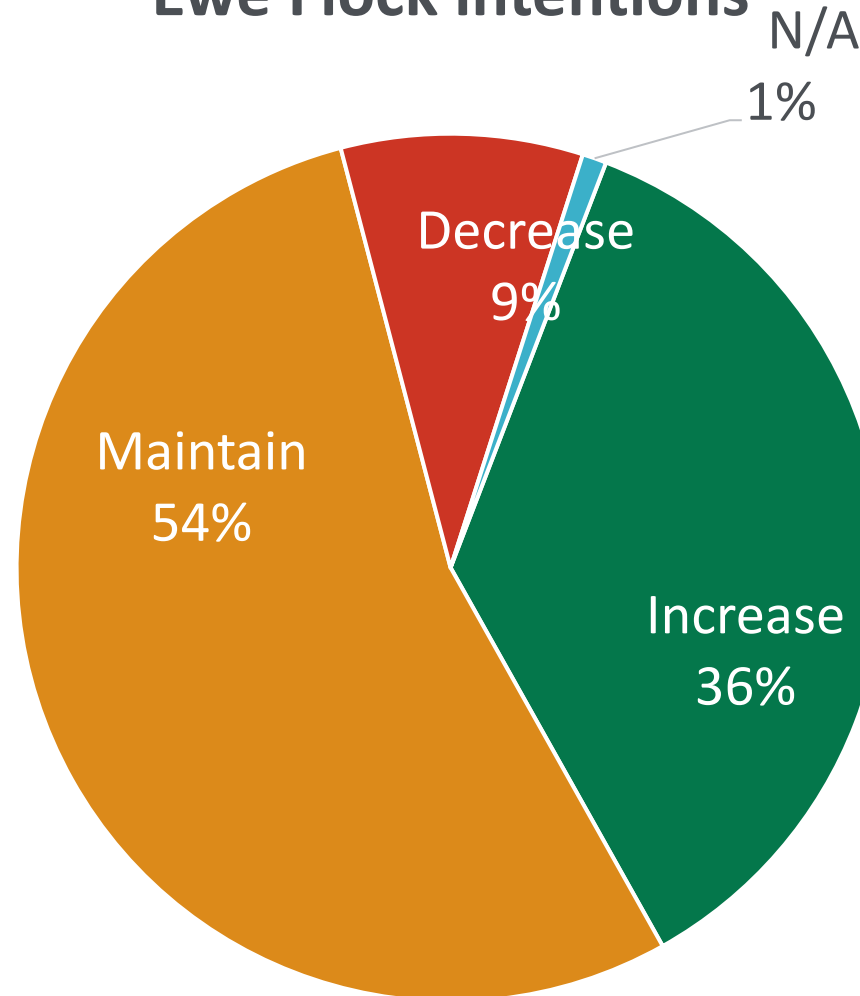
Lambs on hand



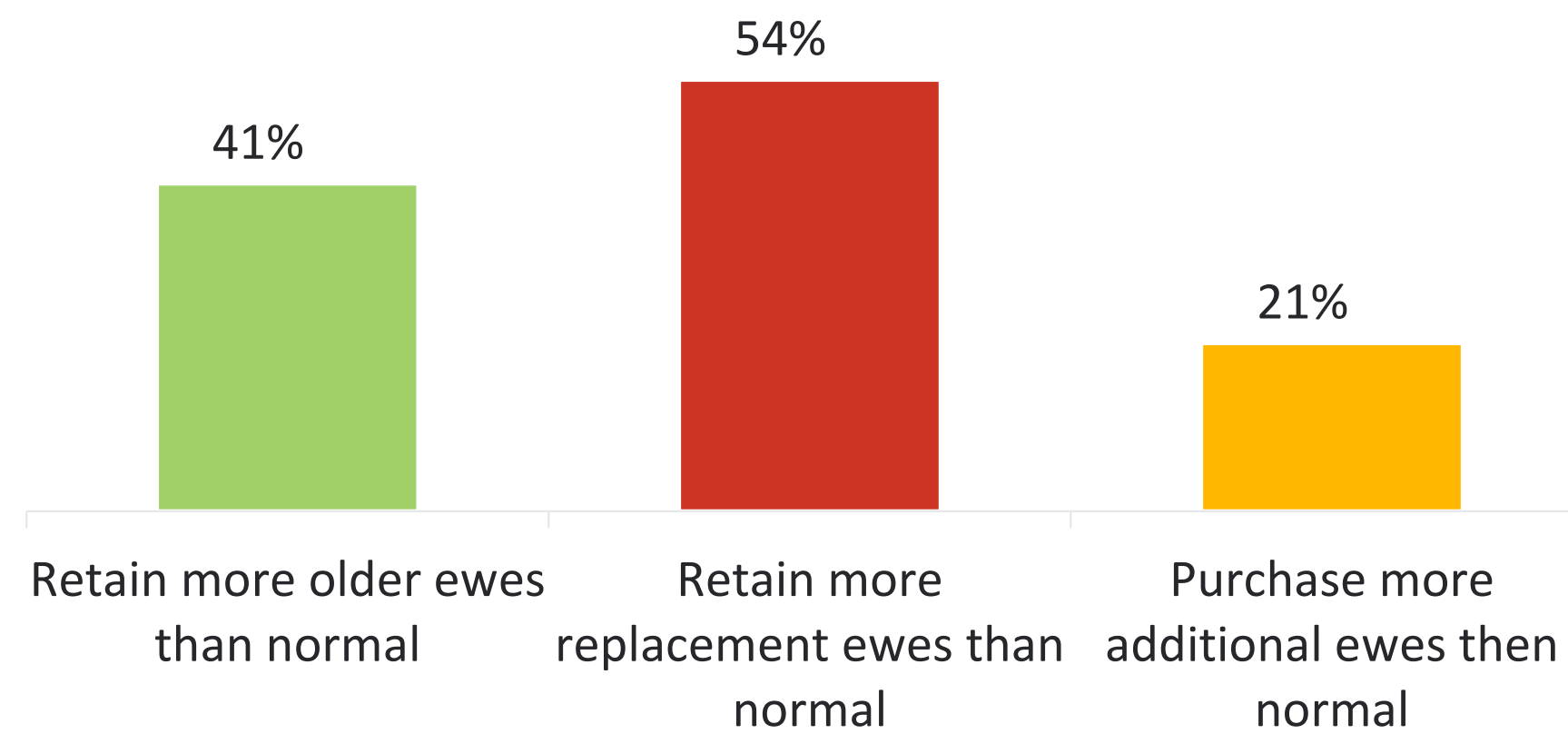
Lamb sales in next 4 months



Ewe Flock intentions



How to achieve increase



Totals

Breeding ewes on hand	7,507,384
Lambs on hand	4,641,161
Expected lamb sales in the next 4 months	2,033,855
Lambs marked in the past 4 months (1 Jul – 31 Oct)	3,981,323
Number of ewes joined to produce marked lambs	4,191,540

Disclaimer

Information contained in this publication is obtained from a variety of third party sources. To the best of MLA's knowledge the information accurately depicts existing and likely future market demand. However, MLA has not verified all third party information, and forecasts and projections are imprecise and subject to a high degree of uncertainty.

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