

# PRIMARY BEEF SALES UNDER PRESSURE

During the 12 weeks ending 26 January 2020 the value of primary beef sales through UK retailers totalled £521.9 million. This was back 4.9 per cent from the corresponding 12 week period in 2018/19. The volume of primary beef sold through UK retailers declined by 2.1 per cent during the same period.

### Primary beef sales

While the majority of primary beef categories recorded a decline in terms of the total value and volume of sales the biggest declines were for higher value cuts.

Primary beef sales declined by 4.9 per cent in value terms and 2.1 per cent in volume terms during the 12 w/e 26 January 2020

Sales of roasting joints had an average retail price of £8.35/kg during the 12 weeks ending 26 January 2020, back from £8.58/kg in the same period last year. This decline in average price combined with a 3.4 per cent decline in volume sales resulted in the value of roasting joint sales to be back by 6 per cent from year earlier levels.

Steak sales in UK retailers were valued at £143.3 million during the 12 weeks ending 26 January 2020 which was back by 2.8 per cent from the same

period on 2018/19. This decline was driven by a 5 per cent decline in the average retail price however was offset by some degree by a 2.3 per cent increase in the volume of steak sales during the same period.

Mince continues to be the most popular beef product in terms of volume sales with 34,400 tonnes sold through UK retailers during the 12 weeks ending 26 January 2020. This accounted for 50 per cent of total primary beef sales during this period in terms of volume. In terms of value it only accounts for 35 per cent of the UK retail market for beef.

The volume of mince sales was back by 1.9 per cent during the 2019/2020 period while the value of sales was back by 3.3 per cent. This decline in the overall value of sales was driven by a combination of the lower volume sales and a 1.5 per cent drop in the average retail price.

Mince is the biggest selling beef product in volume terms, accounting for 50 per cent of primary beef sales in the 12 w/e 26 January 2020

Sales of stewing beef were valued at £73.1 million during the 12 weeks ending 26 January 2020, a 9.9 per cent decline from the corresponding period

in 2018/19. This decline in the value of sales was driven by a 5.3 per cent decline in volume sales and a 4.9 per cent decline in the average retail price to £7.90/kg.

### Processed beef sales

While retail primary beef sales generally struggled during the 2019/2020 period there was more positive news for processed beef sales when compared to the same period in 2018/19.

Processed beef sales were valued at £134.2 million during the 12 weeks ending 26 January 2020, a 4.6 per cent increase from the previous year. This increase was driven by a 3.2 per cent increase in volume sales and a 1.4 per cent increase in the average retail price to £8.45/kg.

Sales of burgers and grills recorded particularly strong growth with the value of sales increasing by 6.8 per cent to £56.9 million. Volume sales of burgers and grills increased by 6.7 per cent which equates to an additional 590 tonnes of sales when compared to the same period in 2018/19.

There was also firm growth recorded in the value of sliced/cooked beef sales, up by 2.7 per cent to total £73.5 million in the 12 weeks ending 26 January 2020. However this increase was driven

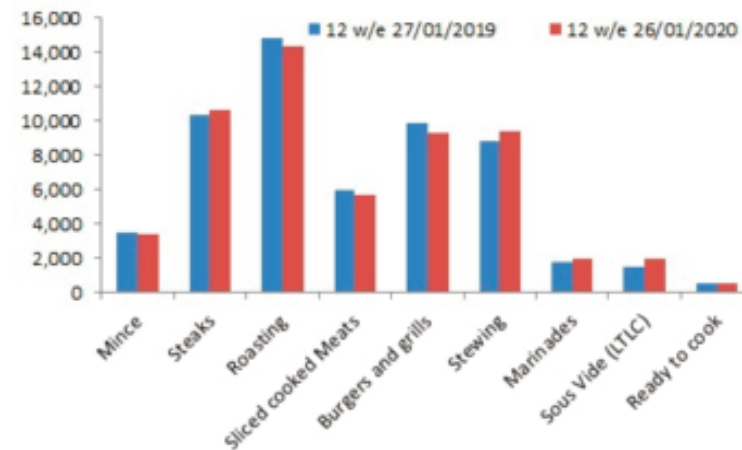
by a 6.8 per cent increase in the average retail price with volume sales back by 3.8 per cent year on year.

Some encouraging growth has been recorded in processed and added value beef product sales during the 2019/20 period

### Added value beef sales

While the volumes remain relatively small there has also been some very encouraging growth recorded in some added value beef products, During the 12 weeks ending 26 January 2020 beef marinade sales were valued at £21.8

Figure 1: Volume beef sales by category during the 12 w/e 27 January 2019 and the 12 w/e 26 January 2020



million, up 12.8 per cent from year earlier levels. This was driven by a 10.6 per cent growth in volume sales and a 1.9 per cent rise in the average retail price.

Similarly there has been strong growth in the sale of Sous Vide beef (slow cooking beef products). Retail sales were valued at £16.4 million in the 12 weeks ending 26 January 2020, up 16.1 per cent from the previous year. This increase was driven by a 27.6 per cent increase in volume sales with the average retail price back by 9.1 per cent over the same period.

# NORTHERN IRELAND BEEF SNAPSHOT FEBRUARY 2020

**Table 1** provides a useful overview of statistics relating to beef production in Northern Ireland during February 2020 and the corresponding figures for February 2019.

## Deadweight prices

The average prime cattle price in the region was 331.6p/kg during February 2020, back 5.6p/kg or 1.7 per cent from February 2019 levels. The R3 steer price has followed a similar trend and was back by 6.3p/kg to 340.1p/kg during February 2020.

The R3 steer price in Great Britain was just ahead on Northern Ireland during February 2020 with an average price of 341.2p/kg. This was back 13.3p/kg from year earlier levels which represents a 3.8 per cent decline. The differential in R3 steer prices between Northern Ireland and Great Britain has narrowed from 8.1p/kg in February 2019 to 1.1p/kg in February 2020.

The R3 steer price in the Republic of Ireland during February 2020 was the equivalent of 310.6p/kg, back 10.8p/kg or 3.4 per cent from February 2019. R3 steer prices in the region were 29.5p/kg behind Northern Ireland

levels which puts the differential at £103 on a 350kg carcasse.

## Throughput

Throughput of prime cattle in local plants held steady during February 2020 with 28,349 prime cattle processed. This was back marginally from February 2019 levels. Cow throughput in Northern Ireland meanwhile increased by 14.2 per cent or 973 head year on year to total 7,828 head in February 2020.

## Carcase weights

Carcase weights have increased for all categories of cattle in Northern Ireland during February 2020. The prime cattle carcasse weight was up 2.1kg to 345.7kg while the average cow carcasse weight increased by 5.3kg to 314.9kg.

## Imports/Exports

There was a strong increase in cattle imports for direct slaughter in local plants with a total of 1,609 head imported from Great Britain and the Republic of Ireland. Meanwhile exports of cattle out of Northern Ireland for direct slaughter halved to total just 269 head during February 2020.

## Cattle availability

At the end of February 2020 there were 401,018 cattle for beef production aged between 12-30 months on farms in Northern Ireland. This was back 17,804 head or 4.3 per cent from February 2019 levels. The number of beef sired cattle ages 12-30 months has recorded a strong decline, back by 4.8 per cent or 18,389 head year on year. Meanwhile the number of dairy sired male cattle in the 12-30 month age range on Northern Ireland farms increased by 1.7 per cent total 35,437 head.

## Calf birth registrations

During February 2020 there were 22,801 beef sired calves registered in Northern Ireland, up by 2,340 head or 11.4 per cent from February 2019 levels. Beef calf registrations to suckler cows increased by 4.6 per cent during February 2020 while beef calf registrations to dairy cows in the region increased by 18 per cent when compared to February 2019 levels. Dairy male calf registrations declined by 2.2 per cent to total 6,250 head during February 2020.

**Table 1: NI beef industry snapshot February 2020 vs February 2019**

	February 2019	February 2020	% Change
<b>Finished Cattle Prices (p/kg)</b>			
Average Prime Cattle Price	337.2	331.6	-1.7%
Average Cow Price	221.0	239.3	+8.3%
Average R3 Steer Price (NI)	346.4	340.1	-1.8%
Average R3 Steer Price (ROI)	321.4	310.6	-3.4%
Average R3 Steer Price (GB)	354.5	341.2	-3.8%
<b>Throughput</b>			
Total Clean Throughput (Head)	28,535	28,349	-0.7%
Total Cow Throughput (Head)	6,855	7,828	+14.2%
Average Clean Carcasse Weight (kg)	343.6	345.7	+0.6%
Average Cow Carcasse Weight (kg)	309.6	314.9	+1.7%
<b>Trade (Head)</b>			
Live Imports for Direct Slaughter	918	1,609	+75.3%
Live Exports for Direct Slaughter	547	269	-50.8%
<b>Availability (Head)</b>			
No. Cattle on the Ground*	418,822	401,018	-4.3%
Beef Sired	383,970	365,581	-4.8%
Dairy Sired (Male Only)	34,852	35,437	+1.7%
<b>Calf Births Registrations (Head)</b>			
Calf Births	26,853	29,051	+8.2%
Beef Sired	20,461	22,801	+11.4%
Dairy Sired (Male Only)	6,392	6,250	-2.2%
<b>Euro / Stg Exchange Rate (€ / £)</b>			
	87.3	84.1	-3.6%
* Aged between 12-30 mths (Beef + Dairy Male Only)			
<b>All NI Figures Unless Otherwise Stated</b>			

## FQAS Helpline

If you have had a recent inspection and need help and advice to rectify any non-conformances, contact the FQAS helpline:  
Tel: 028 9263 3024

## Answerphone Service

Factory Quotes & Mart Results  
Updated 5pm Daily  
Tel: 028 9263 3011

## Text Service

Free weekly price quotes sent to your mobile phone  
Email - bulletin@lmcni.com  
Tel: 028 9263 3000

# WEEKLY BEEF & LAMB MARKETS

## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 02/03/20	Next Week 09/03/20
<b>Prime</b>		
U-3	324 - 334p	324 - 336p
R-3	318 - 328p	318 - 330p
O+3	312 - 322p	312 - 324p
P+3	264 - 276p	264 - 278p
	Including bonus where applicable	
<b>Cows</b>		
O+3 & better	240 - 250p	240 - 250p
Steakers	140 - 170p	140 - 170p
Blues	120 - 130p	120 - 130p

Cow quotes vary depending on weight and grade. Pricing policies vary from plant to plant. Producers are advised to check pricing policies before presenting cattle for slaughter.

### Deadweight Cattle Trade

Base quotes from the major NI plants for in spec U-3 grade prime cattle remained steady at 324-334p/kg this week with the majority of plants quoting 330-334p/kg for steers and heifers. Quotes for good quality O+3 grade cows continued to range from 240-250p/kg across the plants. Similar quotes are expected for all types of cattle early next week.

Prime cattle throughput in NI last week slightly decreased to 7,081 head. This takes the prime cattle year to date throughput to 61,683 head, marginally back from the 61,956 prime cattle slaughtered in same period in 2019. The average carcass weight of prime cattle to date in 2020 is 346.2kg, up 4.3kg when compared to the same period last year. Meanwhile a total of 1,883 cows were killed in NI last week similar levels to the previous week. This takes the year to date throughput of cows to 17,589, up 1,653 head from the 15,936 cows slaughtered in the corresponding period in 2019. The average cow carcass weight to date this year is 313.3kg, up 5kg when compared to the same period in 2019.

Imports of prime cattle from ROI for direct slaughter in NI plants last week consisted of 247 prime cattle and 59 cows, while 37 cows were imported from GB for direct slaughter. Exports of cattle out of NI for direct slaughter to ROI last week consisted of seven prime cattle and 52 cows with no cattle exported from NI to GB.

The average NI steer price last week was marginally back to 331.4p/kg from the previous week while the R3 steer price increased slightly to 339.6p/kg. In the corresponding week in 2019 the reported R3 steer price was 341.9p/kg. The average heifer price in NI last week was back 1.5p/kg to 333.8p/kg while the R3 heifer price decreased half a penny to 341.3p/kg. In the same week last year the R3 heifer price was 343.1p/kg. The average NI young bull price last week increased by 4.7p/kg to 316.2p/kg while the R3 young bull price increased 0.8p/kg to 325.4p/kg. The NI cow trade came under pressure last week with the average cow price decreasing by 2.6p/kg to 237.9p/kg, while the O3 cow price was back by 5.3p/kg to 255.1p/kg.

In GB last week the average steer price was back by 0.7p/kg to 335p/kg while the R3 steer price was back 1.3p/kg to 341.3p/kg. The average heifer price in GB last week increased marginally to 337p/kg while the R3 heifer price increased by 2.4p/kg to 343.9p/kg. The cow trade in GB improved last week with the O3 cow price up by 1.7p/kg to 258.6p/kg, 3.5p/kg above the O3 cow price in NI.

In ROI last week there was an increase in reported prices in euro terms and this combined with a weaker sterling has meant prices improved strongly in sterling terms. The R3 steer price last week was up by the equivalent of 5.3p/kg to 313.3p/kg, narrowing the differential with NI to 26.3p/kg. Meanwhile the R3 heifer price increased by 4.8p/kg to 318.1p/kg which puts it 23.2p/kg lower than the same price in NI. The O3 cow price in ROI was up 6.2p/kg to 253p/kg, 2.1p/kg behind the equivalent price in NI.

### LAST WEEK'S DEADWEIGHT CATTLE PRICES (UK / ROI)

	W/E 29/02/20	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	340.1	322.9	351.0	344.8	345.7	345.9	347.2
	R3	339.6	313.3	349.2	340.6	339.8	338.2	341.3
	R4	336.7	314.4	349.0	345.8	339.8	337.0	344.9
	AVG	331.4	-	346.7	334.2	330.3	327.7	335.0
Heifers	U3	345.6	329.4	357.9	352.4	352.7	347.7	353.4
	R3	341.3	318.1	349.6	347.4	342.0	338.2	343.9
	R4	337.0	318.0	350.2	344.3	340.7	337.9	344.8
	AVG	333.8	-	349.1	337.0	331.1	327.5	337.0
Young Bulls	U3	329.7	303.8	336.3	333.4	334.8	322.3	334.6
	R3	325.4	294.6	335.5	321.0	335.0	330.9	331.1
	O3	311.9	282.2	305.3	296.1	302.7	311.6	303.0
	AVG	316.2	-	326.5	305.2	316.6	313.9	316.0
Prime Cattle Price Reported	6,035	-	7,234	6,950	7,982	5,008	27,174	
Cows	O3	255.1	253.0	260.6	262.2	257.7	254.5	258.6
	O4	258.9	253.0	259.9	260.6	259.3	249.8	257.9
	P2	219.1	226.5	205.1	217.8	215.7	212.9	214.7
	P3	237.9	243.2	233.8	235.5	232.3	233.1	233.0
AVG	237.9	-	253.8	247.8	229.9	227.5	236.0	

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=84.39p Stg  
(ii) Shading indicates a lower price than the previous week.  
(iii) AVG is the average of all grades in the category, not just those listed

### REPORTED NI CATTLE PRICES - P/KG

W/E 29/02/20	Steers	Heifers	Young Bulls
U3	340.4	346.0	328.9
R3	337.1	340.8	324.9
O+3	329.6	329.8	321.5

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 29/02/20	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	149.7	169.3	177.9	188.7
P2	169.5	197.3	219.7	231.1
P3	181.9	214.8	236.6	239.8
O3	-	225.9	247.6	255.9
O4	-	222.0	248.8	259.4
R3	-	-	280.6	276.4

### LATEST LIVELWEIGHT CATTLE MART PRICES NI

W/E 29/02/20	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>						
Steers	204	214	208	175	203	190
Friesians	161	174	166	147	159	155
Heifers	198	214	208	172	197	188
Beef Cows	162	203	166	120	160	138
Dairy Cows	110	141	118	70	109	92
<b>Store Cattle (p/kg)</b>						
Bullocks up to 400kg	230	270	248	200	229	215
Bullocks 400kg - 500kg	210	238	225	185	209	200
Bullocks over 500kg	200	211	205	160	199	185
Heifers up to 450kg	218	259	235	170	215	190
Heifers over 450kg	200	216	208	165	199	182
<b>Dropped Calves (£/head)</b>						
Continental Bulls	300	420	350	200	295	250
Continental Heifers	265	400	315	150	250	200
Friesian Bulls	110	160	128	30	90	65
Holstein Bulls	55	100	78	5	45	25

# SHEEP TRADE

## NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 02/03/20	Next Week 09/03/20
Hoggets up to 22kgs	480-490p	490-495p

## REPORTED SHEEP PRICES

(P/KG)	W/E 15/02/20	W/E 22/02/20	W/E 29/02/20
NI L/W Hoggets	428.0	438.8	444.7
NI D/W Hoggets	447.0	467.0	478.1
GB D/W Hoggets	522.8	532.0	530.3
ROI D/W	454.0	463.3	477.0

## Deadweight Sheep Trade

Quotes from the major NI processors for R3 grade hoggets improved this week to 490p/kg up to 22kg. Similar quotes are expected for early next week. Hogget throughput in local plants last week totalled 5,950 head back 717 hoggets from the previous week. Year to date hogget throughput totals 63,995 head, up 36 per cent from the same period last year. A further 5,423 hoggets were exported to ROI for direct slaughter last week, taking exports for the year to date to 59,481, up marginally from the same period in 2019. The average NI deadweight hogget price last week increased by 11.1p/kg to 478.1p/kg. In the same week last year the hogget price was 424.5p/kg. The average ROI hogget price last week increased by the equivalent of 13.7p/kg to 477p/kg.

## This week's marts

Many of the marts have recorded steady numbers passing through the sale rings with a strong trade being reported. In Omagh last Saturday 657 hoggets sold from 434-484p/kg compared to 842 hoggets the previous week selling from 447-473p/kg. On Monday in Massereene 1,012 hoggets sold from 440-500p/kg compared to 646 hoggets last week selling from 430-478p/kg. In Saintfield on Tuesday 566 hoggets sold from 424-485p/kg compared to 530 hoggets last week selling from 429-480p/kg. This week in Enniskillen 722 hoggets sold from 414-489p/kg compared to 514 hoggets last week selling from 427-483p/kg. The trade for cull ewes continued to strengthen this week with top prices ranging from £125-178 across the marts.

## LATEST SHEEP MARTS (P/KG LW)

From: 28/02/20		Hoggets			
To: 05/03/20		No	From	To	Avg
Friday	Newtownstewart	170	404	464	-
Saturday	Swatragh	950	398	472	-
	Omagh	657	434	484	-
Monday	Massereene	1012	440	500	-
	Kilrea	380	435	490	-
Tuesday	Saintfield	566	424	485	-
	Rathfriland	401	415	478	440
Wednesday	Ballymena	1425	410	466	430
	Enniskillen	722	414	489	-
	Armoy	374	445	515	-
	Markethill	950	430	474	-

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## LMC URGES FARMERS TO MAKE SAFETY A KEY PRIORITY THIS SPRING

March is here and with it will come the pressure to get slurry tanks emptied and general field work started. All of this work comes with an inherently high

Image 1: LMC is an affiliate member of the Farm Safety Partnership



safety risk. Adding to the pressure facing farmers this year is the fact that the weather was so poor during February.

This has had the knock-on effect of reducing the time period which farmers would normally have to undertake all of these aforementioned activities. And as we all know: rushing leads to short cuts being taken which, in turn, increase the probability of accidents happening.

The Livestock and Meat Commission for Northern Ireland (LMC), an affiliate member of the Farm Safety Partnership, is reminding farmers and farm workers of the importance of exercising extreme caution when carrying out on-farm tasks over the coming weeks.

Farmers and farm workers can find themselves under pressure with a

workload that rarely ceases. In the case of beef and sheep, farms are often relatively small scale in Northern Ireland. This means that many and varied tasks are undertaken by the farmer on his/ her own and in many cases these activities are fitted in around other off-farm employment commitments.

No matter how time poor the farmer may be, the risks still need to be fully weighed up before working with slurry, animals, equipment or potential falls when working at heights.

Ian Stevenson

Despite these pressures, LMC Chief Executive, Ian Stevenson, says that

shortcuts should not be taken when it comes to farm safety.

“During the spring and summer months, and particularly in good weather, many children enjoy helping out on the farm. But with lots of heavy and dangerous equipment on the move, it’s always a significant risk at this time of year.

“I would urge all farmers and farm workers to consider the risks before beginning any task and to keep safety at the forefront of their minds.”

The Commission’s Industry Development Manager Colin Smith agrees: “LMC fully recognises the critical importance of improving the safety standards achieved by all farm businesses. Farming continues to have the highest rate of fatal injury of all the

The Northern Ireland Beef and Lamb Farm Quality Assurance Scheme (NIBL FQAS) standard and rules have been updated to bring renewed focus on key aspects of farm safety. These include maintenance of slurry stores and the condition of handling facilities.

Colin Smith

main industry sectors. Estimates also suggest that around 100 non-fatal accidents occur on NI farms which require some form of medical treatment each month.

“Everyone working in the agriculture industry has a responsibility to ensure farms are as safe as possible and for all staff and visitors to be aware of the hazards.”

## VEGANUARY – A CASE OF MORE HYPE THAN SUBSTANCE

Despite all the hype surrounding the campaign to promote a meat-free January, the Livestock and Meat Commission for Northern Ireland (LMC) is confirming the number of consumers buying red meat held up extremely well during this period.

The organisation’s economist Seamus McMenamin commented: “The latest Kantar figures for the 12 weeks ending 26 January 2020 confirm that 119,000 more shoppers purchased fresh primary meat and poultry in the UK when compared with the same period in 2018/19.

“Overall, the volumes of all meat purchased in retail outlets during the period flat lined. Factored into this figure is a relatively sharp decline in the demand for bacon and overall, meat sales remain very price dependent.”

consumer support for these categories, particularly given the immense media coverage given to the Veganuary campaign.”

We know that 92 per cent of Northern Ireland consumers eat red meat. But they also want to know that it is produced in a sustainable manner and that it can contribute to a healthy diet.

Seamus Mc Menamin

According to the LMC economist, UK consumers are still eating meat, just choosing to eat meat less often. Red meat consumption levels were stagnant for most of last year. This was a contributing factor in driving down producer prices for much of this period.

“LMC works closely with suppliers and retailers to communicate a direct message to consumers, particularly during Beef Week and Love Lamb Week but also as part of its ongoing advertising campaign across all forms of media. The latest burst of the ‘Flavour Your Life’ campaign concludes this March.”

“We are also fully aware of the raised public profile that has been given to veganism and non-meat alternatives in recent times. Our job is to communicate a balanced message, where red meat is concerned and we have had a strong track record in doing just that.”

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## IN MY OPINION: RICHARD HALLERON FQAS THIRTY YEARS IN THE MAKING

It’s hard to believe that 2020 marks the 30th anniversary of the inception of Northern Ireland’s Farm Quality Assurance Scheme (FQAS). From the get-go it has served the interests of beef and sheep farmers well, helping to secure them access to a selection of the world’s strongest markets for our red meat.

What’s more, the Livestock and Meat Commission - the organisation that played such a pivotal role in conceiving the scheme at the outset - has always acted to ensure that its relevance and significance have grown consistently over the years.

Today, it’s hard to conceive of what farmgate returns would be like, had farmers not signed up for FQAS in their thousands. The figures speak for themselves. Almost 100% of the prime cattle processed in the major beef plants in Northern Ireland are now quality assured while the rolling membership for the scheme exceeds 12,000 farm businesses.

One of the central principles built into FQAS at the outset was its flexibility and in-built robustness. As a result, it has been refined, over the years, to meet the changing priorities of our beef and lamb sectors. A case in point has been the growing focus on the safety aspects associated with slurry storage and management.

More recent amendments include the introduction of antibiotic training measures for farmers and the decision to withdraw certification to farmers who keep persistently infected BVD animals in their herd. Fast coming down the track is the discussion that will centre on the pros and cons of introducing lifetime quality assurance certification for animals reared on local farms.



At the end of the day consumers want to be re-assured of the standards to which farmers adhere when it comes to producing beef and lamb. The good news is that Northern Ireland’s farm quality assurance scheme delivers on this principle in spades.

Consumers want animals to be maintained to the highest welfare standards throughout their lives. So it’s important that farm quality assurance measures reflect this demand. Looking

to the future, there will be a greater need for the red meat sectors to quantify their Carbon Footprint while, at the same time, confirming their commitment to sustainable farming practises. It seems very evident that the Farm Quality Assurance Scheme could provide a platform to help deliver the sustainability priorities of industry in the years to come.

But let’s go back to the very beginning again. Northern Ireland led the world when it came to putting in place ‘independently assessed’ farm quality assurance measures that had real significance and which struck a genuine chord with retailers and consumers in countries around the world.

This is something that everyone involved with the local red meat industry should be immensely proud of. And, of course, farmers across Northern Ireland should feel particularly upbeat.

It was their commitment that made the scheme work so well and their fee contributions that delivered the momentum that has seen quality assurance become such a driving force at the very heart of our beef and lamb sectors.



He continued: “The specific figures for January confirm a fall of around 155,000 trips across the fresh primary meat and poultry options in the UK. This is an extremely modest reduction in



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