

REDUCTION IN PRIME CATTLE CARCASS WEIGHTS DURING MAY 2020

The average prime cattle carcass weight in NI during May was 340.4kg, back from an average of 343.9kg during May 2019. The decline in the average carcass weight during May 2020 goes against recent trends which have shown a steady increase in the average carcass weight of prime cattle being processed in local plants

Steers

The average steer carcass weight in NI during May 2020 was 357.2kg, back 3.8kg from May 2019 when the average carcass weight was 361kg as outlined in **Figure 1**.

One factor which may have contributed to this drop in the average carcass weight was a reduction in the average age at slaughter to 767 days (25.2

months) during May 2020. This was back by 12 days from May 2019. There was no change to the origin of steers killed locally year on year with 57 per cent of steers processed during May 2020 originating from the suckler herd.

Heifers

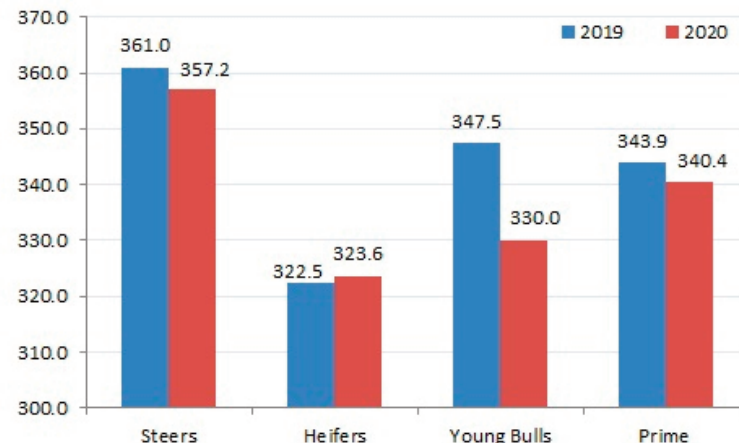
The average heifer carcass weight was 323.6kg during May 2020 in NI, up marginally from May 2019 when it was 322.5kg. This slight increase in the heifer carcass weight occurred despite heifers being killed four days earlier on average at 781 days (25.7 months) and also a decrease in the proportion of the heifer kill sourced from the suckler herd to 61 per cent. During May 2019 64 per cent of price reported heifers were of suckler origin.

Young Bulls

The most notable change however has been in the average carcass weight of young bulls. During May 2020 the average carcass weight of young bulls killed in NI was 330kg, back 17.5kg from the 347.5kg recorded in May 2019.

A reduction in the average age at slaughter by 10 days to 471 days (15.5 months) may have contributed to this trend but the biggest driver in this decline was the reduction in the proportion of suckler origin young bulls in the slaughter mix. During May 2019 suckler origin young bulls accounted for 54 per cent of all price reported young bulls in NI and this was back to 46 per cent in May 2020.

Figure 1: Average prime cattle carcass weights by category during May 2019 and May 2020. Source: DAERA



NI BEEF INDUSTRY SNAPSHOT MAY 2020

Finished Cattle Prices (p/kg)	May 2019	May 2020	% Change
Average Prime Cattle Price	335.1	333.1	-0.6%
Average Cow Price	244.3	243.9	-0.2%
Average R3 Steer Price (NI)	343.3	341.5	-0.5%
Average R3 Steer Price (ROI)	338.3	318.5	-5.9%
Average R3 Steer Price (GB)	356.4	340.6	-4.4%
NI Cattle Throughput			
Total Clean Processed (head)	27,297	21,283	-22.0%
Total Cow Processed (head)	6,012	5,515	-8.3%
Average Clean Carcase Weight (kg)	343.9	340.4	-1.0%
Average Cow Carcase Weight (kg)	308.9	314.6	+1.8%
Cattle import/Export Trade (Head)			
Live Imports for Direct Slaughter	874	1,655	+89.4%
Live Exports for Direct Slaughter	399	226	-43.4%
Cattle Availability (Head)			
No. Cattle on the Ground*	468,708	459,729	-1.9%
Beef Sired	437,515	426,972	-2.4%
Dairy Sired (Male Only)	31,193	32,757	+5.0%
Calf Births Registrations (Head)			
Calf Births	60,780	55,706	-8.3%
Beef Sired	56,386	51,695	-8.3%
Dairy Sired (Male Only)	4,394	4,011	-8.7%

PRIME CATTLE THROUGHPUT IN ROI RETURNS TO MORE TYPICAL LEVELS

Last week prime cattle throughput in beef processing plants in ROI increased to 23,611 head which is just ahead of the corresponding week last year when 23,230 prime cattle were processed.

This increase in the prime cattle kill in ROI marked the return of prime cattle throughput in the region to more typical levels as outlined in **Figure 2** below. Since Covid-19 restrictions came into place in ROI in late March this year prime cattle throughput was significantly behind what would be expected at this time of year.

Prime cattle throughput in beef processing plants in ROI from late March this year through to late May was lower than previous years. During this ten week period 215,066 prime cattle passed through ROI plants, a reduction of just under 37,000 head or 15 per cent from the corresponding period in 2019.

Cow throughput

Cow throughput in ROI beef plants followed a similar trend to the prime cattle kill and recorded a significant decline during the ten week period ending 30 May 2020. However there has been a recovery in the number of cows passing through ROI beef plants with 8,201 cows processed in the region last week.

During the ten week period ending 30 May 2020 54,509 cows were

processed in ROI beef plants, back by 13,679 head or 20 per cent from the same period in 2019.

Increased cattle availability?

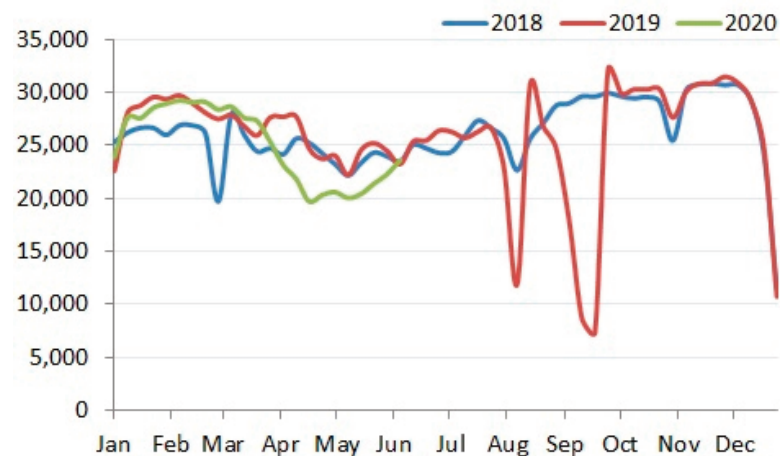
With the notable reduction in both prime cattle and cow throughput in ROI beef plants during the last few months there is a concern that this has contributed to a backlog of cattle for processing on farms in ROI. Reports have indicated that this could potentially contribute to an increased supply of Irish beef coming onto the market later in 2020.

With approximately fifty per cent of Irish beef production destined for the UK retail and food service markets each year this potential increase in

cattle availability for slaughter in the region later this year could have an impact on both the NI and GB deadweight trade.

The reduction in cattle throughput in ROI during the last few weeks/months has been a contributing factor behind the strong improvement in deadweight beef prices in NI with a reduction of beef coming onto the market. This reduction in the volume of beef being processed in ROI has also coincided with a significant tightening in the availability of locally produced cattle for NI processing plants. This has also contributed to the improvement in deadweight prices in NI as it has created competition for cattle between the major processors.

Figure 2: Weekly prime cattle throughput in Irish beef processing plants 2018-2020. (Source: DAFM)



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WEEKLY BEEF & LAMB MARKETS

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 08/06/20	Next Week 15/06/20
Prime		
U-3	340 - 346p	346 - 352p
R-3	334 - 340p	340 - 346p
O+3	328 - 334p	334 - 340p
P+3	278 - 288p	284 - 294p
	Including bonus where applicable	
Cows		
O+3 & better	260 - 275p	260 - 275p
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

With supplies of prime cattle for processing in NI remaining tight base quotes from the major processing plants improved by 6p/kg this week. Base quotes for in-spec U-3 grading steers and heifers ended this week ranging from 346-352p/kg. With a range in the base quotes available producers are encouraged to shop around for the best deal and to use these quotes as a starting point for negotiation. Quotes for O+3 grading cows this week held steady ranging from 260-275p/kg. Similar quotes are expected for all types of cattle early next week.

Last week 6,748 prime cattle were processed in NI beef processing plants. This was up by 1,101 head from the 5,647 prime cattle processed during the previous week and is the highest weekly throughput of prime cattle recorded in NI since the first week of April 2020. However while numbers have recovered they remain behind the 6,999 prime cattle processed locally in the same week last year. Cow throughput also increased last week with 1,878 cows processed in local plants. This was up from the 1,645 cows processed during the previous week and the highest level of throughput recorded since mid-March this year.

There was a strong increase in the number of cattle imported from ROI for direct slaughter in local plants last week. There were 714 prime cattle and 325 cows imported from ROI last week, up from 463 prime cattle and 130 cows imported during the previous week. This is the third consecutive week in which cattle imports from ROI for direct slaughter have recorded an increase. Meanwhile exports of cattle out of NI for direct slaughter last week continued to run at low levels with 19 cows exported from NI to ROI while no cattle were exported from NI to GB.

Tight prime cattle supplies continue to influence the NI deadweight trade with increases reported last week across the majority of grades. The average NI steer price last week held steady at 345.9p/kg while the R3 steer price was up by 1.6p/kg to 354.7p/kg. The average NI heifer price last week was up 4.5p/kg to 350.1p/kg while the R3 heifer price increased by 5.4p/kg to 357.5 p/kg. The average young bull price in NI last week increased by 3p/kg to 336.5p/kg while the R3 young bull price was up by 5p/kg to 347.4p/kg. Meanwhile the O3 cow price in NI last week was back by 1.3p/kg to 278.6p/kg however the average cow price increased by 4.6p/kg to 265.2p/kg.

The deadweight trade for prime cattle in GB also improved strongly last week. The average GB steer price last week was up by 7.8p/kg to 352.6p/kg while the average R3 steer price reported an increase of 8.6p/kg to 360.2p/kg. The differential between NI and the GB R3 steer price last week was 5.5p/kg. The average heifer price in GB last week was 354p/kg, up 7.8p/kg while the R3 heifer price increased by 8.8p/kg to 360.7p/kg. This puts the R3 heifer price in GB 3.2p/kg above NI levels.

In ROI last week the R3 steer price was the equivalent of 325.1p/kg, back 0.8p/kg from the previous week. Meanwhile the R3 heifer price in ROI last week was the equivalent of 329.7p/kg, back just under a penny from the previous week and 27.8p/kg below the equivalent price in NI.

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

	W/E 06/06/20	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	355.8	335.3	372.5	354.0	360.5	366.7	364.1
	R3	354.7	325.1	372.4	353.0	358.5	359.6	360.2
	R4	352.3	325.8	373.8	355.8	352.0	355.2	362.5
	O3	342.8	311.8	356.3	333.2	338.0	334.3	337.1
	AVG	345.9	-	369.3	346.3	347.7	347.0	352.6
Heifers	U3	361.0	342.1	381.5	362.1	365.8	367.3	369.7
	R3	357.5	329.7	373.2	355.7	358.1	360.9	360.7
	R4	353.5	329.5	374.0	355.8	354.7	358.2	362.6
	O3	345.3	316.6	345.4	338.4	334.1	340.3	337.8
	AVG	350.1	-	371.3	351.3	345.7	347.1	354.0
Young Bulls	U3	350.5	325.8	372.4	349.7	365.0	363.2	366.2
	R3	347.4	315.5	368.9	343.6	358.7	356.7	358.2
	O3	328.7	298.5	331.0	316.3	325.9	335.3	326.4
	AVG	336.5	-	363.6	336.9	347.9	353.1	351.6
Prime Cattle Price Reported	5,163	-	7,142	7,324	7,697	5,288	27,451	
Cows	O3	278.6	248.0	279.3	274.4	276.0	275.4	275.6
	O4	282.4	248.0	283.3	275.6	274.2	268.7	274.3
	P2	245.7	222.6	226.2	228.3	226.9	239.6	231.6
	P3	262.9	238.9	250.8	248.6	245.4	248.6	247.0
	AVG	265.2	-	278.3	258.1	246.1	246.5	251.6

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.39p 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

LATEST LIVEWEIGHT CATTLE MART PRICES NI

	W/E 06/06/20	1st QUALITY			2nd QUALITY		
		From	To	Avg	From	To	Avg
Finished Cattle (p/kg)							
Steers		220	232	226	195	219	207
Friesians		155	179	167	105	154	129
Heifers		220	244	232	190	219	204
Beef Cows		180	233	206	135	179	157
Dairy Cows		125	141	133	80	124	102
Store Cattle (p/kg)							
Bullocks up to 400kg		200	243	220	180	199	189
Bullocks 400kg - 500kg		216	224	220	150	215	180
Bullocks over 500kg		200	211	205	161	199	180
Heifers up to 450kg		216	225	220	180	215	197
Heifers over 450kg		201	224	212	175	199	187
Dropped Calves (£/head)							
Continental Bulls		420	495	450	205	415	310
Continental Heifers		395	510	450	200	390	295
Friesian Bulls		180	270	225	90	175	130
Holstein Bulls		90	170	130	25	85	55

REPORTED NI CATTLE PRICES - P/KG

W/E 06/06/20	Steers	Heifers	Young Bulls
U3	354.8	360.2	350.8
R3	352.3	354.6	347.3
O+3	345.3	345.0	337.1

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 06/06/20	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	170.7	186.8	209.5	199.9
P2	195.4	228.2	242.1	254.1
P3	211.3	241.8	261.8	264.9
O3	-	249.5	271.1	279.0
O4	-	-	285.2	282.4
R3	-	-	-	298.7

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 08/06/20	Next Week 15/06/20
Lambs up to 21kg	470-475p	440-460p

REPORTED SHEEP PRICES

(P/KG)	W/E 23/05/20	W/E 30/05/20	W/E 06/06/20
NI L/W Lambs	501.3	459.0	454.6
NI D/W Lambs	506.0	491.0	472.1
GB D/W Lambs	545.6	526.7	491.6
ROI D/W	516.3	500.8	484.9

Deadweight Sheep Trade

Quotes from the plants this week for R3 grading lambs ranged from 470-480p/kg up to 21kg. Quotes for early next week are expected to range from 440-460p/kg up to 21kg. Lamb throughput in NI plants last week totalled 8,801 head. This was back marginally from the previous week however well ahead of the same week in 2019 when 8,218 lambs were processed locally. A further 4,716 lambs were exported to ROI for direct slaughter last week, back 407 head from the previous week. In the same week last year 3,383 lambs were exported to ROI for direct slaughter. Last week the average NI deadweight lamb price decreased by 18.9p/kg to 472.1p/kg. In the corresponding week last year the deadweight lamb price was 423.7p/kg. In ROI last week the average lamb price was the equivalent of 484.9p/kg, back 15.9p/kg from the previous week.

Liveweight Sheep Trade

This week a good trade was reported across the marts with steady numbers passing through many of the sale rings. In Swatragh last Saturday 390 lambs sold from 435-479p/kg compared to 500 lambs the previous week selling from 434-488p/kg. On Monday in Kilrea 370 lambs sold from 459-471p/kg compared to 390 lambs last week selling from 448-466p/kg. On Tuesday in Saintfield 408 lambs sold from 440-480p/kg compared to 402 lambs selling from 440-490p/kg last week. In Ballymena this week a good entry of 1,320 lambs sold from 430-464p/kg (avg 440p/kg) compared to 889 lambs last week selling from 445-483p/kg (avg 452p/kg). Top reported prices for cull ewes ranged from £88-£146.

LATEST SHEEP MARTS (P/KG LW)

From: 06/06/20		Lambs			
To: 11/06/20		No	From	To	Avg
Saturday	Omagh	385	454	498	-
	Swatragh	390	435	479	-
Monday	Massereene	667	445	470	-
	Kilrea	370	459	471	-
Tuesday	Saintfield	408	440	480	-
	Rathfriland	700	441	474	458
Wednesday	Ballymena	1320	430	464	440
	Enniskillen	285	432	468	-
	Armoyle	312	440	475	-
	Markethill	670	440	483	-

Strict Covid - 19 restrictions are in place across all of the livestock marts

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