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BEEF CONTINUES TO DOMINATE NI RED MEAT SALES

Beef continues to account for the large majority of sales within Northern Ireland's red meat market according to the latest data made available from Kantar Worldpanel. During the 12 weeks ending 21 March 2021 beef was responsible for 87 per cent of the total red meat value sales in Northern Ireland with lamb accounting for the remaining 13 per cent.

Beef

Value sales of beef in NI during the 12 weeks ending 21 March 2021 were up a marginal 1.2 per cent when compared to the corresponding period in 2020 to total £32.1 million. Volume sales of beef during this period decreased by 2.4 per cent. However the increase of 30p/kg or 3.6 per cent in the average price of beef offset the decline in volume sales leading to an overall increase in terms of value sales. Although value sales of beef increased overall during this period there was some variability in the performance of individual beef cuts.

There was a strong decline in value sales of mince during the first quarter of 2021 when compared to the same period in 2020. Value sales in this category totalled £9.1 million which is a 19.4 per cent reduction from quarter one of 2020. A reduction of almost 12 per cent in terms of volume sales alongside a 51p/kg decline in price led to the significant decrease in value sales of this beef cut category.

Although mince recorded a strong decline in terms of value sales, an increase in sales within other cut categories led to an overall increase in spend on beef in NI during the 12 weeks ending 21 March 2021.

Other beef, consisting of beef which does not fall in to the mince, frying/grilling steaks, roasting or stewing beef categories recorded a strong increase of almost 24 per cent in terms of value sales during the 12 week period in 2021 compared to 2020. Again this increase may be attributed to the increase in volume sales alongside an increase in average price.

Similarly, frying/grilling steaks value sales in Northern Ireland increased from £9.5 million in the first quarter of 2020 to £11.1 million during the corresponding period in 2021. This equates to a 17.4 per cent increase year on year.

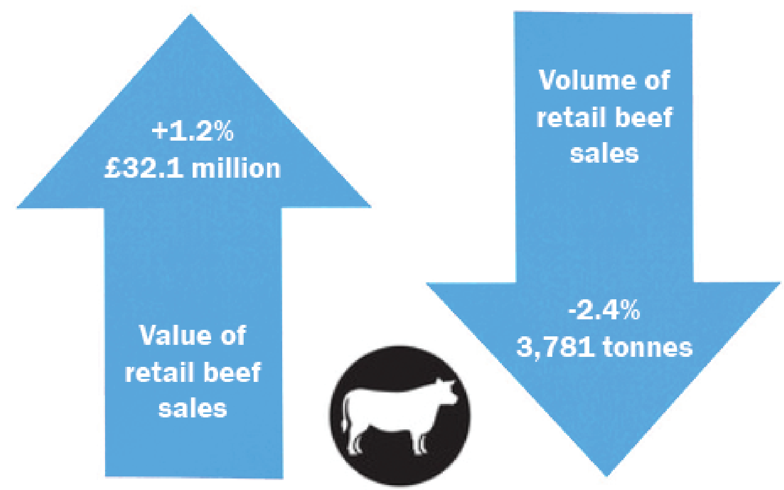
Spend per buyer of beef in Northern Ireland has also increased during the 12 week period in 2021 when compared to the previous year. Average consumer spend during this period was £51 which is up £2 from 2020 figures.

Lamb

While beef remains the dominant meat within Northern Ireland's red meat sector, lamb has also recorded encouraging figures over the 12 week period in 2021.

Lamb has shown a small but steady increase in its share of total meat sales in NI during 2021 when compared to last year's figures. During the 12 weeks ending 21 March 2021 lamb's share totalled 5.9 per cent of total meat value sales in NI which is up from 5.4 during quarter one 2020.

Figure 1: Retail beef value and volume sales during the 12 weeks ending 21 March 2021 compared with the corresponding period in 2020.



Value sales of lamb have increased from £4.2 million in the first quarter of 2020 to £4.8 million during the same period in 2021. The increase in lamb value sales in NI can mainly be attributed to the strong increase in price of £1.03/kg year on year however the 2.6 per cent increase in volume sales was also a contributing factor.

Similar to beef, spend on lamb per buyer has increased during the 12 week period in 2021 to average £23. This is up £1 when compared to the the first quarter of 2020.

WHAT PROPORTION OF HOGGETS/LAMBS ARE MEETING GRADING SPECIFICATIONS?

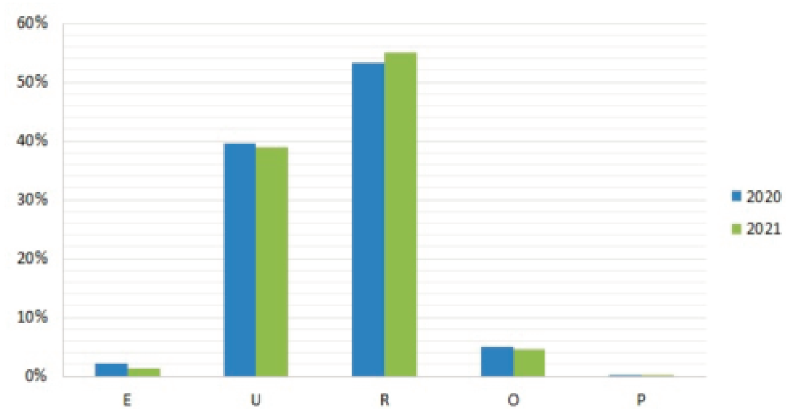
The lamb and hogget trade remains well ahead of 2020 with quotes this week from local processing plants of 630p/kg for R3 grade hoggets up to 22/23kg and 650-680p/kg for R3 grade spring lambs up to 21kg.

While the trade during the first quarter of 2021 remains well ahead of previous years, analysis of deadweight lamb/hogget price reporting statistics has indicated that conformation scores achieved by lambs and hoggets have remained relatively similar to 2020 during the same period. However figures suggest there has been a shift in the fat classes achieved by lambs and hoggets in NI at point of slaughter.

Conformation Scores

Current market specifications require lambs and hoggets to meet U and R conformation scores. During the first quarter of 2021 94 per cent of lamb and hogget carcases achieved these grades which is up marginally from the same period in 2020. The proportion of lambs and hoggets meeting an R grade increased by two per cent to total 55 per cent while the proportion meeting a U grade decreased by a marginal one per cent totalling 39 per cent. The proportion of lambs and hoggets meeting an E, O and P grade remained steady as outlined in **Figure 2**.

Figure 2: Conformation scores achieved by lambs/hoggets processed in NI during quarter 1 2020 and 2021. Source: DAERA



Fat Class Scores

There was a greater change in the fat classes achieved by lamb and hoggets in NI at point of slaughter during the first quarter of 2021.

The proportion of lambs and hoggets meeting a fat class 1 remains very small at one per cent. Meanwhile the proportion meeting a fat class 2 increased by two percent totalling 26 per cent and the proportion meeting a fat class 3 decreased by a more substantial six per cent to total 59 per cent. Lambs and hoggets achieving a fat class 4L increased by three per cent to total 12 per cent while the proportion meeting a fat class 4H and 5 remains very small.

FQAS MEMBERSHIP FEES CHANGING IN MAY 2021

Fees for participation in the Northern Ireland Beef and Lamb Farm Quality Assurance Scheme (FQAS) will be revised from **Tuesday 4th May 2021**. Initial application and annual renewal fees for producer members will increase by £15 to £75 (excluding VAT).

Application and membership renewal fees have remained relatively static for much of the past decade with a modest £5 increase in producer fees implemented in April 2019. This was the first increase in scheme fees since 2012.

Until 2019 FQAS had been operating at a managed loss as historic FQAS reserves were utilised. Since then the scheme has been breaking even. With no significant reserves to rely on and an increase in scheme operating costs, the Industry Board had to review and increase scheme income to ensure its long term sustainability.

This increase in producer membership fees has been accompanied by a 20 per cent increase in the FQAS processor throughput fee. FQAS' funding model is unique in the United Kingdom in that income is derived from both farmer and processor contributions. This increase in scheme income will be utilised to meet ongoing scheme operational costs but will also help with essential supply chain development work where gathering of data is needed to help evidence and monitor the industry's strong sustainability credentials.

FARM QUALITY ASSURED
NORTHERN IRELAND

If you have any queries regarding the increase in renewal fees or would be interested in joining the Farm Quality Assurance Scheme, please contact the **Farm Liaison Officer at the LMC Helpline on 028 9263 3024** for advice or to request an application pack.

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

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 19/04/21	Next Week 26/04/21
Prime		
U-3	368 - 380p	368 - 380p
R-3	362 - 374p	362 - 374p
O+3	356 - 368p	356 - 368p
P+3	302 - 318p	302 - 318p
	Including bonus where applicable	
Cows		
O+3	265 - 290p	265 - 290p

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.

REPORTED NI CATTLE PRICES - P/KG

W/E 17/04/21	Steers	Heifers	Young Bulls
U3	394.4	395.9	382.5
R3	390.1	390.5	378.7
O+3	381.6	380.6	362.0

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 17/04/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	183.4	200.1	207.2	217.3
P2	196.6	232.8	257.1	266.7
P3	226.2	259.6	276.5	278.4
O3	-	273.0	278.4	294.5
O4	-	230.0	274.0	298.5
R3	-	-	-	315.4

Deadweight Cattle Trade

The deadweight cattle trade remained steady this week with base quotes from the major NI processors for in spec U-3 grade prime cattle ranging from 368-380p/kg. The trade for good quality O+3 cows also remained steady with base quotes this week ranging from 265-290p/kg. Similar quotes are expected for all types of cattle early next week.

Prime cattle throughput last week increased by 460 head from the previous week to total 6,326 head. This is also up 458 head when compared to the same week in 2020 when 5,868 prime cattle were processed locally. Cow throughput in NI last week totalled 1,775 head, up 329 cows from the previous week. This is also up 703 head when compared to the 1,072 cows processed in the same week last year.

Imports from ROI for direct slaughter in NI plants last week consisted of 425 prime cattle and 116 cows. This brings total year to date prime cattle imports from ROI to NI for direct slaughter to 3,734 head, up 1,281 head or 52 per cent when compared to the same period last year. There were no imports from GB to NI for direct slaughter last week. Exports from NI to ROI for direct slaughter last week consisted of four prime cattle and 77 cows while no cattle made the journey to GB for direct slaughter.

Deadweight cattle prices in NI last week continued to strengthen primarily due to a tightening in the supply of cattle over recent weeks. The average steer price increased last week by almost 3p/kg from the previous week to 382.1p/kg while the R3 steer price increased 4.8p/kg to 392.2p/kg. This is the highest recorded R3 steer price ever in NI, a similar price was reported in June 2013 of 391.1p/kg. Meanwhile the average heifer price in NI last week was up by 4.2p/kg to 382.9p/kg while the R3 heifer price increased by 4.6p/kg to 392.3p/kg. This is also the highest reported R3 heifer price in NI, with a similar price of 390.6p/kg recorded back in June 2013. The average young bull price in NI last week was up 1.3p/kg to 364.8p/kg while the R3 young bull price increased by 2.6p/kg to 378.9p/kg. The average cow price in NI last week recorded an increase of 6.5p/kg to 271.6p/kg with the O3 cow price up 3.8p/kg to 292.8p/kg.

In GB strong deadweight prices continue to be reported with cattle availability also influencing the deadweight cattle trade. Last week the average steer price in GB was up by 3.7p/kg to 403.9p/kg while the R3 steer price increased by 4.2p/kg to 408.4p/kg. This places the differential in the R3 steer price last week between NI and GB at 16.2p/kg or £57 on a 350kg carcase. The average heifer price in GB last week was up by 5.6p/kg to 404.6p/kg while the R3 heifer price increased by almost 5p/kg to 409.4p/kg. This puts the differential in R3 heifer prices last week between NI and GB at 17.1p/kg or £55 on a 320kg carcase.

In ROI last week deadweight cattle prices also reported notable increases across all of the grades. The R3 steer price in ROI was the equivalent of 346.8p/kg, up by 8.8p/kg from the previous week, which puts the differential between NI and ROI at 45.4p/kg or £159 on a 350kg carcase. The R3 heifer price increase by 7.6p/kg to 349.2p/kg. This puts the differential between NI and ROI at 43.1p/kg or £138 on a 320kg carcase.

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

W/E 17/04/21		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	394.7	357.3	425.0	410.8	412.2	412.9	415.1
	R3	392.2	346.8	423.2	406.3	406.8	400.8	408.4
	R4	388.4	349.1	424.1	410.8	404.2	401.6	413.5
	O3	378.2	332.9	408.0	393.9	383.4	379.1	387.9
	AVG	382.1	-	420.8	403.1	398.0	392.4	403.9
Heifers	U3	395.9	360.8	433.5	412.2	419.2	409.8	419.6
	R3	392.3	349.2	426.4	406.7	408.9	399.4	409.4
	R4	387.8	351.0	425.4	409.3	408.7	400.2	413.9
	O3	379.6	336.8	411.2	395.8	383.5	377.3	388.2
	AVG	382.9	-	423.4	403.3	399.1	389.4	404.6
Young Bulls	U3	381.7	342.3	414.1	412.8	416.4	407.4	414.0
	R3	378.9	332.2	413.3	399.8	407.3	395.6	406.1
	O3	358.5	320.8	385.0	372.1	375.1	373.9	376.7
	AVG	364.8	-	407.7	388.3	399.5	376.6	395.7
Prime Cattle Price Reported		4920	-	6621	6718	7550	5273	26162
Cows	O3	292.8	280.9	304.4	302.4	297.7	289.3	298.4
	O4	297.7	282.0	309.3	307.0	296.6	291.5	300.6
	P2	256.3	257.0	271.2	258.1	253.8	251.4	255.4
	P3	277.2	273.5	272.9	277.7	270.8	265.8	270.4
	AVG	271.6	-	300.0	289.6	269.4	262.8	276.4

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.74p 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 17/04/21	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	245	256	248	215	244	225
Friesians	173	204	184	142	171	158
Heifers	229	256	238	210	228	220
Beef Cows	180	229	197	140	179	160
Dairy Cows	121	140	130	105	116	112
Store Cattle (p/kg)						
Bullocks up to 400kg	275	328	286	230	274	248
Bullocks 400kg - 500kg	240	286	256	218	239	230
Bullocks over 500kg	220	251	230	190	219	205
Heifers up to 450kg	250	327	270	220	249	235
Heifers over 450kg	230	265	240	210	229	218
Dropped Calves (£/head)						
Continental Bulls up to 1 month	415	495	450	310	410	360
Continental Heifers up to 1 month	365	475	415	260	360	310
Friesian Bulls	195	250	215	100	175	140
Holstein Bulls	120	180	145	5	115	60

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 19/04/21	Next Week 26/04/21
R3 Hoggets up to 22kg (one processor is paying up to 23kg)	610 - 650p	620 - 630p
R3 Spring Lambs up to 21kg	660 - 700p	640 - 650p

REPORTED SHEEP PRICES

(P/KG)	W/E 03/04/21	W/E 10/04/21	W/E 17/04/21
NI L/W Hoggets	549.1	579.5	578.7
NI L/W Spring Lambs	657.8	646.6	670.9
NI D/W Hoggets	610.3	627.6	654.2
NI D/W Spring Lambs	666.4	683.1	692.3
GB D/W Hoggets	619.3	646.0	679.5
GB D/W Spring Lambs	-	-	693.7
ROI D/W	616.7	652.4	675.9

Deadweight Sheep Trade

Quotes from the NI plants for R3 grade hoggets ended this week in the region of 630p/kg up to 22kg/23kg while quotes for spring lambs came back to 650-680p/kg up to 21kg. The processors have reported an increase in the number of hoggets/lambs coming forward for slaughter with throughput last week totalling 6,145 head. This was up by 2,394 head from the 3,751 hoggets/lambs processed in local plants the previous week. Exports of lambs/hoggets from NI to ROI for direct slaughter last week totalled 2,759 head back almost 1,000 head from the 3,756 head exported the previous week. The average deadweight hogget price in NI last week was up by 26.6p/kg to 654.2p/kg while the average deadweight spring lamb price in NI last week was up by 9.2p/kg to 692.3p/kg.

Liveweight Sheep Trade

The number hoggets passing through the sale rings has continued to decline in line with normal seasonal trends while the number of spring lambs on offer has started to increase across many of the marts. In Omagh last Saturday 263 hoggets sold from 538-609p/kg with 37 spring lambs selling from 634-704p/kg. This compares to 308 hoggets selling from 571-639p/kg and 37 spring lambs selling from 637-753p/kg the previous week. In Saintfield this week 145 hoggets sold from 530-600p/kg and 118 spring lambs sold from 625-700p/kg. This compares to 180 hoggets selling from 543-600p/kg and 75 spring lambs selling from 652-700p/kg last week. Top reported prices for cull ewes generally ranged from £143-£183 with a top reported price of £207 in Armoy on Wednesday.

LATEST SHEEP MARTS (P/KG LW)

From: 17/04/21		Hoggets				Spring Lambs			
To: 22/04/21		No	From	To	Avg	No	From	To	Avg
Saturday	Omagh	263	538	609	-	37	634	704	-
	Swatragh	600	581	604	-	100	632	656	-
Monday	Kilrea	-	-	-	-	205	664	685	-
	Massereene	223	530	580	-	107	630	673	-
Tuesday	Saintfield	145	530	600	-	118	625	700	-
	Rathfriland	180	500	600	544	250	609	642	636
Wednesday	Ballymena	305	530	663	553	255	630	666	641
	Enniskillen	180	510	580	-	202	608	664	-
	Armoy	284	525	565	-	94	635	668	-
	Markethill	340	520	582	-	340	610	660	-

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

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