

UK BEEF IMPORTS AND EXPORTS DECLINE DURING FIRST QUARTER 2021

During the first three months of 2021 the UK imported 40,024 tonnes of beef and veal which is a 36 per cent reduction relative to 2020 figures and a more significant 41 per cent reduction when compared to 2019. Exports of beef and veal from the UK have also reported a strong decline of 65 per cent relative to 2020 figures and 62 per cent when compared to 2019. This is according to the latest data made available from HMRC.

EU Imports

The EU exported a total of 39,098 tonnes of beef and veal to the UK during the first three months of 2021 accounting for 98 per cent of total beef and veal imports to the UK during this period. This is a decline of 36 per cent or almost 22,000 tonnes from the same period in 2020 and 40 per cent or 26,308 tonnes from 2019. A reduction in beef and veal exports to the UK were recorded across the majority of EU countries during the first quarter of 2021 relative to the same period in 2020 and 2019 as outlined in **Table 1**.

Ireland continues to be the UK's largest source of beef and veal with 31,069 tonnes exported from this region during the first three months of 2021 which accounted for 79 per cent of total beef and veal imports to the UK from the EU. However, while Ireland continues to be the largest source of

imports of this type to the UK, imports of beef and veal from this region have declined by 18,502 tonnes when compared to the same period in 2020. This equates to a 37 per cent reduction year on year.

Poland is the second largest source of beef and veal imports to the UK from the EU during the first quarter of 2021. There were 2,692 tonnes of beef and veal imported to the UK from this region which accounted for 6.9 per cent of total beef and veal imports from the EU. The volume of beef and veal exported from Poland to the UK in the first three months of this year have declined by 1,438 tonnes or 35 per cent year on year.

The Netherlands exported a similar amount of beef to the UK as Poland during the first quarter of 2021. Beef imports to the UK from this region totalled 2,579 tonnes during this period which was back 35 per cent or 1,372 tonnes from the same period in 2020.

Non-EU Imports

Beef and veal imports to the UK from non-EU countries totalled 926 tonnes during the first three months of 2021 accounting for two per cent of total beef and veal imports to the UK. The volume of beef imported to the UK from non-EU countries has declined by 36 per cent from the same period in

2020 when beef and veal imports from this region totalled 1,445 tonnes. Similarly, beef and veal imports to the UK from non-EU countries have declined by 60 per cent or 1,380 tonnes when compared to the first three months of 2019.

Brazil was the greatest non-EU exporter of beef and veal to the UK with 393 tonnes exported from this region during the first quarter of 2021. This accounts for 42 per cent of the total non-EU beef imports to the UK during this period. Imports of beef and veal from this region have declined by three per cent year on year and 50 per cent relative to 2019.

EU Exports

Beef and veal exports from the UK to EU countries during the first quarter of 2021 totalled 5,540 tonnes which is a decline of 79 per cent from both 2020 and 2019 figures during the same period. UK beef and veal exports to the EU accounted for 46 per cent of total exports. Ireland remains the largest market for UK beef and veal within the EU with 2,319 tonnes exported to this region during the first quarter of 2021 which accounts for 42 per cent of total beef and veal exports to EU countries.

Non-EU Exports

Exports of UK beef and veal to non-EU countries totalled 6,456 tonnes during the first three months of 2021 which is

Table 1: UK beef and veal imports during the first three months of 2021, 2020 and 2019 (tonnes). Source: HMRC/AHDB

		2019	2020	2021	2019/2021 % change	2020/2021 % change	
EU	Ireland	52,696	49,571	31,069	-41%	-37%	
	Netherlands	4,797	3,951	2,579	-46%	-35%	
	Poland	3,804	4,130	2,692	-29%	-35%	
	Germany	1,405	1,200	803	-43%	-33%	
	Italy	727	481	667	-8%	+39%	
	Spain	621	554	397	-36%	-28%	
	Belgium	643	498	353	-45%	-29%	
	France	253	218	83	-67%	-62%	
	Denmark	113	33	139	+23%	+316%	
	Other	346	400	317	-9%	-21%	
	Total	65,406	61,037	39,098	-40%	-36%	
Non-EU	Brazil	780	405	393	-50%	-3%	
	Botswana	45	-	-	-	-	
	Uruguay	713	572	172	-76%	-70%	
	Australia	315	173	100	-68%	-42%	
	Namibia	120	20	24	-80%	+19%	
	New Zealand	172	28	74	-57%	+163%	
	Argentina	142	177	55	-61%	-69%	
	Other	20	69	108	+445%	+57%	
		Total	2,306	1,445	926	-60%	-36%

a decline of eight per cent from 2020. However this is an increase of 25 per cent when compared to the same period in 2019.

China and the Philippines remain large markets for UK beef and veal outside of the EU with 1,880 tonnes of beef and veal exported to Hong Kong and

1,527 tonnes exported to the Philippines during the first quarter of 2021. UK beef and veal exports to Hong Kong during this period have declined by 514 tonnes or 21 per cent relative to 2020. Meanwhile UK exports of beef and veal to the Philippines have increased by 359 tonnes or 31 per cent year on year.

NI AVERAGE PRIME CATTLE CARCASS WEIGHTS INCREASE

There has been an increase in carcass weights across all types of prime cattle in local beef processing plants during the six weeks ending 23 May 2021 relative to the same period during 2020 and 2019. During this six week period in 2021 the average prime cattle carcass weight was 347kg which is an increase of 6.4kg when compared to the corresponding period in 2020 and 4.6kg when compared to 2019.

Steers

The average carcass weight of steers in Northern Ireland during the six weeks ending 23 May 2021 was 363.5kg, up 5.8kg from the same period in 2020 and 3.8kg from 2019 when the average carcass weights were 357.7kg and 359.7kg respectively as outlined in **Figure 1**.

While the average steer carcass weight has increased, the average age of slaughter of price reported steers in Northern Ireland has decreased to

24.4 months during the six weeks ending 23 May 2021. This has declined from the corresponding period in 2020 and 2019 when the average age of slaughter for steers was 24.8 months and 25.1 months respectively.

Heifers

The average carcass weight of heifers processed in Northern Ireland was 327.2kg during the six weeks ending 23 May 2021 which was a 4.1kg increase from the same period in 2020 and a more significant increase of 4.5kg from the corresponding period in 2019.

The average age of slaughter of price reported heifers in local plants during the six week period in 2021 has declined slightly from previous years. During this 2021 period the average age of slaughter for heifers in NI was 24.9 months, down from 25.1 months in 2020 and 25.2 months in 2019.

Analysis of this data indicates that there has been improvement in productivity of Northern Ireland's high quality beef as producers are efficiently getting animals to slaughter weights at younger ages. This is of greater importance in recent times as customers are becoming ever more focused on the sustainability of their beef supply chains.

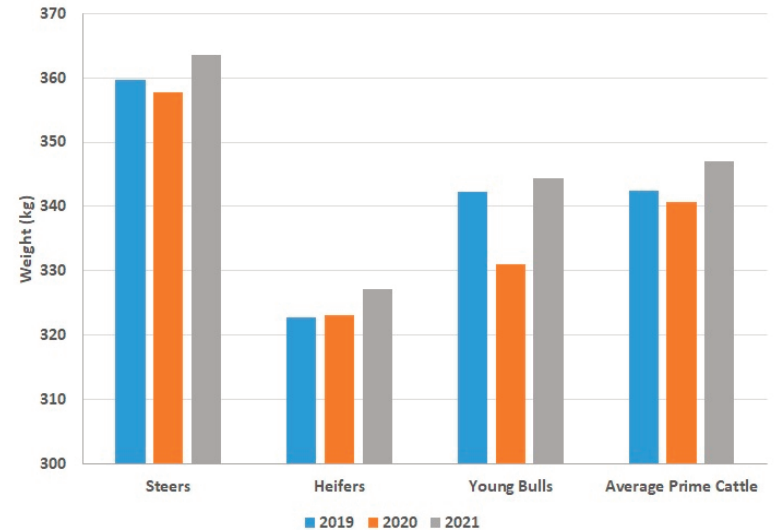
Young Bulls

The average young bull carcass weight during the six weeks ending 23 May 2021 was 344.5kg, up a notable 13.5kg from the same period in 2020 when the average carcass weight was 331kg. Meanwhile, when compared to the relative period in 2019 the average young bull carcass weight is up 2.1kg.

The average age of slaughter for price reported young bulls in Northern Ireland during the six weeks ending 23 May 2021 did not follow the same trend as heifers and steers with a slight

0.3 month increase from the slaughter for young bulls during the six corresponding period in 2020. Meanwhile the average age of 2019 at 15.5 months.

Figure 1: Average weight of prime cattle in NI during the six weeks ending 23 May 2021 and the relative period in 2019 and 2020. Source: LMC Price Reporting



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WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 24/05/21	Next Week 31/05/21
Prime		
U-3	362 - 376p	362 - 376p
R-3	356 - 370p	356 - 370p
O+3	350 - 364p	350 - 364p
P+3	296 - 314p	296 - 314p
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.

Deadweight Cattle Trade

Base quotes from the major NI beef processing plants for in spec U-3 grade prime cattle remained steady ranging from 362-376p/kg this week. The majority of plants are quoting 370-376p/kg for steers and heifers. The trade for cows also remained steady this week with quotes for good quality O+3 grade cows ranging from 265-290p/kg. Similar quotes are expected for all types of cattle early next week.

Prime cattle throughput in local plants last week totalled 6,751 head, a decrease of 327 head from the previous week. In the same week last year prime cattle throughput in NI totalled 5,466 head. Meanwhile a total of 1,926 cows were slaughtered in NI last week, an increase of 334 head from the previous week. In the corresponding week in 2020 cow throughput in NI totalled 1,510 head.

Imports of cattle for direct slaughter from ROI last week decreased to 195 prime cattle and 29 cows with no cattle imported from GB for direct slaughter in NI. Meanwhile exports from NI to ROI for direct slaughter last week comprised of one steer and 68 cows with a further 32 prime cattle and five cows exported out of NI to GB for direct slaughter.

Last week the average steer price in NI was back by 1.4p/kg to 379.9p/kg with the R3 steer price back by 0.8p/kg to 389.1p/kg. In the same week last year the R3 steer price was 346p/kg. The average heifer price in NI last week was 381.9p/kg, back 1.4p/kg from the previous week, while the R3 heifer price was 389p/kg, a decrease of a penny from the previous week. In the same week in 2020 the R3 heifer price was 346.3p/kg. The average cow price in NI last week increased by 2.8p/kg to 277.5p/kg with O3 cow price increasing by 4.6p/kg to 301p/kg. This is the highest recorded O3 cow price since June 2018.

In GB last week the deadweight prime cattle trade came under pressure across all of the regions when compared to the previous week. The average steer price in GB last week decreased by almost 5p/kg to 398.7p/kg with the average R3 steer price last week back by a similar margin to 403.4p/kg. In the same period last year the R3 steer price in GB was 343.4p/kg. The average heifer price in GB last week was back by 4p/kg to 398.5p/kg with the R3 heifer price declining by 4.8p/kg to 402.7p/kg. In the same week in 2020 the R3 heifer price in GB was 343.5p/kg. The average cow price in GB last week increased by a penny to 279.5p/kg while the O3 cow price recorded a decrease of just over a penny to 301.3p/kg.

Last week in ROI the R3 steer price declined marginally from the previous week to 357.7p/kg this puts the R3 steer price at 31.4p/kg behind the same price in NI. The R3 heifer price last week increased by the equivalent of 0.4p/kg to 361p/kg. This places the R3 heifer price in ROI at 28p/kg lower than the same price in NI. The O3 cow price in ROI reported a decrease of 2.7p/kg to the equivalent of 290.4p/kg last week, 10.6p/kg below the O3 cow price in NI.

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

	W/E 22/05/21	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	391.7	366.2	419.1	411.3	404.5	402.4	410.2
	R3	389.1	357.7	419.4	406.1	398.2	393.7	403.4
	R4	386.2	359.2	420.9	408.1	398.7	392.7	409.5
	O3	376.8	345.3	405.1	389.6	374.7	372.2	382.7
	AVG	379.9	-	416.6	400.6	388.9	384.7	398.7
Heifers	U3	393.1	371.7	429.6	415.3	413.7	405.3	416.8
	R3	389.0	361.0	419.9	405.6	399.4	393.7	402.7
	R4	387.1	362.7	423.5	406.6	400.2	393.1	408.9
	O3	379.4	348.9	401.7	388.1	377.6	374.7	382.0
	AVG	381.9	-	420.5	401.3	388.4	383.4	398.5
Young Bulls	U3	383.7	355.1	416.2	402.4	403.0	396.5	407.9
	R3	381.8	343.2	409.8	396.9	392.8	389.9	398.0
	O3	356.2	328.7	375.9	378.9	369.5	371.6	372.3
	AVG	370.0	-	408.9	391.4	384.5	384.5	392.8
Prime Cattle Price Reported	5135	-	6986	7087	7799	5102	26974	
Cows	O3	301.0	290.4	309.5	302.5	300.4	296.9	301.3
	O4	299.7	289.5	311.0	307.7	299.1	298.6	303.1
	P2	259.7	262.6	262.7	253.1	256.4	256.6	256.5
	P3	280.2	280.9	276.5	266.9	273.8	273.3	273.2
	AVG	277.5	-	303.7	287.8	272.3	272.0	279.5

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.14p 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 22/05/21	1st QUALITY			2nd QUALITY		
		From	To	Avg	From	To	Avg
Finished Cattle (p/kg)							
Steers		230	244	235	200	229	215
Friesians		174	193	181	156	173	162
Heifers		225	239	231	210	224	217
Beef Cows		181	210	191	140	180	160
Dairy Cows		122	136	127	100	121	110
Store Cattle (p/kg)							
Bullocks up to 400kg		250	286	265	210	249	230
Bullocks 400kg - 500kg		220	241	230	200	219	210
Bullocks over 500kg		205	229	218	175	204	190
Heifers up to 450kg		220	270	230	200	219	210
Heifers over 450kg		215	242	225	190	214	200
Dropped Calves (£/head)							
Continental Bulls up to 3 months		415	580	477	300	410	355
Continental Heifers up to 3 months		370	510	435	250	365	300
Friesian Bulls up to 3 months		150	230	190	100	145	125
Holstein Bulls up to 3 months		110	185	145	5	105	55

REPORTED NI CATTLE PRICES - P/KG

W/E 22/05/21	Steers	Heifers	Young Bulls
U3	392.2	393.5	383.8
R3	388.0	388.2	381.7
O+3	379.4	382.0	367.6

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 22/05/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	189.2	193.2	219.3	222.0
P2	213.5	238.3	254.5	274.1
P3	184.0	253.6	274.2	283.9
O3	260.0	285.0	300.7	301.4
O4	-	-	285.5	300.0
R3	-	-	-	318.6

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 24/05/21	Next Week 31/05/21
R3 Lambs up to 21kg	620 - 630p	600 - 610p

REPORTED SHEEP PRICES

(P/KG)	W/E 08/05/21	W/E 15/05/21	W/E 22/05/21
NI L/W Lambs	610.5	625.0	624.5
NI D/W Lambs	618.5	638.7	642.1
GB D/W Lambs	690.1	724.2	669.4
ROI D/W	646.4	652.1	660.5

Deadweight Sheep Trade

Quotes for R3 grade lambs ended this week ranging from 600-640p/kg up to 21kg with quotes for early next week expected to range from 600-610p/kg up to 21kg. Lamb throughput held steady last week with a total of 7,025 lambs processed locally. Exports of sheep from NI to ROI for direct slaughter increased by 28 per cent from the previous week to 4,647 head exported last week. The average NI deadweight lamb price was up by 3.4p/kg from the previous week to 642.1p/kg. In the same week in 2020 the NI deadweight lamb price was 506p/kg. In ROI last week the average deadweight lamb price was the equivalent of 660.5p/kg, up by 8.4p/kg from the previous week.

Liveweight Sheep Trade

The trade across the marts this week was generally back with the number of lambs passing through the sale rings increasing. In Swatragh last Saturday 500 lambs sold from 552-633p/kg compared to 700 lambs the previous week selling from 609-658p/kg. In Kilrea on Monday 250 lambs sold from 604-650p/kg compared to 190 lambs last week selling from 616-653p/kg. In Rathfriland this week 630 lambs sold from 575-630p/kg (avg 605p/kg) compared to 440 lambs selling last week from 600-683p/kg (634p/kg). On Wednesday in Enniskillen 342 lambs sold from 568-612p/kg compared to 308 lambs last week selling from 600-663p/kg. Top prices for cull ewes this week ranged from £138-£192 across the marts.

LATEST SHEEP MARTS (P/KG LW)

From: 22/05/21		Lambs			
To: 27/05/21		No	From	To	Avg
Saturday	Omagh	292	564	622	-
	Swatragh	500	552	633	-
Monday	Kilrea	250	604	650	-
	Massereene	417	600	629	-
Tuesday	Saintfield	375	575	615	-
	Rathfriland	630	575	630	605
Wednesday	Ballymena	890	580	627	595
	Enniskillen	342	568	612	-
	Armoy	234	600	645	-
	Markethill	600	580	658	-

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

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