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MIXED PERFORMANCE IN GB RETAIL BEEF SALES

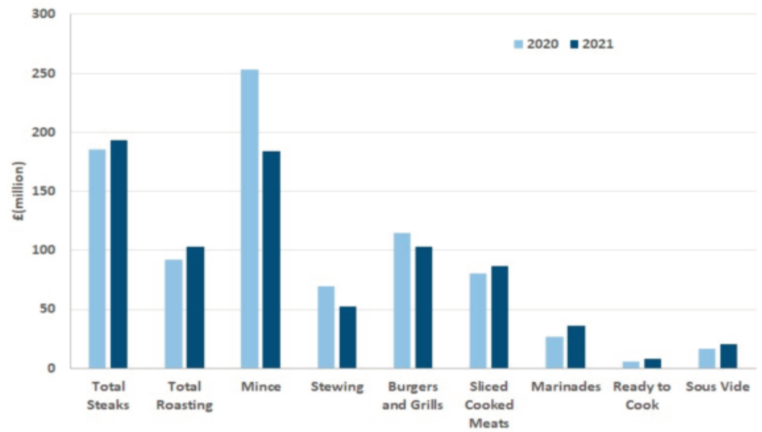
Retail beef sales in Great Britain have recorded a year on year decline during the 12 weeks ending 16 May 2021. Spend on beef totalled £1,085.7 million during this period which was a 6.5 per cent decline relative to the same period in 2020. Meanwhile volume sales totalled 156,500 tonnes which was a decrease of just over 10 per cent when compared to the corresponding period in 2020 according to the latest data made available by Kantar WorldPanel.

These sales figures are compared back to the start of the coronavirus pandemic in 2020 however it should be noted that while spend on beef has decreased year on year, beef volume sales are up 10.1 per cent relative to the corresponding period in 2019.

Food service and catering started to re-open for public access during the 12 week period ending 16 May 2021 but retail continued to operate as the premier channel for consumers to purchase their supplies of beef for dietary intake.

While total beef retail sales have decreased year on year in Great Britain, there has been a mixed performance across the beef cut categories as outlined in **Figure 1**. In terms of spend, mince, stewing beef and burgers and grills have recorded the greatest proportional declines during the 12 weeks ending 16 May 2021 compared to the relative period in 2020.

Figure 1: Value sales of GB retail beef by cut category during the 12 weeks ending 16 May 2021 and the relative period in 2020. Source: Kantar WorldPanel/AHDB



Mince continues to be one of the most popular beef products among British consumers however value sales within this category have decreased by 27.3 per cent during the 12 week period ending 16 May 2021, totalling £183.9 million. The decrease in spend was driven by the 24.6 per cent decrease in volume sales alongside a 3.5 per cent decline in average price to £5.18/kg. The strong decline in volume sales of mince may be attributed to the huge peak demand in the spring of 2020 due to consumers panic buying and stockpiling mince.

Spend on stewing beef in Great Britain totalled £52.3 million during the 12 weeks ending 16 May 2021. This was a decline of just under 25 per cent compared to the same period in 2020. Volume sales in this beef category declined by a similar proportion while the average price was back marginally to £7.98/kg.

While burgers and grills reported a four per cent increase in price during the 12 week period to average £6.22/kg, volume sales within this category decreased by 13.6 per cent to total 16,500 tonnes. The decline in volume sales counteracted the increase in price to lead to an overall decrease in spend of 10.2 per cent.

Image 1: Spend on retail beef in GB decreased by 6.5 per cent year on year to total £1,085.7 million during the 12 weeks ending 16 May 2021.

Although there was an overall decrease in spend across retail beef in Great Britain, a number of beef cut categories reported an increase in spend during the 12 weeks ending 16 May 2021.

Within the primary beef category, higher value cuts such as total steaks and roasting beef recorded increases in terms of spend year on year. Steaks reported an increase of 4.2 per cent to total £193.3 million, making it the most popular beef cut in terms of spend during the 12 week period. Meanwhile roasting beef increased by just under 12 per cent to take the total spend in this cut category to £103.2 million.

Meanwhile within processed beef, sliced cooked meats recorded an increase of 8.1 per cent in spend year on year to total £86.7 million. Marinades, ready to cook beef and sous vide beef also recorded increases in spend however the total spend in these categories were comparatively small relative to the other beef categories.

FIRM DECREASE IN LAMB AND MUTTON IMPORTS TO THE UK

There has been a firm decrease in lamb and mutton imports to the UK during the first three months of 2021 when compared to both 2020 and 2019 levels. Imports of lamb and mutton to the UK during the first quarter of 2021 totalled 14,481 tonnes which is a decline of 14.6 per cent from 2020 levels and 18.8 per cent from 2019 levels during the relative period.

EU Imports

The amount of lamb and mutton imported in to the UK from EU countries totalled 1,344 tonnes throughout January to March 2021 which is a 57 per cent or 1,780 tonne decrease from the corresponding period during 2020.

The largest source of lamb and mutton from the EU continues to be Ireland which exported 716 tonnes to the UK during the first quarter of 2021. This accounted for 53.2 per cent of total imports from the EU. These levels have declined by 1,240 tonnes compared to 2020 levels and over 2,000 tonnes compared with the relative period in 2019.

Spain was the next largest source of UK lamb and mutton imports from the EU with a total of 71 tonnes coming from this region. Imports of this type from Spain have decreased by 71 per cent or 175 tonnes year on year. Meanwhile imports from this region have declined by 76 per cent or 226 tonnes from the same period in 2019.

Lamb and mutton imports to the UK from France reported a greater proportional decline of 79.4 per cent when compared to 2020 figures and a larger 87.6 per cent when compared to 2019. Imports to the UK from this region totalled 24 tonnes during the three month period which accounted for 1.8 per cent of EU lamb and mutton imports.

Non-EU imports

Non-EU lamb and mutton imports to the UK totalled 13,137 tonnes during the first three months of 2021 accounting for 91 per cent of total lamb and mutton imports to the UK. Imports from non-EU countries have declined by five per cent relative to quarter one 2020.

The majority of non-EU lamb and mutton imports are sourced from New Zealand with a total of 10,591 tonnes coming from this region during the first three months of 2021. These imports accounted for 81 per cent of non EU-imports or 73 per cent of total lamb and mutton imports to the UK. Imports from this region have declined by 308 tonnes from 2020 levels and 847 tonnes from the relative period in 2019.

Lamb and mutton imports to the UK from Australia totalled 2,456 tonnes during the first quarter of 2021. Imports from this region to the UK have declined by 9.2 per cent from the same period in 2020 however they have increased by a notable 29.6 per cent relative to 2019 levels.

Table 1: UK lamb and mutton imports during January-March 2021, 2020 and 2019 (tonnes). Source: HMRC/AHDB.

		2019	2020	2021	2020/2021 % change	2019/2021 % change
EU	Ireland	2,722	1,956	716	-63.4%	-73.7%
	Spain	297	246	71	-71.0%	-76.0%
	France	190	115	24	-79.4%	-87.6%
	Other	1,017	807	533	-33.9%	-47.6%
	Total	4,225	3,124	1,344	-57.0%	-68.2%
Non EU	New Zealand	11,438	10,899	10,591	-2.8%	-7.4%
	Australia	1,895	2,706	2,456	-9.2%	+29.6%
	Uruguay	24	-	-	-	-
	Argentina	17	41	45	+9.9%	+161.0%
	Other	241	177	44	-75.0%	-81.6%
	Total	13,615	13,824	13,137	-5.0%	-3.5%

WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 21/06/21	Next Week 28/06/21
Prime		
U-3	370 - 388p	374 - 388p
R-3	364 - 382p	368 - 382p
O+3	358 - 376p	362 - 376p
P+3	304 - 326p	308 - 326p
	Including bonus where applicable	
Cows		
O+3	270 - 294p	275 - 300p

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 19/06/21	Steers	Heifers	Young Bulls
U3	394.6	396.1	387.2
R3	389.2	392.2	381.8
O+3	382.5	385.3	369.4

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 19/06/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	190.9	208.0	223.9	227.1
P2	219.7	236.0	262.4	273.9
P3	245.6	247.2	281.6	286.0
O3	-	312.5	299.7	302.3
O4	-	275.0	305.0	301.5
R3	-	-	-	318.5

Deadweight Cattle Trade

With the availability of locally produced prime cattle tightening base quotes from the major NI plants strengthened by 6-8p/kg to 370-388p/kg this week for in spec U-3 grading steers and heifers. The cow trade also strengthened this week with quotes for good quality O+3 grading cows ranging from 270-294p/kg.

Prime cattle throughput in local plants last week totalled 6,378 head, a decrease of 123 head from the previous week. In the same week last year prime cattle throughput in NI totalled 6,094 head. Meanwhile a total of 1,623 cows were processed in NI last week, a decrease of 82 cows from the previous week. In the same week last year the NI cow throughput recorded the highest weekly throughput to date at 2,367 cows.

Imports of cattle for direct slaughter from ROI last week consisted of 322 prime cattle and 91 cows with no cattle imported to date this year from GB for direct slaughter locally. Exports out of NI for direct slaughter last week continued to operate at very low levels with one steer and 27 cows exported to ROI while no cattle made the journey to GB for direct slaughter.

The NI deadweight prime cattle trade strengthened last week with reports of reduced availability of prime cattle for processing. The average steer price in NI last week was 381.8p/kg, up just over 2p/kg from the previous week. Meanwhile the R3 steer price in NI was up 2.5p/kg to 390.8p/kg. In the same week in 2020 the R3 steer price was 362.1p/kg. The average heifer price in NI last week was 384.9p/kg, up 1.2p/kg from the previous week. Meanwhile the highest ever recorded R3 heifer price was reported in NI last week of 393.5p/kg. This is up 1.7p/kg from the previous week and well above the same week last year when the R3 heifer price was 361.6p/kg. The young bull trade also improved last week with the average price up by 1.5p/kg to 371.5p/kg however the R3 young bull price came back slightly from the previous week to 381.6p/kg. Last week the NI cow trade also strengthened with the O3 cow price reporting an increase of 4.2p/kg to 302.3p/kg, the highest price reported since June 2018.

In GB last week the deadweight trade improved across the majority of cattle grades. The average steer price was up 2.6p/kg to 393.4p/kg while the average R3 steer price was up by 3.5p/kg to 398.8p/kg. In the same week last year the R3 steer price in GB was 368.1p/kg. The average heifer price in GB last week was up 3.6p/kg to 393.9p/kg while the average R3 heifer price increased by almost 3p/kg to 398p/kg. In the same week in 2020 the R3 heifer price in GB was 367.5p/kg. Meanwhile last week the O3 cow price in GB increased by just over 3p/kg to 306.5p/kg, 4.2p/kg above the same price in NI and the highest reported O3 cow price in GB to date.

In ROI last week the deadweight prime cattle trade also reported a strengthening in prices from the previous week. The R3 steer price increased by the equivalent of 1.5p/kg to 360.5p/kg with the R3 heifer price up by 0.8p/kg to the equivalent of 362.4p/kg. Meanwhile the O3 cow price in ROI was up by 3.5p/kg to 288.7p/kg last week which puts it 13.6p/kg below the same price in NI.

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

W/E 19/06/21		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	393.4	370.1	410.1	401.7	401.9	398.5	404.2
	R3	390.8	360.5	410.5	397.3	395.8	392.9	398.8
	R4	388.2	362.9	413.2	399.9	397.5	395.4	404.3
	O3	378.9	348.6	393.9	382.7	374.2	373.0	378.7
	AVG	381.8	-	408.5	392.4	387.1	383.4	393.4
Heifers	U3	395.7	373.8	423.1	403.7	407.0	405.8	411.1
	R3	393.5	362.4	412.0	395.8	394.7	393.7	398.0
	R4	389.4	364.0	416.1	398.1	397.3	392.5	403.8
	O3	382.9	354.0	398.7	381.6	372.2	371.5	377.1
	AVG	384.9	-	412.5	391.3	387.1	383.2	393.9
Young Bulls	U3	387.1	359.9	406.7	399.8	403.2	389.1	403.6
	R3	381.6	350.0	402.3	385.7	396.1	386.5	396.4
	O3	365.1	329.8	379.4	357.8	362.5	352.3	363.5
	AVG	371.5	-	401.9	383.6	386.9	376.5	390.4
Prime Cattle Price Reported		5109	-	6283	6807	6883	4112	24085
Cows	O3	302.3	288.7	306.6	308.4	305.5	304.2	306.5
	O4	301.5	289.4	308.6	311.6	306.6	306.0	308.4
	P2	261.7	266.6	273.6	257.1	265.8	265.7	265.0
	P3	284.1	281.6	288.7	285.5	284.0	284.4	284.5
	AVG	279.7	-	305.2	296.0	280.3	277.0	285.8

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.84p 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 19/06/21	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	246	259	251	212	245	228
Friesians	178	192	184	150	177	163
Heifers	229	254	238	210	228	218
Beef Cows	187	220	195	145	186	165
Dairy Cows	131	157	140	110	130	120
Store Cattle (p/kg)						
Bullocks up to 400kg	250	314	275	215	245	225
Bullocks 400kg - 500kg	230	270	245	200	229	218
Bullocks over 500kg	211	238	218	185	210	198
Heifers up to 450kg	235	271	250	210	234	220
Heifers over 450kg	238	258	244	212	237	220
Dropped Calves (£/head)						
Continental Bulls up to 2 months	385	510	450	280	380	330
Continental Heifers up to 4 months	325	470	400	220	320	275
Friesian Bulls up to 3 months	190	310	235	120	185	140
Holstein Bulls up to 4 months	165	245	185	25	160	85

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 21/06/21	Next Week 28/06/21
R3 Lambs up to 21kg	560 - 565p	490 - 500p

REPORTED SHEEP PRICES

(P/KG)	W/E 05/06/21	W/E 12/06/21	W/E 19/06/21
NI L/W Lambs	546.4	544.2	528.6
NI D/W Lambs	593.1	576.8	567.1
GB D/W Lambs	669.5	665.2	634.5
ROI D/W	633.0	620.4	604.0

Deadweight Sheep Trade

Quotes from the plants for R3 grade lambs continued to come under pressure this week and ended this week back 30-55p/kg at 510-530p/kg with plants paying up to 21kg. Reports have indicated lambs being presented for slaughter are generally of good quality with an average carcase weight last week of 21.3kg. Lamb throughput in the NI plants last week increased by 826 head to 9,752 head with a further 2,676 lambs exported from NI to ROI for direct slaughter. Exports to ROI for direct slaughter during the last six weeks totalled 16,739 lambs, back 42 per cent from the 28,954 lambs exported during the same period in 2020. The deadweight lamb price in NI last week was 567.1p/kg, back 9.7p/kg from the previous week. In ROI last week the lamb price was back by the equivalent of 16.4p/kg to 604p/kg.

Liveweight Sheep Trade

Good numbers of lambs passed through the sale rings this week with the liveweight trade also coming under pressure when compared to last week. In Kilrea on Monday 500 lambs sold from 514-538p/kg compared to 400 lambs last week selling from 544-581p/kg. On Tuesday in Rathfriland 613 lambs sold from 463-500p/kg (avg 475p/kg) compared to 617 lambs last week selling from 510-570p/kg (avg 538p/kg). In Markethill this week 780 lambs sold from 440-480p/kg compared to 820 lambs last week selling from 510-539p/kg. Top reported prices for well fleshed cull ewes ranged from £124-£184 with the highest recorded price of £184 in Swatragh last Saturday.

LATEST SHEEP MARTS (P/KG LW)

From: 19/06/21		Lambs			
To: 24/06/21		No	From	To	Avg
Saturday	Omagh	607	524	556	-
	Swatragh	800	519	579	-
Monday	Kilrea	500	514	538	-
	Massereene	812	500	537	-
Tuesday	Saintfield	725	480	525	-
	Rathfriland	613	463	500	475
Wednesday	Ballymena	1409	480	511	490
	Enniskillen	502	453	512	-
	Armoy	292	490	527	-
	Markethill	780	440	480	-

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