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FIRM INCREASE IN NI RETAIL BEEF SALES

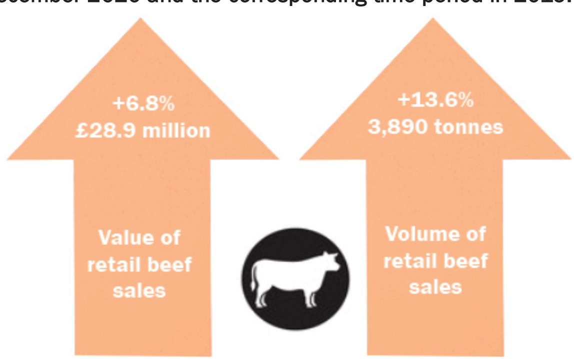
With the on-going massive disruption to the food service sector due to Covid-19 restrictions the retail trade has become an even more important outlet for beef cuts which were popular in meals prepared for consumption outside the home. The latest retail sales data for Northern Ireland covers the period up to the end of Christmas week and it is very interesting to analyse consumer spending behaviour on beef in retail outlets in the absence of large household gatherings and traditional festive parties and dining at the end of the year.

Retail sales data has indicated a 6.8 per cent increase in beef value sales in Northen Ireland, totalling £28.9 million, during the 12 w/e 27 December 2020 when compared to the same period in 2019. This is according to the latest available data from Kantar Worldpanel, the global leader in continuous consumer panels.

The increase in value sales of beef can be attributed to the strong increase in volume sales across all major beef cut categories with the exception of stewing beef which reduced marginally during the 12 w/e 27 December 2020 when compared to the same period in 2019.

The growth in volume sales may have been driven by the increase in the number of consumers eating at home due to the ongoing Covid-19 restrictions alongside the 47p/kg decline in the average price of beef to £7.43/kg. Additionally, strong promotional activity from levy bodies and retailers will have helped with the uplift in beef sales.

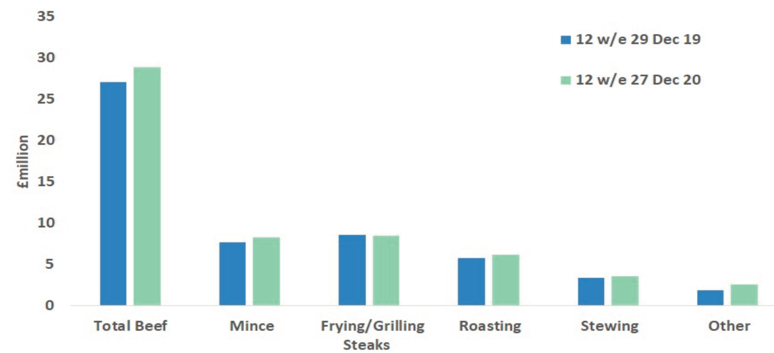
Figure 1: Value and volume sales of retail beef in Northern Ireland during the 12 w/e 27 December 2020 and the corresponding time period in 2019.



Most of the beef cut categories recorded a greater sales performance in terms of both volume sales and value sales in the 12 w/e 27 December 2020 when compared to the same period last year. The greatest percentage increase in terms of value sales was seen in the mince, roasting and other beef cut categories as outlined in **Figure 2**.

In terms of volume sales, mince continues to be the most popular beef cut category in NI accounting for just over 40 per cent of the total beef volume sales during the 12 w/e 27 December 2020. Volume sales of mince were up by 13 per cent, totalling 1,571 tonnes during this period compared with the corresponding period in 2019. The increase in volume sales alongside a four per cent decline in average price led to a nine per cent increase in value sales, totalling £8.3 million during the 12 week period in 2020.

Figure 2: Retail beef value sales in Northern Ireland by individual cuts during the 12 w/e 27 December 2020 and the corresponding time period in 2019.



Roasting beef is the second most popular choice of beef cut category for Northern Irish consumers in terms of volume sales, totalling 965 tonnes during the 12 w/e 27 December 2020. Volume sales in this category were up by a significant 28 per cent when compared to the 12 weeks ending 29 December 2019 which may be attributed to the £1.18/kg decline in average price. The increase in volume sales alongside the decrease in the average price led to an eight per cent increase in value sales during the 12 w/e 27 December 2020.

Other beef, consisting of beef which does not fall in to the mince, frying/grilling steaks, roasting or stewing beef categories, saw a strong increase of 37 per cent in terms of value sales during the 12 w/e 27 December 2020 when compared to the same period in the previous year. The volume sales for this category were up by 28 per cent during the 12 week period in 2020 compared to the previous year. The increase in volume sales alongside the 56p/kg increase in average price attributed to the large increase in terms of value sales.

The only beef cut category which saw a decline in terms of value sales was frying/grilling steaks which decreased by almost two per cent during the 12 w/e 27 December 2020 when compared to the same period in 2019. Volume sales in this category were up by one per cent while the average price of frying/grilling steaks decreased by three per cent.

NI BEEF INDUSTRY SNAPSHOT JANUARY 2021

Table 1 provides an overview of key performance statistics relating to beef production in Northern Ireland during January 2021 and the corresponding figures during January 2020.

Deadweight Prices

The average prime cattle price in Northern Ireland during January 2021 was 373.3p/kg, an increase of 41.6p/kg from January 2020 when the average prime cattle price was 331.7p/kg. This equates to a 12.5 per cent increase year on year.

The R3 steer price in Northern Ireland during January 2021 was 382.7p/kg, a 42.3p/kg increase from January 2020 when the R3 steer price was 340.4p/kg. In Republic of Ireland the R3 steer price increased by the equivalent of 32.7p/kg to 341.2p/kg during January 2021 while in Great Britain the R3 steer price increased by just under 42p/kg to 381.9p/kg.

The differential in R3 steer prices between Northern Ireland and Great Britain widened marginally from 0.4p/kg in January 2020 to 0.8p/kg in January 2021. The differential in R3 steer price between the Republic of Ireland and Northern Ireland also widened to 41.5p/kg in January 2021. This equates to £145 differential on a 350kg carcase.

Throughput

Prime cattle throughput in Northern Ireland during January 2021 totalled 25,653 head, a 7.9 per cent decrease from the corresponding period in 2020. Meanwhile cow throughput declined by 3.2 per cent with 8,042 cows killed, back from 8,307 head in January 2020.

Carcase Weights

Average carcase weights decreased for prime cattle, with prime carcase weight down 1.6kg to 345.7kg from January 2020 with cow carcase weight reporting similar levels to January 2020 at 312.7kg during January 2021.

Imports/Exports

Cattle imports for direct slaughter in local plants totalled 864 head during January 2021, a significant 50.9 per cent decline from the 1,759 cattle imported during January 2020. Meanwhile cattle exports from Northern Ireland for direct slaughter totalled 248 head during January 2021. This is similar to January 2020 levels when 254 cattle were exported from Northern Ireland for direct slaughter. The entirety of exports from Northern Ireland in both January 2021 and January 2020 were to the Republic of Ireland.

Cattle Availability

The number of beef sired and male dairy sired cattle on the ground on Northern Irish farms aged between 12 and 30 months increased by 5.6 per cent to a total 410,247 head in January 2021. The number of beef sired cattle increased by 5.2 per cent to total 371,925 head while the number of dairy sired males in this age category increased by a greater 9.6 per cent to total 38,322 head.

Calf Birth Registrations

Beef sired and male dairy sired calf registrations in NI totalled 29,815 head during January 2021, a 4.6 per cent decrease from January 2020. There was a 1.7 per cent decrease in beef sired calf registrations in January 2021 while dairy sired male calf registrations reduced by a more significant 15.2 per cent from January 2020 levels.

Table 1: NI beef industry snapshot January 2021 and January 2020 (weeks 41-44) Source: DAERA/DAFM/AHDB

Finished Cattle Prices (p/kg)	January 2020	January 2021	% Change
Average Prime Cattle Price	331.7	373.3	+12.5%
Average Cow Price	235.3	254.5	+8.2%
Average R3 Steer Price (NI)	340.4	382.7	+12.4%
Average R3 Steer Price (ROI)	308.5	341.2	+10.6%
Average R3 Steer Price (GB)	340.0	381.9	+12.3%
NI Throughput			
Total Clean Slaughterings (Head)	27,859	25,653	-7.9%
Total Cow Slaughterings (Head)	8,307	8,042	-3.2%
Average Clean Carcase Weight (kg)	347.3	345.7	-0.5%
Average Cow Carcase Weight (kg)	312.8	312.7	-0.0%
Trade (Head)			
Live Imports for Direct Slaughter	1,759	864	-50.9%
Live Exports for Direct Slaughter	254	248	-2.4%
Availability (Head)			
No. Cattle on the Ground*	388,642	410,247	+5.6%
Beef Sired	353,665	371,925	+5.2%
Dairy Sired (Male Only)	34,977	38,322	+9.6%
Calf Births Registrations (Head)			
Calf Births	31,267	29,815	-4.6%
Beef Sired	24,430	24,016	-1.7%
Dairy Sired (Male Only)	6,837	5,799	-15.2%
Euro / Stg Exchange Rate (€ / £)	84.9	89.3	+5.2%
* Aged between 12-30 mths (Beef + Dairy Male Only)			
All NI Figures Unless Otherwise Stated			

WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 08/02/21	Next Week 15/02/21
Prime		
U-3	364 - 374p	362 - 370p
R-3	358 - 368p	356 - 364p
O+3	352 - 362p	350 - 358p
P+3	298 - 312p	296 - 308p
	Including bonus where applicable	
Cows		
O+3 & better	260 - 280p	265 - 280p
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.

REPORTED NI CATTLE PRICES - P/KG

W/E 06/02/21	Steers	Heifers	Young Bulls
U3	387.3	390.9	375.9
R3	383.0	383.8	373.5
O+3	374.2	376.7	364.5

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 06/02/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	174.9	188.0	199.3	209.7
P2	199.4	221.4	244.1	252.2
P3	212.5	246.1	258.6	265.8
O3	-	230.0	281.6	280.9
O4	-	-	277.5	284.9
R3	-	-	-	299.7

Deadweight Cattle Trade

Base quotes from the major NI beef processing plants came back at the beginning of this week with quotes for in spec U-3 steers and heifers ranging from 364-374p/kg. Quotes for Monday are expected to range from 362-370p/kg. Most of the plants are quoting at the upper end of this range and producers are encouraged to shop around to get the best deal. Quotes for O+3 grading cows firmed at the upper end this week to range from 260-280p/kg with similar quotes expected for early next week.

Prime cattle throughput in local plants last week totalled 6,965 head. This was up 131 head from the previous week and back 220 head when compared to the 7,185 head processed locally during the same week last year. Cow throughput in NI last week totalled 1,654 head, back 309 cows from the previous week and 483 below the 2,137 cows reported in the same week in 2020.

Imports of cattle for direct slaughter from ROI last week consisted of 111 prime cattle and 62 cows with no cattle imported last week from GB for direct slaughter in local plants. Exports of cattle from NI to ROI for direct slaughter last week included six prime cattle and 60 cows while no cattle were exported to GB for direct slaughter.

Last week in NI the average steer price and R3 steer price both reported a marginal decrease from the previous week to 375.8p/kg and 385.9p/kg respectively. In the corresponding week in 2020 the R3 steer price was 341.4p/kg. The average heifer price in NI last week held steady at 377.9p/kg when compared to the previous week with the R3 heifer price back almost 3p/kg to 384.9p/kg. In the same week in 2020 the R3 heifer price was 342.4p/kg. The average price for young bulls in NI last week decreased by a penny to 362.4p/kg with the R3 young bull price back by almost a penny to 373.5p/kg. The average cow price in NI last week reported a decrease of 0.6pkg to 258.8p/kg with the O3 cow price back by almost a penny from the previous week to 280.7p/kg.

The average GB steer price held steady last week at 378p/kg when compared to the previous week while the R3 steer price was back by 0.6p/kg to 383p/kg. R3 steer prices recorded decreases in all of the regions last week except in Southern England where an increase of half a penny was recorded to 379.4p/kg. Meanwhile last week the average heifer price in GB decreased by a penny to 376.7p/kg while the R3 heifer price held steady at 383p/kg. The R3 heifer price recorded decreases in all of the regions except in Southern England where an increase of 2.7p/kg was reported from the previous week. In GB last week the average cow price was back by 0.4p/kg to 250.4p/kg with the O3 cow price up by almost a penny to 271.5p/kg.

In ROI last week deadweight cattle prices came under pressure and this combined with a weakening in the euro against sterling has resulted in declines across all grades. The ROI R3 steer price decreased by 2.8p/kg to the equivalent of 338.3p/kg, this is 47.6p/kg below the NI R3 steer price. The R3 heifer price was back by 4p/kg to the equivalent of 342.7p/kg this is 42.2p/kg below the NI R3 heifer price last week.

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

W/E 06/02/21		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	387.7	347.9	390.7	383.9	385.6	388.8	387.3
	R3	385.9	338.3	391.4	382.3	381.1	379.4	383.0
	R4	380.3	339.5	390.2	388.0	381.8	377.1	386.8
	O3	373.1	324.5	379.6	367.3	362.6	358.3	364.8
	AVG	375.8	-	387.3	377.9	373.6	371.0	378.0
Heifers	U3	390.4	354.5	398.1	388.2	394.8	390.3	393.1
	R3	384.9	342.7	391.0	380.2	382.6	380.1	383.0
	R4	383.1	344.0	390.6	383.9	382.2	380.4	385.5
	O3	376.7	332.1	381.5	363.3	359.7	355.9	361.5
	AVG	377.9	-	387.8	377.1	372.5	368.8	376.7
Young Bulls	U3	374.3	330.8	382.7	382.6	384.8	380.0	383.3
	R3	373.5	320.7	375.0	375.0	377.9	370.8	375.9
	O3	359.3	309.6	350.9	343.6	344.3	337.6	344.5
	AVG	362.4	-	367.0	352.7	358.1	340.1	357.5
Prime Cattle Price Reported		6008	-	7141	7154	8239	4924	27458
Cows	O3	280.7	268.4	271.4	272.0	271.1	271.3	271.5
	O4	284.7	268.8	273.6	274.7	264.9	270.7	270.2
	P2	242.0	241.6	231.1	225.6	222.3	232.2	225.8
	P3	262.8	256.8	242.9	247.7	241.8	248.7	244.3
	AVG	258.8	-	267.1	258.6	243.1	245.9	250.4

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=87.93p 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 06/02/21	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	230	241	234	205	229	215
Friesians	174	188	179	145	174	158
Heifers	225	250	228	205	224	212
Beef Cows	167	204	176	126	166	146
Dairy Cows	119	138	125	100	118	109
Store Cattle (p/kg)						
Bullocks up to 400kg	240	284	260	210	239	225
Bullocks 400kg - 500kg	230	267	245	205	229	215
Bullocks over 500kg	215	230	222	180	214	200
Heifers up to 450kg	235	272	250	200	234	217
Heifers over 450kg	225	265	235	195	224	210
Dropped Calves (£/head)						
Continental Bulls	360	480	420	255	355	305
Continental Heifers	310	460	385	220	305	265
Friesian Bulls	225	305	250	150	220	180
Holstein Bulls	150	225	175	35	145	90

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 08/02/21	Next Week 15/02/21
R3 Hoggets up to 22kg (with one processor paying up to 23kg)	530 - 535p	540 - 550p

REPORTED SHEEP PRICES

(P/KG)	W/E 23/01/21	W/E 30/01/21	W/E 06/02/21
NI L/W Hoggets	490.6	485.5	495.1
NI D/W Hoggets	552.6	530.0	530.8
GB D/W Hoggets	574.3	558.4	580.6
ROI D/W	534.6	513.9	530.8

Deadweight Sheep Trade

Quotes for R3 grading hoggets from the major NI processing plants improved as the week progressed and ended this week ranging from 530-540p/kg up to 22kg with one plant quoting up to 23kg. Hogget throughput totalled 7,382 head last week, up 31 per cent from the previous week. Exports of sheep to ROI for direct slaughter last week included 4,294 hoggets, back 493 head from the 4,787 exported during the previous week. The deadweight hogget price in NI slightly improved from the previous week by 0.8p/kg to 530.8p/kg last week. In the same week in 2020 the deadweight hogget price in NI was 436.9p/kg. In ROI the hogget price increased by the equivalent of 16.9p/kg to 530.8p/kg last week.

Liveweight Sheep Trade

Steady numbers of hoggets passed through the marts this week, with a sharper trade reported from last week. In Swatragh last Saturday 750 hoggets sold from 441-530p/kg compared to 1,050 hoggets the previous week selling from 462-537p/kg. On Monday in Kilrea 390 hoggets sold from 500-568p/kg compared to 300 hoggets last week selling from 487-525p/kg. In Saintfield this week 311 hoggets sold from 486-530p/kg compared to 333 hoggets last week selling from 470-520p/kg. On Wednesday in Ballymena 1,540 hoggets sold from 505-570p/kg (avg 518p/kg) compared to 1,150 hoggets last week selling from 481-539p/kg (avg 497p/kg). In Armoy this week 364 hoggets sold from 495-545p/kg compared to 544 hoggets last week selling from 487-541p/kg. Top reported prices for good quality cull ewes ranged from £120-£188.

LATEST SHEEP MARTS (P/KG LW)

From: 06/02/21		Hoggets			
To: 11/02/21		No	From	To	Avg
Saturday	Omagh	310	492	532	-
	Swatragh	750	441	530	-
Monday	Massereene	506	500	533	-
	Kilrea	390	500	568	-
Tuesday	Saintfield	311	486	530	-
	Rathfriland	400	495	557	513
Wednesday	Ballymena	1540	505	570	518
	Enniskillen	632	486	533	-
	Armoy	364	495	545	-
	Markethill	800	510	570	-

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

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