

2022: A RECORD YEAR FOR COW TRADE IN NI

The throughput of cows in NI processing plants during 2022 has remained significantly ahead of previous years as shown in **Figure 1**. The NI cow kill totalled 118,872 head during 2022 which was an increase of 14,178 head or 13.5 per cent from the 2021 kill which totalled 104,694 head. In addition to seeing the highest weekly cow kill which totalled 3,307 head during the w/e 12 November, cow throughput during 2022 was the highest on record in NI.

Cattle kill forecasts during early 2022 had estimated the NI cow kill to be closer to 106,000 head during 2022.

Throughput

At the end of June 2022 the cow kill in NI totalled 55,224 head and was running 20 per cent or 9,090 cows ahead of the 46,134 cows killed in the same period in 2021. In addition throughput during the first two quarters of 2022 was also a notable 20 per cent ahead of the same period in 2020 when 45,869 cows were killed in local plants.

During the third quarter of 2022 cow throughput remained ahead of 2021 levels by five per cent, and during the final three months of 2022 cow throughput in NI totalled 35,251 head, a 12 per cent increase on the 31,503 cows killed in the same period in 2021.

Trade

The deadweight cow trade in NI remained ahead of previous years during 2022 as shown in **Figure 2**. During 2022 the average O3 cow price was 349.6p/kg on average, compared to 299.7p/kg on average throughout 2021. Moreover the average cow price in NI during 2022 was 321.3p/kg up by 47.5p/kg year on year or the equivalent of £142.50 on a 300kg carcass. The monthly average cow price peaked during the month of June 2022 when it was 357.6p/kg. This was up by 77.1p/kg or £231.30 on a 300kg carcass when compared to the average price of 280.5p/kg reported during June 2021.

Figure 1: Monthly cow throughput in NI processing plants during 2020 - 2022. Source: DAERA.

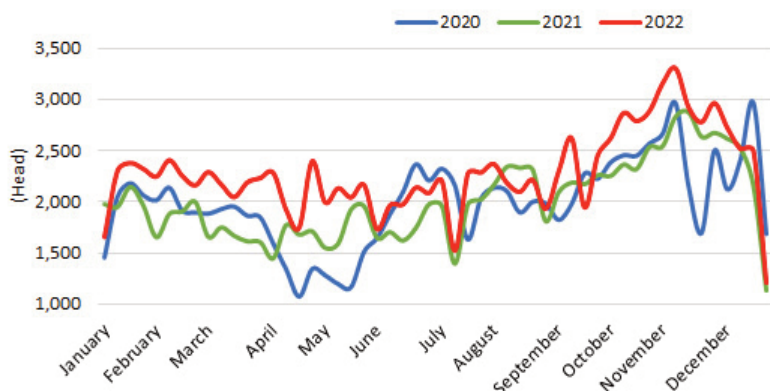
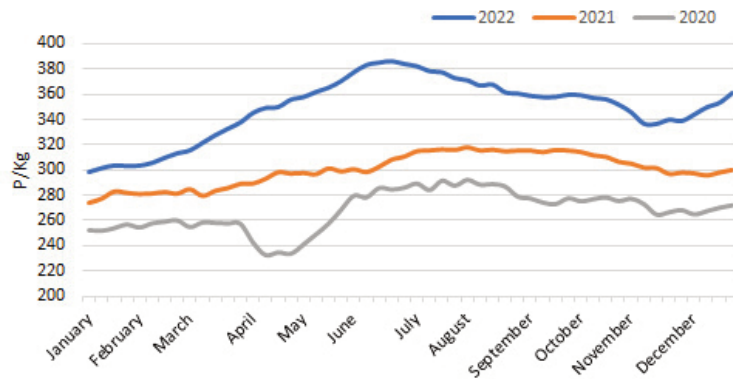


Figure 2: The average weekly O3 cow price in NI during 2022, 2021 and 2020 (p/kg). Source LMC Deadweight Price Reporting.



This was followed by reports from the plants of a plentiful supply of cows to meet a weakening demand for beef in the retail market during the autumn period of 2022. This is supported by data from Kantar Worldpanel for the 12 weeks ending 30 October 2022 which indicated total volume sales of beef in the UK declined by 6.5 per cent to 129,900 tonnes year on year. This was managed by the rule of supply and demand with downward pressure on the deadweight cow trade in NI following.

This softening in demand from local processors consequently weakened the liveweight trade with demand in the marts for cows back from the first half of the year. However, this pressure was short lived and the trade recovered. Recent reports from industry have indicated a firm demand for cows across the local marts, especially for well fleshed cows that can be finished within a short period of time.

Beef from cull cattle is the primary source of minced beef and therefore cow beef is in high demand with the latest survey of the retail market completed by Kantar Worldpanel for 2022 reporting consumers are purchasing more minced beef products as they manage their reduced expenditure, while mince provides a valuable and accessible protein source in the face of rising costs.

Origin

There was no change to the cow slaughter mix year on year with suckler cows accounting for 34 per cent of the price reported kill during 2022, and dairy origin cows accounting for the corresponding 66 per cent during 2022.

In line with seasonal trends there were monthly fluctuations when suckler cows represented a greater proportion of the kill. During the Q3 period July-September 2022, 39 per cent of the NI cow kill were of suckler origin compared to 29, 35 and 34 per cent during Q1, Q2 and Q4 respectively.

The increased availability of dairy cows coming forward for slaughter during 2021 and 2022 can be linked to the strong increase in the NI dairy herd recorded in recent years with dairy female calf registrations in NI increasing steadily since 2017 which will have a higher cull output as a result.

The latest DAERA June Agricultural census also reported an increase in cow numbers on NI beef farms which will have contributed to this increase in cow throughput. The strong deadweight prices will also have encouraged producers to offload underperforming or older stock as they act to maximise their returns from cull animals.

Imports & Exports

In addition to an increased domestic cow kill, last year there was also an increase in the number of cows being exported from NI for direct slaughter in ROI as shown in **Table 1**. During 2022 a total of 3,152 cows were exported compared to 2,578 head during 2021, an increase of 22.3 per cent.

Meanwhile exports to GB also increased year on year, to total 404 head up from 158 cows exported during 2021. However compared to pre-Brexit levels these shipments remain small. In total this accounts for a 30 per cent increase in cow exports year on year.

Cow imports for direct slaughter in local plants last week totalled 47 head, bringing the total for 2022 to 5,700 head. These imports accounted for just 4.8 per cent of the total cow kill. Cow imports for direct slaughter last year increased by 44 head from the levels imported during the previous year despite the deadweight trade for cows in NI remaining behind the trade for O3 cows in GB and ROI for most of 2022.

Carcass Weights & Production

During 2022 the average cow carcass weight recorded in NI was 304.1kg. In addition to a 6.8kg decline year on year, this was a decline from the first six months of 2022 when the average cow carcass weight in NI was 308kg. This occurred despite the increase in suckler cow numbers slaughtered

during Q3 and can be explained by the increase in the dairy influence on the NI cow kill during Q4 when dairy origin cows accounted for 66 per cent of the kill, resulting in the drop in average carcass weight to 300.2kg during the second half of 2022.

Despite the recent decline in cow carcass weights the increase in cow throughput has offset this decline and the levels of cow beef handled in local processing plants during 2022 totalled 36,079 tonnes, remaining well ahead of 2021 levels which totalled 32,460 tonnes of cow beef. This equates to an increase of 3,619 tonnes or 11.2 per cent year on year.

Table 1: NI cow imports and exports to ROI for direct slaughter during 2020 - 2022 (Head). Source: DAERA.

	Exports		Imports	
	GB	ROI	GB	ROI
2022	404	3,152	6	5,694
2021	158	2,578	-	5,656
2020	43	3,192	1,721	6,671

FARM QUALITY MART CLINICS

LMC Farm Liaison Officer, Terry White, runs Farm Quality Assurance Scheme (FQAS) advice sessions at a range of Livestock Marts across Northern Ireland. Terry is present to assist members of FQAS with non-conformances, general scheme queries and any issues prior to or following an inspection.

Any farmers who wish to join the scheme can also do so through their local FQAS mart clinic. Terry will be available at the livestock marts listed in the table below.

If you are unable to attend any of the events listed below please contact the LMC head office to speak with Terry for help and advice.

For further information call (028) 9263 3024.

Mart	Day	Date
Saintfield	Wednesday (Day)	11/01/2023
Kilrea	Wednesday (Day)	18/01/2023
Enniskillen	Thursday (Day)	19/01/2023

FQAS Helpline

If you have had a recent inspection and need help and advice to rectify any non-conformances. Contact the FQAS helpline: 028 9263 3024

Answerphone Service

Factory base quotes & mart results Updated 5pm Daily Tel: 028 9263 3011

Text Service

Free weekly base quotes sent to your mobile phone Email: bulletin@lmcni.com Tel: 028 9263 3000

WEEKLY BEEF & LAMB MARKETS

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 02/01/23	Next Week 09/01/23
Prime		
U-3	430 - 440p	430 - 442p
R-3	424 - 434p	424 - 436p
O+3	418 - 428p	418 - 430p
P+3	362 - 372p	362 - 374p
	Including bonus where applicable	
Cows		
O+3	335 - 354p	335 - 354p

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

The deadweight cattle trade in NI is indicating an improved trade with base quotes from the major processors this week increasing to range from 430-440p/kg for in spec U-3 grade prime cattle with further strengthening expected next week. During the corresponding week last year the major processors were quoting 388-394p/kg for in spec U-3 grading steers and heifers. The deadweight cow trade is also reporting an improved trade with base quotes ending this week ranging from 335-354p/kg for good quality O+3 grading cows. With a range in the base quotes reported, and a differential between quotes and the prices paid, producers are reminded these quotes should be used as a starting point for negotiation and should price around the processing plants to get the best possible deal for their cattle.

Prime cattle throughput in NI last week totalled 4,500 head smaller than the previous week due to the holidays. This was 12.5 per cent less cattle than the 5,145 prime cattle killed locally in the corresponding week last year and brings the total prime cattle kill in NI during 2022 to 373,485 head. Cow throughput in NI last week totalled 1,207 head which brings the total NI cow kill during 2022 to total 118,872 head, a record level.

The average steer price in NI last week was 444p/kg, up 7.4p/kg from the previous week. The R3 steer price in NI last week was up 7.1p/kg from the previous week to 455p/kg. The average heifer price in NI last week was 446.6p/kg, up 8.5p/kg from the previous week. Meanwhile the R3 heifer price in NI last week was up 5.5p/kg to 454.9p/kg. The average cow price in NI reported a strong increase of 13.7p/kg to 335.1p/kg while the O3 cow price reported an increase last week of 7.7p/kg to 361.6p/kg.

The deadweight prime cattle trade in GB last week was improved across the majority of grades compared to the previous week. The average steer price was up by 3.4p/kg to 448.9p/kg while the R3 steer price was up by 3.1p/kg to 454.6p/kg. The R3 steer price reported increases in all of the GB regions in Southern England (+4.8p/kg), Northern England (+3.2p/kg), the Midlands & Wales (+3.1p/kg) and Scotland (+1.5p/kg). The average heifer price in GB last week was up by 6.6p/kg to 448.3p/kg while the R3 heifer price was up 4.2p/kg to 454.3p/kg. The R3 heifer price also reported improvements in all regions. In Southern England (+7.5p/kg), Scotland (+4.1p/kg), the Midlands & Wales (+3.9p/kg) and in Northern England (+1.7p/kg). Meanwhile the GB cow trade improved last week with the average cow price up 22.1p/kg to 349.4p/kg. The O3 cow price reported an increase of 13.8p/kg to 372.9p/kg, 11.3p/kg ahead of the O3 cow price in NI.

In ROI last week the deadweight cattle trade also increased across all grades. The average R3 steer price was up by the equivalent of 10.5p/kg to 445p/kg, this is 10p/kg behind the same price in NI. The R3 heifer price was up by the equivalent 8.6p/kg to 448.4p/kg and the O3 cow price in ROI last week recorded an increase of 8.2p/kg to the equivalent of 377p/kg, bringing the O3 price to 15.4p/kg ahead of the same price in NI.

REPORTED NI CATTLE PRICES - P/KG

W/E 31/12/22	Steers	Heifers	Young Bulls
U3	457.2	459.6	444.1
R3	451.8	454.2	443.3
O+3	444.3	445.6	432.7

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 31/12/22	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	236.6	258.3	274.3	295.8
P2	271.1	301.6	317.2	332.2
P3	279.6	324.2	327.5	341.9
O3	279.4	339.1	349.8	364.6
O4	-	-	350.9	364.4
R3	-	-	-	385.0

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 02/01/23	Next Week 09/01/23
R3 Hoggets up to 22kg	530 - 540p	510 - 555p

REPORTED SHEEP PRICES

(P/KG)	W/E 17/12/22	W/E 24/12/22	W/E 31/12/22
NI L/W Lambs	484.4	489.4	-
NI D/W Lambs	526.5	532.5	534.9
GB D/W Lambs	540.0	539.9	541.3
ROI D/W	557.3	567.8	574.9

Deadweight Sheep Trade

Base quotes from the three major processors this week ranged from 530-540p/kg. Next week preliminary quotes of 510-555p/kg have been received by LMC with one processor quoting at the upper end of the range. Producers are reminded to price around the plants and negotiate for the best possible price for their lambs. Throughput of hoggets last week totalled 5,520 head compared to 5,270 head slaughtered during the same week last year. This brings the total lamb/hogget kill during 2022 to 448,166 head, up 19,525 head or 4.6 per cent from the 428,641 head slaughtered in NI during 2021. Meanwhile, hogget exports to ROI for direct slaughter totalled 4,664 head last week bringing the total for 2022 to 287,303 head. During 2021 lamb/hogget exports to ROI for direct slaughter totalled 268,526 head. The deadweight lamb price last week was up 2.4p/kg to 534.9p/kg. In the corresponding week last year the deadweight lamb price in NI was 545.2p/kg.

Liveweight Sheep Trade

Good numbers of hoggets passed through the sale ring which were open this week. In Swatragh on Saturday 830 hoggets sold from 470-511p/kg. On Tuesday in Saintfield 785 hoggets sold from 488-530p/kg. In Rathfriland on Tuesday 607 hoggets sold from 480-550p/kg with an average price of 490p/kg. The same average of 490p/kg was reported in Ballymena on Wednesday when a large sale of 2,810 hoggets sold from 470-537p/kg. In Enniskillen this week 608 hoggets sold from 460-534p/kg. Top reported prices for culled ewes ranged from £140-250.

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

W/E 31/12/22	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	458.9	451.8	456.1	458.2	459.1	463.6	458.7
	R3	455.0	445.0	455.1	456.5	452.9	454.6	454.6
	R4	454.0	446.4	458.4	456.7	452.7	458.6	457.0
	O3	442.9	436.5	441.0	443.6	435.2	430.9	437.2
	AVG	444.0	-	453.9	450.6	445.1	445.1	448.9
Heifers	U3	459.7	458.7	466.5	461.2	463.9	464.6	464.2
	R3	454.9	448.4	456.6	453.0	453.5	455.1	454.3
	R4	452.3	451.7	460.4	455.8	452.4	449.8	456.6
	O3	439.5	441.9	442.6	441.4	430.1	428.7	433.4
	AVG	446.6	-	458.2	448.7	442.6	442.6	448.3
Young Bulls	U3	444.1	439.9	451.0	447.7	451.9	450.0	450.2
	R3	441.8	432.1	444.5	447.5	443.6	440.0	444.4
	O3	426.0	420.0	416.7	424.3	420.5	428.0	419.8
	AVG	429.1	-	432.8	432.4	428.7	400.2	429.6
Prime Cattle Price Reported	3,398	-	4,287	4,072	4,864	2,847	16,070	
Cows	O3	361.6	377.0	378.1	377.6	370.8	366.5	372.9
	O4	363.7	376.8	378.3	377.6	367.6	366.8	371.6
	P2	318.2	347.5	333.8	332.8	322.4	324.9	325.5
	P3	337.6	361.0	338.2	349.3	341.5	350.0	345.7
	AVG	335.1	-	375.8	368.6	341.1	333.1	349.4

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.41p 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 LIVELWEIGHT CATTLE MART PRICES NI

W/E 24/12/22	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	267	295	277	215	266	240
Friesians	196	202	199	-	-	-
Heifers	241	287	261	180	240	215
Beef Cows	221	264	242	170	219	195
Dairy Cows	153	187	165	90	152	122
Store Cattle (p/kg)						
Bullocks up to 400kg	258	338	280	215	257	230
Bullocks 400kg - 500kg	231	303	255	185	230	208
Bullocks over 500kg	241	291	267	170	240	200
Heifers up to 450kg	220	279	245	160	219	200
Heifers over 450kg	210	260	235	170	209	190
Dropped Calves (£/head)						
Continental Bulls	300	420	350	200	295	255
Continental Heifers	300	440	340	200	295	240
Friesian Bulls	90	140	110	10	85	50
Holstein Bulls	70	110	90	16	65	40

LATEST SHEEP MARTS (P/KG LW)

From: 31/12/22		Hoggets			
To: 05/01/23		No	From	To	Avg
Saturday	Swatragh	830	470	511	-
Monday	Kilrea	1440	484	567	-
Tuesday	Saintfield	785	488	530	-
	Rathfriland	607	480	550	490
Wednesday	Ballymena	2810	470	537	490
	Enniskillen	608	460	534	-
	Markethill	1220	470	505	-
	Armoy	442	440	536	-

Information supplied by LMC / DAERA/ AHDB/ DAFM

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