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NI BEEF INDUSTRY: A REVIEW OF PRIME CATTLE SLAUGHTERINGS 2022

2022 was a remarkable year for deadweight cattle prices in Northern Ireland with prime cattle prices remaining higher than previous years throughout the course of 2022.

This is displayed in **Figure 1** which shows the R3 steer price in NI during 2020 to 2022. Throughout the course of 2022 the average R3 steer price was 431.5p/kg. This was up by 37.2p/kg when compared to the average price of 394.3p/kg reported during 2021. This equates to an increase of £130 on the value of a 350kg carcase.

The R3 steer price is the most commonly price reported type of prime cattle in NI and therefore provides the most representative indicator of the overall trade for prime cattle in the region.

However analysis of other grades including the R3 heifer and young bulls prices during 2022 also clearly demonstrate the improved trade during 2022 which were ahead of 2021 levels by 37.5p/kg and 36.5p/kg respectively. Year on year this is an increase the equivalent of £120 on a 320kg heifer carcase and was an increase of £102 on a 280kg young bull carcase.

Cattle Slaughterings

Table 1 displays how the cattle kill in Northern Ireland was significantly ahead during 2022 when compared to both 2021 and 2020 levels. Prime cattle throughput in NI during 2022 totalled 373,485 head, a 7.5 per cent increase from 2021 when 347,502 prime cattle were slaughtered in local plants.

2022 saw a strong prime cattle kill throughout the year. During the first six months of 2022, the kill was significantly higher than the previous year levels by 22,270 head or 13.2 per cent. While during the next six months the difference year on year had contracted to 3,713 head or 2.1 per cent. The general trend of tightening availability was evident and this has also been reflected by a strengthening in both base quotes from the seven major NI beef processors and the deadweight trade as shown in **Figure 1**.

Imports & Exports

The increased prime cattle slaughterings in NI has occurred despite only a marginal increase in the number of prime cattle being imported for direct slaughter. During 2022 prime cattle imports totalled 14,755 head from ROI for slaughter in local plants, accounting for four per cent of total prime cattle throughput. In comparison during 2021, 14,582 prime cattle were imported from ROI for direct slaughter in local plants accounting for 4.2 per cent of total prime cattle throughput. In total just four prime cattle were imported from GB during 2021 and 2022 for direct slaughter locally.

Prime cattle by category

While throughput has increased there were some key changes to the source of prime cattle being killed in local plants.

Steers

The NI steer kill totalled 183,523 head and accounted for 49 per cent of the prime cattle kill during 2022. This was an increase of 7,325 head from the 176,198 steers killed in local plants during 2021 which represented 50.7 per cent of the total prime cattle kill.

During 2022 52.5 per cent of the price reported steer kill in NI originated from the suckler herd, back slightly from 53.6 per cent in 2021. Beef cross steers accounted for 31.6 per cent of the price reported steer kill in 2022 compared to 31.4 per cent in 2021. Meanwhile the proportion of dairy sired steers increased from 14.2 per cent of the price reported kill in 2021 to 15 per cent in 2022.

The increased dairy influence in the NI steer kill has resulted in a decline in the average carcase weight of steers slaughtered in local processing plants during 2022, back by 2.1kg from 2021 levels to an average of 361kg.

Heifers

By the close of 2022, the heifer kill was up by 12,646 head or 9.4 per cent compared to 2021 levels recording the biggest increase of all categories. The NI heifer kill totalled 147,542 head during 2022 and accounted for 39.5 per cent of the prime cattle kill, an increase from 134,896 head in 2021 when heifers accounted for 38.8 per cent of the kill.

In the price reported heifer kill the proportion of suckler origin heifers was back from 58.5 per cent in 2021 to 57.7 per cent in 2022. Meanwhile the proportion of beef cross heifers increased from 35.8 per cent in 2021 to 36.4 per cent in 2022.

The average carcase weight of heifers slaughtered in local processing plants during 2022 was 324.4kg. This is a decrease of 3kg when compared to the average weight of 327.4kg recorded during 2021.

Figure 1: Average price of R3 price reported steers in NI from January 2020-December 2022. Source: LMC Deadweight Price Reporting.

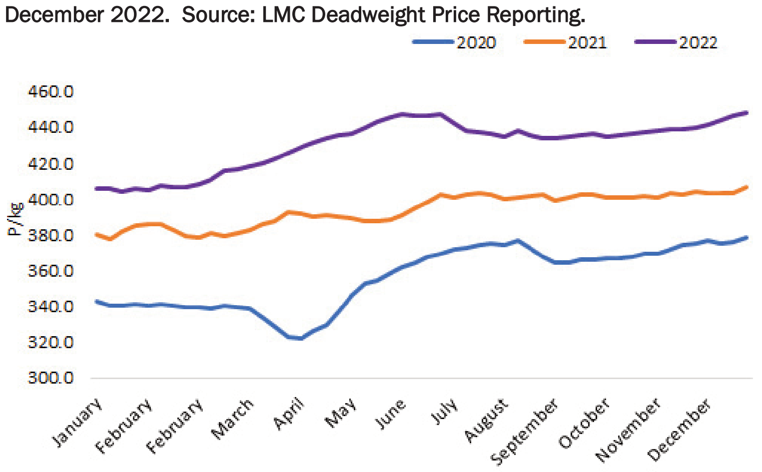

Figure 2: Origin of prime cattle slaughtered in Northern Irish processing plants during 2022 by category. Source: LMC Deadweight Price Reporting.

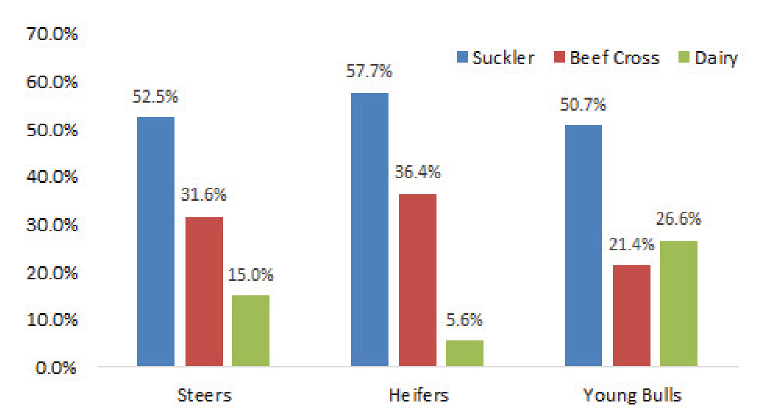

Table 1: Prime cattle throughput and average carcase weights (kg) in NI by category, and total production (tonnes) during 2020, 2021 and 2022. Source DAERA.

		2022	2021	2020	2022/21 % Change	2022/20 % Change
Throughput (Head)	Steers	183,523	176,198	174,392	+4.2%	+5.2%
	Heifers	147,542	134,896	136,771	+9.4%	+7.9%
	Young Bulls	42,420	36,408	34,477	+16.5%	+23%
	Total Prime Cattle	373,485	347,502	345,640	+7.5%	+8.1%
Average Carcase Weight (Kg)	Steers	361.0	363.1	361.6	-0.6%	-0.2%
	Heifers	324.4	327.4	326.5	-0.9%	-0.6%
	Young Bulls	344.1	348.4	342.7	-1.3%	+0.4%
	Average weight	344.5	347.5	345.7	-0.8%	-0.3%
Beef Production (tonnes)	Total Beef Production	169,257	157,055	155,927	+7.8%	+8.5%
	Total Prime Beef	128,802	120,837	119,586	+6.6%	+7.7%

Young Bulls

The young bull kill in NI increased from 36,408 head during 2021, when young bulls accounted for 10.5 per cent of the prime kill to 42,420 head in 2022 which accounted for 11.4 per cent of the prime kill. This is an increase of 6,012 head year on year.

During 2022 50.7 per cent of price reported young bulls came from the suckler herd, a decline from 2021 levels when they accounted for 53 per cent. The proportion of beef crosses increased, up from 19 per cent in 2021 to 21.4 per cent in 2022. As a result of the increasing number of beef sired stock being finished under 16 months the proportion of dairy sired young bulls in the kill slightly declined from 26.8 per cent in 2021 to 26.6 per cent in 2022.

The average carcase weight of young bulls slaughtered in local processing plants during 2022 was 344.1kg. This is a 4.3kg decline when compared to the average weight of 348.4kg recorded during 2021.

With an increase in both steer and young bull slaughterings year on year this meant the overall male prime cattle kill recorded an increase of 6.3 per cent or an additional 13,337 head on 2021 levels. The strong cattle kill recorded in NI during 2022 reflected the increased number of cattle on the ground over the first six months of 2022 while also indicating the reduced supplies of cattle anticipated to be available for slaughter during the course of 2023.

Beef Production 2022

The average carcase weight of prime cattle processed in local plants during 2022 was 344.5kg, an overall decline of 3kg relative to 2021 when the average weight was 347.5kg. Meanwhile, 2022 levels were a decline of 1.2kg compared with 2020 when the average prime cattle carcase weighed 345.7kg.

The decline in carcase weights can be attributed to the increased dairy influence in the prime kill as mentioned, in addition to this the costs of production during 2022 will have impacted the overall levels of finishing during last year particularly in regard to high meal costs.

Despite the decline recorded in prime carcase weights the increase in throughput across all categories has attributed to an overall increase in beef production in NI. During 2022 beef from prime cattle accounted for 76.1 per cent of total beef output in the region, with beef production from this source during 2022 totalling 128,802 tonnes.

This was an increase of of 7,965 tonnes or 6.6 per cent compared to 2021. Meanwhile, 2022 output is an increase of 9,216 tonnes or 7.7 per cent compared to the 119,586 tonnes of prime beef produced in NI during 2020.

WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 09/01/23	Next Week 16/01/23
Prime		
U-3	432 - 446p	432 - 446p
R-3	426 - 440p	426 - 440p
O+3	420 - 434p	420 - 434p
P+3	364 - 378p	364 - 378p
	Including bonus where applicable	
Cows		
O+3	335 - 354p	335 - 360p

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 07/01/23	Steers	Heifers	Young Bulls
U3	459.6	461.7	449.7
R3	455.3	455.2	444.8
O+3	449.0	446.2	435.0

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 07/01/23	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	251.0	272.7	285.7	300.7
P2	280.2	304.0	321.9	340.5
P3	291.5	318.3	334.5	347.0
O3	307.7	345.8	358.9	366.2
O4	272.0	332.0	360.5	366.9
R3	-	-	-	388.1

Deadweight Cattle Trade

The deadweight cattle trade in NI strengthened this week with base quotes from the plants ending this week ranging from 432-446p/kg for in spec U-3 grade prime cattle. The majority of plants are quoting 436-446p/kg for steers and heifers with similar quotes expected for early next week. Base quotes for good quality O+3 grading cows this week ranged from 335-354p/kg with prelimiary quotes of 335-360p/kg received for early next week. With the range in quotes provided producers are encouraged to shop around the plants to get the best possible deal for their cattle and use these base quotes as a starting point for negotiation.

Prime cattle throughput in NI plants last week totalled 5,714 head, while cow slaughterings totalled 1,763 head.

Imports of cattle from ROI for direct slaughter last week included 56 prime cattle and 21 cows with no cattle imported from GB to NI last week for direct slaughter in local plants. Meanwhile exports from NI to ROI for direct slaughter last week consisted of three prime cattle and nine cows with no cattle making the journey from NI to GB for direct slaughter last week.

The deadweight cattle trade in NI continued reporting improvements last week across the majority of grades. The average steer price in NI last week increased by 2.4p/kg to 446.4p/kg While the R3 steer price was up by 2.5p/kg to 457.5p/kg. The average heifer price reported a slight decrease last week of 0.2p/kg to 446.4p/kg with the R3 heifer price up by 0.6p/kg to 455.5p/kg. The average young bull price in NI was 429.9p/kg, up 0.8p/kg while the R3 young bull price was up by 1.4p/kg to 443.2p/kg. The average cow price in NI last week decreased by 3p/kg to 332.1p/kg with the O3 cow price up by almost 3p/kg to 364.5p/kg.

In GB last week the deadweight cattle trade reported a mixed picture across the regions from the previous week. The average steer price was up by half a penny to 449.4p/kg while the R3 steer price increased by 1.7p/kg to 456.3p/kg. However variations in the R3 steer price were reported across the regions last week with increases in Southern England (+2.6p/kg), Scotland (+1.9p/kg), and the Midlands and Wales (+1.6p/kg) with a marginal increase reported in Northern England (+0.4p/kg). Last week the average heifer price in GB decreased by 1.3p/kg to 447p/kg with the R3 heifer price up 0.4p/kg to 454.7p/kg. Again variations were reported across the regions with the R3 heifer price up 2.1p/kg in Northern England and 0.7p/kg in the Midlands and Wales, while decreases were reported in Scotland (-0.9p/kg) and Southern England (-0.8p/kg). Meanwhile in GB last week the average O3 cow price increased by half a penny from the previous week to 373.4p/kg with the average cow price back 3.2p/kg to 346.2p/kg which was just over 14p/kg ahead of the average cow price in NI.

In ROI last week official deadweight cattle prices reported to the EU by the Department of Agriculture, Food and the Marine showed that the R3 steer price was up by the equivalent of 3.2p/kg to 448.2p/kg with the R3 heifer price up 4.9p/kg to 453.3p/kg. This puts the R3 steer price in ROI 9.3p/kg behind the equivalent NI price with the ROI R3 heifer price 2.2p/kg below the same price in NI. The O3 cow price in ROI increased by 3.8p/kg last week to the equivalent of 380.8p/kg.

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

W/E 07/01/23		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	460.0	455.2	456.4	459.5	464.4	465.5	461.0
	R3	457.5	448.2	457.0	456.9	454.5	457.2	456.3
	R4	457.3	451.3	461.1	456.8	455.1	459.4	458.7
	O3	446.0	439.7	447.2	442.6	434.2	434.9	437.9
	AVG	446.4	-	457.8	449.9	444.7	445.3	449.4
Heifers	U3	461.5	465.0	464.1	461.4	465.8	462.2	463.3
	R3	455.5	453.3	455.7	455.1	454.2	454.3	454.7
	R4	454.1	456.0	459.4	455.0	454.0	455.4	456.6
	O3	443.4	447.3	440.6	437.9	434.1	427.8	433.4
	AVG	446.4	-	458.1	448.3	441.8	440.2	447.0
Young Bulls	U3	449.7	443.4	455.0	452.1	466.6	470.0	459.9
	R3	443.2	436.5	447.9	442.3	448.1	427.5	446.5
	O3	426.0	424.9	425.8	416.8	416.6	425.7	419.3
	AVG	429.9	-	442.5	427.4	433.2	421.9	432.1
Prime Cattle Price Reported		4,886	-	4,118	5,739	5,230	3,814	18,901
Cows	O3	364.5	380.8	379.0	374.3	375.5	366.3	373.4
	O4	365.3	381.4	384.5	373.7	375.2	366.9	373.7
	P2	324.7	350.3	328.6	331.0	324.0	328.7	326.6
	P3	340.1	366.6	350.7	352.8	344.2	348.3	347.0
	AVG	332.1	-	372.5	354.2	340.6	339.1	346.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.31p 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 07/01/23	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	270	294	279	218	269	243
Friesians	201	232	210	180	198	190
Heifers	250	305	266	185	249	217
Beef Cows	220	289	240	160	219	190
Dairy Cows	155	186	163	85	154	120
Store Cattle (p/kg)						
Bullocks up to 400kg	260	342	285	220	259	235
Bullocks 400kg - 500kg	235	309	260	190	234	210
Bullocks over 500kg	247	287	263	210	246	220
Heifers up to 450kg	250	376	275	190	249	220
Heifers over 450kg	226	276	248	175	225	200
Dropped Calves (£/head)						
Continental Bulls	350	510	400	225	345	285
Continental Heifers	300	395	340	200	295	240
Friesian Bulls	160	275	190	55	155	100
Holstein Bulls	100	200	135	4	95	55

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 09/01/23	Next Week 16/01/23
R3 Hoggets up to 22kg	510 - 530p	490 - 515p

REPORTED SHEEP PRICES

(P/KG)	W/E 24/12/22	W/E 31/12/22	W/E 07/01/23
NI L/W Lambs/Hoggets	489.4	-	476.6
NI D/W Lambs/Hoggets	532.5	534.9	530.8
GB D/W Lambs/Hoggets	539.9	541.3	534.9
ROI D/W	567.8	574.9	575.7

Deadweight Sheep Trade

Base quotes from the major NI processing plants for R3 grade hoggets ended this week ranging from 510-530p/kg up to 22kg. Next week base quotes of 490-515p/kg are expected with producers reminded these quotes should be used only as a starting point for negotiation. Throughput increased last week with 8,575 hoggets processed across local plants. Hogget exports to ROI last week for direct slaughter totalled 5,918 head, up by 1,254 head from the previous week. The deadweight lamb price in NI last week was back by just over 4p/kg from the previous week to 530.8p/kg. During the corresponding week of 2022 the NI deadweight lamb price was 557.3p/kg. In ROI last week the deadweight lamb price was the equivalent of 575.7p/kg, up 0.8p/kg from the previous week.

Liveweight Sheep Trade

The number of hoggets passing through the sale rings this week was similar to previous weeks with trade back from previous weeks. Last Saturday in Swatragh 1,180 hoggets sold from 473-515p/kg compared to 830 hoggets the previous week selling from 470-511p/kg. On Monday in Kilrea 800 hoggets sold from 462-488p/kg compared to 1,440 hoggets last week selling from 484-567p/kg. In Rathfriland this week 594 hoggets sold from 450-494p/kg (avg 475p/kg) compared to 607 hoggets last week selling from 480-550p/kg (avg 490p/kg). In Enniskillen on Wednesday 600 hoggets sold from 445-490p/kg compared to 608 hoggets last week selling from 460-534p/kg. A strong trade was reported for cull ewes across the marts this week with top prices ranging from £129-284.

LATEST SHEEP MARTS (P/KG LW)

From: 07/01/23		Hoggets			
To: 12/01/23		No	From	To	Avg
Saturday	Swatragh	1180	473	515	-
	Omagh	1039	483	517	-
Monday	Kilrea	800	462	488	-
	Markethill	600	460	490	-
Tuesday	Saintfield	575	460	500	-
	Rathfriland	594	450	494	475
Wednesday	Ballymena	1662	450	500	472
	Enniskillen	600	445	490	-
	Armoy	516	466	519	-

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