

MARKET SIGNALS AND TECHNOLOGY DRIVE A DECADE OF CHANGE IN NI CALF REGISTRATIONS

According to the latest calf birth data provided by APHIS, there was an increase in beef-sired calf births registered in Northern Ireland during 2022. This increase represents a reversal in the trend of declining beef calf births which was a serious concern for the NI beef sector throughout the second half of the last decade.

Last year 377,654 beef-sired calf births were registered on Northern Ireland farms. This was an increase of 6,999 head from 370,655 head registered during 2021 and a more significant 47,027 head or 14.2 per cent increase from the 330,627 beef calf registrations recorded a decade ago during 2012.

Farmgate prices have increased sharply in recent years with the exclusion of the onset of the covid-19 pandemic during Spring 2020 when the deadweight cattle trade like other sectors experienced much uncertainty and turbulence. While input costs are also higher particularly this year as a consequence of the war in Ukraine, this increase in beef calf production could nonetheless be regarded as producers' response to this price signal with a significant increase recorded over the last decade in the production of traditional bred calves for which there is bonus schemes at point of slaughter.

real terms this was up by 52,020 head from the 49,178 Aberdeen Angus calves registered during 2012. Aberdeen Angus calf births in NI have increased steadily year on year since 2014 and this was also the case last year when Aberdeen Angus calf births increased year on year by 3,080 head or three per cent from 2021 levels.

A proportionately greater increase in Hereford numbers was recorded last year. During 2022, 25,738 Hereford calves were registered, up by 13,728 head or over 114 per cent on the 2012 figure. Hereford calves accounted for 6.8 per cent of all beef calf registrations during 2022, while Aberdeen Angus accounted for a further 26.8 per cent. The combination of these two breeds make up 126,936 head and account for 33.6 per cent of total beef-sired registrations.

During 2022 Limousin was the second most common breed of calf registered, with a total of 88,760 head registered. During 2012 Limousin was the dominant beef-sired calf breed with 108,960 calves registered in NI which accounted for 33 per cent of all beef calf registrations. Limousin remained the most common breed of beef sired calf registered in NI until 2020 when it was surpassed by Aberdeen Angus.

During 2012, Charolais sired calves were the second most common breed of calves in NI and accounted for 27 per cent of beef calf births. Charolais births were back by 14.4 per cent or 12,894 head from 2012 levels to 76,624 head last year and Charolais accounted for 20 per cent of total beef calf births in 2022.

Use of Belgian Blue genetics has increased significantly in NI with an additional 11,663 calves registered during 2022 to total 30,975 head, compared to 19,312 head during 2012. Comparatively, Simmental popularity has declined over the last decade with 21,515 calf births recorded last year which accounted for 5.7 per cent of all

beef calves. During 2012 Simmental registrations accounted for 7.6 per cent of all beef calf registrations and totalled 25,177 head.

During 2012 beef sired calves accounted for 63.3 per cent of all calf births in NI which has increased to 69.5 per cent during 2022. Consequently the proportion of dairy sired calves has converged from 36.7 per cent during 2012 to account for 30.5 per cent of all calf births during 2022.

Dairy calf birth registrations

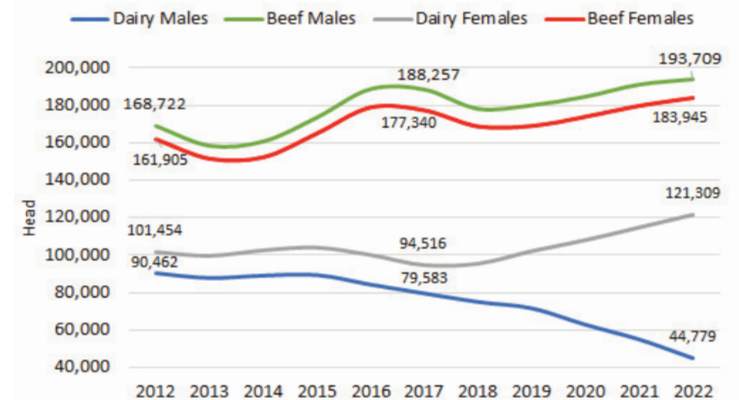
During 2022, Friesian was the most dominant of the dairy breeds accounting for 49 per cent of total dairy calf births in NI. This was a decline from 51 per cent during 2021 and 62 per cent in 2012. This represents a significant change in the industry in the last ten years. While Friesian remains the most common dairy breed during 2022 total calf births have declined by 38,244 head with 81,602 Friesian calves registered during 2022 compared to 119,846 during 2012.

Holstein remains the second most common dairy breed with Holstein calf registrations totalling 66,184 in 2022 compared to 54,901 during 2012. Holstein numbers are up by 20.6 per cent on 2012 levels and these calves now represent almost 40 per cent of all dairy bred calf births compared to 28.6 per cent a decade ago. Combined these two dominant dairy breeds accounted for 89 per cent of all dairy calf registrations last year back slightly from 91 per cent in 2012.

By category, the number of dairy male calves registered has declined over the last decade as shown in **Figure 2**. The number of dairy sired bull calves registered in 2022 decreased by just over 45,600 head to 44,779 from the 90,462 head registered during the same period in 2012. This decline of over 50 per cent in registrations of male dairy calves reflects advances in the industry. With many of these cattle finished intensively as young bulls, feed costs often have an impact on the value of this type of stock and producers may not be in a position to retain these cattle with the high costs of production. This shift in calf registrations to beef breeds may also reflect increased understanding of EBV's and producer confidence in genetic advancements particularly sexed semen.

During 2022 the total number of dairy sired male and female calves registered in NI declined by 25,828 head or 13.5 per cent from 2012 levels. During 2022 the levels of dairy cows slaughtered increased, however as shown in **Figure 2** there has been an increase in dairy

Figure 2: NI Calf Birth Registrations by category 2012 - 2022
Source: APHIS.



female calf registrations from 2012. It appears there remain more dairy cows in NI than during 2012, and that in total an increased proportion of dairy cows have been calved to beef bulls during 2022 when compared to 2012.

In overall terms Aberdeen Angus was the single most common breed among calves registered last year accounting for 18.6 per cent. This reflects a significant change from 2012 when almost a quarter (23 per cent) of all calves were Friesian. Although Aberdeen Angus is the most dominant breed the total numbers remain below the 119,846 Friesian calf births during 2012.

Calf births by dam type

The number of beef-sired calf registrations to the suckler herd totalled 231,756 head during 2022. This is the fourth consecutive year the level of beef bred calves registered to the suckler herd has increased and was 1,786 head more than the same period last year. While 2022 levels remain 23,849 head behind 2012 levels as shown in **Figure 3**, 2022 beef calf registrations to suckler dams accounted for an increase of 8,515 head from 2019 levels which saw the lowest calf registrations to suckler cows recorded locally in the last decade.

Figure 3: NI Beef calf registrations by dam type during 2012 - 2022 (head).
Source: APHIS.

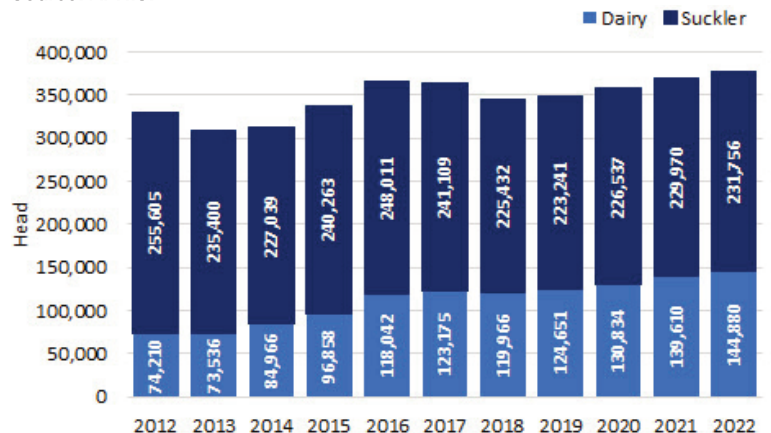


Figure 3 observes a similar trend in the calves produced by the NI dairy herd, with a relatively steady increase year on year in the number of beef-bred calves registered to the dairy herd from 2012 - 2022. These increases in beef-sired calf births indicate an improved interest in suckler beef production arguably due to the higher value of beef bred animals at point of sale. Moreover, given the rising production costs experienced over the last twelve months producers are encouraged to consider EBV's when selecting bulls for breeding to increase animal performance and returns at the farm gate.

Calf birth registrations in 2022 were higher than previous years and should increase availability of cattle for beef production as we move further into the decade. However, such an increase will have little bearing on the availability of prime beef this year given that cattle born last year will not be finished for almost two years.

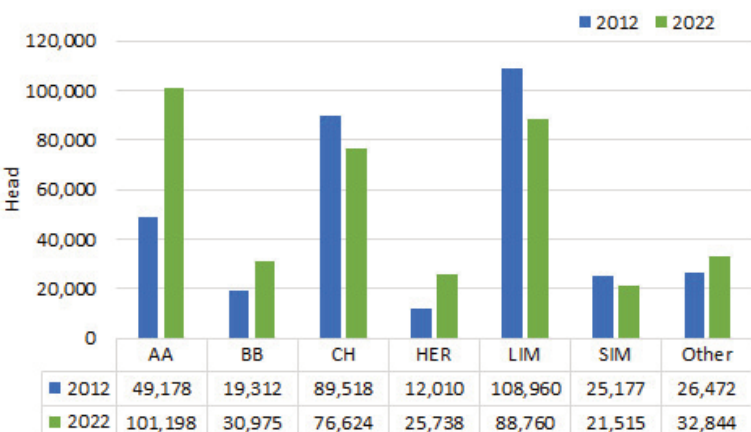
Cattle supplies in 2023 are expected to remain tight, while Aberdeen Angus and Hereford are likely to remain popular breeds in Northern Ireland, given that they are associated with successful beef marketing schemes.

Breakdown by Breed

Beef-sired calf birth registrations

There has been a shift in the proportion of beef-sired calves born to particular breeds during 2022 when compared to 2012. **Figure 1** displays the top six beef sires in NI during 2022 which accounted for 91.3 per cent of all beef-sired calves born. During 2012 the same six breeds accounted for 92 per cent of total beef sired calves.

As shown in **Figure 1**, Aberdeen Angus was the dominant beef-sired calf breed in NI during 2022. Aberdeen Angus calf registrations more than doubled during 2022 compared to 2012 levels with 101,198 head registered last year. In **Figure 1: Beef calf registrations by breed during 2012 and 2022 (head).**
Source: APHIS.



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WEEKLY BEEF & LAMB MARKETS

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

| (P/KG DW) | This Week 16/01/23 | Next Week 23/01/23 |
|----------------------------------|-----------------------|-----------------------|
| Prime | | |
| U-3 | 434 - 446p | 434 - 450p |
| R-3 | 428 - 440p | 428 - 444p |
| O+3 | 422 - 434p | 422 - 438p |
| P+3 | 366 - 378p | 366 - 382p |
| Including bonus where applicable | | |
| Cows | | |
| O+3 | 340 - 360p | 340 - 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.

Deadweight Cattle Trade

Base quotes from the major plants this week for U-3 grade prime cattle improved mid-week to range from 434-450p/kg with the majority of plants quoting 438p/kg upwards for steers and heifers. Quotes for O+3 grading cows also improved mid-week to range from 340-360p/kg across the plants. Similar quotes are expected for all types of cattle early next week.

Cattle throughput in NI last week totalled 6,945 prime cattle and 2,456 cows. Imports from ROI for direct slaughter in local plants last week consisted of 127 prime cattle and 112 cows. Exports from NI to ROI consisted of 85 cows and one prime animal for direct slaughter. There were no cattle moved between GB and NI for direct slaughter last week.

Last week the deadweight cattle trade in NI continued to strengthen with an average steer price of 449.7p/kg, up 3.3p/kg from the previous week with the R3 steer price up by 1.8p/kg to 459.3p/kg. In the corresponding week last year the R3 steer price was 403.9p/kg. The average heifer price in NI last week was 449.8p/kg, an increase of 3.4p/kg from the previous week while the R3 heifer price increased by 4.2p/kg to 459.7p/kg. In the same week in 2022 the R3 heifer price was 405.7p/kg. The average young bull price in NI last week increased by 4.2p/kg to 434.1p/kg with the R3 young bull price increasing by 2.6p/kg to 445.8p/kg. Meanwhile the average cow price was up by 4.4p/kg to 336.5p/kg, with the O3 cow price up by 2.5p/kg to 367p/kg.

In GB a strong deadweight trade was also reported with the average steer price increasing by almost 2p/kg to 451.3p/kg while the R3 steer price was up by 1.7p/kg to 458p/kg. In the corresponding week last year the R3 steer price in GB was 416.7p/kg. The average heifer price in GB last week was up by 3p/kg from the previous week to 450p/kg with the R3 heifer price up by 3.8p/kg to 458.5p/kg. In the same week in 2022 the R3 heifer price in GB was 415.6p/kg. The average cow price in GB last week increased by 7.9p/kg to 354.1p/kg while the O3 cow price was up just over 5p/kg to 378.5p/kg. This was 11.5p/kg ahead of the O3 cow price in NI.

In ROI last week the R3 steer price was up 3.6p/kg to the equivalent of 451.8p/kg with the R3 heifer price increasing 4.3p/kg to 457.6p/kg. In the corresponding week in 2022 the R3 steer and R3 heifer prices in ROI were 361.7p/kg and 365p/kg respectively. Meanwhile last week the O3 cow price in ROI was up by the equivalent of 6.5p/kg to 387.3p/kg, which was 20.3p/kg ahead of the same price in NI.

The Department of Agriculture Food and Marine has acknowledged an error in the reporting of Republic of Ireland deadweight cattle prices for the period between 12/12/2022 - 08/01/2023. Updated LMC publications containing the revised prices are now available to download at: <https://www.lmcni.com/publications-overview/>

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

| | W/E 14/01/23 | Northern Ireland | Rep of Ireland | Scotland | Northern England | Midlands & Wales | Southern England | GB |
|--------------------------------|-----------------|---------------------|-------------------|----------|---------------------|---------------------|---------------------|-------|
| Steers | U3 | 464.2 | 460.3 | 460.5 | 463.1 | 462.4 | 464.1 | 462.2 |
| | R3 | 459.3 | 451.8 | 458.8 | 458.5 | 457.0 | 458.1 | 458.0 |
| | R4 | 460.4 | 454.7 | 463.8 | 462.5 | 456.7 | 456.8 | 461.8 |
| | O3 | 446.2 | 446.1 | 443.6 | 444.5 | 437.0 | 435.9 | 439.5 |
| | AVG | 449.7 | - | 459.4 | 453.1 | 445.3 | 446.6 | 451.3 |
| Heifers | U3 | 464.4 | 469.0 | 467.9 | 462.2 | 470.8 | 465.6 | 467.1 |
| | R3 | 459.7 | 457.6 | 461.2 | 457.1 | 458.5 | 458.1 | 458.5 |
| | R4 | 457.1 | 461.1 | 463.2 | 458.3 | 455.5 | 458.5 | 460.0 |
| | O3 | 447.0 | 453.0 | 445.3 | 443.5 | 433.5 | 429.5 | 436.6 |
| | AVG | 449.8 | - | 460.9 | 451.0 | 444.5 | 441.5 | 450.0 |
| Young Bulls | U3 | 448.9 | 451.2 | 453.4 | 457.2 | 448.3 | 446.1 | 452.3 |
| | R3 | 445.8 | 443.5 | 444.4 | 456.0 | 450.6 | 444.9 | 450.3 |
| | O3 | 433.7 | 430.3 | 421.3 | 420.0 | 418.2 | 410.8 | 419.2 |
| | AVG | 434.1 | - | 439.4 | 439.3 | 431.5 | 424.6 | 434.4 |
| Prime Cattle Price Reported | 5,758 | - | 6,483 | 6,706 | 7,273 | 4,668 | 25,130 | |
| Cows | O3 | 367.0 | 387.3 | 382.7 | 379.7 | 378.0 | 374.4 | 378.5 |
| | O4 | 369.3 | 386.6 | 385.4 | 380.5 | 380.0 | 373.7 | 379.6 |
| | P2 | 330.7 | 358.1 | 338.6 | 336.4 | 338.2 | 335.4 | 337.2 |
| | P3 | 348.1 | 372.5 | 351.8 | 362.2 | 359.4 | 350.2 | 355.8 |
| | AVG | 336.5 | - | 370.8 | 361.3 | 350.3 | 343.8 | 354.1 |

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.51p 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

REPORTED NI CATTLE PRICES - P/KG

| W/E 14/01/23 | Steers | Heifers | Young Bulls |
|-----------------|--------|---------|----------------|
| U3 | 463.6 | 464.3 | 447.1 |
| R3 | 457.8 | 459.0 | 445.7 |
| O+3 | 450.5 | 450.6 | 439.9 |

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

| W/E 14/01/23 | Weight Bands | | | |
|-----------------|--------------|-----------|-----------|--------|
| | <220kg | 220-250kg | 250-280kg | >280kg |
| P1 | 257.3 | 271.8 | 287.8 | 303.4 |
| P2 | 271.1 | 311.1 | 329.4 | 344.0 |
| P3 | 271.4 | 312.8 | 341.4 | 353.3 |
| O3 | - | 347.1 | 361.6 | 367.8 |
| O4 | - | 334.0 | 374.0 | 369.4 |
| R3 | - | - | - | 387.4 |

SHEEP TRADE

NI SHEEP BASE QUOTES

| (P/Kg DW) | This Week 16/01/23 | Next Week 23/01/23 |
|--------------------------|-----------------------|-----------------------|
| R3 Hoggets up to 22kg | 490 - 500p | 490 - 510p |

REPORTED SHEEP PRICES

| (P/KG) | W/E 31/12/22 | W/E 07/01/23 | W/E 14/01/23 |
|-------------------------|-----------------|-----------------|-----------------|
| NI L/W Lambs/Hoggets | - | 476.6 | 455.3 |
| NI D/W Lambs/Hoggets | 534.9 | 530.8 | 510.1 |
| GB D/W Lambs/Hoggets | 541.3 | 534.9 | 520.1 |
| ROI D/W | 574.9 | 575.9 | 553.9 |

Deadweight Sheep Trade

There was a weakening in the base quotes received from the major processors this week for R3 grading hoggets with quotes ranging from 490-500p/kg up to 22kg. Preliminary base quotes received for early next week indicate some improvement ranging from 490-510p/kg. Throughput increased last week from the previous week with 9,561 hoggets processed across the NI plants. In the corresponding week in 2022 hogget throughput totalled 7,678 head in local plants. Exports of hoggets to ROI for direct slaughter last week totalled 5,915 head, similar levels from the previous week. The average deadweight hogget price in NI last week was 510.1p/kg, back 20.7p/kg from the previous week. In the same week last year the average deadweight hogget price reported was 550.1p/kg.

Liveweight Sheep Trade

This week the marts have reported smaller numbers of hoggets passing through the sale rings with trade generally back from last week. In Swatragh on Saturday 520 hoggets sold from 467-505p/kg compared to the previous week when 1,180 hoggets sold from 473-515p/kg. In Kilrea on Monday 390 hoggets sold from 455-500p/kg compared to 800 hoggets selling from 462-488p/kg last week. This week in Markethill 200 hoggets sold from 450-478p/kg compared to 600 hoggets last week selling from 460-490p/kg. On Tuesday in Rathfriland 417 hoggets sold from 430-480p/kg (avg 467p/kg) compared to 594 hoggets selling from 450-494p/kg (avg 475p/kg) last week. Top reported prices for culled ewes remained firm this week ranging from £130-244 across the marts.

LATEST LIVELWEIGHT CATTLE MART PRICES NI

| | W/E 14/01/23 | 1st QUALITY | | | 2nd QUALITY | | |
|--------------------------------|-----------------|-------------|-----|-----|-------------|-----|-----|
| | | From | To | Avg | From | To | Avg |
| Finished Cattle (p/kg) | | | | | | | |
| Steers | | 270 | 315 | 280 | 215 | 269 | 240 |
| Friesians | | 204 | 224 | 214 | 185 | 203 | 195 |
| Heifers | | 240 | 290 | 260 | 175 | 239 | 210 |
| Beef Cows | | 230 | 274 | 240 | 170 | 229 | 200 |
| Dairy Cows | | 150 | 185 | 163 | 80 | 149 | 115 |
| Store Cattle (p/kg) | | | | | | | |
| Bullocks up to 400kg | | 265 | 358 | 288 | 225 | 264 | 240 |
| Bullocks 400kg - 500kg | | 250 | 338 | 270 | 200 | 249 | 220 |
| Bullocks over 500kg | | 250 | 296 | 265 | 215 | 249 | 225 |
| Heifers up to 450kg | | 250 | 319 | 275 | 200 | 249 | 225 |
| Heifers over 450kg | | 240 | 296 | 260 | 185 | 239 | 212 |
| Dropped Calves (£/head) | | | | | | | |
| Continental Bulls | | 380 | 540 | 430 | 250 | 375 | 310 |
| Continental Heifers | | 330 | 430 | 370 | 225 | 325 | 270 |
| Friesian Bulls | | 160 | 265 | 180 | 50 | 155 | 100 |
| Holstein Bulls | | 85 | 185 | 120 | 1 | 80 | 40 |

LATEST SHEEP MARTS (P/KG LW)

| From: 14/01/23 | | Hoggets | | | |
|----------------|-------------|---------|------|-----|-----|
| To: 19/01/23 | | No | From | To | Avg |
| Saturday | Swatragh | 520 | 467 | 505 | - |
| | Omagh | 618 | 428 | 473 | - |
| Monday | Kilrea | 390 | 455 | 500 | - |
| | Markethill | 200 | 450 | 478 | - |
| Tuesday | Saintfield | 525 | 460 | 520 | - |
| | Rathfriland | 417 | 430 | 480 | 467 |
| Wednesday | Ballymena | 360 | 450 | 511 | 477 |
| | Enniskillen | 200 | 450 | 491 | - |

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