

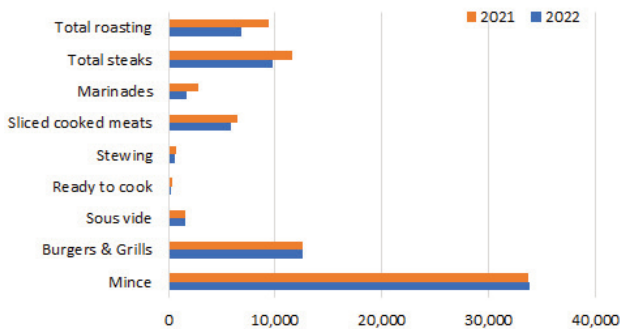
## EXPENDITURE ON BEEF INCREASES WHILE THE VOLUME PURCHASED DECLINES

Retail expenditure on beef in Great Britain during the twelve week period ending 30 October 2022 totalled £1019.7 million according to the latest data from Kantar Worldpanel. This is a 3.2 per cent increase from the corresponding period of 2021 when the retail value of beef sales totalled £987.2 million.

This increase in expenditure has been driven by higher retail prices as inflation increased the average retail price of beef to £7.85/kg in the 12 weeks ending 30 October 2022. This is an increase of 77p/kg in the average retail price of beef year on year. The impact of higher retail prices on demand has meant fewer consumers have purchased beef and those that continued to buy bought less or bought less expensive cuts.

The volume of UK retail beef sales totalled 129,900 tonnes during the 12 week period ending 30 October 2022, a 6.5 per cent decline from year earlier levels when sales totalled 139,500 tonnes.

**Figure 1: Volume sales of beef in the GB retail market ('000 Kg) during the 12 weeks ending 30 October 2022 compared to the corresponding period of 2021. Source: Kantar Worldpanel.**



The volume sales of individual cuts recorded a mixed performance year on year although the majority of key products recorded a decline in volume sales as shown in Figure 1.

Beef mince has performed strongly being less price sensitive than other categories and has recorded an increase in both sales volume and value. The volume of mince sold increased 0.3 per cent during the 12 w/e 30 October 2022 when compared to year earlier levels, while the total spend on mince in the UK increased 11.4 per cent. This brings the value of beef mince sold during the 12 week period to £198.7 million. This increase in the sales value has been driven by the 59p/kg increase in the price of mince year on year. This price increase is less than that seen in other categories as shown in Table 1, and mince remains a more affordable alternative to primary beef cuts at £5.88/kg.

Burgers and grills are the only other beef category to record an increase in volume sales year on year up 0.4 per cent, while the average price increased 70p/kg year on year. However, as Table 1 displays, burgers and grills are at the lower end of the beef products price range and are arguably like mince, an affordable and convenient protein source in the current economic climate.

Marinades saw the largest decline in both volume sales and value. Volumes declined by 39.6 per cent with a 40.5 per cent decline recorded in spend year on year despite this being the only category to record a decline in average price year on year as shown in Table 1. The average price of beef marinades declined 14p/kg year on year however remains ahead of primary beef cuts at £11.43/kg.

Sales of roasting joints have recorded the largest decline in absolute volume sales through retail year on year, back by 26.5 per cent (2,480 tonnes) during the 12 w/e 30 October 2022, while the price per kilo increased £1.54/kg to £10.43kg. The second largest decline in absolute volume sales of beef was recorded in the steaks category

**Table 1: The average price and spend on beef by category in the GB retail market during the 12 weeks ending 30 October 2022 and the year on year change. Source: Kantar Worldpanel.**

Category	Average Price (£/Kg)	Price change year-on-year	Total Spend (£millions)	% Spend change year-on-year
Mince	£5.88	+£0.59	£198.7	+11.4%
Burgers & Grills	£7.05	+£0.70	£88.9	+11.3%
Total Beef	£7.85	+£0.77	£1,019.7	+3.2%
Primary Beef	£8.58	+£0.79	£489.2	+2.0%
Processed Beef	£9.33	+£0.69	£177.6	+4.6%
Sous vide	£9.52	+£0.35	£15.3	+0.1%
Stewing	£9.55	+£1.41	£59.4	+14.3%
Total Roasting	£10.43	+£1.54	£71.8	-14.4%
Marinades	£11.43	-£0.14	£19.3	-40.5%
Ready to cook	£12.79	+£0.43	£4.2	-12.5%
Sliced Cooked Meats	£14.34	+£1.11	£85.2	-1.6%
Total Steaks	£16.14	+£2.10	£157.5	-3.4%

with 15.7 per cent (1,816 tonnes) less sold year on year. Meanwhile, this category recorded the largest price increase up £2.10/kg year on year. This brought the average price of steak in the UK to £16.14 during the 12 w/e 30 October 2022.

By category during the 12 weeks ending 30 October 2022 year on year, volume sales of ready to cook meats, declined by 18.6 per cent. This coincides with a 7.6 per cent increase in the average retail price of ready to cook beef products year on year.

## PRIME CATTLE KILL UPDATE

Last week the prime cattle kill in NI totalled 7,937 head, a decline of 318 cattle from the previous week, however throughput in recent weeks remains strong. During the eight week period ending 26 November 2022 the levels of prime cattle slaughtered in NI recorded an increase of 9,700 head from the previous eight week period. Increases were recorded in the levels of steers and heifers slaughtered while throughput of young bulls declined.

The young bull throughput declined by 730 head from the previous eight week period ending 01 October 2022 to total 6,297 head as shown in Figure 2. However this is 28 per cent above the corresponding eight week period of 2021 when 4,911 young bulls were slaughtered locally.

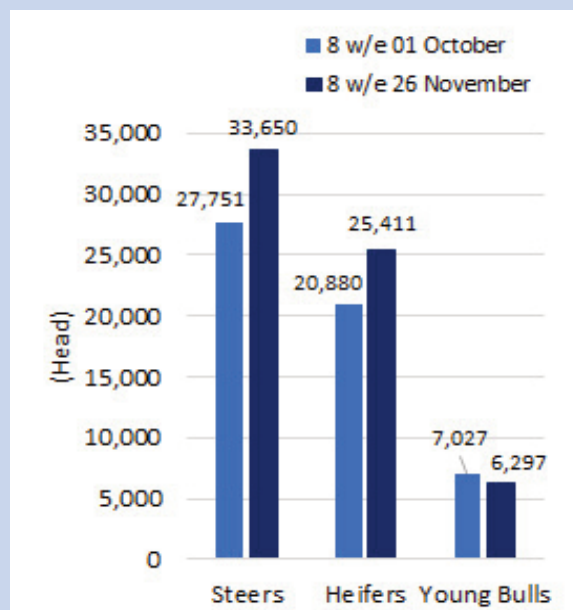
During the eight weeks ending 26 November 2022, 53 per cent of young bulls slaughtered in NI were of suckler origin while 22 per cent were beef cross and almost a quarter, 24 per cent were dairy animals. This is a shift from the eight weeks prior during which 62 per cent of the young bulls slaughtered in local processing plants were of suckler origin while 18 per cent were beef cross and 19 per cent were dairy origin animals.

The nine per cent decline in the proportions of suckler young bulls slaughtered during the eight w/e 26 November 2022, has been reflected in the average carcass weight which declined by 6.4kg during the last eight weeks to average 344.2kg.

The levels of heifers slaughtered in local plants recorded an increase of 4,531 head during the last eight week period, when compared to the previous eight week period ending 01 October when 20,880 heifers were killed locally. The carcass weights of heifers increased by 0.3kg during this period to an average of 321.3kg. This increase occurred despite a two per cent decline in the proportion of suckler bred heifers to total 57 per cent while the proportion of beef cross and dairy heifers increased by one per cent to represent 37 and six per cent of the kill respectively.

During the eight week period ending 26 November 2022, steer throughput recorded an increase of 5,899 head to total 33,650 cattle. The origin of steers processed was similar with 53 per cent of the kill being suckler animals, with the only change being a one per cent increase in the proportions of beef cross steers at the expense of dairy bred steers which accounted for 15 per cent. Despite the origin of steers slaughtered during this period being relatively unchanged the carcass weight of steers was 361.3kg, up 2.9 kg from 358.4kg during the previous eight weeks ending 01 October 2022.

**Figure 2: The levels of prime cattle by category slaughtered in NI during the eight w/e 26 November 2022 and 01 October 2022. Source: DAERA.**



## FQAS MART CLINICS DECEMBER 2022



LMC Farm Liaison Officer, Terry White, runs Farm Quality Assurance Scheme (FQAS) mart clinics 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.

For further information call (028) 9263 3024.

Mart	Day	Date
Markethill	Tuesday (Day)	06/12/2022
Ballymena	Friday (Day)	09/12/2022

### 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 28/11/22	Next Week 05/12/22
<b>Prime</b>		
U-3	414 - 430p	414 - 428p
R-3	408 - 424p	408 - 422p
O+3	402 - 418p	402 - 416p
P+3	346 - 362p	346 - 360p
	Including bonus where applicable	
<b>Cows</b>		
O+3	302 - 335p	302 - 335p

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 has remained firm with base quotes for U-3 grade prime cattle this week ranging from 414-430/kg. Next week quotes of 414-428p/kg are expected. The majority of plants are quoting from 420p/kg upwards for in spec U-3 steers and heifers however with reports of higher prices available producers should use these quotes as a starting point for negotiation. Quotes for good quality O+3 grade cows ranged from 302-335p/kg across the plants this week with similar quotes expected early next week.

Throughput of prime cattle in NI plants last week totalled 7,937 head, a decline of 318 head from the previous week. However this is an increase of 544 head when compared to the same week last year when prime cattle throughput totalled 7,393 head. Cow throughput in NI last week remained high with 2,779 cows processed, this is slightly back from the same week in 2021 when cow throughput totalled 2,640 head.

Imports of prime cattle from ROI for direct slaughter in NI plants last week totalled 247 head with 196 cows also imported. No cattle were imported from GB for direct slaughter in NI plants last week. There were two prime cattle and 34 cows exported from NI for slaughter in ROI plants last week while no cattle were exported from NI to GB for direct slaughter.

The deadweight cattle trade in NI firmed last week from the previous week across the majority of grades. The average steer price was up 0.8p/kg to 428.7p/kg while the R3 steer price was up by 0.9p/kg to 439.9p/kg. The average heifer price in NI last week was 431.2p/kg, up almost a penny, while the R3 heifer price increased by a penny to 441.5p/kg. Deadweight prices for young bulls came under some pressure in NI last week. However, the average young bull price was up by half a penny to 413.5p/kg, while the R3 young bull price in NI last week was 424.3p/kg, back 0.7p/kg from the previous week. The cow trade in NI strengthened last week compared to the previous week with the average cow price up 1.3p/kg to 304.2p/kg while the O3 cow price increased 3.3p/kg bringing it to 340.4p/kg.

In GB last week the average steer price remained relatively steady from the previous week at 443.6p/kg, while Scotland was the only region to record a decline in the average steer price where it came back 3p/kg to 454.1p/kg. The average R3 steer price in GB last week was back 0.3p/kg to 451.7p/kg from the previous week. The average heifer price in GB last week was slightly back by 0.2p/kg to 440.3p/kg while the average R3 heifer price increased by 0.8p/kg to 451.5p/kg. The cow trade in GB last week was back when compared to the previous week. The average cow price in GB decreased by 2.1p/kg to 324.8p/kg with the O3 cow price back by 0.7p/kg to just over 358p/kg last week.

In ROI last week the deadweight prime cattle trade improved with the R3 steer price up by the equivalent of 1.5p/kg to 404.9p/kg and the R3 heifer price increasing by 0.6p/kg to 408p/kg. The cow trade also firmed in ROI last week with the O3 cow price up by 0.6p/kg to 345.6p/kg. This is 5.2p/kg higher than the equivalent price in NI. Prime cattle throughput in ROI last week totalled 26,163 head while 11,115 cows were also slaughtered.

### Deadweight Sheep Trade

Base quotes from the major NI processors for R3 grade lambs strengthened this week to 540-545p/kg with quotes of 520-530p/kg expected early next week. The plants have reported a decrease in the number of lambs coming forward for slaughter with throughput last week totalling 9,962 head, back 467 head from the 10,429 lambs killed in NI during the previous week. However this is up 836 head when compared to the 9,126 lambs processed in the same week last year. Exports of lambs to ROI for direct slaughter last week totalled 6,995 head compared to 6,854 lambs the previous week. The deadweight lamb price in NI last week increased 24.7p/kg to 531p/kg while in ROI the deadweight lamb price was up by the equivalent of 12.5p/kg to 559.8p/kg.

### Liveweight Sheep Trade

A steady trade was reported across the marts this week with good numbers passing through many of the sale rings. In Massereene on Monday 602 lambs sold from 490-514p/kg compared to 648 lambs last Monday selling from 490-522p/kg. In Saintfield this week 785 lambs sold from 480-530p/kg compared to 545 lambs last week selling from 495-560p/kg. In Rathfriland this week 772 lambs sold to an average of 485p/kg compared to 503 lambs last week selling to an average of 500p/kg. In Ballymena this week a good entry of 2,650 lambs sold from 470-538p/kg compared to 2,125 lambs last week selling from 470-531p/kg. Top reported prices for cull ewes generally ranged from £149-172 across the marts with a top reported price of £298 in Rathfriland on Tuesday.

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

	W/E 26/11/22	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	442.2	412.1	456.6	456.2	457.4	457.4	456.8
	R3	439.9	404.9	456.5	452.3	450.0	447.8	451.7
	R4	438.5	404.0	456.9	456.3	446.4	449.5	454.4
	AVG	428.2	393.3	447.8	434.9	429.0	427.7	432.1
Heifers	U3	447.3	420.1	462.1	459.5	459.6	461.5	460.8
	R3	441.5	408.0	455.8	450.5	450.5	450.2	451.5
	R4	439.3	409.2	456.3	451.7	447.7	450.3	452.4
	AVG	429.9	399.7	440.9	429.6	426.2	421.3	426.7
Young Bulls	U3	432.5	407.2	449.5	450.2	448.3	449.3	449.3
	R3	424.3	397.7	445.7	437.7	440.9	441.3	441.4
	O3	413.9	383.7	417.0	408.8	415.1	420.0	412.7
	AVG	413.5	-	435.3	418.9	423.4	423.8	424.6
Prime Cattle Price Reported	6,469	-	6,323	6,406	7,374	4,686	24,789	
Cows	O3	340.4	345.6	362.8	361.1	356.5	354.1	358.1
	O4	341.2	346.0	368.8	358.9	355.6	353.6	358.3
	P2	297.6	305.6	321.4	316.1	314.8	317.0	316.2
	P3	318.4	328.1	337.2	339.1	332.1	334.1	334.2
AVG	304.2	-	357.8	330.2	317.9	315.5	324.8	

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.27p 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 26/11/22	1st QUALITY			2nd QUALITY		
		From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>							
Steers		255	285	266	205	254	225
Friesians		190	209	202	163	188	177
Heifers		240	266	256	195	239	215
Beef Cows		215	259	230	160	214	180
Dairy Cows		140	187	155	70	139	110
<b>Store Cattle (p/kg)</b>							
Bullocks up to 400kg		260	313	275	200	259	230
Bullocks 400kg - 500kg		230	286	250	165	229	195
Bullocks over 500kg		240	271	250	170	239	200
Heifers up to 450kg		260	351	275	180	259	215
Heifers over 450kg		220	264	243	170	219	195
<b>Dropped Calves (£/head)</b>							
Continental Bulls		400	540	440	265	395	325
Continental Heifers		340	430	377	200	335	270
Friesian Bulls		145	180	160	70	110	90
Holstein Bulls		50	110	80	1	45	25

### REPORTED NI CATTLE PRICES - P/KG

W/E 26/11/22	Steers	Heifers	Young Bulls
U3	442.0	446.7	433.1
R3	437.5	439.7	425.8
O+3	430.9	434.7	423.7

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 26/11/22	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	230.9	244.0	254.5	273.4
P2	249.6	276.6	291.0	311.0
P3	300.0	302.8	309.4	320.9
O3	-	330.0	330.3	341.3
O4	-	323.1	340.5	341.5
R3	-	-	-	358.4

## SHEEP TRADE

### NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 28/11/22	Next Week 05/12/22
R3 Lambs up to 22kg	530 - 545p	520 - 530p

### REPORTED SHEEP PRICES

(P/KG)	W/E 12/11/22	W/E 19/11/22	W/E 26/11/22
NI L/W Lambs	463.6	477.4	490.7
NI D/W Lambs	502.0	506.3	531.0
GB D/W Lambs	534.5	547.2	549.6
ROI D/W	540.2	547.3	559.8

### LATEST SHEEP MARTS (P/KG LW)

From: 26/11/22		Lambs			
To: 01/12/22		No	From	To	Avg
Saturday	Omagh	1122	498	565	-
	Swatragh	1705	497	555	-
Monday	Kilrea	1080	472	532	-
	Massereene	602	490	514	-
Tuesday	Saintfield	785	480	530	-
	Rathfriland	772	470	523	485
Wednesday	Ballymena	2650	470	538	485
	Enniskillen	609	460	502	-
	Armoy	712	465	517	-
	Markethill	1330	480	540	-

Information supplied by LMC / DAERA/ AHDB/ DAFM

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## LMC'S ANIMAL HEALTH PRIORITIES CAME INTO SHARP FOCUS THIS AUTUMN

The entire Autumn period had a very strong animal health focus for the Livestock and Meat Commission (LMC) and its management team. Communicating the key fact that improved animal health levels will help improve farm sustainability was at the heart of this important messaging. A case in point was LMC's sponsorship of the 2022 Animal Health and Welfare Northern Ireland (AHWNI) conference.

The event was marked by a series of presentations, all profiling the symbiotic nature of the productivity, sustainability and enhanced profit-related benefits that can be secured if livestock farmers make the attainment of improved animal health in their herds and flocks a clear priority. LMC Chief Executive Ian Stevenson takes up the story.

"Courtesy of his presentation, Dr Phillip Skuce from Scotland's Moredun Research Institute, outlined that optimising animal health in an average sized Scottish suckler beef herd could improve herd economics by up to £10,000 per annum." Ian added: "We know that poor levels of animal health lead to poorer growth rates, lower feed conversion rates, higher levels of mortality and enhanced herd or flock culling rates. "All of these factors contribute to a higher carbon footprint. But the good news is that farmers have full control of these issues. "The solution lies in the adoption of bespoke, dynamic animal-health plans."

Agriculture is responsible for approximately 45% of UK methane emissions, the majority of which is produced through rumen digestion and the decomposition of manures. However, certain livestock diseases also make a significant contribution to emission levels. Delegates attending the AHWNI conference were told that improving livestock health and welfare to drive on farm efficiencies could reduce methane emissions by as much as 10%.

"Effective farm health strategies are a gateway into lower emissions production systems" Ian Stevenson further explained. Diseases of cattle and sheep that impact directly on greenhouse gas (GHG) emission levels include: Bovine Viral Diarrhoea (BVD); Johne's Disease; Bovine Respiratory Disease (BRD); Infectious Bovine Rhinotracheitis (IBR); Sheep Scab and lameness. As Ian Stevenson also confirmed, sustainable parasite management can also have a very significant impact on both animal health standards and carbon footprint values.

Recent studies indicate that gastrointestinal parasitism leads to a minimum 10% increase in GHG emissions in lamb production. Meanwhile, liver fluke infections add an extra 11 days to slaughter in cattle, reducing growth rates by 4% and adding 2% to the GHG footprint. Routinely monitoring worms and fluke can help enormously when deciding if/when to treat, what product to use, and whether treatment has worked or not. This also has the spin-off benefit of avoiding unnecessary anthelmintic treatment and slowing down selection for resistance.

### The role of veterinary surgeons

The LMC representative reflected on the key role played by veterinary surgeons, not just in delivering animal health solutions within agriculture, but across society as a whole. Specifically, where livestock farming is concerned, he highlighted the need for a close working relationship between the producer and his/her vet.

"The days are gone when the vet is seen as someone, who comes in to deal with a crisis situation," Stevenson commented. "Yes, issues such as difficult calvings will always arise. But increasingly, the veterinary surgeon is the person who can help the farmer manage risk and design preventative animal health strategies that can be implemented within a specific farming business. He added: "Farmers should be aware of the specific animal health problems that are impacting within their herds or flocks. "Implementing bespoke

vaccination policies in response to this challenge is an important proactive measure. "And the farm's vet will deliver the advice that can make all of this happen in the most cost-effective way possible."

Ian attended the recent 2022 British Veterinary Association (Northern Ireland) annual dinner. He commented: "The role of vets in everyday life is often underestimated, whether this is regarding the health and welfare of domestic livestock and companion animals or underpinning the integrity of our food system. "Vets play a key role in controlling notifiable diseases, the certification of food consignments for import and export, the opening of new export markets and maintaining access to existing markets. "They also help manage the risk of new and emerging disease risks such as African Swine Fever, Avian Flu and other trade-disrupting, animal health-related issues."

### Farm Quality Assurance Scheme

LMC's front-line commitment to the improvement of animal health and welfare levels within Northern Ireland's cattle and sheep sectors is encapsulated within the organisation's Farm Quality Assurance Scheme (FQAS) standards. During 2022 a robust review of the scheme's standards was undertaken. The work was carried out by the FQAS Standards' Setting Committee.

"A review of this nature is undertaken on a formal basis every three years. However, specific quality assurance-related measures can be addressed, as and when required," Ian Stevenson confirmed. The development of the FQAS standards is underpinned by the three core pillars of farm assurance. These relate to animal health and welfare, food safety and protecting the environment.

The most recent review was marked by several important updates to each section of the FQAS Product Standard and Rules. These sections relate to eight key areas, namely: husbandry, animal health, animal nutrition, animal traceability, housing and handling, transport, environmental care and farm procedures.

"The revision of standards should be viewed as a positive action by farmers and industry stakeholders," the Commission's Chief Executive added: "Routine reviews provide up to date support for scheme members in the marketing of their beef and lamb to the widest possible range of industry customers. It also provides further assurance to customers that beef and lamb sourced from farm quality assured producers continues to be produced to the highest standards."



A number of specific improvements, relating to animal health and welfare requirements, are included in the 2022 edition of the FQAS standard and rules.

These include a review of health, performance and antibiotic usage in consultation with the farm vet as part of the completion of herd / flock health plans.

There is also a requirement to use analgesic following specified procedures such as castration, dehorning and disbudding.

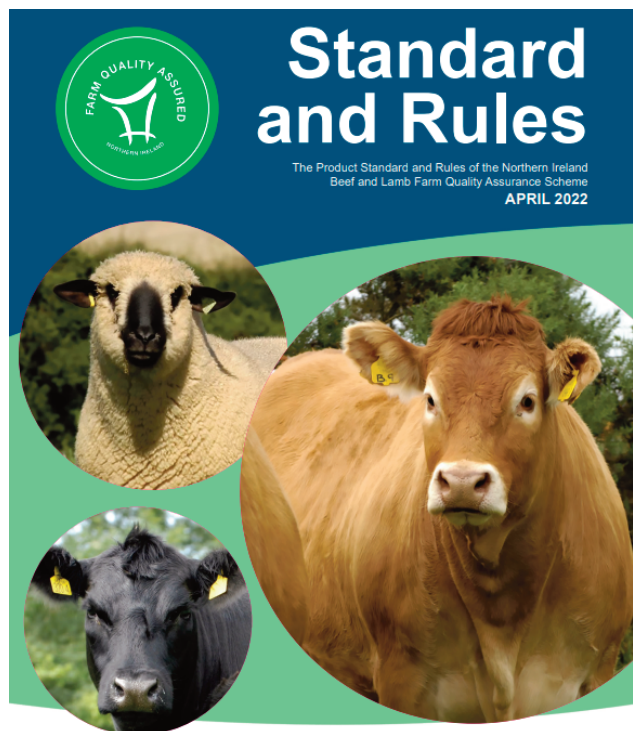
Another area of enhancement includes the setting of new standards on the rearing of young stock (calves and lambs); ensuring their welfare and needs are met in accordance with the DAERA codes of practice for the welfare of livestock. Measures here include the need to provide calves and lambs with sufficient, high-quality colostrum at birth. Providing adequate levels of comfort for these animals at all times is an FQAS priority.

Other key areas of enhancement in the animal health section of FQAS 2022 include a focus on isolation facilities, dealing with casualty animals, and confirming visits of prescribing vets to farms within 12 months of veterinary medicine prescription dates.

Ian Stevenson again: "In February 2020 it became a requirement of FQAS that at least one person responsible for administering animal medicines must be formally trained in the responsible use of antimicrobials. "To date, over 10,000 farmers in Northern Ireland have undertaken training in this regard.

"A key report published by the UK Veterinary Medicines Directorate last month has shown that UK antibiotic sales for food-producing animals have reduced by 55% since 2014. "Sales of these products are now at their lowest levels to date."

FQAS standards can be changed within any three-year review period. The proactive stance that LMC has taken towards the eradication of BVD in Northern Ireland is a case in point. Back in 2020 the Commission acted to suspend the FQAS membership of any farmer retaining persistently infected (PI) BVD animals on their farms. Ian Stevenson concluded: "The implementation of the measure acted to significantly reduce the number of PI cattle on farms. "But not every farmer is an FQAS member. BVD is a disease that we can and must eradicate. "And if it takes additional legislation to finally get us over the line, where this matter is concerned, so be it."



Northern Ireland  
**Beef & Lamb**  
Farm Quality Assurance Scheme

The April 2022 version of the NIFQA Standards & Rules is available now and can be viewed online at <https://www.lmcni.com/farm-quality-assurance/fqas-documentation/>



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