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LAMB SALES STRUGGLE IN THE GB RETAIL MARKET

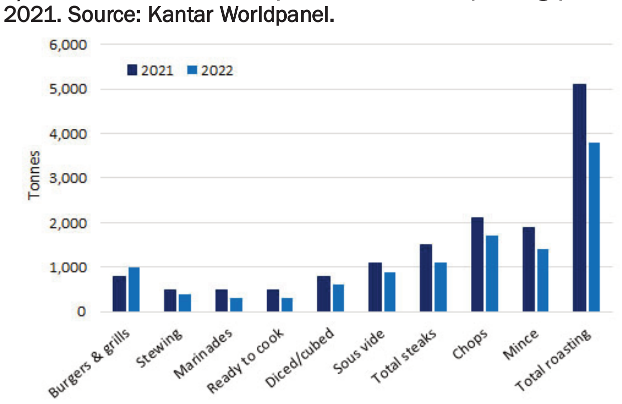
During the 12 week period ending 30 October 2022 retail lamb sales in Great Britain were valued at £167.1 million according to the latest available data from Kantar. This is a 9.9 per cent decline from year earlier levels when retail lamb sales were valued at £186.4 million.

The decline in the total value of retail lamb sales was driven primarily by a decline in the volume of lamb sold by major retailers. During the 12 week period ending 30 October 2022 the volume of lamb sales by the GB retailers totalled 16,400 tonnes, a decline of 18.6 per cent from the corresponding period in 2021. There was also a decline in household penetration for lamb year on year which will have contributed to the decline in both the value and volume of sales.

Some of the decline in volume sales of lamb has been offset by an increase in the average retail price year on year. In the 12 week period ending 30 October 2022 the average retail price was £10.19/kg, an increase of 96p/kg from the same period in 2021 when the average retail price was £9.23/kg. As shown in **Figure 1** all primary lamb cuts recorded declines in volume sales during the 12 week period ending 30 October 2022 while similar to the performance of beef, during the same period processed lamb recorded an increase.

The most signficiant change seen in any lamb category was ready to cook lamb products. Consumer spend on these products decreased 33.2 per cent year on year with these products recording a decline in volume sales of 40.3 per cent.

Figure 1: Volume sales of lamb in GB during the 12 week period to w/e 30 October 2022 compared to the corresponding period of 2021. Source: Kantar Worldpanel.



The total roasting joint category recorded retail sales in GB valued at £42.2 million during the 12 weeks ending 30 October 2022. This was back 22.2 per cent from year earlier levels. This decline was driven by a 4.7 per cent increase in the average retail price of roasting joints to £11.02/kg while volume sales of roasting joints were back by 25.7 per cent.

Within this category leg roasting joints struggled with the value and volume of sales back by 26.7 per cent and 32.3 per cent respectively. The performance of shoulder roasting joints during this period however was better. In value terms sales declined by 6.5 per cent to total £11.5 million while volumes decreased by a marginal 0.5 per cent to total 1,100 tonnes during the 12 weeks ending 30 October 2022. This performance can be explained by shoulder roasting joints being the only lamb product to record a price decrease year on year, the average price back by 69p/kg year on year.

Sales of lamb leg steaks also came under some pressure during the 2021/22 period. The value of retail sales totalled £16.5 million, back 17.9 per cent from year earlier levels while volume sales declined by 28.2 per cent to total 1,100 tonnes.

Retail sales of processed lamb were valued at £6.8 million during the 12 weeks ending 30 October 2022, an 18.3 per cent or £1.1m growth in value from the corresponding 12 week period in 2021. A combination of a 13.8 per cent increase in the volume of processed lamb sales and 3.9 per cent increase in the average retail price contributed to the improvement in the overall value of sales. Volume sales are likely to have increased with this category seeing one of the smallest price increases year on year as shown in **Table 1.** Within the processed lamb category, sales of burgers and grills strengthened in both value and volume terms during the 2022 period recording increases of 21.2 and 16.4 per cent respectively.

Meanwhile, retail sales of added value lamb products struggled during the 12 weeks ending 30 October 2022 according to the latest available data from Kantar. Sales of sous vide products, lamb marinades and ready to cook lamb products all recorded declines in retail value and volume sales. This decline in the value and volume of added value lamb products is similar to that seen in the retail sales of added value beef during the same period which also recorded a decrease in both value and volumes of sales.

Table 1: The average retail price of lamb in GB by category during the 12 w/e 30 October 2022 and the year on year change. Source: Kantar Worldpanel.

	Average price (£/kg)	Price change year-on-year
Burgers/Grills	£6.65	+£0.26
Processed Lamb	£6.70	+£0.27
Mince	£9.50	+£1.70
Total Lamb	£10.19	+£0.96
Shoulder Roasting Joint	£10.82	-£0.69
Sous Vide	£10.99	+£1.57
Total Roasting	£11.02	+£0.49
Leg Roasting Joint	£11.10	+£0.83
Primary Lamb	£11.28	+£1.23
Stewing	£12.75	+£0.62
Diced/Cubed	£12.77	+£2.78
Ready to cook	£12.84	+£0.69
Chops	£12.96	+£1.84
Marinades	£13.34	+£2.34
Total Steaks	£14.99	+£1.88

While the value and volume of lamb sales recorded a decline year on year there has been an increase in the volume of sheepmeat imports entering the UK market. According to the latest data available from HMRC up to the w/e 30 September 2022, total volumes of sheepmeat imports were up by 25.1 per cent compared to the same time period in 2021 at 47,422 tonnes.

During the first nine months of 2022 New Zealand exported 29,823 tonnes of sheepmeat into the UK, up 11.5 per cent from the same period last year. Lamb imports to the UK from Australia increased by 23.8 per cent to total 8,026 tonnes during the same period. However the increased product availability has not had a significant impact on decreasing the price of lamb.

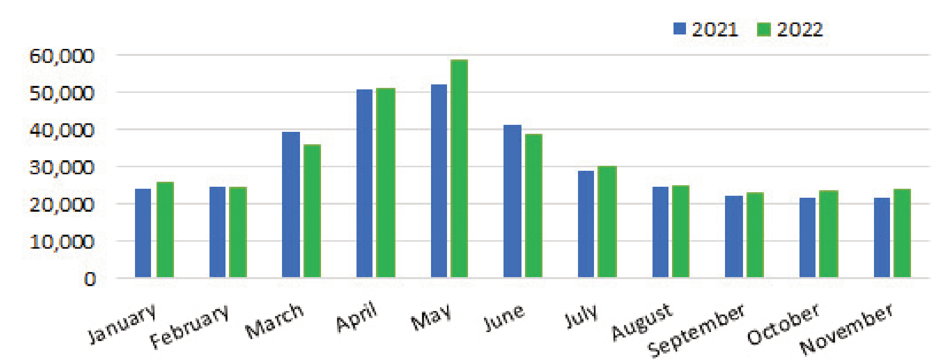
This increase in imports was primarily driven by frozen sheepmeat with a 64.9 and 36.8 per cent increase from New Zealand and Australia respectively.

NI CALF REGISTRATIONS UPDATE

Beef sired calf registrations during November 2022 totalled 23,966 head an increase of 9.6 per cent on the corresponding period in 2021 when 21,864 calves were registered. This increase has resulted in calf registrations during eight of the first eleven months of 2022 being ahead of the corresponding months in 2021 as indicated in **Figure 2**. Previous to 2021 the last time similar numbers were recorded during the month of November was 2007 when 20,341 beef sired calves were registered in Northern Ireland.

During 2022 to date a total of 358,531 beef sired calves were registered in NI compared to 350,839 calves registered during the same period in 2021. This accounts for a 2.2 per cent increase in beef sired calf registrations year on year with 7,692 more beef sired calves registered during 2022 to date. This increase is perhaps surprising given the 14.2 per cent increase in cow throughput year on year in NI during the period from January to November 2022.

Figure 2: Beef sired calf registrations from January to November 2022 and the corresponding period in 2021. Source: APHIS.

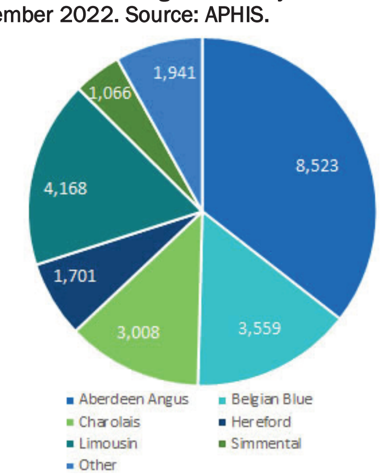


During the month of November 2022 by breed Aberdeen Angus remained the most popular beef sire with 8,523 Aberdeen Angus calves registered, accounting for 36 per cent of all beef registrations as shown in **Figure 3**. Aberdeen Angus calf registration levels were more than double that of the next most common beef sire which was Limousin. Limousin calf registrations totalled 4,168 head or 17 per cent of total calf registrations during November 2022. Meanwhile, 3,559 Belgian Blue calves were registered last month, 15 per cent of total beef calves.

This was similar to the corresponding period of 2021 when Aberdeen Angus, Limousin and Belgian Blue calves accounted for 35, 18 and 14 per cent of total beef calf registrations respectively.

During November the number of dairy sired male calf registrations continued the monthly year on year decline recorded during much of 2022. The number of dairy sired male calves registered during November 2022 totalled 4,307 head, a reduction of 31.4 per cent on the 5,660 head registered during November 2021. Total dairy male registrations during the first eleven months of 2022 were running 9,257 head or 18.3 per cent lower than the same period in 2021.

Figure 3: Beef calf registrations by breed during November 2022. Source: APHIS.



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WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 05/12/22	Next Week 12/12/22
Prime		
U-3	414 - 430p	418 - 430p
R-3	408 - 424p	412 - 424p
O+3	402 - 418p	406 - 418p
P+3	346 - 362p	350 - 362p
	Including bonus where applicable	
Cows		
O+3	302 - 335p	308 - 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.

REPORTED NI CATTLE PRICES - P/KG

W/E 03/12/22	Steers	Heifers	Young Bulls
U3	443.7	447.0	432.6
R3	438.9	440.9	432.3
O+3	431.9	432.5	417.0

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 03/12/22	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	230.2	246.1	257.0	274.4
P2	251.1	282.9	296.7	312.8
P3	282.1	294.8	317.3	321.8
O3	311.7	315.5	332.4	340.7
O4	266.0	-	340.0	346.6
R3	-	-	-	366.3

Deadweight Cattle Trade

Base quotes from the major processors this week ranged from 414-430p/kg with quotes of 418-430p/kg expected on Monday. Six of the seven major processors are quoting 424p/kg upwards for both steers and heifers. Base quotes for O+3 grading cows this week also strenghtened at the lower end to range from 308-335p/kg with similar quotes expected early next week.

Last week prime cattle throughput decreased from the previous week to 7,665 head processed locally. This brings total throughput of prime cattle to date in 2022 to 349,582 head, an 8.5 per cent increase when compared to the 322,051 prime cattle processed in the same period in 2021. Cow throughput in NI recorded an increase last week to 2,966 cows. This brings the total cow throughput to date this year to 109,924 head, a 14.2 per cent increase when compared to the same period in 2021 when 96,253 cows were processed locally.

Imports of prime cattle from ROI for direct slaughter in NI plants last week totalled 268 head with 168 cows also imported. This brings total prime cattle imports from ROI during 2022 to date to 13,970 head, a slight decrease of 0.7 per cent from the same period in 2021. Meanwhile cattle exports from NI for slaughter in ROI plants consisted of 49 cows last week. This brings total cattle exports during 2022 to date to 3,387 head, up 29 per cent when compared to the same period last year.

Last week the NI average steer price and R3 steer price both increased by 1.7p/kg from the previous week to 430.4p/kg and 441.6p/kg respectively. A decrease of 0.7p/kg was reported in the average heifer price last week to 430.5p/kg while the R3 heifer price was up by 0.4p/kg to 441.9p/kg. The average young bull price in NI last week decreased by almost 3p/kg from the previous week to 410.6p/kg, however the R3 young bull price increased by 2.4p/kg to 426.7p/kg. Meanwhile the average NI cow price decreased by 0.7p/kg last week to 303.5p/kg with O3 cow price back a penny from the previous week at 339.4p/kg.

In GB last week the average steer price improved by 0.6p/kg to 444.2p/kg while the R3 steer price was back 0.7p/kg from the previous week to 451p/kg. This has narrowed the differential between NI and GB R3 steer prices to 9.4p/kg last week. Meanwhile the average heifer price in GB increased by 1.2p/kg to 441.5p/kg with the R3 heifer price back by 2.2p/kg to 449.3p/kg. This has narrowed the differential between NI and GB R3 heifer prices last week to 7.4p/kg. The average cow price in GB last week came back by 1.5p/kg to 323.3p/kg with the O3 price back by 3p/kg to 355.1p/kg. This places it 15.7p/kg above the equivalent cow price in NI last week.

The deadweight cattle trade strenghtened in ROI with last week with the majority of prices increasing 6-8p/kg from the previous week. The R3 steer price and R3 heifer price in ROI both increased by the equivalent of 6.7p/kg to 411.6p/kg and 414.7p/kg respectively. This places R3 steer price in ROI at 30p/kg below the same NI price and the R3 heifer price in ROI at 27.2p/kg lower than the equivalent price in NI.

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

W/E 03/12/22		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	444.5	420.0	456.4	456.2	456.9	457.6	456.6
	R3	441.6	411.6	454.2	452.7	449.0	448.6	451.0
	R4	439.3	411.3	457.4	456.0	447.4	448.5	454.8
	O3	431.1	401.0	441.0	436.6	431.5	424.7	432.1
	AVG	430.4	-	452.6	448.2	438.8	435.8	444.2
Heifers	U3	445.8	427.2	458.8	456.8	461.0	456.1	458.5
	R3	441.9	414.7	454.2	450.4	447.6	446.7	449.3
	R4	440.4	416.1	456.5	454.4	447.1	449.0	453.5
	O3	429.8	407.0	435.7	430.6	419.0	420.8	424.4
	AVG	430.5	-	453.8	445.0	434.1	429.1	441.5
Young Bulls	U3	432.3	414.3	447.7	449.0	452.1	408.0	448.9
	R3	426.7	404.8	432.7	443.2	438.0	425.3	438.4
	O3	413.9	392.3	414.0	403.8	410.8	414.6	409.8
	AVG	410.6	-	419.0	429.8	423.2	419.0	423.5
Prime Cattle Price Reported		6,246	-	6,537	7,113	7,403	4,662	25,715
Cows	O3	339.4	351.2	361.4	358.3	352.7	350.2	355.1
	O4	346.1	352.2	364.1	357.4	352.1	348.9	355.2
	P2	300.3	311.7	306.6	320.7	310.1	310.4	311.9
	P3	319.6	331.9	325.8	335.6	328.6	327.4	329.3
	AVG	303.5	-	355.5	335.2	314.6	309.9	323.3

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.18p 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 03/12/22	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	260	292	273	210	259	230
Friesians	200	218	208	170	196	185
Heifers	247	284	255	200	246	220
Beef Cows	203	236	217	150	202	175
Dairy Cows	140	173	155	60	139	100
Store Cattle (p/kg)						
Bullocks up to 400kg	250	303	275	200	249	225
Bullocks 400kg - 500kg	235	294	259	170	234	200
Bullocks over 500kg	231	270	248	165	229	197
Heifers up to 450kg	230	303	252	170	226	200
Heifers over 450kg	220	261	245	160	219	190
Dropped Calves (£/head)						
Continental Bulls	400	530	435	285	395	340
Continental Heifers	280	380	330	200	275	240
Friesian Bulls	180	280	230	100	175	135
Holstein Bulls	100	190	125	2	95	40

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 05/12/22	Next Week 12/12/22
R3 Lambs up to 22kg	520 - 540p	520 - 540p

REPORTED SHEEP PRICES

(P/KG)	W/E 19/11/22	W/E 26/11/22	W/E 03/12/22
NI L/W Lambs	477.4	490.7	479.0
NI D/W Lambs	506.3	531.0	536.6
GB D/W Lambs	547.2	549.6	561.1
ROI D/W	547.3	559.8	565.6

Deadweight Sheep Trade

Base quotes from the major lamb processors this week ranged from 520-540p/kg with similar quotes expected early next week. Lamb throughput in local plants increased to 10,302 head last week and brings the year to date throughput for lambs/hoggets to 411,079 head. This is an increase of 2.7 per cent when compared to 400,439 lambs/hoggets slaughtered in the same period in 2021. Exports of lambs to ROI for direct slaughter last week decreased to 6,492 head. This brings the total lambs/hoggets exported to ROI for direct slaughter to 264,735 to date in 2022, an increase of eight per cent when compared to 245,000 lambs/hoggets exported in the same period last year. The deadweight lamb price in NI last week increased by 5.6p/kg to 536.6p/kg.

Liveweight Sheep Trade

The liveweight trade for lambs in the marts last week generally reported a softening from the previous week. In Omagh last Saturday 616 lambs sold from 468-501p/kg compared to 1,122 lambs the previous Saturday selling from 498-565p/kg. Massereene this week had 615 lambs selling from 461-490p/kg compared to 602 lambs the previous week selling from 490-514p/kg. In Rathfriland on Tuesday 462 lambs sold from 454-529p/kg with an average price of 492p/kg, improved from last week's average of 485p/kg. In Ballymena this week 1,550 lambs sold from 460-533p/kg (avg 480p/kg) compared to last week when 2,650 lambs sold from 470-538p/kg (avg 485p/kg). Top reported prices for cull ewes ranged from £98-£300 across the marts this week.

LATEST SHEEP MARTS (P/KG LW)

From: 03/12/22		Lambs			
To: 08/12/22		No	From	To	Avg
Saturday	Omagh	616	468	501	-
	Swatragh	1200	462	505	-
Monday	Kilrea	800	474	521	-
	Massereene	615	461	490	-
Tuesday	Saintfield	660	470	510	-
	Rathfriland	462	454	529	492
Wednesday	Ballymena	1550	460	533	480
	Enniskillen	682	450	492	-
	Armoy	596	470	510	-
	Markethill	1300	470	500	-

Contact us
T: 028 9263 3000
E: bulletin@lmcni.com
W: www.lmcni.com