LMC
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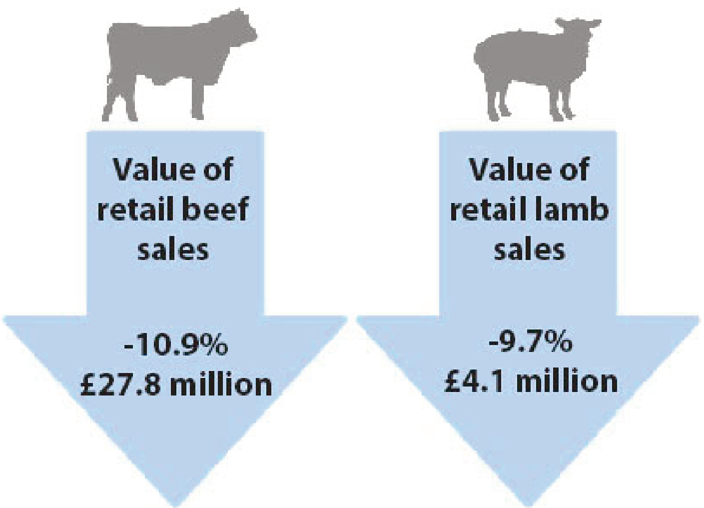
NI RECORDS FIRM DECREASE IN RED MEAT RETAIL SALES

There has been a reduction in retail red meat sales in Northern Ireland during recent weeks relative to the same period last year. During the 12 weeks ending 13 June 2021 red meat value sales totalled £31.9 million in Northern Ireland which is a reduction of 10.7 per cent or £3.8 million from the same period in 2020.

It is worth noting that the equivalent 12 week period in 2020 coincided with the beginning of the Covid-19 pandemic which resulted in a complete closure of food service for an initial period and panic buying by many consumers at retail level.

Total spend on red meat has declined due to a reduction in volume sales of 5.5 per cent to total 4,082 tonnes during the 12 week period alongside a 46p/kg decline in average price.

Figure 1: Retail beef and lamb value sales during the 12 weeks ending 13 June 2021 compared with the corresponding period in 2020.



Although retail sales of red meat have decreased during the 12 weeks ending 13 June 2021 relative to the same period in 2020, lamb and beef have recorded a slight increase in their share of total meats in NI. Red meat accounted for 45 per cent of total meat value sales during the 12 week period in 2021, up from 44.8 per during the same period in last year.

Beef

Value sales of beef in Northern Ireland were back almost 11 per cent during the 12 weeks ending 13 June 2021 relative to the corresponding period last year. Value sales of beef totalled £27.8 million accounting for 87 per cent of total spend on red meat in NI. Volume sales in this category were also back 5.7 per cent year on year, totalling 3,642 tonnes during the 12 week period in 2021. The retail price of beef in NI has also dropped by 45p/kg during the 12 week period to average £7.63/kg which has driven the downward movement in value sales.

A decline in spend was recorded across all red meat cut categories with the exception of roasting beef which reported a significant increase of almost 24 per cent or £1 million year on year. The most notable proportional decrease in value sales were recorded in other beef, frying/grilling steaks and stewing beef.

Other beef, consisting of beef which does not fall into the mince, frying/grilling steaks, roasting or stewing beef categories recorded a strong decrease of 28.2 per cent in terms of value sales during the 12 weeks ending 13 June 2021 compared to the corresponding period in 2020. The average price of this category of beef increased by 12p/kg however this was offset by the notable decline in volume sales of 29.4 per cent leading to a decline in value sales.

Frying/grilling steaks also recorded a strong decline in spend in NI during the 12 weeks ending 13 June 2021 relative to the same period last year. Spend in this category totalled £8 million which was back from £10.5 million during the relative 12 week period last year equating to a 23.3 per cent decline year on year. Volume sales in this cut category were back 25.6 per cent relative to 2020. This decline alongside a 42p/kg increase in average price led to the overall decrease in spend in this cut category. Spend on stewing beef in NI during the 12 week period in 2021 totalled £2.4 million which is a decline of 16 per cent year on year. This decline was heavily influenced by a significant drop in price of 15.5 per cent or £1.32/kg while volume sales in this category dropped by a marginal 0.6 per cent relative to the same period in 2020.

Lamb

Lamb volume sales during the 12 week period ending 13 June 2021 totalled £4.1 million accounting for the remaining 13 per cent of spend on red meat in NI. Similar to beef, spend in this category has come back relative to the same period last year when value sales totalled £4.6 million.

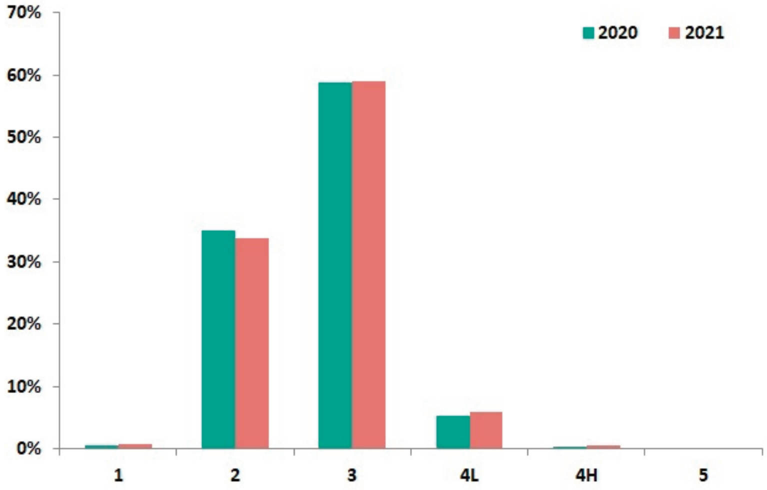
The volume of retail lamb meat sold in Northern Ireland during the 12 week period in 2021 totalled 440 tonnes which is a reduction of four per cent from the relative period last year and a more notable 28 per cent from 2019 figures during the corresponding period. This drop in volume sales alongside a six per cent decline in average price led to an overall decline in spend on lamb.

LAMB AND HOGGET GRADING OVERVIEW QUARTER 2 2021

The deadweight lamb trade has eased back over the last month however continues ahead of last year. Last week's deadweight lamb price in Northern Ireland was 472.8p/kg which is 11.7p/kg ahead of the same week last year when the deadweight lamb price was 461.1p/kg.

While the lamb and hogget trade has been well ahead of 2020 during the second quarter of 2021, there has been some changes to conformation scores achieved by lambs and hoggets processed in local plants while fat classes achieved remain very similar to quarter 2 2020.

Figure 2: Fat classes achieved by lambs and hoggets killed in NI during quarter 2 2021 and 2020. Source: DAERA



Fat Class

Producers should aim to produce lambs which achieve a fat cover of 2 or 3 as these lambs can be used to service the widest range of customers. During quarter 2 2021 the proportion of lambs meeting a fat class 2 was 34 per cent which was back marginally from 2020. The majority of lambs killed in local plants during quarter 2 2021 were awarded a fat class 3 with 59 per cent meeting this specification. This was unchanged from the same period last year.

The proportion of lambs killed in local plants awarded fat class 1, fat class 4H and fat class 5 during quarter 2 of 2021 remained very small.

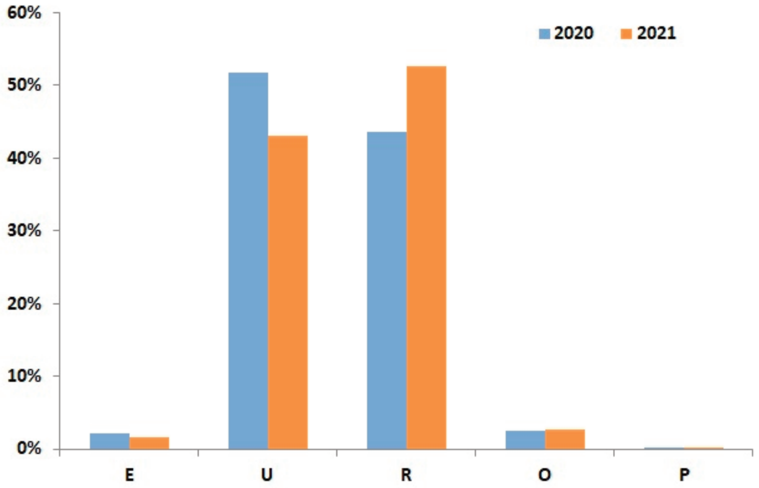
Conformation scores

Current market specifications require lambs and hoggets to meet U and R conformation scores at point of slaughter. During the second quarter of 2021 96 per cent of lambs and hogget carcases met these requirements which is very similar to last year's figures during the same period.

However, while the overall proportion of lambs and hoggets killed in Northern Ireland meeting market specification for grade has remained steady there has been some changes in the proportion of lambs achieving each grade year on year as outlined in **Figure 3**.

The proportion of lambs and hoggets achieving a U grade in NI processing plants was 43 per cent, back from 53 per cent in the second quarter of 2020. Meanwhile the number of R grading lambs increased to 53 per cent, up nine per cent relative to last year's figures.

Figure 3: Conformation scores achieved by lambs and hoggets killed in NI during quarter 2 2021 and 2020. Source: DAERA



WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 26/07/21	Next Week 02/08/21
Prime		
U-3	384 - 394p	384 - 394p
R-3	378 - 388p	378 - 388p
O+3	372 - 382p	372 - 382p
P+3	318 - 332p	318 - 332p
	Including bonus where applicable	
Cows		
O+3	275 - 302p	280 - 302p

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 24/07/21	Steers	Heifers	Young Bulls
U3	403.5	405.5	398.7
R3	400.1	401.1	392.6
O+3	395.1	395.8	380.5

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 24/07/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	208.4	221.5	235.3	241.9
P2	228.5	259.8	277.8	287.5
P3	235.4	271.6	295.7	297.8
O3	-	306.0	309.1	316.7
O4	-	303.5	306.0	321.3
R3	-	-	-	331.6

Deadweight Cattle Trade

Base quotes from the plants for in-spec U-3 grade prime cattle this week ranged from 384-394p/kg with the majority of plants quoting at the upper end of this scale for both steers and heifers. Quotes for good quality O+3 grade cows ranged from 280-302p/kg this week with the majority of plants quoting in the region of 290-302p/kg. Similar base quotes for all types of cattle are expected for Monday.

Prime cattle throughput last week totalled 6,380 head. This was an increase of 1,160 head from the previous week and 11 per cent higher than the 5,761 head processed during the same week last year. Cow throughput in NI last week totalled 1,976 head an increase of 580 head from the previous week and a similar throughput when compared to the 2,031 processed in the same week in 2020.

Prime cattle imports from ROI for direct slaughter last week totalled 365 head with 171 cows also imported. Exports from NI for direct slaughter in ROI plants last week consisted of one heifer and 28 cows while no cattle were exported from NI to GB for direct slaughter last week.

Last week in NI the average steer price was back slightly to 393.2p/kg while the R3 steer price increased by 1.8p/kg to 402.9p/kg. This was up 30.6p/kg from the corresponding week last year when the R3 steer price in NI was 372.3p/kg. The average heifer price in NI last week increased by 0.8p/kg to 396.9p/kg while the R3 heifer price was up marginally from the previous week to 402.6p/kg. In the same week in 2020 the R3 heifer price in NI was 373p/kg, almost 30p/kg behind current levels. Meanwhile the NI cow trade came under some pressure last week with the average cow price back 5.5p/kg from the previous week to 294.5p/kg. The O3 cow price in NI last week was up by 0.8p/kg to 316p/kg. This is just over 28p/kg higher than 287.9p/kg reported in the same week last year.

The GB deadweight trade for prime cattle improved last week compared to the previous week. The average steer price was up by 4p/kg to 405.2p/kg while the R3 steer price increased by 3.6p/kg to 411.6p/kg. This placed the GB R3 steer price 8.7p/kg above the R3 steer price in NI last week. The average heifer price in GB last week was 404p/kg, up 2.7p/kg from the previous week while the R3 heifer price increased by a similar margin to 411.2p/kg. This puts the GB R3 heifer price 8.6p/kg higher than the equivalent price in NI last week.

Last week the ROI deadweight cattle trade strengthened with an increase in the price paid for the majority of cattle grades. The R3 steer price was up by 2.8p/kg to the equivalent of 368.6p/kg while the R3 heifer price increased by 3.6p/kg to 373.1p/kg. This has slightly narrowed the differential in R3 heifer prices with NI to 29.5p/kg or £94 on a 320kg carcase. The O3 cow price in ROI was up by 3p/kg to 303.9p/kg, 12.1p/kg below the equivalent price in NI. Prime cattle throughput in ROI last week totalled 24,912 head similar levels to the previous week when 24,753 prime cattle were processed in ROI plants.

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

W/E 24/07/21		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	402.8	377.0	419.9	412.2	415.2	416.6	416.6
	R3	402.9	368.6	421.8	410.0	408.8	406.5	411.6
	R4	402.4	371.0	420.4	411.7	405.2	405.8	413.8
	O3	393.6	357.8	404.6	397.3	388.8	385.0	393.0
	AVG	393.2	-	417.0	404.8	399.7	395.9	405.2
Heifers	U3	405.8	383.4	426.7	414.6	419.0	419.4	420.5
	R3	402.6	373.1	420.2	408.1	409.1	408.0	411.2
	R4	402.5	374.2	417.9	410.5	407.9	406.5	412.1
	O3	395.3	365.9	392.6	399.4	382.2	385.0	389.5
	AVG	396.9	-	416.6	406.1	398.5	392.5	404.0
Young Bulls	U3	397.8	365.6	408.2	411.5	411.7	407.4	409.9
	R3	394.1	355.7	406.6	399.7	407.4	400.5	405.4
	O3	377.0	340.5	380.9	371.7	372.8	374.6	375.1
	AVG	385.4	-	400.8	395.8	399.9	396.8	399.1
Prime Cattle Price Reported		4938	-	6329	6608	6604	4014	23555
Cows	O3	316.0	303.9	325.8	314.9	317.4	313.4	317.2
	O4	320.4	304.5	327.5	318.5	315.8	314.3	318.1
	P2	277.2	281.5	280.7	265.1	274.9	266.5	272.3
	P3	295.2	295.7	290.4	286.2	289.3	283.5	287.6
	AVG	294.5	-	320.1	299.0	287.9	281.7	293.8

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.99p 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 24/07/21	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	253	267	256	218	252	235
Friesians	186	223	194	145	185	170
Heifers	230	258	235	210	229	215
Beef Cows	185	222	200	140	184	165
Dairy Cows	133	156	138	110	132	120
Store Cattle (p/kg)						
Bullocks up to 400kg	260	300	275	225	259	240
Bullocks 400kg - 500kg	240	291	260	210	239	222
Bullocks over 500kg	215	243	230	180	214	200
Heifers up to 450kg	230	270	250	200	229	215
Heifers over 450kg	228	255	240	200	227	215
Dropped Calves (£/head)						
Continental Bulls	420	620	490	300	415	380
Continental Heifers	350	530	400	225	345	285
Friesian Bulls	150	290	190	75	145	110
Holstein Bulls	155	220	175	45	150	90

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 26/07/21	Next Week 02/08/21
R3 Lambs up to 21kg	470p	485 - 490p

REPORTED SHEEP PRICES

(P/KG)	W/E 10/07/21	W/E 17/07/21	W/E 24/07/21
NI L/W Lambs	493.3	436.0	421.6
NI D/W Lambs	510.5	505.4	472.8
GB D/W Lambs	546.4	548.5	560.5
ROI D/W	531.1	540.4	529.6

Deadweight Sheep Trade

Quotes from the plants ended this week ranging from 470-475p/kg for R3 grading lambs up to 21kg. Quotes for Monday are expected to range from 485-490p/kg up to 21kg. Lamb throughput in NI plants last week increased strongly to 10,480 head last week, up 32 per cent from the previous week. In the same week last year 11,808 lambs were processed locally. A further 5,520 lambs were exported from NI to ROI for direct slaughter last week, a decrease of 1,366 head from the previous week. The deadweight lamb price in NI last week was 472.8p/kg, back 32.6p/kg from the previous week. In the same week last year the deadweight lamb price was 461.1p/kg. In ROI last week the deadweight lamb price was back by the equivalent of 10.8p/kg to 529.6p/kg.

Liveweight Sheep Trade

Good numbers of lambs continued to pass through the marts this week with a stronger trade reported compared to last week. In Swatragh last Saturday 1,100 lambs sold from 430-517p/kg compared to 1,700 lambs the previous week selling from 430-469/kg. In Massereene on Monday 1,004 lambs sold from 420-440p/kg compared to 1,183 lambs last week selling from 410-435p/kg. In Saintfield this week 690 lambs sold from 428-475p/kg compared to 1,012 lambs last week selling from 400-447p/kg. In Ballymena on Wednesday a strong entry of 2,416 lambs sold from 415-480p/kg (avg 444p/kg) compared to 2,602 lambs last week selling from 400-465p/kg (avg 413p/kg). The ewe trade remained firm this week with the marts reporting top prices ranging from £127-£186.

LATEST SHEEP MARTS (P/KG LW)

From: 24/07/21		Lambs			
To: 29/07/21		No	From	To	Avg
Saturday	Omagh	491	433	473	-
	Swatragh	1100	430	517	-
Monday	Kilrea	600	420	480	-
	Massereene	1004	420	440	-
Tuesday	Saintfield	690	428	475	-
	Rathfriland	711	425	525	458
Wednesday	Ballymena	2416	415	480	444
	Enniskillen	802	412	478	-
	Armoy	529	425	505	-
	Markethill	1150	450	491	-

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