

STRONG INCREASE IN RETAIL LAMB SALES

While lamb remains a minority meat in terms of overall protein consumption in the UK the latest retail sales data from Kantar have been very encouraging.

This improvement in sales during the 2020 period has been welcomed, especially given the decline in demand from the foodservice sector. There have been more people cooking at home during Covid-19 restrictions and this combined with strong promotional activity by retailers and levy bodies will have contributed to this upward movement in lamb sales.

The Muslim festival Eid-al-Adha traditionally sees an increase in demand for lamb. This year it was at the end of July/early August which meant it was within the 2020 reference period however last year it was celebrated later in August so any increase in sales due to the festival were not included in the 2019 reference period.

During the 12 weeks ending 09 August 2020 volume sales of primary lamb cuts through major UK retailers increased by 17.7 per cent from the corresponding period in 2019 to total 13,400 tonnes.

The overall value of primary lamb sales through major retailers increased by 25.6 per cent to total £130.4 million

during the 12 weeks ending 09 August 2020. This increase was driven by the increase in volume sales outlined above but also by an increase in the average retail price to £9.74/kg. This was an increase of 6.8 per cent or 62p/kg from year earlier levels.

The majority of lamb cuts recorded an increase in the value and volume of sales during the 2020 period. In percentage terms volume sales of diced/cubed lamb and lamb mince recorded the biggest increase year on year (47.2 per cent and 39.2 per cent respectively) however the volumes involved remain small in comparison to other cuts.

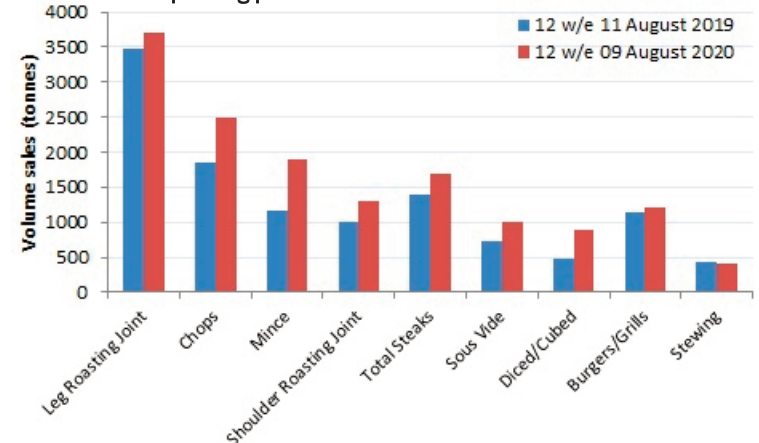
Image 1: There has been a strong increase in the value and volume of lamb sales through the major UK retailers during the 12 weeks ending 09 August 2020



The value of diced/cubed lamb sales also increased strongly, up 61.4 per cent to £9.3 million with the value of mince sales increasing by 43.7 per cent to total £14.7 million.

Lamb roasting joints accounted for the largest proportion of lamb sales through UK retailers in terms of both volume and value. Volume sales of lamb roasting joints totalled 5,000 tonnes during the 12 weeks ending 09 August 2020, up 10 per cent from year earlier levels. Roasting joints accounted for 37 per cent of primary lamb sales through UK retailers in volume terms during the 2020 period, back slightly from 39 per cent in the same period in 2019.

Figure 1: Volume of UK retail lamb sales by cut during the 12 w/e 09 August 2020 and corresponding period in 2019



Within the lamb roasting joint category sales of shoulder joints performed particularly well, increasing by 22.4 per cent to total 1,300 tonnes in the 12 weeks ending 09 August 2020. Meanwhile volume sales of leg roasting joints increased by 6.3 per cent to total 3,700 tonnes.

Overall the value of sales of lamb roasting joints through UK retailers increased by 21 per cent to £50.2 million during the 2020 period. This was driven by the growth in volume sales but also a ten per cent increase in the average retail price.

There was also growth recorded in the

value and volume of lamb leg steak sales through UK retailers during the 2020 period. Volume sales totalled 1,700 tonnes, a 17.9 per cent increase from 2019 levels. The average retail price increased by 4.6 per cent to £13.06/kg and this combined with the additional volume sales resulted in a 23.4 per cent increase in the value of lamb steak sales to £21.9 million during the 2020 period.

A similar trend can be observed in retail sales of lamb chops with strong increases in the value and volume of sales (29.5 per cent and 26.4 per cent respectively).

UNSETTLED WEATHER DRIVING STRONG PRIME CATTLE SUPPLIES

Reports from major beef processors in NI have indicated strong supplies of prime cattle coming forward for slaughter with delays of several weeks being reported in some plants. The unsettled weather and poor grazing conditions have resulted in many producers considering killing cattle or housing them earlier than they may have expected.

NI last week although the final figure was unavailable from DAERA at the time of publication. Prime cattle throughput has been particularly strong in Northern Ireland with 35,831 head slaughtered during the previous six weeks, a 6.7 per cent increase from the 33,587 prime cattle processed locally in the corresponding period last year.

There are some indications however that this surge in the availability of locally produced prime cattle will be

Most of the major plants have indicated a stronger throughput of prime cattle in

Table 1: Number of cattle for beef production by age on NI farms at the end of August 2020. Source: APHIS

Age	2018	2019	2020	2019/2020	2018/2020
0-6 mths	193,641	198,508	200,089	+0.8%	+3.3%
6-12 mths	163,491	161,883	171,312	+5.8%	+4.8%
12-18 mths	212,732	200,771	212,244	+5.7%	-0.2%
18-24 mths	134,333	128,413	130,297	+1.5%	-3.0%
24-30 mths	115,011	122,251	111,231	-9.0%	-3.3%
Over 30 mths	310,626	290,020	288,038	-0.7%	-7.3%

short lived with the latest reports from APHIS indicating lower numbers of slaughter age cattle on local farms. At the end of August 2020 there were 111,231 cattle for beef production on NI farms, a nine per cent reduction from the 122,251 cattle in this age group at the end of August 2019 and 3.3 per cent below August 2018 levels.

Meanwhile the number of cattle for beef production aged between 18-24 months at the end of August 2020 totalled 130,297 head. This was up 1.5 per cent from the end of August 2019 however was three per cent lower than August 2018 levels.

The number of cattle for beef production in lower age groups however has generally increased. At the end of August 2020 there were 212,244 cattle aged between 12-18 months. This was a 5.7 per cent increase from August 2019 levels and similar to August 2018 levels. These cattle will provide much of the prime cattle throughput in local plants during the first half of 2021.

DECLINE IN PRIME CATTLE IMPORTS FROM ROI

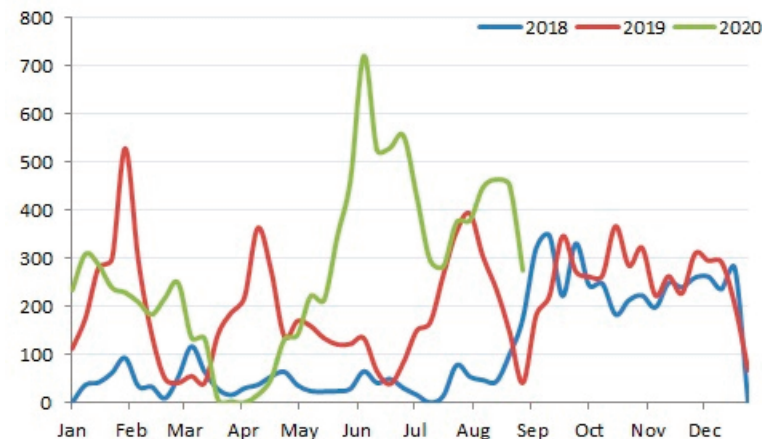
Last week 275 prime cattle were imported from ROI for direct slaughter in local plants. This was a reduction from the 452 prime cattle imported last week and is the lowest level of import recorded since the middle of May this year.

As outlined in **Figure 2** below imports of prime cattle from ROI for direct slaughter in recent months have been

running well ahead of previous years. A widening price differential for prime cattle between NI and ROI and tighter supplies of prime cattle for slaughter in NI have contributed to this increase.

Since the start of June 2020 5,731 prime cattle have been imported from ROI for direct slaughter in NI compared to 2,379 prime cattle in the same period last year.

Figure 2: Weekly prime cattle imports from ROI for direct slaughter 2018-2020
Source: DAERA



FQAS Helpline

If you have had a recent inspection and need help and advice to rectify any non-conformances, contact the FQAS helpline:
Tel: 028 9263 3024

Answerphone Service

Factory Quotes & Mart Results
Updated 5pm Daily
Tel: 028 9263 3011

Text Service

Free weekly price quotes sent to your mobile phone
Email - bulletin@lmni.com
Tel: 028 9263 3000

WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 31/08/20	Next Week 07/09/20
Prime		
U-3	350 - 360p	350 - 358p
R-3	344 - 354p	344 - 352p
O+3	338 - 348p	338 - 346p
P+3	288 - 302p	288 - 300p
	Including bonus where applicable	
Cows		
O+3 & better	260 - 270p	260 - 270p
Steakers	140 - 170p	140 - 170p
Blues	120 - 130p	120 - 130p

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 processing plants this week ranged from 350-360p/kg for in spec U-3 grade prime cattle with the majority of plants quoting at the upper end for of this scale. Quotes for good quality O+3 grade cows ranged from 260-270p/kg across the plants this week. Similar quotes are expected for all types of cattle early next week.

The plants have indicated an increase in prime cattle throughput in local plants last week although the final figure was unavailable at time of publication. Unsettled weather conditions and poor grazing conditions have contributed to an increase in supplies of cattle from local producers for slaughter. Reports have also indicated good supplies of cows being presented for slaughter.

Stronger supplies of locally produced cattle and the unsettled weather conditions last week will have contributed to the notable decline in the level of import for direct slaughter when compared to previous weeks. Imports for direct slaughter from ROI last week consisted of 275 prime cattle and 127 cows. Imports from ROI for direct slaughter during 2020 to date have totalled 9,744 head, up 3,314 head from the same period in 2019 when 6,430 prime cattle were imported. Meanwhile cattle exports from NI to ROI for direct slaughter last week included six prime cattle and 105 cows. This brings the total year to date cattle exports to 1,858 head, a decrease of 1,625 head when compared to the same period in 2019.

The NI deadweight trade for prime cattle came under pressure last week with majority of grades reporting declines between 4-7p/kg from the previous week. The average steer price in NI last week was back by 4.8p/kg to 361.7p/kg with the R3 steer price decreasing by a similar margin to 372.4p/kg. The average heifer price declined by 4.6p/kg to 363.1p/kg with the R3 heifer price back 4p/kg from the previous week to 370.5p/kg. The average young bull price came back by 4.2p/kg to 351.3p/kg with the R3 young bull price back 6p/kg from the previous week to 361.8p/kg. Meanwhile the average NI cow price decreased by 8.7p/kg to 253.4p/kg with the O3 cow price back by 8p/kg to 279.2p/kg.

In GB last week the reported deadweight cattle prices also came under pressure with declines generally ranging from 1-2p/kg from the previous week. The average steer price was back 0.7p/kg to 373.6p/kg while the R3 steer price decreased by a penny to 380.7p/kg. This has widened the differential in the R3 steer price between NI and GB to 8.3p/kg last week. The average heifer price in GB was up slightly to 373.8p/kg while the R3 heifer price decreased by 1.6p/kg to 378.9p/kg. This puts the differential in the R3 heifer price between NI and GB at 8.4p/kg last week. The average GB cow price reported a decrease of 2.3p/kg to 262.2p/kg from the previous week with the O3 cow price back by 1.2p/kg to 288.4p/kg.

In ROI last week the R3 steer price was the equivalent of 330.3p/kg, back 4.7p/kg from the previous week and just over 42p/kg lower than the R3 steer price in NI. The R3 heifer price in ROI was 331.9p/kg, back 5.5p/kg from the previous week and 38.6p/kg below the R3 heifer price in NI. The O3 cow price in ROI last week was back 2.8p/kg to the equivalent of 264.6p/kg.

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

	W/E 29/08/20	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	372.0	341.3	392.8	380.0	382.3	381.0	385.0
	R3	372.4	330.3	392.4	378.0	377.1	378.3	380.7
	R4	368.4	330.6	394.8	383.7	378.6	376.8	386.8
	O3	357.8	312.1	377.8	361.8	353.3	358.8	359.4
	AVG	361.7	-	390.6	371.7	366.8	366.1	373.6
Heifers	U3	374.3	343.6	398.5	385.4	386.9	385.0	389.5
	R3	370.5	331.9	392.0	376.9	377.5	375.0	378.9
	R4	367.4	331.6	394.4	378.4	379.2	377.2	384.5
	O3	358.2	317.4	364.3	362.4	357.0	355.5	358.2
	AVG	363.1	-	389.8	372.3	368.5	363.3	373.8
Young Bulls	U3	366.8	324.8	386.6	375.1	373.2	374.9	379.8
	R3	361.8	314.4	381.5	364.9	369.9	364.6	372.7
	O3	343.9	297.2	344.3	327.5	345.2	355.3	339.2
	AVG	351.3	-	376.6	358.2	363.8	358.8	365.4
Prime Cattle Price Reported	4,450	-	6,225	6,863	7,859	4,831	25,778	
Cows	O3	279.2	264.6	293.7	285.3	287.6	291.1	288.4
	O4	285.0	264.3	298.0	284.0	287.1	287.5	288.0
	P2	242.5	237.8	254.2	241.4	248.3	256.2	250.0
	P3	263.5	253.6	265.3	257.4	264.6	264.6	263.5
	AVG	253.4	-	287.0	262.1	257.2	258.4	262.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.76p 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 29/08/20	Steers	Heifers	Young Bulls
U3	371.4	372.7	366.5
R3	368.7	367.3	364.2
O+3	359.1	358.0	349.9

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 29/08/20	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	165.9	189.1	202.3	218.1
P2	174.6	219.6	241.5	254.7
P3	-	247.1	259.8	265.3
O3	-	249.7	269.4	281.0
O4	-	-	286.1	285.0
R3	-	-	-	299.3

LATEST LIVELWEIGHT CATTLE MART PRICES NI

W/E 29/08/20	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	225	233	227	200	224	212
Friesians	160	176	169	137	159	152
Heifers	210	244	216	185	209	197
Beef Cows	157	192	173	120	156	138
Dairy Cows	117	136	124	100	116	108
Store Cattle (p/kg)						
Bullocks up to 400kg	235	275	255	200	234	217
Bullocks 400kg - 500kg	220	263	240	200	219	208
Bullocks over 500kg	215	235	222	185	214	200
Heifers up to 450kg	220	246	232	185	218	202
Heifers over 450kg	200	228	214	170	199	185
Dropped Calves (£/head)						
Continental Bulls	350	480	415	245	345	295
Continental Heifers	280	420	330	200	275	240
Friesian Bulls	150	280	200	80	145	105
Holstein Bulls	125	200	160	20	120	70

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 31/08/20	Next Week 07/09/20
Lambs up to 21kg	435-445p	445-450p

REPORTED SHEEP PRICES

(P/KG)	W/E 15/08/20	W/E 22/08/20	W/E 29/08/20
NI L/W Lambs	413.3	418.6	418.6
NI D/W Lambs	433.4	439.7	437.7
GB D/W Lambs	468.3	460.9	444.5
ROI D/W	438.2	444.7	449.2

Deadweight Sheep Trade

Quotes from the local plants for R3 grading lambs ended this week ranging from 440-445p/kg up to 21kg across the plants. Quotes for early next week are expected to range from 445-450p/kg up to 21kg. Local plants have reported a steady throughput of lambs although final figures were unavailable at time of publication. Exports of sheep to ROI for direct slaughter last week decreased to 7,664 head. This brings the total sheep exported to ROI in August to 30,556 head, a 27 per cent decrease when compared to the 42,076 sheep exported in the same period in 2019. The deadweight lamb price in NI last week decreased by 2p/kg to 437.7p/kg from the previous week. In the corresponding week last year the average deadweight lamb price in NI was 362.7p/kg.

Liveweight Sheep Trade

Good numbers of lambs continue to pass through the marts with trade generally holding steady from last week. In Omagh last Saturday 1,162 lambs sold from 433-488p/kg compared to 1,559 lambs last week selling from 445-495p/kg. In Massereene on Monday 952 lambs sold from 410-444p/kg a similar trade to last week when 1,026 lambs sold from 410-446p/kg. In Saintfield on Tuesday 572 lambs sold from 400-470p/kg compared to 740 lambs last week selling from 400-496p/kg. In Ballymena this week a large entry of 2,601 fat lambs sold from 390-438p/kg (avg 406p/kg) compared to 2,008 lambs last week selling from 400-437p/kg (avg 415p/kg). Top reported prices this week for cull ewes ranged from £100-£154 across the marts.

LATEST SHEEP MARTS (P/KG LW)

From: 29/08/20		Lambs			
To: 03/09/20		No	From	To	Avg
Saturday	Omagh	1162	433	488	-
	Swatragh	1520	385	462	-
Monday	Massereene	952	410	444	-
	Kilrea	480	407	430	-
Tuesday	Saintfield	572	400	470	-
	Rathfriland	740	400	500	421
Wednesday	Ballymena	2601	390	438	406
	Enniskillen	898	400	468	-
	Armoy	573	411	467	-
	Markethill	1280	400	450	-

Strict Covid - 19 restrictions are in place across all of the livestock marts

Information supplied by LMC / DAERA/ AHDB/ DAFM

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Contact us

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



LOVE LAMB WEEK 2020 BREAKS NEW GROUND

Covid 19 restrictions have not impeded LMC staff in any way from delivering a series of impactful, consumer-driven messages throughout Love Lamb Week 2020. This year's celebration kicked off on Tuesday, 1st September 2020 and will continue through until Monday, 7th September 2020. LMC's Education Services' Manager Lauren Hyde commented:

"Love Lamb Week is an industry-driven initiative. Here in Northern Ireland we liaise closely with a range of stakeholder organisations, including the Ulster Farmers' Union. This year we have been collaborating with the awarding winning artisan street food business, 'The Hatch', based in Newcastle, Co Down, to put lamb back on the menu.

"To mark Lamb Week, they have been cooking up a bespoke Lamb Flatbread with hummus and pomegranate. All the Northern Ireland Farm Quality Assured

lamb used has been sourced from the ABP group."



Lauren went on to highlight the significance of Love Lamb Week. She commented: "It represents a unique opportunity for the sheep industry to showcase the provenance and quality of locally produced lamb. Love Lamb Week was launched in 2015. The momentum of the campaign has grown significantly since that time.

"This year's campaign will also have a digital focus, and will be promoting lamb's delicious flavour, environmental credentials and demonstrating how

lamb can be enjoyed as part of a balanced diet."

She continued: "Courtesy of our association with The Hatch, this year's campaign is helping to raise awareness of lamb within the food chain as a whole. This should boost the opportunities for catering outlets to use lamb more often as a menu choice.

"Love Lamb Week has a proven track record in raising the profile of what is one of the most versatile and high-quality meats that is so naturally produced here in Northern Ireland, which local consumers can avail of every week of the year."

Lauren concluded: "The promotion also acts as a reminder to sheep farmers that LMC remains fully committed to reflecting their interests within a fast-changing marketplace. Local sheep farmers produce some of the best lamb in the world. It is a meat produced

almost completely from grazed grass, making it a consumer's dream.

"Love Lamb Week provides LMC staff with unique opportunity to highlight the unique role played by the sheep industry across Northern Ireland. From

a consumer perspective, exquisite taste and quality are always guaranteed, traits that are further backed up by the traceability, welfare and other production guarantees that are enshrined within FQAS."



RESPONSIBLE USE OF ANTIMICROBIALS COURSES RUNNING FROM 1ST SEPTEMBER 2020

On 3rd February 2020 a new standard was introduced in the Northern Ireland Beef and Lamb Farm Quality Assurance Scheme (FQAS) that requires "At least one person responsible for administering animal medicines to be formally trained in the responsible use of antimicrobials."

In a bid to ensure a more even spread of demand for these courses NIFCC inspectors will ask for evidence that FQAS scheme members have enrolled on a course prior to the first inspection and a certificate of attendance will be required as evidence at the second inspection. This means members will have 18 months to attend a course.

Feedback through LMC's FQAS helpline shows that there is some confusion as to whether there are courses available to enrol on and attend. Courses are running from 1st September 2020 and details of available courses are detailed on line at: <https://www.cafre.ac.uk/farm-family-key-skills/responsible-use-of-antimicrobials-on-beef-and-sheep-farms/>

Venues have been booked up until 17th December 2020 and there are limited spaces available. More venues will become available in 2021 as required. Courses running from 1st September 2020 are being held in venues that allow compliance with government

guidelines on social distancing and to ensure attendees are kept safe. CAFRE are currently working on an alternative online course that will operate

alongside the face to face courses. Courses will continue to operate unless government guidance changes.

Frequently Asked Questions in relation to the new training requirement	
1) What courses are available?	The main course available in Northern Ireland is CAFRE's Farm Family Key Skills Programme 'Responsible use of antimicrobials on beef and sheep farms'.
2) How much is the course?	The CAFRE FFKS course is free to attend. Other courses may charge.
3) When can I enrol on a course?	You do not have to wait until the time of your inspection to enrol and attend. Courses are currently available at: www.cafre.ac.uk/farm-family-key-skills/responsible-use-of-antimicrobials-on-beef-and-sheep-farms/
4) How many people from my farm business should attend?	At least one person per farm business responsible for the administering animal medicines must be formally trained in the responsible use of antimicrobials.
5) What if I don't enrol on a course before my inspection?	If you do not enrol on a course prior to your inspection you will receive a non-conformance. To rectify this you will need to provide evidence that you have enrolled on a course.
6) What if I have completed a similar course already?	If you have completed any courses listed at the link below then you do not have to attend another one but you do have to provide evidence of attendance. www.lmcni.com/site/wp-content/uploads/2020/07/20-01-09-Approved-Antibiotic-Courses.pdf
7) What if I enrol but can't attend a course?	Every effort should be made to attend the course however if you are unable to attend you should enrol on the next available course and attend as soon as possible after your inspection.
8) What impact will Covid-19 have on the courses?	To allow compliance with government guidelines on social distancing all venues are now selected to ensure there is sufficient room to meet distancing guidelines. The option to complete the CAFRE course online is currently being explored.

TASTE OF SUMMER CAMPAIGN A HIT WITH CONSUMERS

The months of July and August were marked by a concerted campaign on the part of LMC to encourage consumers across Northern Ireland to experiment with beef and lamb as they turned increasingly to cooking and preparing meals in their own homes.

The Commission's Lauren Hyde takes up the story: "The Taste the Summer campaign was designed to provide people with the confidence to use Northern Ireland Farm Quality Assured beef and lamb more regularly as versatile and flavour-filled centre pieces to the meals they were cooking in their own kitchens over the summer months.

"We are very aware of the fact that significant numbers of people are uncertain of the best ways to prepare and utilise the various beef and lamb cuts. At a very fundamental level, the campaign was designed to address these issues. We want to build on all of this for the future."

The Taste the Summer campaign featured exclusively on the Commission's Beef and Lamb NI Facebook page. As part of the initiative, LMC offered one lucky person the opportunity to win all the ingredients required to cook the different dishes featured on each of

the weeks during which the campaign was running.

Lauren continued: "The consumer response generated by the campaign was extremely encouraging, reaching hundreds of thousands of consumers across Northern Ireland. It, undoubtedly, tapped into the growing demand for new and different eating experiences that consumers could avail of as they cooked at home. All of this has brought home the power of social media as a marketing and communication tool.

She concluded: "Adding to all of this is the fact that consumer recognition of the Northern Ireland Farm Quality Assurance logo for beef and lamb remains extremely high. Another key benefit of social media is the fact that it is a two-way communication process.

A case in point is the fact that the Taste the Summer campaign has allowed us to gauge what people like about locally produced beef and lamb and where shortfalls in their knowledge with regard to red meat actually exist. All of this is information that we can use to make our messages to consumers more targeted and relevant."



Contact us:

Website: www.lmcni.com

Telephone: 028 9263 3000

Fax: 028 9263 3001

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