

LMC

NI BEEF AND SHEEP YEARBOOK 2015



LMC Market Information Department
January 2016

LMC MARKET INFORMATION SERVICES

LMC's Market Information Services are designed to support, examine and inform the NI red meat industry. The service aspires to support producers and processors with their decision making by making available accurate and timely information that creates a better understanding of the trade. LMC is committed to creating an environment where our stakeholders are well-informed whether this is through the provision of basic statistics, further analysis / examination of this data or the delivery of information through public events. This publication provides a summary of the beef and sheep trade in NI during 2015.

During 2015 LMC has continued to communicate detailed market information to producers and processors through its various publications. The Bulletin remains LMC's primary market information tool and is published each Saturday in the Farming Life newspaper. This publication is complimented by a mid-week market update in the Irish Farmers' Journal and the Farm Week newspapers. LMC also continued to provide weekly deadweight trade updates through the text service with a significant increase in subscribers during 2015. In addition to these weekly publications the LMC Quarterly was published and distributed to approximately 12,000 stakeholders over the course of the year. The Market Information section of the LMC website continues to host all bulletin and quarterly publications, including additional market reports and updates of both the liveweight and deadweight trade.

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REVIEW OF THE YEAR

Relatively tight supplies of prime cattle and steady consumer demand for beef during the first few months of 2015 helped to stabilise deadweight prices for prime cattle in NI early in the year. However as the year progressed the combination of improved supplies of prime cattle and reduced consumer demand for beef increased the availability of beef on the market and deadweight prices started to come under pressure as a result making 2015 a difficult year for beef producers. A notable increase in the average carcase weight of prime cattle slaughtered in NI plants will also have contributed to the increased volumes of beef available on the market and with sterling trading strongly against the euro for much of 2015 it became difficult for NI processors to compete on export markets.

A lower than usual carryover of hoggets from 2014 into 2015 resulted in reduced hogget availability for slaughter early in 2015 however increased lamb production on NI farms during 2015 combined with reduced levels of export to ROI for direct slaughter resulted in a notable increase in lamb throughput in NI during 2015 when compared to year earlier levels. With sterling performing strongly against the euro it was difficult for NI processors to compete on EU markets which had a negative impact on deadweight lamb price, particularly during the second half of the year.

BEEF MARKET 2015

A total of Prime cattle throughput in NI during 2015 totalled 315,485 head, a one per cent reduction on 2014 levels and is the fifth consecutive year in which the prime cattle kill in NI recorded a decline. There was however a notable increase in the carcase weights of prime cattle slaughtered in NI plants with an average prime cattle carcase weight during 2015 of 340kg, a 9kg increase from an average carcase weight of 331kg during 2014. This increase in average carcase weight resulted in an increase in the volume of beef from prime cattle handled by the NI processors despite the slight drop in throughput. The volume of beef sourced from prime cattle handled by NI processors during 2015 totalled 107,422 tonnes, a two per cent increase on the 105,303 tonnes processed during 2014.

Cow throughput in NI remained strong during 2015 with a total of 87,110 cows slaughtered, a five per cent increase from 2014 levels when 82,855 cows were killed. The average cow carcase weight recorded a slight increase to 305.6kg during 2015. The combination of this slight increase in carcase weight and the increase in cow throughput resulted in a six per cent increase in the volume of cow beef handled by NI processors.



The average R3 steer price in NI during 2015 was 337.7p/kg, back by 4.2p/kg from 341.9p/kg during the 2014 period. Averages however can hide a lot of variations in the trade and in the second half of 2015 prime cattle prices in NI came under significant pressure in response to steady prime cattle supplies and reports of reduced consumer demand for beef. With sterling trading strongly against the euro for much of 2015 it also made accessing markets in the EU much more difficult for NI processors. Cow prices in NI during 2015 remained similar to year earlier levels with an average O3 cow price of 243.6p/kg.

There was a notable increase in beef sired calf registrations on NI farms during 2015 with a total of 338,378 beef calves registered. This was an eight per cent increase from 2014 levels when 312,818 beef sired calves were registered. This accounts for an additional 25,560 beef sired calves registered on NI farms year on year. This has led to an increase in the number of younger beef sired cattle on NI farms which will increase prime cattle supplies for slaughter in NI as 2016 progresses. Limousin continued to be the most popular beef sire used on NI farms and accounted for 29.5 per cent of beef registrations. The number of dairy sired male calves registered in NI during 2015 remained similar to 2014 levels with a total of 89,447 head registered.

Total imports of cattle for direct slaughter in NI during 2015 totalled 29,939 head, very similar to the 30,860 head imported for direct slaughter during 2014. Meanwhile total cattle exports for direct slaughter during 2015 totalled 21,543 head compared to 18,636 head during 2014. During 2015 there was an increase in the number of cows exported to ROI for direct slaughter while the number of prime cattle exported to GB for direct slaughter was notably reduced from 2014 levels.

Total retail expenditure on beef in the UK during 2015 was similar to year earlier levels and totalled £2.2 billion. There was a slight increase in the average retail price of beef during 2015 to £7.87 while the volume of retail beef sales were back slightly from 2014 levels to total 276,630 tonnes during 2015.



SHEEP MARKET 2015

Lamb/hogget throughput in NI totalled 467,320 head during 2015, a five per cent increase on 2014 levels when 444,943 lambs/hoggets were killed in NI plants. This increase in annual throughput occurred despite a tightening in the availability of hoggets early in 2015 as a result of a lower carryover of hoggets from 2014. Total ram/ewe throughput in NI plants during 2015 was 35,672 head, a notable decrease from the 50,797 rams/ewes killed in NI plants during 2014.

ROI continues to act as an important market for NI origin lambs with exports for direct slaughter during 2015 totalling 332,075 head, a 10 per cent decline from 2014 levels when 368,796 sheep were exported. Exports for direct slaughter accounted for 40 per cent of total NI sheep output during 2015, a notable decline from 51 per cent of the total output exported during 2014.

Increased lamb throughput in NI plants and reports of reduced consumer demand put downward pressure on deadweight lamb prices in NI during 2015. In addition to this the euro performed strongly against sterling for much of 2015 which made trading NI origin lamb on key EU markets very challenging for NI processors. The average R3 lamb/hogget price in NI during 2015 was 352p/kg, a notable decline from an average of 405p/kg during 2014. This decline by 53p/kg is the equivalent of £11 on a 21kg lamb.

Consumer data has indicated a two per cent decline in the value of UK retail lamb sales during 2015 to total £637 million. The average retail price of lamb during 2015 was £8.33/kg, a reduction of 10p/kg from the average retail price in 2014. Meanwhile the volume of UK retail sales during 2015 was similar to year earlier levels at 77,864 tonnes.



CATTLE STATISTICS

Table 1.1: Monthly NI cattle kill broken down by category 2014-2015

	2015					2014						
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	16,661	12,913	2,728	32,302	7,961	40,582	11,712	12,481	5,620	29,813	7,658	37,885
February	13,949	10,501	2,227	26,677	6,503	33,454	11,275	11,242	4,890	27,407	6,857	34,912
March	14,767	10,105	2,409	27,281	5,795	33,335	10,745	9,510	4,316	24,571	5,922	31,460
April	15,479	11,275	2,828	29,582	6,045	35,850	14,386	12,804	4,757	31,947	6,291	38,979
May	12,978	9,200	2,426	24,604	4,835	29,654	13,169	10,640	4,540	28,349	5,237	34,125
June	9,927	7,432	2,979	20,338	5,181	25,811	9,212	8,015	4,678	21,905	5,464	27,884
July	12,689	9,725	4,094	26,508	8,278	35,194	10,167	7,948	4,162	22,277	6,684	29,537
August	10,592	7,790	2,533	20,915	7,964	29,211	12,065	7,893	2,918	22,876	6,916	30,264
September	12,734	8,008	1,873	22,615	7,107	30,079	13,591	8,005	2,203	23,799	6,804	31,142
October	18,726	10,865	2,349	31,940	10,473	42,948	19,705	11,915	2,149	33,769	9,323	43,621
November	15,571	9,537	1,918	27,026	9,555	37,041	15,465	10,574	1,629	27,668	8,660	36,738
December	13,837	9,341	2,519	25,697	7,413	33,404	12,411	9,427	2,000	23,838	7,039	31,279
Total	167,910	116,692	30,883	315,485	87,110	406,563	153,903	120,454	43,862	318,219	82,855	407,826

Figure 1.1: Proportion of the NI cattle kill by category 2015

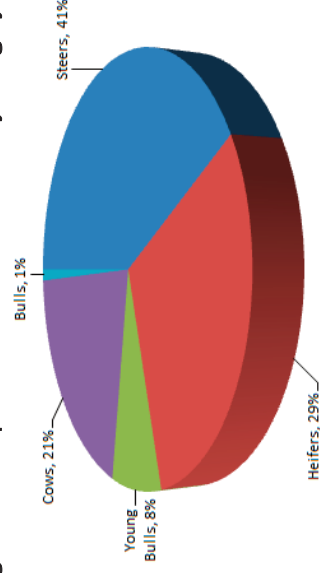


Table 1.2: Summary of NI cattle kill broken down by category 2014-2015

	2015		2014	
	Count	Percentage	Count	Percentage
Steers	167,910	41%	153,903	38%
Heifers	116,692	29%	120,454	30%
Young Bulls	30,883	8%	43,862	11%
Cows	87,110	21%	82,855	20%
Bulls	3,968	1%	6,752	2%
Total	406,563		407,826	

Table 2.1: Volume of beef produced from each cattle type in NI by month ('000 tonnes) 2014-2015

	2015						2014					
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	5,812	4,127	889	10,829	2,430	13,259	4,055	3,920	1,810	9,784	2,349	12,133
February	4,878	3,317	725	8,919	1,962	10,881	3,896	3,496	1,608	9,000	2,103	11,102
March	5,197	3,206	796	9,199	1,769	10,968	3,730	2,946	1,417	8,093	1,821	9,914
April	5,411	3,573	943	9,927	1,819	11,746	5,060	3,989	1,567	10,615	1,914	12,530
May	4,576	2,923	820	8,318	1,480	9,798	4,623	3,327	1,526	9,475	1,622	11,098
June	3,483	2,366	1,012	6,860	1,611	8,471	3,186	2,502	1,567	7,255	1,696	8,951
July	4,499	3,105	1,429	9,033	2,599	11,632	3,483	2,464	1,402	7,349	2,078	9,428
August	3,741	2,481	863	7,085	2,426	9,511	4,111	2,466	978	7,555	2,114	9,669
September	4,543	2,586	649	7,778	2,158	9,936	4,651	2,489	720	7,823	2,037	9,896
October	6,672	3,520	791	10,983	3,201	14,184	6,776	3,733	710	11,219	2,812	14,031
November	5,620	3,081	658	9,359	2,927	12,286	5,328	3,324	536	9,188	2,576	11,764
December	4,960	3,025	847	8,832	2,247	11,079	4,330	2,959	659	7,947	2,077	10,024
Total	59,391	37,310	10,422	107,122	26,630	133,753	53,227	37,613	14,499	105,303	25,200	130,539

Table 2.2: Average monthly carcass weights by category (kg) 2014-2015

	2015					2014				
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Steers	Heifers	Young Bulls	Prime Cattle	Cows
January	348.8	319.6	326.0	335.2	305.3	346.2	314.1	322.0	328.2	306.8
February	349.7	315.9	325.4	334.3	301.7	347.8	311.7	329.1	329.6	315.2
March	351.9	317.3	330.5	337.2	305.3	347.0	309.7	328.2	329.4	306.9
April	349.6	316.9	333.4	335.6	300.9	351.7	311.5	329.4	332.3	304.3
May	352.6	317.7	337.9	338.1	306.2	351.0	312.7	336.1	334.2	309.8
June	350.9	318.3	339.6	337.3	310.9	345.8	312.2	334.9	331.2	310.5
July	354.6	319.3	349.0	340.8	313.9	342.6	310.0	337.0	329.9	311.0
August	353.2	318.5	340.6	338.7	304.7	340.7	312.4	335.3	330.2	305.6
September	356.7	323.0	346.4	343.9	303.7	342.2	310.9	326.7	330.2	299.3
October	356.3	324.0	336.8	343.9	305.7	343.9	313.3	330.2	332.2	301.6
November	360.9	323.1	343.3	346.3	306.3	344.5	314.3	329.2	332.1	297.5
December	358.4	323.8	336.4	343.7	303.1	348.9	313.9	329.3	333.4	295.1

Table 2.3: Average annual carcass weight by category (kg) 2014-2015

	Steers	Heifers	Young Bulls	Prime Cattle	Cows
2015	353.6	319.8	337.1	339.6	305.6
2014	345.8	312.2	330.6	331.0	304.9

December 2015 Farm Survey Results

The December 2015 agricultural survey released by the Department of Agriculture and Rural Development (DARD) provides estimates of the numbers of cattle on NI farms at the beginning of December each year.

The December 2015 survey identified 261,000 beef cows on NI farms, a three per cent increase on year earlier levels. This increase follows on from a two per cent reduction in suckler cow numbers recorded between December 2013 and December 2014. Suckler cow numbers on NI farms are now at similar levels to December 2010. The number of beef heifers in calf with their first calf in December 2015 totalled 46,700 head, a 1 per cent increase on the 46,400 beef heifers in calf with their first calf recorded on NI farms in December 2014. Numbers of beef heifers in calf on NI farms are now at similar levels to December 2008.

The survey has identified an eleven per cent decrease in the number of cattle on NI farms 2 years old and older when compared to year earlier levels. Meanwhile the number of beef cattle aged 1-2 years increased by three per cent on year earlier levels while the number between 6 months and 1 year increased by ten per cent.

The number of cattle aged less than 6 months in December 2015 was six per cent higher than year earlier levels. This was a result of increases in both beef and dairy cow numbers during 2015 and therefore an increase in beef sired calf registrations in the second half of 2015 when compared to the corresponding period in 2014.

Figure 2.1: Total beef heifers in calf in Dec 2000-2015

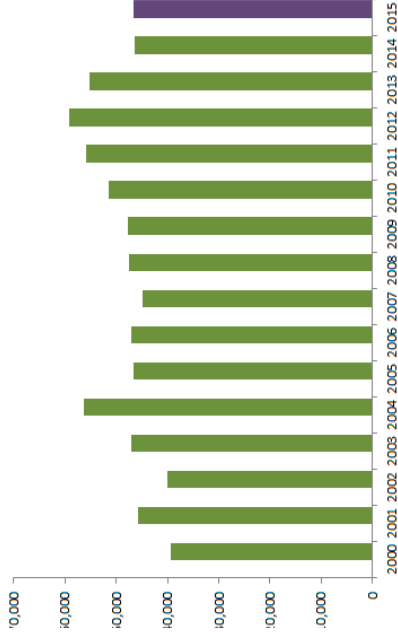


Figure 2.2: Total beef cows in Dec 2000-2015

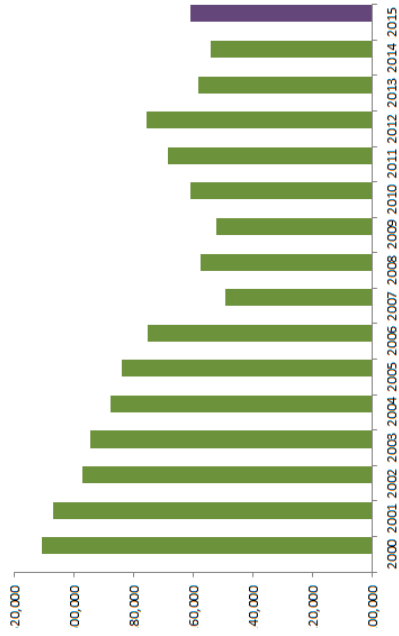


Table 3.1: Monthly calf registrations by category 2014-2015

	2015			2014		
	Beef Sired	Dairy Sired Male only	Total	Beef Sired	Dairy Sired Male only	Total
January	19,210	8,637	27,847	17,826	9,472	27,298
February	18,545	7,748	26,293	15,838	7,355	23,193
March	30,437	8,776	39,213	24,080	7,355	31,435
April	46,409	7,473	53,882	40,476	7,032	47,508
May	50,349	6,193	56,542	52,584	6,684	59,268
June	41,797	5,341	47,138	38,985	5,252	44,237
July	34,775	5,364	40,139	32,452	4,699	37,151
August	22,685	4,948	27,633	22,796	5,038	27,834
September	20,369	7,734	28,103	18,433	8,077	26,510
October	19,514	9,890	29,404	18,922	10,159	29,081
November	18,423	9,356	27,779	16,063	9,848	25,911
December	15,865	7,987	23,852	14,363	8,230	22,593
Total	338,378	89,447	427,825	312,818	89,201	402,019

Figure 3.1: Monthly calf registrations (beef and dairy males) 2014-2015

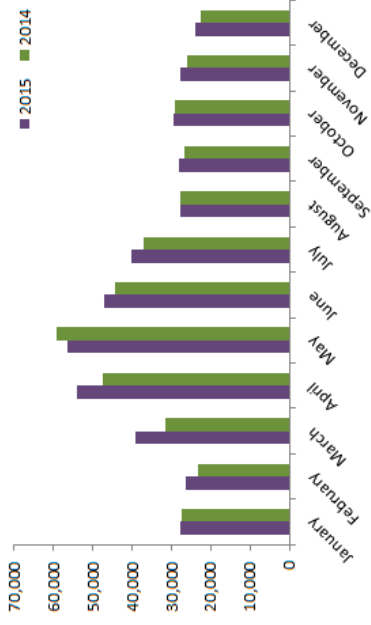


Figure 3.2: Beef sired calf registrations by breed 2015

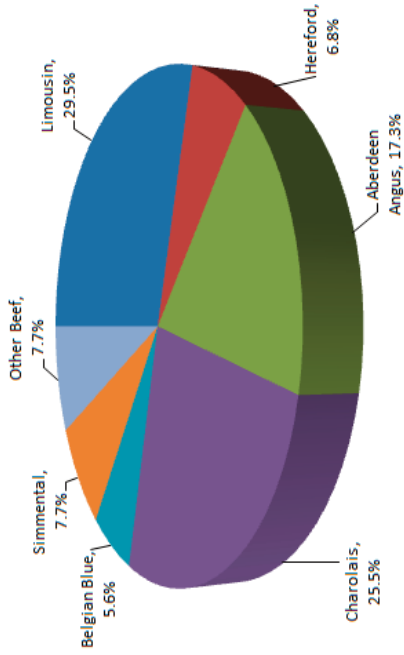


Table 4.1: Number of beef cattle on the ground (aged 12-30 months) 2014-2015

	2015			2014		
	Beef Sired	Dairy Sired Male only	Total	Beef Sired	Dairy Sired Male only	Total
January	321,279	44,291	365,570	333,309	46,752	380,061
February	329,020	44,496	373,516	341,653	46,719	388,372
March	353,317	42,993	396,310	367,704	45,750	413,454
April	379,189	41,143	420,332	388,882	43,959	432,841
May	392,498	39,643	432,141	393,590	41,846	435,436
June	399,087	38,026	437,113	397,213	40,311	437,524
July	396,005	37,078	433,083	397,210	39,675	436,885
August	408,104	40,446	448,550	390,500	40,381	430,881
September	380,508	40,815	421,323	377,154	42,088	419,242
October	364,266	41,895	406,161	356,814	42,912	399,726
November	347,677	43,070	390,747	341,084	44,047	385,131
December	339,478	43,379	382,857	329,539	44,529	374,068

Figure 4.1: Total beef cattle on the ground (aged 12-30 months) 2014-2015

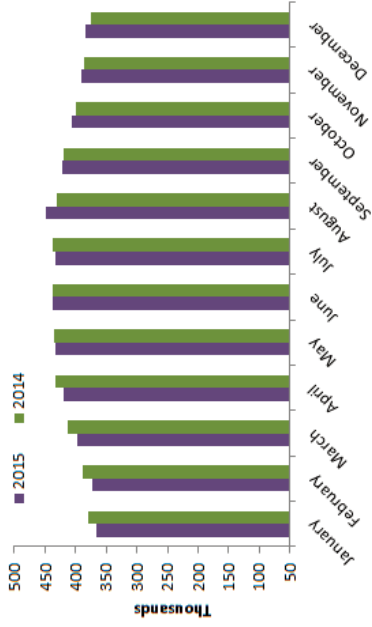


Table 4.2: Total beef cattle on the ground (aged 18-30 months) 2014-2015

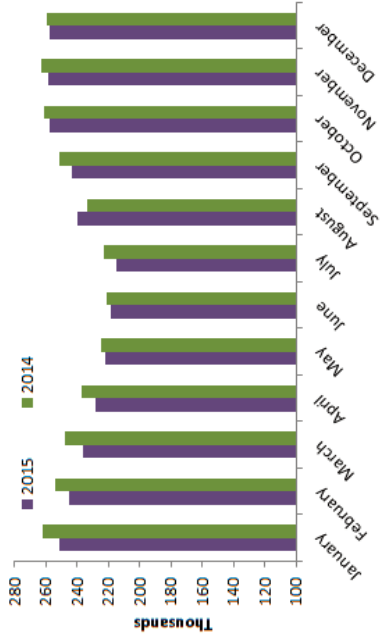


Table 5.1: Monthly imports of cattle for breeding and production from GB and ROI 2014-2015

	2015			2014		
	GB	Ireland	Total	GB	Ireland	Total
January	221	1,480	1,701	48	1,680	1,728
February	477	3,184	3,661	32	1,975	2,007
March	77	4,355	4,432	76	2,052	2,128
April	266	3,322	3,588	109	2,665	2,774
May	203	2,655	2,858	119	1,843	1,962
June	69	1,213	1,282	185	1,041	1,226
July	63	1,504	1,567	70	1,360	1,430
August	82	1,397	1,479	43	1,943	1,986
September	160	2,297	2,457	80	2,391	2,471
October	125	3,035	3,160	174	4,122	4,296
November	247	2,670	2,917	268	3,404	3,672
December	165	1,625	1,790	89	2,028	2,117
Total	2,155	28,737	30,892	1,293	26,504	27,797

Figure 5.1: Monthly imports of cattle for breeding and production from GB 2014-2015

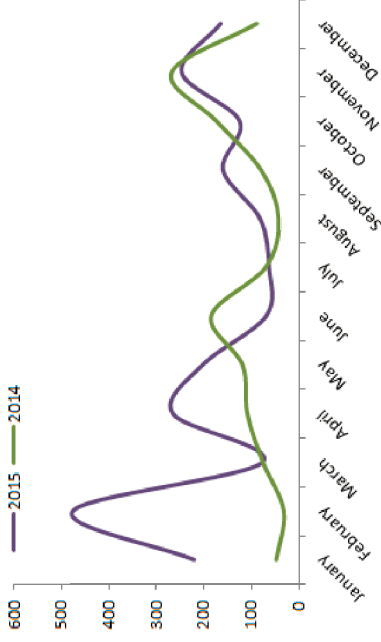


Figure 5.2: Monthly imports of cattle for breeding and production from ROI 2014-2015

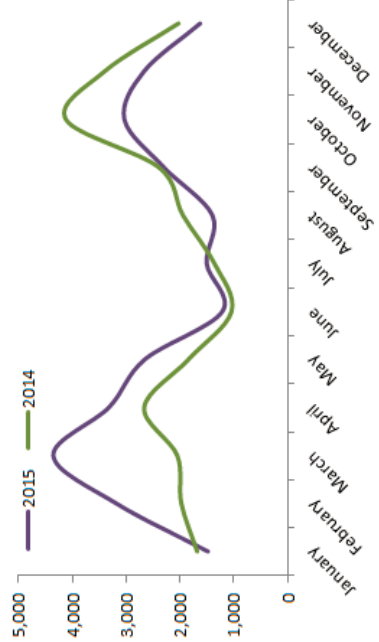


Table 6.1: Monthly exports of cattle from NI to GB and ROI for breeding and production 2014-2015

	2015			2014		
	GB	ROI	Total	GB	ROI	Total
January	364	79	443	750	114	880
February	1,403	93	1,496	1,128	96	1,226
March	1,032	114	1,146	880	93	995
April	1,361	435	1,796	1,252	373	1,625
May	1,991	421	2,412	924	216	1,140
June	1,309	229	1,538	640	34	675
July	746	114	860	372	64	446
August	945	100	1,045	660	26	724
September	1,553	95	1,648	1,689	140	1,850
October	1,067	100	1,167	1,477	56	1,584
November	1,021	100	1,121	837	68	921
December	438	178	616	765	196	961
Total	13,230	2,058	15,288	11,374	1,476	13,027

Figure 6.1: Monthly exports of cattle from NI to GB for breeding and production 2014-2015

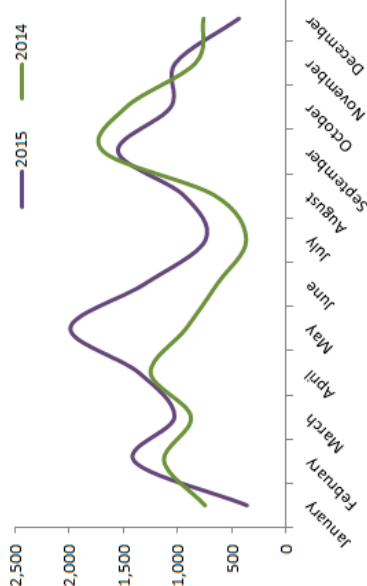


Figure 6.2: Monthly exports of cattle from NI to ROI for breeding and production 2014-2015

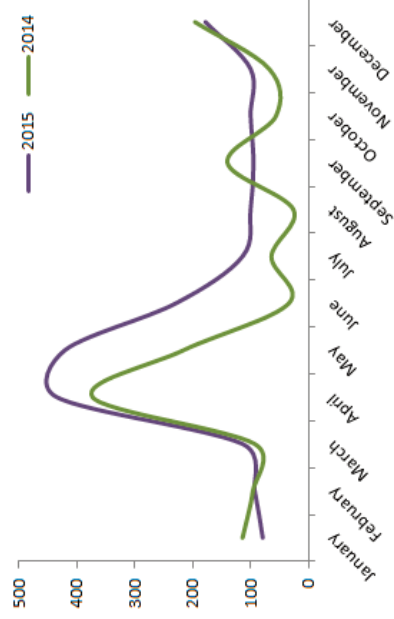


Table 7.1: Monthly imports of cattle for direct slaughter in NI plants from GB and ROI 2014-2015

	2015			2014		
	GB	ROI	Total	GB	ROI	Total
January	215	2,282	2,497	176	1,451	1,627
February	141	2,069	2,210	71	1,415	1,486
March	174	2,064	2,238	69	1,859	1,928
April	136	2,327	2,463	251	1,486	1,737
May	69	1,700	1,769	393	791	1,184
June	157	1,966	2,123	287	1,311	1,598
July	332	2,805	3,137	849	2,469	3,318
August	246	1,756	2,002	379	3,430	3,809
September	195	2,999	3,194	277	4,072	4,349
October	234	3,623	3,857	277	4,154	4,431
November	173	2,457	2,630	210	2,754	2,964
December	135	1,684	1,819	214	2,215	2,429
Total	2,207	27,732	29,939	3,453	27,407	30,860

Figure 7.1: Monthly imports of cattle from GB for direct slaughter 2014-2015



Figure 7.2: Monthly imports of cattle from ROI for direct slaughter 2014-2015



Table 8.1: Monthly exports of cattle from NI to GB and ROI for direct slaughter 2014-2015

	2015			2014		
	GB	ROI	Total	GB	ROI	Total
January	270	1,218	1,488	1,031	1,028	2,059
February	317	1,129	1,446	730	946	1,676
March	110	1,012	1,122	899	496	1,395
April	185	1,276	1,461	764	648	1,412
May	114	1,205	1,319	544	647	1,191
June	294	1,086	1,380	414	415	829
July	579	899	1,478	365	393	758
August	676	1,275	1,951	571	381	952
September	822	1,160	1,982	1,005	527	1,532
October	1,548	1,851	3,399	1,586	1,212	2,798
November	1,307	1,336	2,643	981	1,650	2,631
December	1,152	722	1,874	494	909	1,403
Total	7,374	14,169	21,543	9,384	9,252	18,636

Figure 8.1: Monthly exports of cattle to GB for direct slaughter 2014-2015

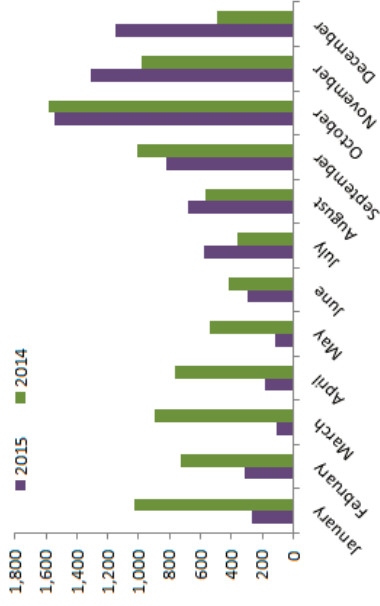


Figure 8.2: Monthly exports of cattle to ROI for direct slaughter 2014-2015

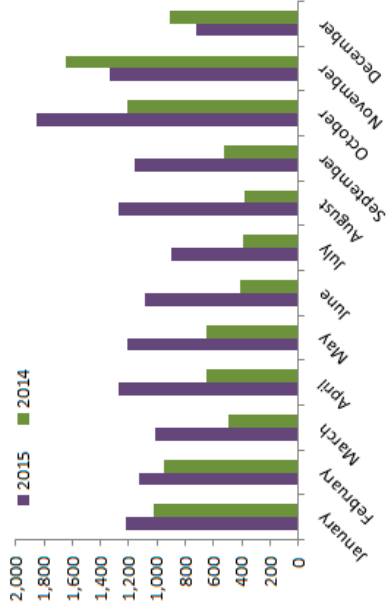


Table 9.1: Monthly UK beef consumer data 2014-2015

	2015			2014		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
January	190,472	7.98	23,874	190,212	8.18	23,252
February	192,526	7.70	24,997	185,489	7.79	23,800
March	185,363	7.87	23,539	188,305	7.87	23,916
April	176,300	7.87	22,395	170,536	7.86	21,689
May	156,926	7.72	20,320	170,940	7.75	22,068
June	155,700	7.74	20,113	154,920	7.52	20,590
July	149,100	8.01	18,605	145,732	7.80	18,688
August	140,600	8.10	17,354	141,128	7.94	17,771
September	148,000	7.97	18,560	144,295	7.86	18,366
October	155,198	7.93	19,582	159,003	7.88	20,190
November	170,900	7.82	21,846	164,464	7.72	21,309
December	172,100	7.85	21,932	174,266	7.79	22,374
Total	2,175,785	7.87	276,630	2,179,064	7.82	278,680

Figure 9.1: Monthly UK average retail price of beef (£/kg) 2014-2015

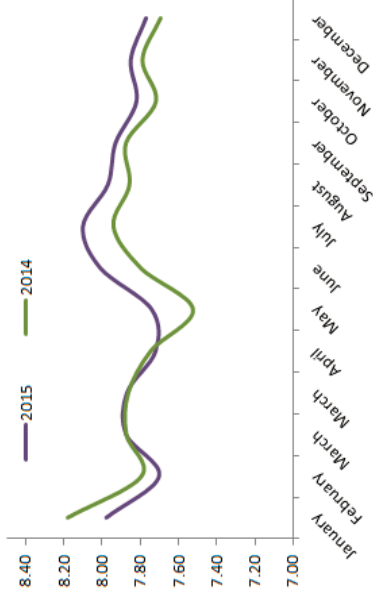


Figure 9.2: Monthly UK volume of total beef sales (tonnes) 2014-2015

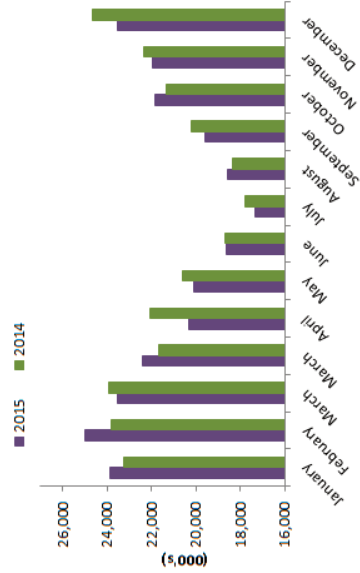


Figure 9.3: Monthly UK expenditure on beef (£000's) 2014-2015

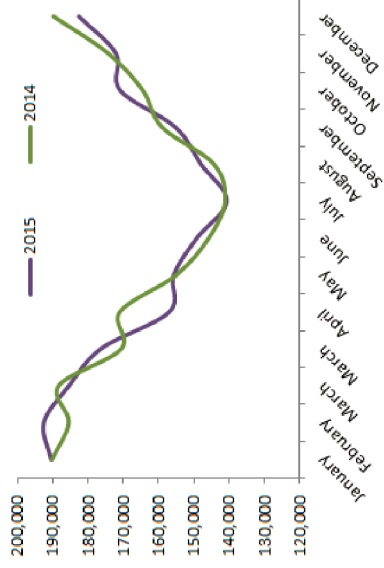


Table 10.1: Monthly NI R3 prime cattle prices (p/kg) 2014-2015

	2015			2014		
	Heifer	Steers	Y Bulls	Heifer	Steers	Y Bulls
January	366.5	367.9	354.1	365.6	363.8	334.3
February	361.5	362.3	345.7	358.3	356.7	323.6
March	353.9	354.7	340.3	342.6	340.8	310.1
April	339.2	343.0	324.4	345.9	344.3	318.5
May	328.9	329.5	319.3	338.9	336.9	316.9
June	329.4	329.8	318.6	324.8	325.8	307.0
July	345.5	344.6	337.7	324.3	323.3	312.1
August	334.2	334.0	327.2	325.2	324.1	315.6
September	330.3	328.7	322.7	328.2	327.3	315.6
October	324.0	322.3	315.0	347.2	345.9	336.9
November	323.4	322.0	313.3	350.6	350.0	335.9
December	317.1	316.5	305.8	357.0	358.9	346.2
Average	338.6	337.7	326.2	343.2	341.9	319.4

Figure 10.1: NI R3 young bull prices (p/kg) 2014-2015

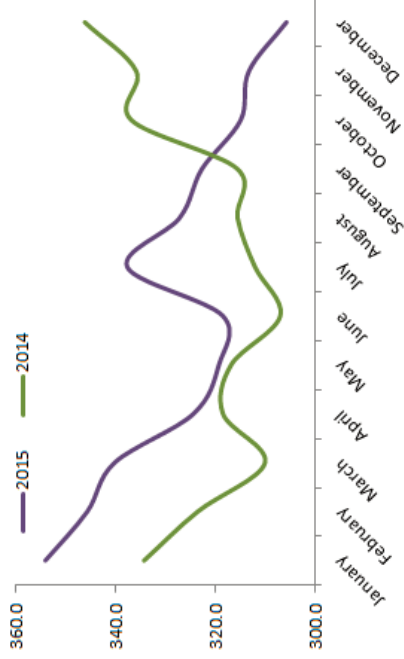


Figure 10.2 NI R3 steer prices (p/kg) 2014-2015

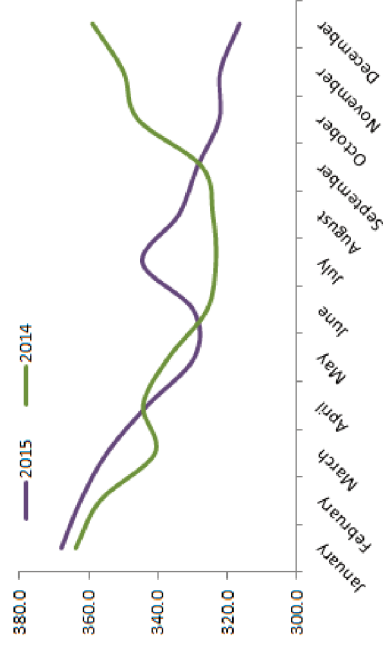


Table 11.1: Monthly average prime cattle prices NI (p/kg) 2014-2015

	2015			2014		
	Heifer	Steers	Y Bulls	Heifer	Steers	Y Bulls
January	360.8	358.0	334.1	359.5	354.7	322.7
February	355.8	352.3	327.9	352.6	346.0	313.4
March	348.0	345.2	322.6	336.5	329.9	296.6
April	332.3	331.3	306.8	339.3	334.4	305.7
May	322.0	319.0	303.9	333.2	327.7	306.0
June	323.3	320.0	308.0	318.6	314.9	294.5
July	338.4	335.3	328.9	317.1	314.2	299.2
August	327.3	324.4	315.3	318.8	312.8	299.9
September	323.9	320.2	312.1	321.6	315.7	298.6
October	318.3	312.6	302.4	341.2	334.7	319.5
November	316.9	312.0	300.8	343.7	339.3	319.3
December	311.7	307.0	292.6	350.5	347.9	324.9
Average	332.3	327.9	312.9	337.1	331.2	306.3

Figure 11.1.1: Average young bull prices NI (p/kg) 2014-2015

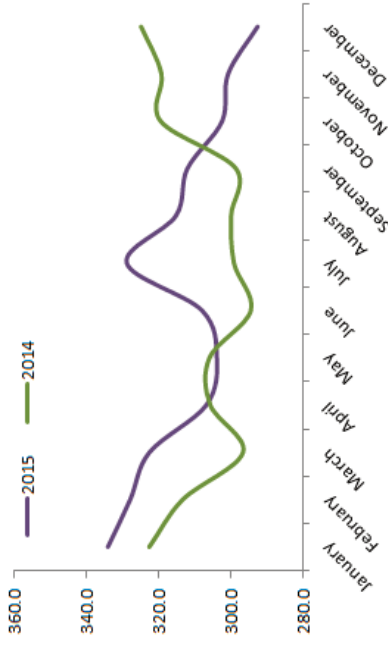


Figure 11.1.2 Average steer prices NI (p/kg) 2014-2015

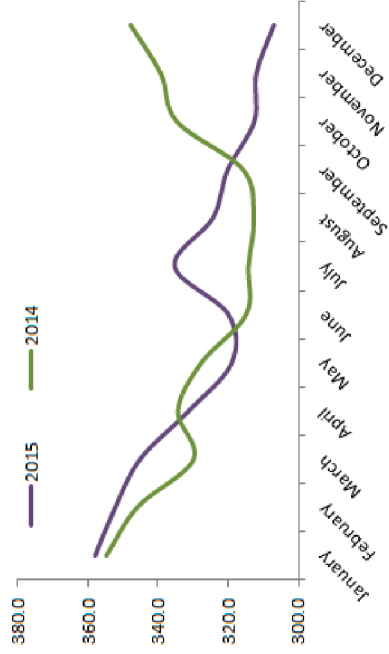


Table 12.1: Monthly average NI cow prices (p/kg) 2014-2015

	2015			2014		
	Cow P3	Cow O3	Cow Avg	Cow P3	Cow O3	Cow Avg
January	222.8	247.3	224.1	216.1	236.7	220.0
February	224.7	247.7	225.1	217.7	241.5	229.9
March	223.7	247.2	225.5	215.9	237.7	222.3
April	222.0	241.4	221.0	222.8	243.0	227.3
May	222.2	241.3	224.6	222.2	242.7	229.3
June	233.8	255.3	237.2	223.7	242.9	230.3
July	244.6	263.8	249.1	228.2	246.0	230.8
August	226.4	244.2	222.9	226.3	246.5	228.5
September	220.4	242.2	213.9	227.5	246.9	222.7
October	219.7	238.6	215.2	232.4	252.4	226.9
November	217.4	236.5	212.8	221.7	242.4	213.8
December	206.4	226.8	202.0	218.3	239.2	210.1
Average	223.1	243.6	221.4	222.4	243.2	223.6

Figure 12.1: NI P3 cow prices (p/kg) 2014-2015

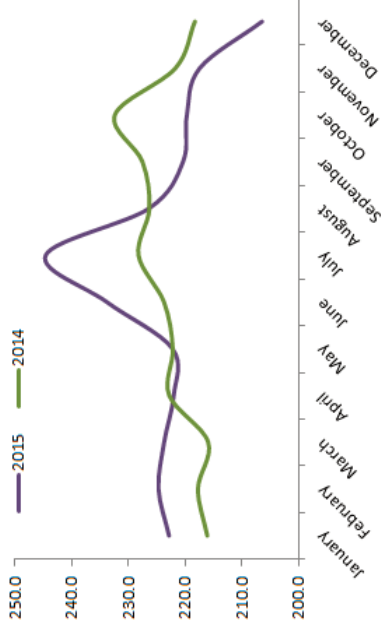


Figure 12.2: NI P3 cow prices (p/kg) 2014-2015

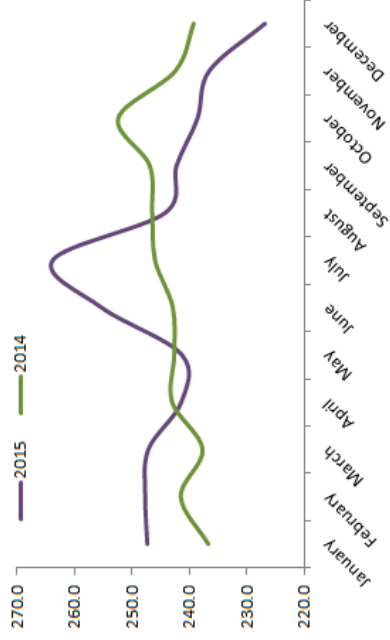


Table 13.1: Conformation analysis of the NI slaughter mix 2014-2015

Conformation Analysis Cows		E	U	R	O	P
2015		0.0%	1.8%	14.9%	27.6%	55.7%
2014		0.0%	1.7%	16.5%	31.2%	50.6%
Conformation Analysis heifers						
		E	U	R	O	P
2015		0.2%	20.8%	49.9%	24.5%	4.6%
2014		0.2%	19.3%	51.4%	25.5%	3.8%
Conformation Analysis steers						
		E	U	R	O	P
2015		0.4%	21.1%	38.7%	29.9%	10.0%
2014		0.3%	21.2%	38.5%	29.6%	10.4%
Conformation Analysis young bulls						
		E	U	R	O	P
2015		2.3%	22.8%	25.5%	36.1%	13.3%
2014		1.8%	21.7%	26.8%	34.7%	14.9%

Figure 13.1: Conformation analysis of NI steer kill 2014-2015

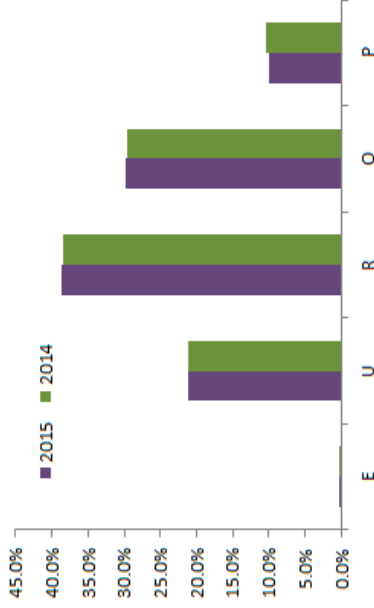


Figure 13.2: Conformation analysis of NI young bull kill 2014-2015

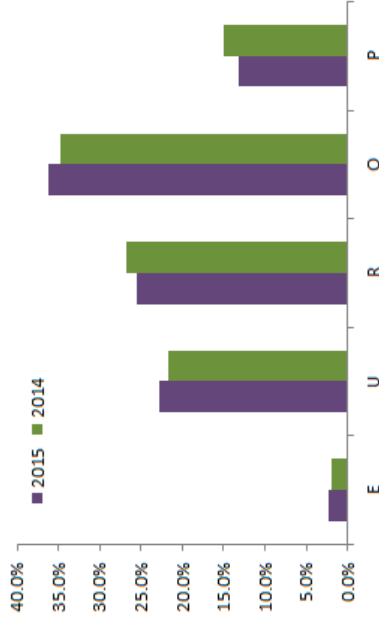


Table 14.1: Fat class analysis of the NI slaughter mix 2014-2015

Fat Class Analysis Cows					
	1	2	3	4	5
2015	20.8%	23.6%	31.5%	20.1%	4.0%
2014	18.5%	22.4%	33.4%	21.9%	3.8%
Fat Class Analysis heifers					
	1	2	3	4	5
2015	1.2%	9.2%	42.4%	44.1%	3.2%
2014	1.4%	10.4%	44.7%	41.0%	2.5%
Fat Class Analysis steers					
	1	2	3	4	5
2015	1.4%	17.4%	57.0%	23.9%	0.4%
2014	2.0%	20.4%	55.8%	21.4%	0.4%
Fat class Analysis young bulls					
	1	2	3	4	5
2015	6.0%	49.6%	40.9%	3.5%	0.0%
2014	8.5%	49.4%	39.2%	3.0%	0.0%

Figure 14.1: Fat class analysis of the NI steer kill 2014-2015

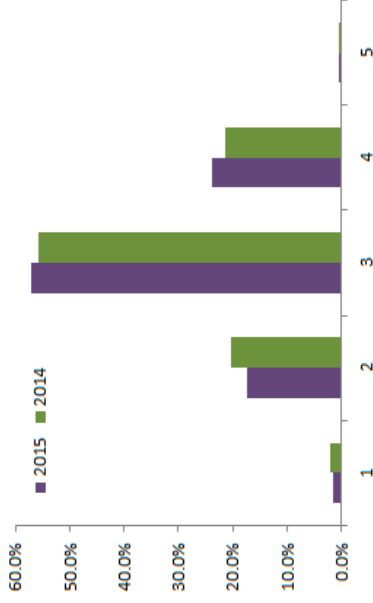


Figure 14.2: Fat class analysis of NI young bull kill 2014-2015

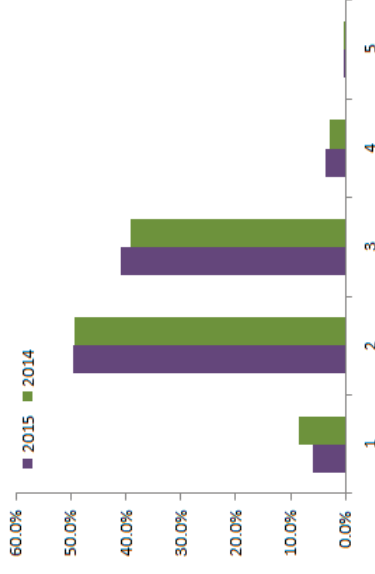


Table 15.1: Analysis of prime cattle sourced from the suckler herd 2014-2015

Suckler Dam Conformation Analysis						
	E	U	R	O	P	
2015	0.7%	31.2%	53.4%	14.0%	0.7%	
2014	0.6%	29.4%	54.0%	15.2%	0.9%	
Suckler Dam Fat Class Analysis						
	1	2	3	4	5	
2015	1.2%	14.6%	50.6%	32.0%	1.5%	
2014	1.7%	17.0%	50.8%	29.3%	1.2%	

Figure 15.1: Suckler dam conformation analysis 2014-2015

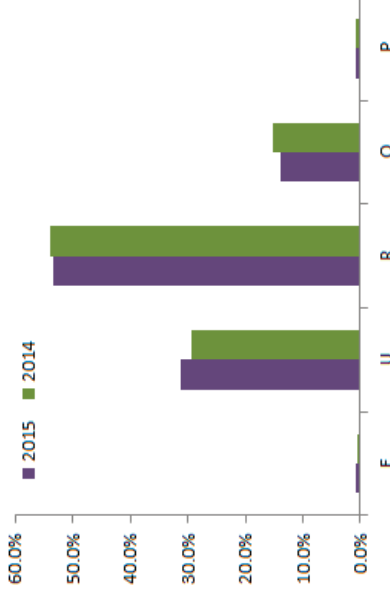


Figure 15.2: Suckler dam fat class analysis 2014-2015

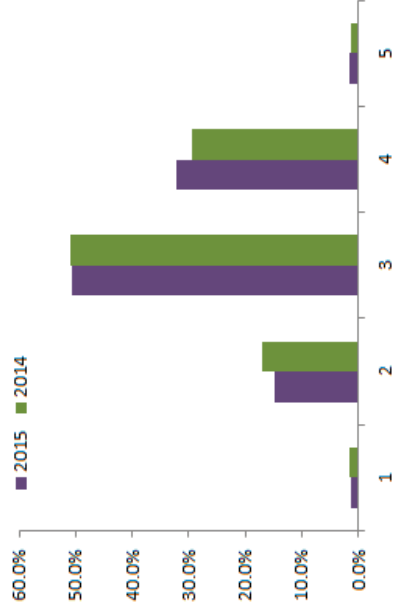


Table 16.1: Analysis of prime cattle sourced from the dairy herd 2014-2015

Dairy Dam Conformation Analysis						
	E	U	R	O	P	
2015	0.0%	1.5%	18.4%	55.5%	24.6%	
2014	0.0%	1.3%	17.5%	55.2%	25.9%	
Dairy Dam Fat Class Analysis						
	1	2	3	4	5	
2015	4.7%	24.0%	47.3%	22.9%	1.1%	
2014	7.3%	27.6%	44.4%	19.8%	0.9%	

Figure 16.1: Conformation analysis of prime cattle sourced from the dairy herd 2014-2015

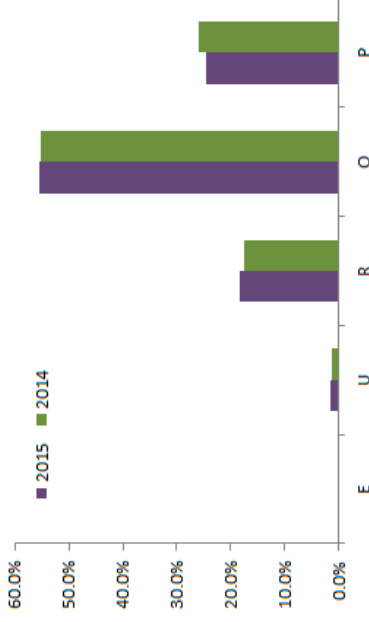


Figure 16.2: Fat class analysis of prime cattle sourced from the dairy herd 2014-2015

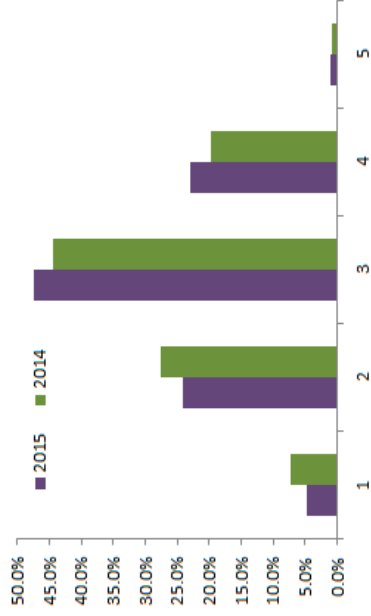




Table 17.1: Monthly NI sheep kill broken down by category 2014-2015

	2015			2014		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	31,689	4,765	36,454	36,145	5,052	41,197
February	21,255	3,511	24,766	25,467	3,719	29,186
March	21,775	2,414	24,189	20,175	3,256	23,431
April	28,321	3,479	31,800	23,824	5,058	28,882
May	24,923	2,227	27,150	23,591	3,659	27,250
June	41,337	2,661	43,998	42,735	3,535	46,270
July	60,987	2,572	63,559	61,472	4,113	65,585
August	49,241	2,148	51,389	46,958	3,956	50,914
September	52,384	3,026	55,410	48,600	5,872	54,472
October	60,574	3,624	64,198	54,819	5,483	60,302
November	41,475	2,898	44,373	34,347	4,306	38,653
December	33,359	2,347	35,706	26,810	2,788	29,598
Total	467,320	35,672	502,992	444,943	50,797	495,740

Table 17.2: Proportion of annual sheep kill per month 2014-2015

	2015			2014		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	7%	13%	7%	8%	10%	8%
February	5%	10%	5%	6%	7%	6%
March	5%	7%	5%	5%	6%	5%
April	6%	10%	6%	5%	10%	6%
May	5%	6%	5%	5%	7%	5%
June	9%	7%	9%	10%	7%	9%
July	13%	7%	13%	14%	8%	13%
August	11%	6%	10%	11%	8%	10%
September	11%	8%	11%	11%	12%	11%
October	13%	10%	13%	12%	11%	12%
November	9%	8%	9%	8%	8%	8%
December	7%	7%	7%	6%	5%	6%
Total	100%	100%	100%	100%	100%	100%

Figure 17.1: Monthly NI lamb/hogget kill 2014-2015

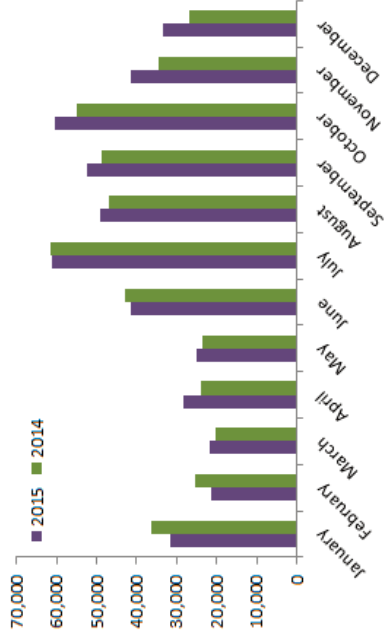


Table 18.1: Monthly NI sheep production ('000 tonnes) 2014-2015

	2015			2014		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	712	127	839	797	143	940
February	476	92	567	561	104	665
March	482	66	547	446	95	541
April	629	97	726	520	150	669
May	537	66	603	505	108	613
June	891	81	973	898	105	1,003
July	1,302	77	1,379	1,337	118	1,455
August	1,041	62	1,103	999	111	1,110
September	1,121	86	1,207	1,041	151	1,192
October	1,306	100	1,406	1,204	148	1,351
November	905	78	983	763	112	874
December	728	61	789	597	76	673
Total	10,129	994	11,122	9,668	1,419	11,087

Figure 18.1: Monthly total sheep meat production in NI 2014-2015

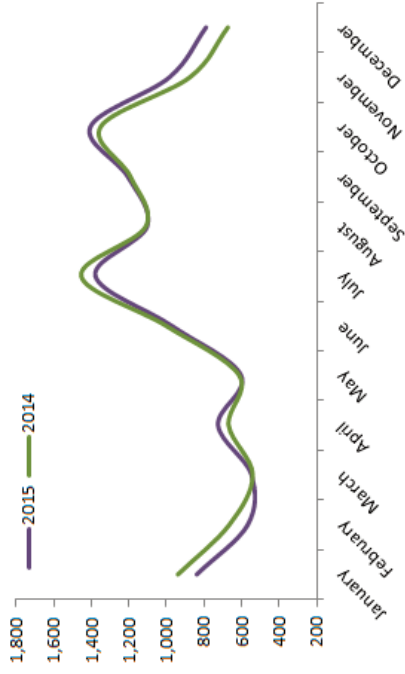


Table 18.2: Average NI carcase weight 2014-2015

	Lambs & Hoggets	Ewes & Rams
2015	21.7	27.9
2014	21.8	28.0

December 2015 Farm Survey Results

The December 2015 agricultural survey released by the Department of Agriculture and Rural Development (DARD) provides estimates of the numbers of sheep on NI farms at the beginning of December each year.

The survey identified a three per cent increase in the size of the sheep breeding flock between December 2014 and December 2015. This follows on from a three per cent increase in the breeding flock between 2013 and 2014. In December 2015 there were 914,200 breeding sheep on NI farms compared to 890,300 the previous December. This year on year increase takes the NI breeding flock to similar levels as recorded in December 2012.

The number of ewe lambs entering the breeding flock in December 2015 totalled 89,500 head and they accounted for 10 per cent of the total breeding flock. By comparison in December 2014 there were 93,300 ewe lambs in the NI breeding flock accounting for a four per cent decrease year on year.

The number of lambs on NI farms under 1 year old at the start of December 2015 totalled 346,500 head, a 1 per cent decrease on the 351,300 head on NI farms in December 2014.

Total sheep numbers in NI in December 2015 were 1.32 million head compared to 1.29 million head the previous December. This accounts for a 2 per cent increase year on year.

Figure 19.1: Total number of breeding ewes on NI farms in December 2000-2015

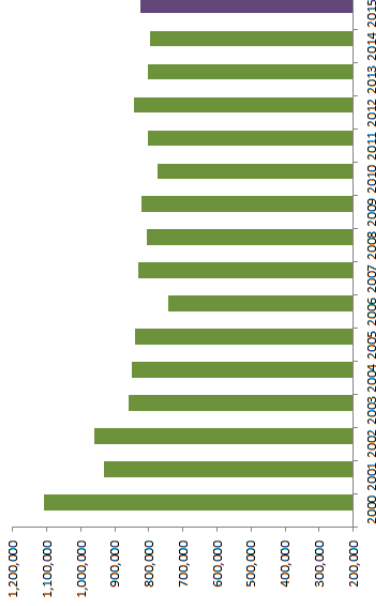


Figure 19.2: Total number of ewe lambs in the NI breeding flock in December 2000-2015

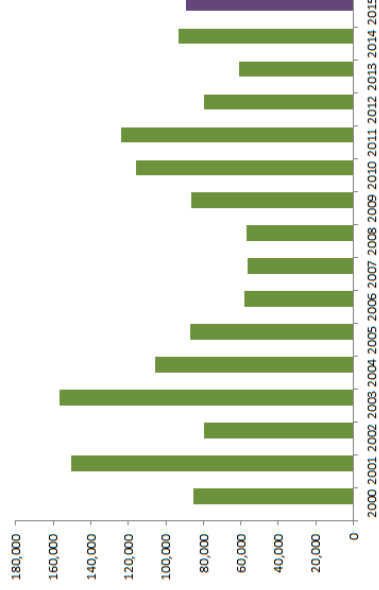


Table 20.1: Monthly average carcass weight by category (kg) 2014-2015

	2015			2014		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	22.5	26.7	23.0	22.1	28.2	22.8
February	22.4	26.1	22.9	22.0	27.9	22.8
March	22.1	27.2	22.6	22.1	29.3	23.1
April	22.2	27.9	22.8	21.8	29.5	23.2
May	21.5	29.6	22.2	21.4	29.5	22.6
June	21.6	30.6	22.1	21.0	29.6	21.7
July	21.3	30.0	21.7	21.8	28.6	22.2
August	21.1	28.7	21.5	21.3	28.1	21.8
September	21.4	28.4	21.8	21.4	25.7	21.9
October	21.6	27.6	21.9	22.0	26.9	22.4
November	21.8	27.1	22.2	22.2	25.9	22.6
December	21.8	26.2	22.1	22.3	27.0	22.8
Overall Average	21.7	27.9	22.1	21.8	28.0	22.5

Figure 20.1: Average monthly lamb & hogget carcass weights (kg) 2014-2015

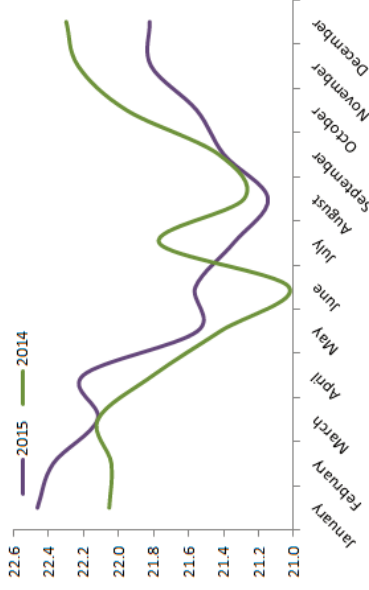


Figure 20.2: Average monthly ewe & ram carcass weights (kg) 2014-2015

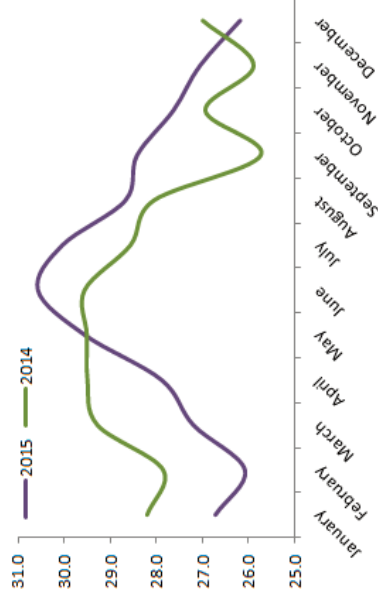


Table 21.1: Monthly imports of sheep into NI for breeding & production from GB and ROI 2014-2015

	2015			2014		
	GB	Ireland	Total	GB	Ireland	Total
January	289	1	290	331	6	337
February	303	1	304	563	-	563
March	1,335	3	1,338	1,456	1	1,457
April	2	-	2	89	-	89
May	106	-	106	241	46	287
June	45	1	46	412	1	413
July	807	-	807	60	323	383
August	263	6	269	367	392	759
September	817	4	821	756	26	782
October	1,142	21	1,163	1,326	9	1,335
November	150	14	164	495	70	565
December	356	9	365	262	3	265
Total	5,615	60	5,675	6358	877	7235

Table 21.2: Monthly exports of sheep for breeding & production from NI to GB and ROI 2014-2015

	2015			2014		
	GB	Ireland	Total	GB	Ireland	Total
January	4,245	1,622	5,867	1,166	601	1,767
February	5,236	985	6,221	2,330	817	3,147
March	6,397	1,335	7,732	3,091	578	3,669
April	10,092	1,091	11,183	7,111	778	7,889
May	8,601	246	8,847	5,320	19	5,339
June	8,373	133	8,506	5,778	19	5,797
July	8,864	30	8,894	6,908	151	7,059
August	10,207	750	10,957	7,314	462	7,776
September	9,363	937	10,300	7,618	507	8,125
October	7,435	1,698	9,133	4,130	1,061	5,191
November	5,198	1,635	6,833	2,642	500	3,142
December	3,058	3,311	6,369	1,669	1,167	2,836
Total	87,069	13,773	100,842	55,077	6,660	61,737

Table 22.1: Monthly sheep exports from NI for direct slaughter in GB & ROI 2014-2015

	2015			2014		
	ROI	GB	Total	ROI	GB	Total
January	31,544	-	31,544	38,011	234	38,245
February	27,227	-	27,227	31,736	4	31,740
March	28,799	-	28,799	31,027	-	31,027
April	19,745	-	19,745	28,606	61	28,667
May	12,934	210	13,144	11,078	-	11,078
June	13,665	381	14,046	17,811	-	17,811
July	22,308	-	22,308	23,971	-	23,971
August	27,917	-	27,917	29,415	-	29,415
September	38,340	268	38,608	37,961	9	37,970
October	44,688	-	44,688	51,846	43	51,889
November	32,714	-	32,714	32,971	-	32,971
December	32,194	80	32,274	34,363	-	34,363
Total	332,075	939	333,014	368,796	351	369,147

Figure 22.1: Monthly sheep exports from NI to ROI for direct slaughter 2014-2015

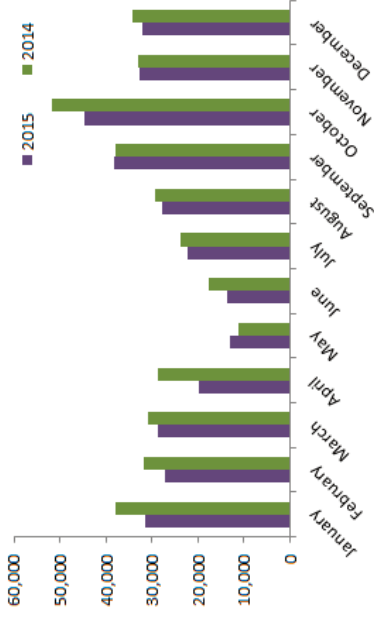


Figure 22.2: Monthly sheep exports from NI to GB for direct slaughter 2014-2015

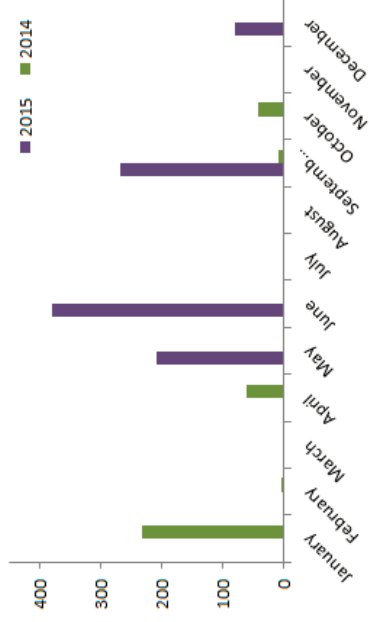


Table 23.1: Monthly UK lamb consumer data 2014-2015

	2015			2014		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
January	57,760	7.84	7,371	58,459	7.95	7,350
February	46,744	8.84	5,289	52,562	8.24	6,376
March	46,632	8.45	5,521	54,429	8.63	6,305
March	67,300	6.96	9,677	51,185	8.94	5,725
April	61,277	7.29	8,406	76,142	6.84	11,128
May	39,000	8.79	4,441	42,144	8.90	4,737
June	41,600	8.55	4,868	45,828	8.23	5,569
July	41,200	8.74	4,716	43,259	8.83	4,898
August	43,500	8.67	5,025	44,391	8.49	5,226
September	45,290	8.74	5,182	43,527	9.00	4,829
October	48,400	8.60	5,630	46,426	8.63	5,378
November	47,900	8.46	5,657	42,557	8.48	5,016
December	50,800	8.36	6,080	48,201	8.42	5,726
Total	637,402	8.33	77,864	648,858	8.43	78,228

Figure 23.2: Monthly UK volume of total lamb sales (tonnes) 2014-2015

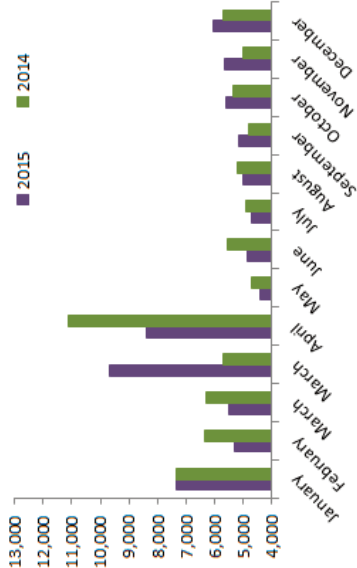


Figure 23.1: Monthly UK average retail price of lamb (£/kg) 2014-2015

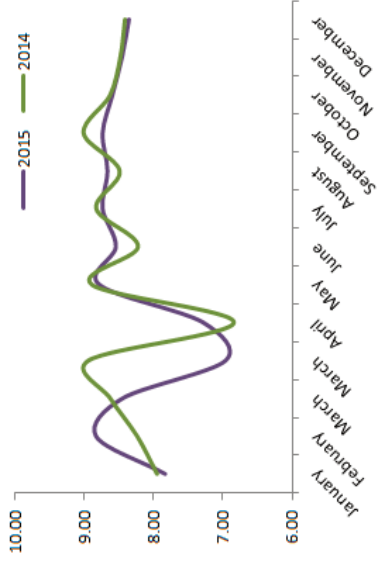


Figure 23.3: Monthly UK expenditure on lamb (£000's) 2014-2015

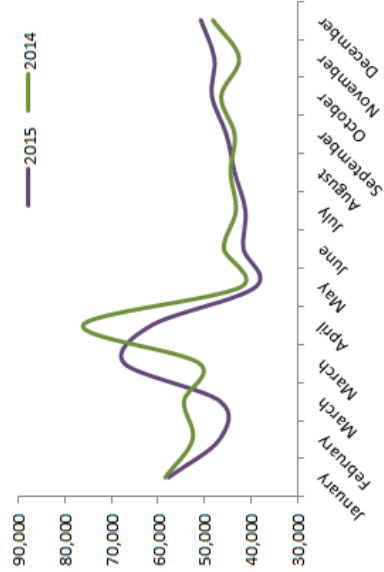


Table 24.1: Monthly NI R3 sheep prices (p/kg) 2014-2015

	2015			2014		
	Hoggets	Lambs	Lambs & Hoggets	Hoggets	Lambs	Lambs & Hoggets
January	394.8	386.5	393.4	385.2	386.8	385.4
February	395.7		395.7	395.9		395.9
March	409.3	420.8	411.6	442.9	522.4	458.8
April	364.8	418.4	391.6	466.8	499.7	483.3
May	338.0	381.4	359.7	421.5	462.4	441.9
June	299.5	347.6	327.0	378.5	429.4	412.5
July		310.1	310.1		363.3	363.3
August		305.6	305.6		348.1	348.1
September		309.8	309.8		339.0	339.0
October		309.0	309.0		346.3	346.3
November		318.4	318.4		363.9	363.9
December		329.8	329.8		384.2	384.2
Average	370.8	340.6	352.0	419.1	396.7	405.0

Figure 24.2: Average deadweight lamb prices (p/kg) March - December 2014-2015

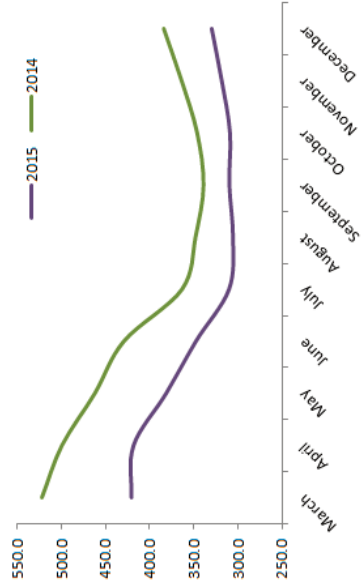


Figure 24.1: Monthly combined lamb & hogget deadweight prices (p/kg) 2014-2015

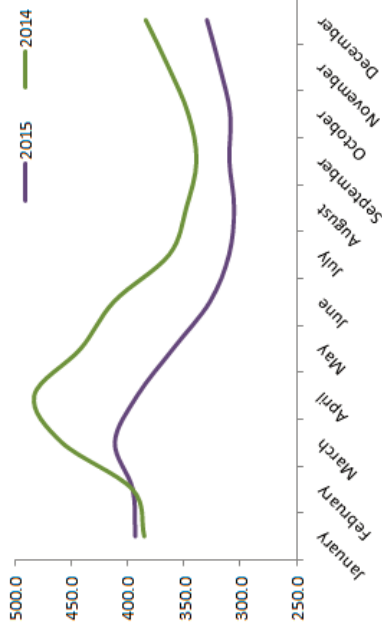


Figure 24.3: Average deadweight hogget prices (p/kg) January - June 2014-2015

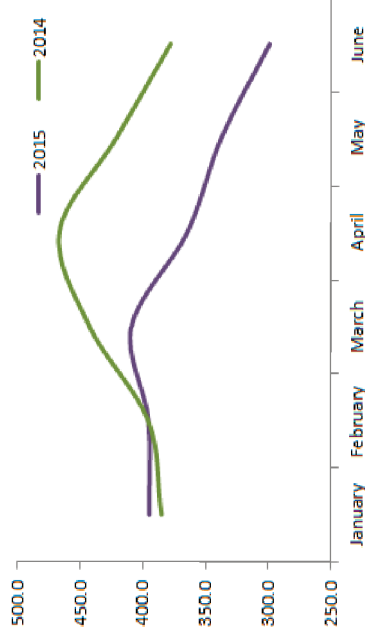


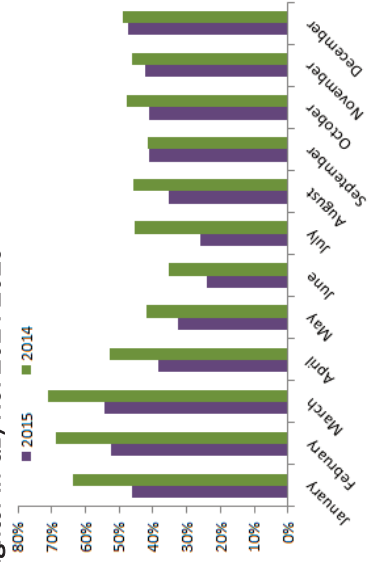
Table 25.1: Total sheep slaughtering and exports for direct slaughter by month 2014-2015

	Export for D/S				Total Slaughtered NI Plants		Total Eligible Kill NI	
	2015		2014		2015		2014	
	ROI & GB	ROI & GB	ROI & GB	All Sheep	All Sheep	All Sheep	All Sheep	
January	31,544	38,245	36,454	41,197	67,998	79,442		
February	27,227	31,740	24,766	29,186	51,993	60,926		
March	28,799	31,027	24,189	23,431	52,988	54,458		
April	19,745	28,667	31,800	28,882	51,545	57,549		
May	13,144	11,078	27,150	27,250	40,294	38,328		
June	14,046	17,811	43,998	46,270	58,044	64,081		
July	22,308	23,971	63,559	65,585	85,867	89,556		
August	27,917	29,415	51,389	50,914	79,306	80,329		
September	38,608	37,970	55,410	54,472	94,018	92,442		
October	44,688	51,889	64,198	60,302	108,886	112,191		
November	32,714	32,971	44,373	38,653	77,087	71,624		
December	32,274	34,363	35,706	29,598	67,980	63,961		
Total	333,014	369,147	502,992	495,740	836,006	864,887		

Table 25.2: Proportion of NI sheep exported for direct slaughter in GB/ROI 2014-2015

	2015	2014
January	46%	64%
February	52%	69%
March	54%	71%
April	38%	53%
May	33%	42%
June	24%	35%
July	26%	45%
August	35%	46%
September	41%	42%
October	41%	48%
November	42%	46%
December	47%	49%
Total	40%	51%

Figure 25.1: Proportion of NI sheep exported for direct slaughter in GB/ROI 2014-2015













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