

LMC

NI BEEF AND SHEEP YEARBOOK 2017



LMC Market Information Department
January 2018

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 2017.

During 2017 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 2017. In addition to these weekly publications the LMC Quarterly was published and distributed to approximately 12,500 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

Strong supplies of prime cattle came available for slaughter throughout 2017 with throughput running five per cent higher than 2016 levels. There was also an increase in cow throughput in local plants in 2017 with 3,497 additional cows slaughtered than 2016. While some of this increase in total cattle throughput was offset by lower carcass weights local processors still handled larger volumes of beef. Despite the improved cattle supplies the deadweight cattle trade in NI remained firm during much of 2017 with good consumer demand for beef underpinning a steady deadweight trade. A narrowing price differential between NI and GB meant exports to mainland UK for direct slaughter were back from previous years while imports from ROI for slaughter in local plants were also operating at lower levels.

Total lamb and hogget throughput in NI plants during 2017 was similar to 2016 levels with supplies following the normal seasonal trend. A strengthening euro against sterling also made NI lambs very attractive to processors in ROI with 47 per cent of NI lambs/hoggets exported to the region for direct slaughter. There was a relatively firm deadweight trade for lamb during 2017 with a combined average R3 lamb/hogget price of 401.6p/kg, up almost 10p/kg from 2016 levels. It was a difficult year for lamb in terms of UK retail sales with an increase in the average price combined with reduced consumer demand. The weaker sterling against euro did however make NI origin lamb much more competitive on key EU markets which helped firm the deadweight trade.



BEEF MARKET 2017

Prime cattle throughput in NI during 2017 totalled 332,715 head, a 4.4 per cent increase on 2016 levels. There was however a decrease in the carcass weights of prime cattle slaughtered in NI plants with an average prime cattle carcass weight during 2017 of 334kg, a 3.5kg decrease from an average carcass weight of 337.5kg during 2016. This decrease in average carcass weight however did not offset the increase in prime cattle throughput with an increase in the volume of beef from prime cattle handled by the NI processors.

Cow throughput in NI remained strong during 2017 with a total of 103,440 cows slaughtered, a 3.4 per cent increase from 2016 levels when 99,943 cows were killed. The average cow carcass weight recorded a decrease to 296.6kg during 2017. Local processors handled 30,676 tonnes of cow beef during 2017, a 2.2 per cent increase from 2016 levels.

The average R3 steer price in NI during 2017 was 359.6p/kg, a considerable 29.2p/kg increase from the 330.4p/kg paid during 2016. The deadweight trade for prime cattle started the year strongly and held relatively steady throughout the year. This stability in the beef trade can be attributed to steady consumer demand for beef despite increases in average retail prices. A weak sterling against euro also made NI origin beef more competitive on key EU markets which was another factor that contributed to the stability in the trade. The average cow price in NI during 2017 was 252.4p/kg, up 30p/kg from year earlier levels. The average O3 cow price in NI was 271.5p/kg during 2017.

There was a slight decline in beef sired calf registrations on NI farms during 2017 with a total of 365,597 beef calves registered. This was a 0.5 per cent decrease from 2016 levels when 367,418 beef sired calves were registered. Limousin continued to be the most popular beef sire used on NI farms and accounted for 26.9 per cent of beef registrations. There was a notable increase in the number of Aberdeen Angus and Hereford calf registrations during 2017, particularly to dairy cows. The number of dairy sired male calves registered in NI during 2017 was 79,583, a 6 per cent decline from 2016 levels when 84,346 dairy sired male calves were registered.

Total imports of cattle for direct slaughter in NI during 2017 totalled 17,789 head, a 24.2 per cent increase from 13,488 head imported for direct slaughter during 2016. Meanwhile total cattle exports for direct slaughter recorded a notable decline during 2017. Exports totalled 12,378 head compared to 17,639 head during 2016. During 2017 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 2016 levels due to the narrowing price differential between the two regions.

Total retail expenditure on beef in the UK during 2017 was similar to year earlier levels and totalled £2.2 billion. There was an increase in the average retail price of beef during 2017 to £7.88 while the volume of retail beef sales remained at similar levels from 2016 to total 281,842 tonnes during 2017.



SHEEP MARKET 2017

Lamb/hogget throughput in NI totalled 423,247 head during 2017, back marginally from 2016 levels when 423,896 lambs/hoggets were killed in NI plants. Total ram/ewe throughput in NI plants during 2017 was 30,255 head, a 3.5 per cent increase from the 29,192 rams/ewes killed in NI plants during 2016.

ROI continues to act as an important market for NI origin lambs with exports for direct slaughter during 2017 totalling 402,820 head, a two per cent increase from 2016 levels when 394,439 sheep were exported. Exports from NI to ROI for direct slaughter accounted for 47 per cent of total NI sheep output during 2017, which was unchanged from 2016 levels. There was a relatively strong deadweight trade for lambs/hoggets during 2017 which was underpinned by a weak euro creating competition for locally produced lambs from processors in ROI while also making NI product more competitive on key EU markets.

The average R3 lamb/hogget price in NI during 2017 was 402p/kg, an increase from an average of 392p/kg during 2016. This increase of 10p/kg is the equivalent of £2.10 on a 21kg lamb.

Consumer data has indicated a 4.6 per cent decline in the value of UK retail lamb sales during 2017 to total £594 million. The average retail price of lamb during 2017 was £8.92/kg, an increase of 42p/kg from the average retail price in 2016. Meanwhile the volume of UK lamb retail sales during 2017 was at lower levels than 2016 at 67,653 tonnes.



Table 1.1: Monthly NI cattle kill by category 2016-2017

	2017					2016						
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	13,627	10,760	2,564	26,951	7,993	35,244	14,422	11,299	3,312	29,033	8,559	37,878
February	13,570	10,633	2,385	26,588	8,121	34,966	13,422	9,649	2,913	25,984	7,161	33,426
March	16,534	12,548	2,809	31,891	8,646	40,815	13,260	9,604	2,760	25,624	6,248	32,139
April	12,192	9,576	2,496	24,264	5,886	30,404	16,149	11,077	3,874	31,100	8,076	39,506
May	16,268	12,812	4,080	33,160	8,268	41,753	10,983	8,228	3,228	22,439	5,532	28,347
June	11,213	8,679	4,158	24,050	7,552	31,897	11,278	8,262	3,672	23,212	6,502	30,032
July	9,936	7,754	3,669	21,359	7,140	28,779	12,111	8,836	4,468	25,415	9,236	35,053
August	15,008	10,381	3,668	29,057	9,200	38,685	10,749	7,578	3,032	21,359	7,435	29,108
September	14,585	8,868	2,691	26,144	8,999	35,517	12,926	7,979	2,552	23,457	7,850	31,698
October	15,577	9,853	2,367	27,797	10,122	38,213	19,251	11,407	2,832	33,490	12,076	46,057
November	19,139	14,044	2,885	36,068	13,531	49,979	13,950	9,951	2,355	26,256	10,787	37,418
December	12,831	10,227	2,328	25,386	7,982	33,573	16,225	11,493	2,872	30,590	10,481	41,416
Total	170,480	126,135	36,100	332,715	103,440	439,825	164,726	115,363	37,870	317,959	99,943	422,078

Table 1.2: Summary of NI cattle kill by category 2016-2017

	2017	2016
Steers	170,480	164,726
Heifers	126,135	115,363
Young Bulls	36,100	37,870
Cows	103,440	99,943
Bulls	3,670	4,176
Total	439,825	422,078

Figure 1.1: Proportion of the NI cattle kill by category 2017

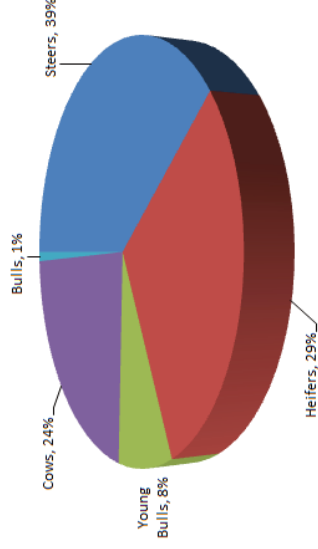


Table 2.1: Monthly NI volume of beef produced by category ('000 tonnes) 2016-2017

	2017						2016					
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	4,780	3,408	814	9,001	2,391	11,529	5,159	3,659	1,106	9,924	2,639	12,695
February	4,755	3,342	757	8,854	2,460	11,436	4,817	3,119	970	8,906	2,208	11,240
March	5,746	3,921	911	10,578	2,561	13,273	4,766	3,112	926	8,804	1,934	10,854
April	4,232	2,984	803	8,019	1,734	9,870	5,726	3,538	1,253	10,517	2,459	13,121
May	5,652	4,022	1,341	11,014	2,519	13,684	3,909	2,614	1,054	7,577	1,708	9,447
June	3,916	2,722	1,389	8,027	2,292	10,451	4,004	2,643	1,232	7,879	2,022	10,041
July	3,438	2,435	1,233	7,106	2,148	9,381	4,270	2,796	1,487	8,553	2,840	11,583
August	5,227	3,244	1,262	9,732	2,726	12,644	3,782	2,384	1,011	7,178	2,212	9,540
September	5,094	2,800	922	8,817	2,614	11,589	4,561	2,504	838	7,903	2,291	10,379
October	5,460	3,117	782	9,359	2,957	12,452	6,753	3,574	937	11,263	3,487	14,982
November	6,678	4,467	974	12,120	3,887	16,180	4,842	3,123	757	8,722	3,126	12,027
December	4,503	3,250	767	8,520	2,387	11,002	5,678	3,644	764	10,087	3,069	13,326
Total	59,479	39,712	11,956	111,147	30,676	143,489	58,268	36,711	12,335	107,313	29,994	139,236

Table 2.2: Average monthly carcass weights by category (kg) 2016-2017

	2017					2016				
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Steers	Heifers	Young Bulls	Prime Cattle	Cows
January	350.7	316.7	317.6	334.0	299.2	357.7	323.8	333.9	341.8	308.3
February	350.4	314.3	317.6	333.0	302.9	358.9	323.2	333.0	342.8	308.4
March	347.5	312.5	324.3	331.7	296.2	359.5	324.0	335.4	343.6	309.5
April	347.1	311.6	321.9	330.5	294.6	354.5	319.4	323.4	338.2	304.5
May	347.4	313.9	328.6	332.1	304.6	355.9	317.8	326.5	337.7	308.7
June	349.2	313.6	334.2	333.8	303.5	355.1	319.9	335.4	339.5	311.0
July	346.0	314.1	336.2	332.7	300.9	352.6	316.4	332.9	336.5	307.5
August	348.3	312.5	343.9	334.9	296.3	351.8	314.6	333.6	336.0	297.5
September	349.3	315.7	342.7	337.2	290.5	352.9	313.8	328.4	336.9	291.8
October	350.5	316.4	330.2	336.7	292.1	350.8	313.3	330.8	336.3	288.8
November	348.9	318.1	337.7	336.0	287.2	347.1	313.8	321.3	332.2	289.8
December	350.9	317.8	329.5	335.6	299.0	350.0	317.1	266.1	329.7	292.8

Table 2.3: Average annual carcass weight by category (kg) 2016-2017

	Steers	Heifers	Young Bulls	Prime Cattle	Cows
2017	348.9	314.8	331.2	334.1	296.6
2016	353.7	318.2	325.7	337.5	300.1

December 2017 Farm Survey Results

The NI agricultural survey is released annually by the Department of Agriculture, Environment and Rural Affairs (DAERA) and provides estimates of the numbers of cattle on NI farms at the beginning of December each year.

The December 2017 survey identified 258,400 beef cows on NI farms, a two per cent decrease on year earlier levels. This is the second consecutive year in which suckler cow numbers in NI have declined. Suckler cow numbers in NI have varied within a relatively narrow range of 250,000 to 275,000 since the decoupling of support payments in 2005.

The number of beef heifers in calf in December 2017 totalled 45,400 head, a one per cent decline from December 2016 levels. Meanwhile dairy cow numbers recorded a marginal increase in December 2017 to 312,500 head while the number of dairy heifers in calf was up marginally to 60,000 head.

The survey has identified a nine per cent increase in the number of cattle on NI farms 2 years old and older when compared to year earlier levels. The number of beef cattle aged 1-2 years was unchanged in December 2017 while the number of cattle aged less than 1 year decreased by one per cent to total 489,600 head.

Figure 2.1: Total beef heifers in calf in Dec 2000-2017

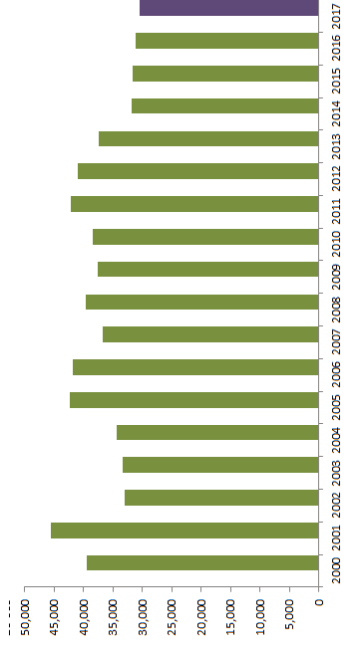


Figure 2.2: Total beef cows in Dec 2000-2017

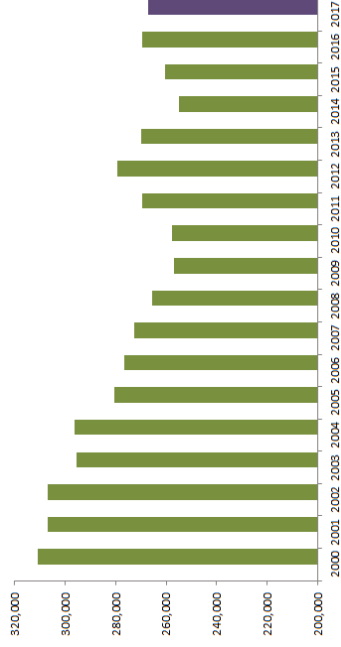


Table 3.1: Monthly calf registrations by category 2016-2017

	2017			2016		
	Beef	Dairy Male only	Total	Beef	Dairy Male only	Total
January	24,641	8,242	32,883	21,201	8,487	29,688
February	21,956	7,215	29,171	28,054	9,071	37,125
March	37,825	7,185	45,010	39,070	8,398	47,468
April	51,997	5,349	57,346	48,437	6,480	54,917
May	61,589	5,089	66,678	60,231	5,230	65,461
June	41,625	4,603	46,228	42,676	4,596	47,272
July	29,881	3,768	33,649	28,235	3,784	32,019
August	24,390	4,754	29,144	23,256	4,539	27,795
September	18,838	7,925	26,763	20,686	7,874	28,560
October	18,961	9,445	28,406	18,932	9,170	28,102
November	18,621	9,174	27,795	19,598	9,157	28,755
December	15,273	6,834	22,107	17,042	7,560	24,602
Total	365,597	79,583	445,180	367,418	84,346	451,764

Figure 3.1: Monthly calf registrations (beef sired and dairy males) 2016-2017

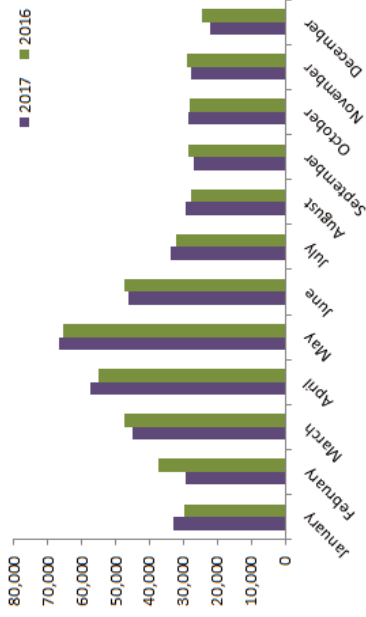


Figure 3.2: Beef sired calf registrations by breed 2017

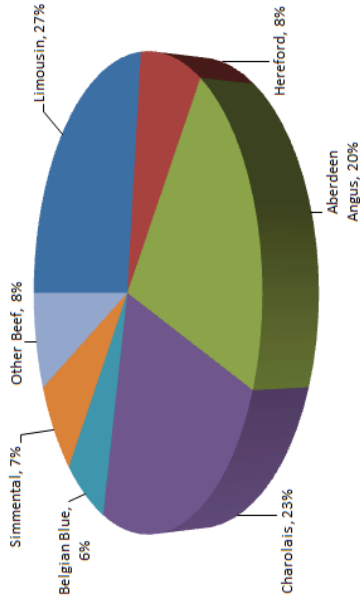


Table 4.1: Number of beef cattle on the ground (aged 12-30 months) 2016-2017

	2017			2016		
	Beef Sired	Dairy Sired Male only	Total	Beef Sired	Dairy Sired Male only	Total
January	367,439	46,375	413,814	337,559	44,436	381,995
February	375,409	45,945	421,354	348,349	45,057	393,406
March	401,413	44,226	445,639	373,502	44,598	418,100
April	432,400	42,694	475,094	397,603	42,923	440,526
May	440,161	40,240	480,401	410,697	41,736	452,433
June	440,926	38,225	479,151	415,899	40,406	456,305
July	439,309	37,370	476,679	415,809	40,321	456,130
August	431,234	37,980	469,214	409,611	41,264	450,875
September	419,179	39,032	458,211	399,473	42,819	442,292
October	400,313	39,084	439,397	380,386	43,776	424,162
November	383,115	38,970	422,085	364,872	43,899	408,771
December	377,291	38,991	416,282	357,040	44,267	401,307

Figure 4.1: Total beef cattle on the ground (aged 12-30 months) 2016-2017

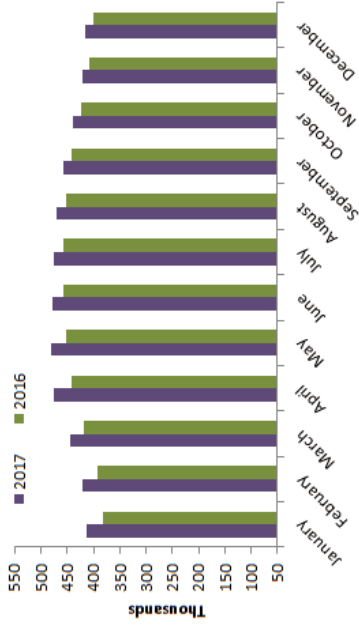


Table 4.2: Total beef cattle on the ground (aged 18-30 months) 2016-2017

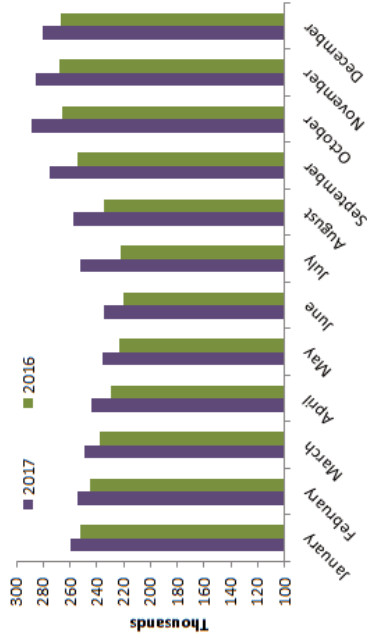


Table 5.1: Monthly imports of cattle to NI from ROI and GB for breeding and production 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	909	193	1,102	824	44	868
February	1,364	327	1,691	1,486	101	1,587
March	1,690	142	1,832	1,538	125	1,663
April	1,401	118	1,519	1,279	208	1,487
May	1,678	173	1,851	1,080	147	1,227
June	879	183	1,062	866	124	990
July	568	272	840	521	85	606
August	791	246	1,037	643	34	677
September	1,601	137	1,738	1,322	64	1,386
October	1,805	470	2,275	1,287	166	1,453
November	1,326	285	1,611	1,761	463	2,224
December	807	102	909	1,538	174	1,712
Total	14,819	2,648	17,467	14,145	1,735	15,880

Figure 5.1: Monthly imports of cattle to NI from GB for breeding and production 2016-2017

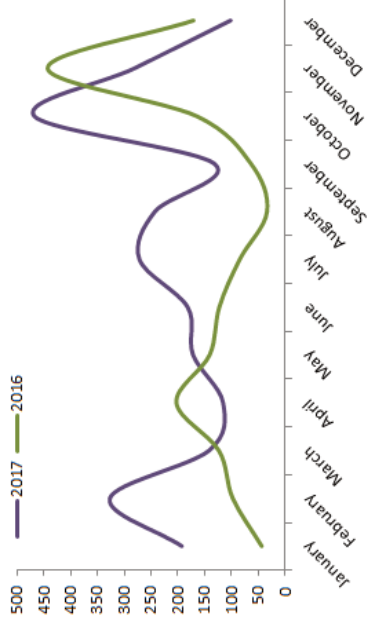


Figure 5.2: Monthly imports of cattle to NI from ROI for breeding and production 2016-2017

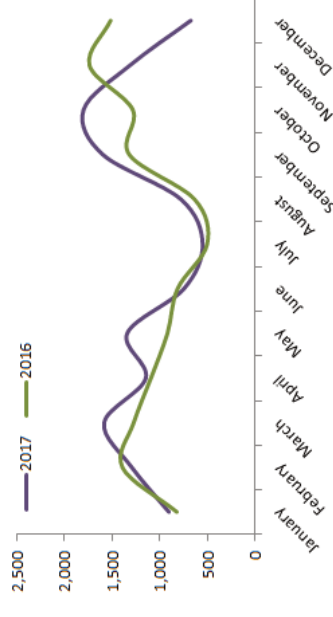


Table 6.1: Monthly exports of cattle from NI to ROI and GB for breeding and production 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	26	549	575	85	951	1,036
February	180	523	703	113	1,468	1,581
March	96	895	991	160	1,424	1,584
April	229	1,656	1,885	356	1,251	1,607
May	218	1,075	1,293	473	1,255	1,728
June	55	160	215	254	327	581
July	124	255	379	52	472	524
August	81	534	615	230	454	684
September	80	1,266	1,346	116	1,102	1,218
October	179	632	811	120	1,035	1,155
November	156	277	433	151	618	769
December	154	391	545	118	345	463
Total	1,578	8,213	9,791	2,228	10,702	12,930

Figure 6.1: Monthly exports of cattle from NI to GB for breeding and production 2016-2017

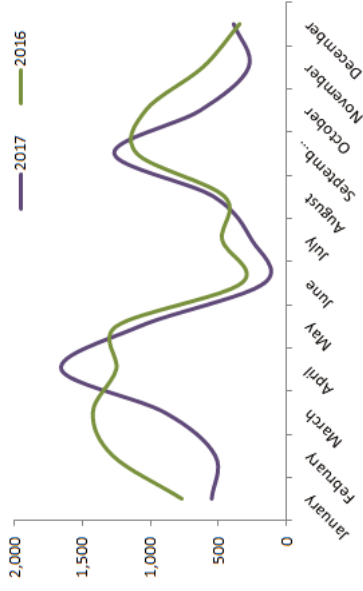


Figure 6.2: Monthly exports of cattle from NI to ROI for breeding and production 2016-2017

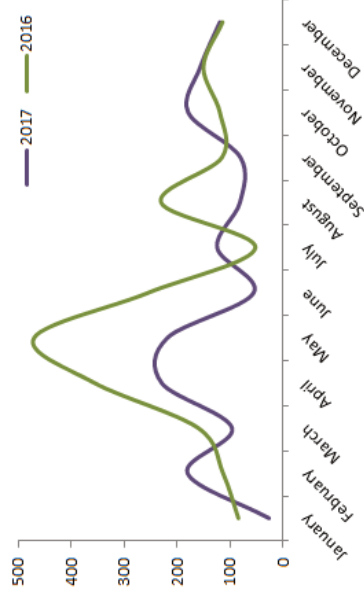


Table 7.1: Monthly imports of cattle for direct slaughter in NI plants from ROI and GB 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	858	629	1,487	2,779	198	2,977
February	1,116	620	1,736	1,492	263	1,755
March	878	457	1,335	1,101	226	1,327
April	1,484	595	2,079	837	356	1,193
May	1,040	555	1,595	607	456	1,063
June	784	648	1,432	583	429	1,012
July	1,172	567	1,739	546	432	978
August	1,654	412	2,066	575	36	611
September	867	424	1,291	716	39	756
October	735	728	1,463	429	38	467
November	514	713	1,227	378	136	514
December	86	253	339	537	299	836
Total	11,188	6,601	17,789	10,580	2,908	13,488

Figure 7.1: Monthly imports of cattle from GB for direct slaughter 2016-2017



Figure 7.2: Monthly imports of cattle from ROI for direct slaughter 2016-2017

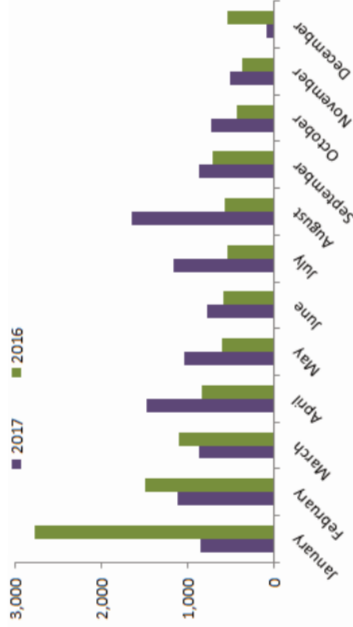


Table 8.1: Monthly exports of cattle from NI to ROI and GB for direct slaughter 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	686	247	933	996	839	1,835
February	468	174	642	955	795	1,750
March	565	92	657	1,128	514	1,642
April	821	92	913	2,171	528	2,699
May	864	77	941	1,343	220	1,563
June	375	120	495	819	149	968
July	539	131	670	1,064	328	1,392
August	634	340	974	816	421	1,237
September	1,167	603	1,770	514	659	1,173
October	1,152	800	1,952	833	982	1,815
November	944	433	1,377	453	439	892
December	700	354	1,054	514	159	673
Total	8,915	3,463	12,378	11,606	6,033	17,639

Figure 8.1: Monthly exports of cattle to GB for direct slaughter 2016-2017

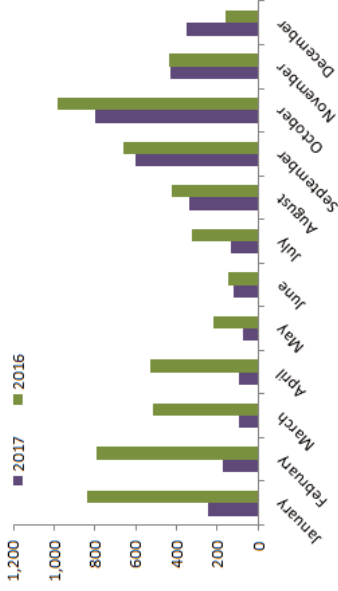


Figure 8.2: Monthly exports of cattle to ROI for direct slaughter 2016-2017



Table 9.1: Monthly UK retail beef consumer data 2016-2017

	2017			2016		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
January	191,800	7.64	25,119	188,800	7.83	24,101
February	193,700	7.85	24,669	184,700	8.01	23,057
March	176,600	7.76	22,745	173,900	7.56	23,002
April	166,500	7.64	21,799	155,700	7.51	20,750
May	157,200	7.88	19,945	156,900	7.72	20,322
June	147,200	8.04	18,288	149,700	7.74	19,345
July	143,900	8.14	17,690	142,700	7.63	18,693
August	145,500	7.87	18,487	137,000	7.73	17,731
September	158,000	7.96	19,863	150,800	7.71	19,558
October	171,100	7.87	21,752	160,200	7.31	21,904
November	180,200	7.84	22,989	179,600	7.56	23,748
December	186,000	7.89	23,565	184,900	7.53	24,540
	199,600	8.01	24,931	192,500	7.83	24,592
Total	2,217,300	7.88	281,842	2,157,400	7.67	281,343

Figure 9.2: Monthly UK volume of retail beef sales (tonnes) 2016-2017

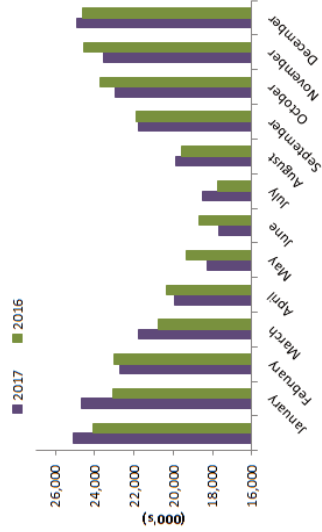


Figure 9.1: Monthly UK average retail price of beef (£/kg) 2016-2017

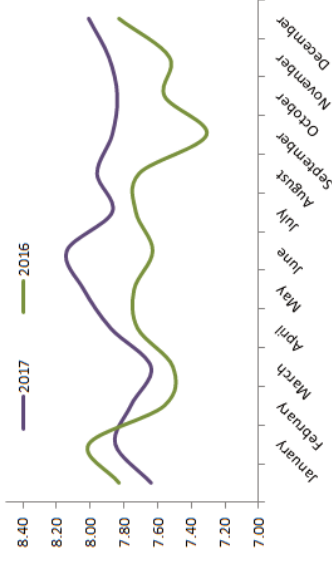


Figure 9.3: Monthly UK retail expenditure on beef (£000's) 2016-2017

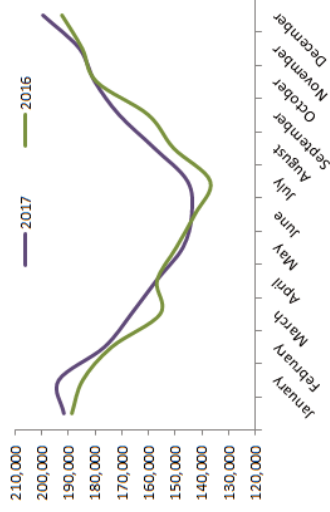


Table 10.1: Monthly NI R3 prime cattle prices (p/kg) 2016-2017

	2017			2016		
	Heifers	Steers	Young Bulls	Heifers	Steers	Young Bulls
January	353.9	355.5	344.7	316.7	317.1	304.3
February	350.5	351.6	343.1	316.3	315.3	304.3
March	350.5	351.1	338.6	313.4	313.3	301.9
April	353.0	355.3	344.2	308.5	308.9	299.5
May	360.3	361.1	353.9	314.5	314.3	306.7
June	368.7	370.2	363.8	325.6	326.5	319.7
July	370.8	371.1	363.4	330.6	331.5	324.7
August	368.4	368.2	360.9	337.2	337.9	329.6
September	359.3	359.1	350.4	341.8	342.9	333.7
October	357.9	357.6	347.4	341.6	340.8	331.6
November	358.7	358.9	345.7	349.4	349.7	338.9
December	360.5	361.2	348.3	354.7	355.8	346.4
Average	358.8	359.6	352.6	330.6	330.4	321.5

Figure 10.1: NI R3 young bull prices (p/kg) 2016-2017

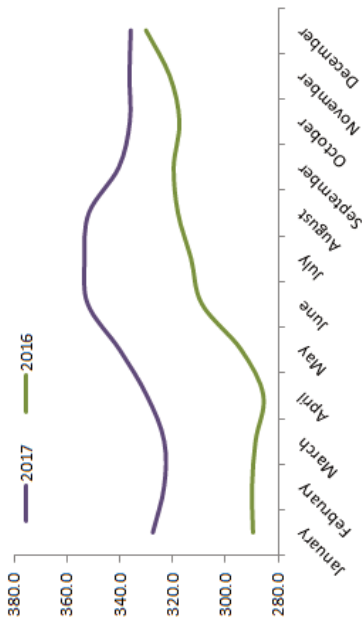


Figure 10.2: NI R3 steer prices (p/kg) 2016-2017

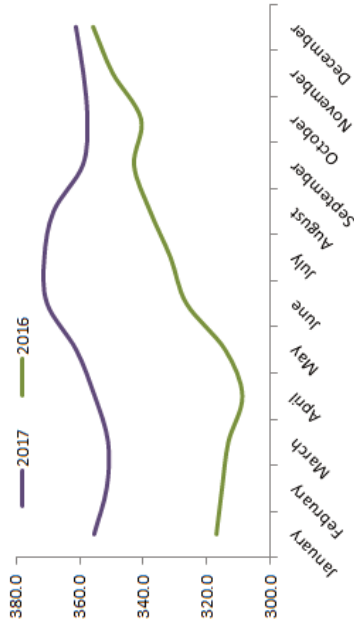


Table 11.1: Monthly average prime cattle prices NI (p/kg) 2016-2017

	2017			2016		
	Heifers	Steers	Young Bulls	Heifers	Steers	Young Bulls
January	348.7	347.1	327.5	310.7	306.8	289.6
February	343.8	342.7	323.3	309.5	305.9	290.0
March	343.2	340.6	323.2	307.4	303.6	288.7
April	346.1	345.0	329.8	302.0	300.0	285.7
May	352.8	351.4	340.1	306.8	305.0	294.1
June	360.9	360.5	352.2	318.9	317.1	308.9
July	362.4	360.5	353.4	322.3	321.3	313.1
August	360.2	359.0	351.8	330.0	328.0	318.0
September	353.2	349.6	340.4	335.8	333.3	319.6
October	349.9	347.5	336.2	335.0	331.5	317.5
November	351.4	348.8	336.4	341.8	339.3	321.1
December	353.6	352.1	335.9	348.8	347.5	330.1
Average	351.7	350.0	339.5	322.2	320.4	307.0

Figure 11.1: Average young bull prices NI (p/kg) 2016-2017

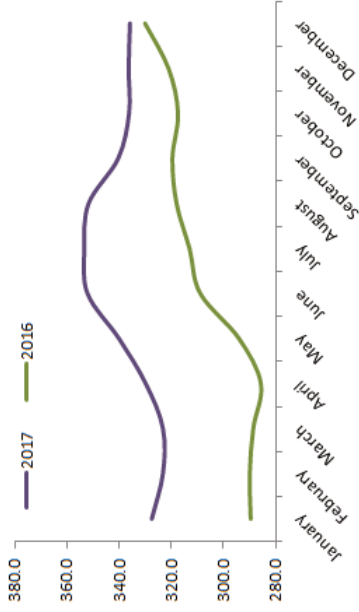


Figure 11.2: Average steer prices NI (p/kg) 2016-2017

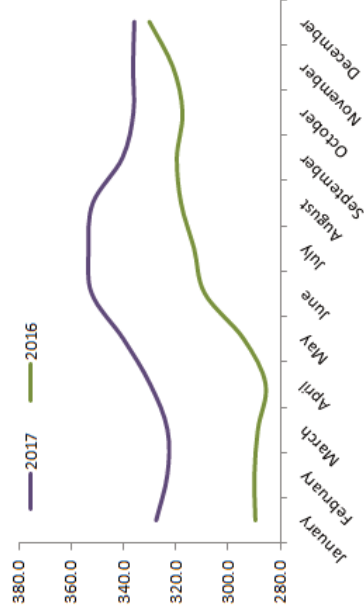


Table 12.1: Monthly average NI cow prices (p/kg) 2016-2017

	2017			2016		
	Cow P3	Cow O3 Cow Avg	Cow P3	Cow O3	Cow Avg	
January	236.4	253.9	237.5	206.3	227.8	206.7
February	236.4	255.1	239.9	208.6	229.8	211.1
March	238.6	256.5	238.6	208.0	226.8	209.8
April	245.1	262.8	244.8	207.5	226.7	207.6
May	256.5	275.1	261.6	216.4	235.5	219.1
June	266.9	285.1	268.9	226.5	245.5	229.9
July	266.3	284.6	268.8	228.9	246.9	229.5
August	265.2	282.6	264.4	230.9	249.4	228.7
September	257.4	275.9	253.3	233.7	252.8	229.9
October	254.9	274.0	249.5	232.3	251.4	225.0
November	253.0	272.7	250.2	233.6	253.0	228.1
December	251.8	275.5	254.9	233.8	253.6	232.0
Average	251.8	271.5	252.4	222.7	243.6	222.6

Figure 12.1: NI P3 cow prices (p/kg) 2016-2017

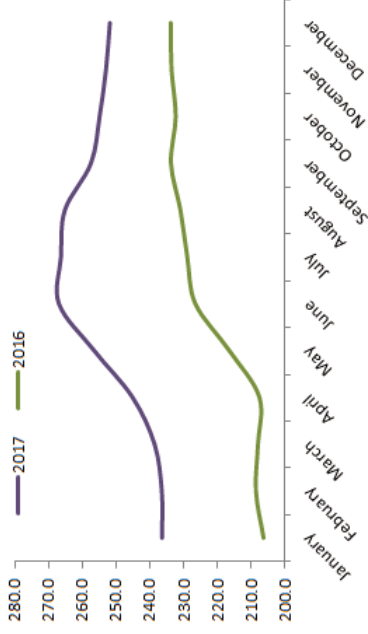


Figure 12.2: NI O3 cow prices (p/kg) 2016-2017

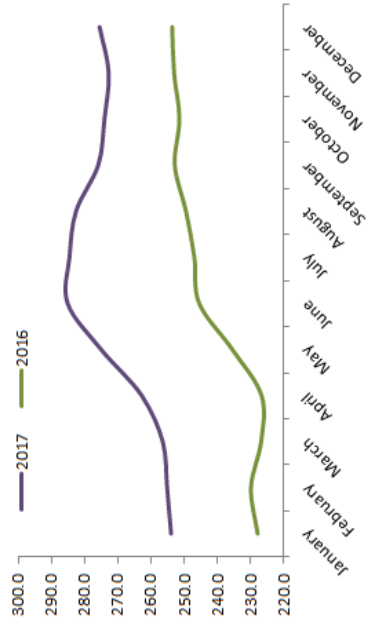


Table 13.1: Conformation analysis of the NI slaughter mix 2016-2017

Conformation Analysis Cows						
	E	U	R	O	P	
2017	0.0%	1.4%	14.5%	28.1%	55.9%	
2016	0.0%	1.7%	14.4%	26.7%	57.2%	
Conformation Analysis Heifers						
	E	U	R	O	P	
2017	0.1%	16.3%	45.3%	31.4%	6.9%	
2016	0.2%	18.5%	47.6%	27.5%	6.2%	
Conformation Analysis Steers						
	E	U	R	O	P	
2017	0.3%	17.8%	35.9%	34.8%	11.2%	
2016	0.3%	19.4%	37.8%	32.1%	10.4%	
Conformation Analysis Young Bulls						
	E	U	R	O	P	
2017	2.2%	22.5%	27.4%	35.4%	12.5%	
2016	2.2%	19.9%	23.9%	41.0%	13.0%	

Figure 13.1: Conformation analysis of NI steer kill 2016-2017

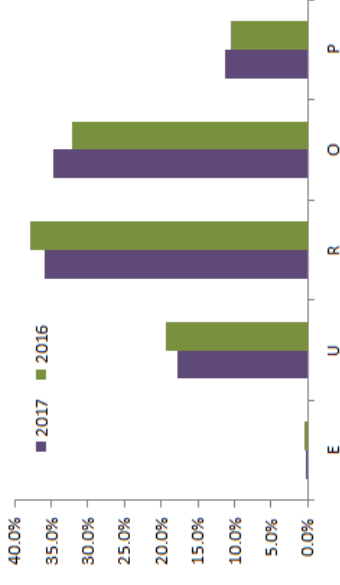


Figure 13.2: Conformation analysis of NI young bull kill 2016-2017

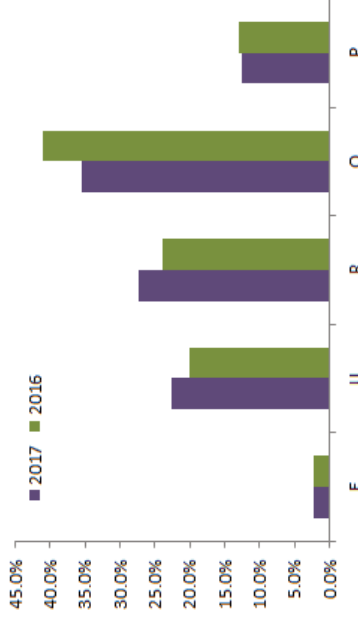


Table 14.1: Fat class analysis of the NI slaughter mix 2016-2017

Fat Class Analysis Cows					
	1	2	3	4	5
2017	21.1%	24.0%	30.7%	19.7%	4.5%
2016	22.6%	23.1%	30.9%	19.4%	4.0%
Fat Class Analysis Heifers					
	1	2	3	4	5
2017	1.9%	9.8%	42.9%	42.2%	3.2%
2016	1.6%	9.1%	40.5%	44.8%	4.0%
Fat Class Analysis Steers					
	1	2	3	4	5
2017	1.9%	19.2%	56.6%	22.0%	0.3%
2016	1.6%	17.4%	55.7%	24.8%	0.5%
Fat class Analysis Young Bulls					
	1	2	3	4	5
2017	5.6%	49.8%	41.7%	2.9%	0.0%
2016	6.6%	49.8%	40.5%	3.1%	0.0%

Figure 14.1: Fat class analysis of the NI steer kill 2016-2017

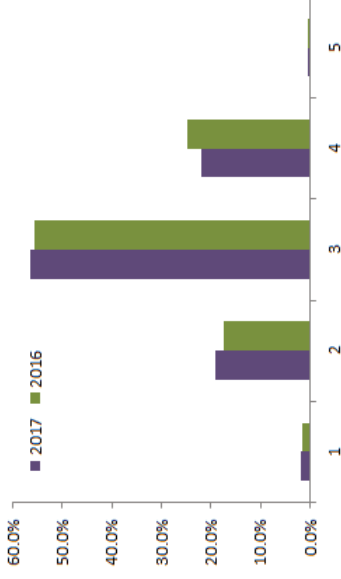


Figure 14.2: Fat class analysis of NI young bull kill 2016-2017

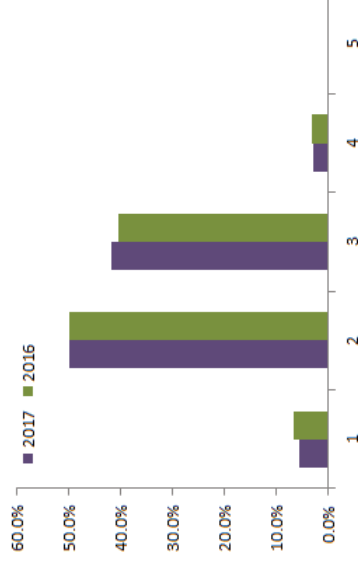


Table 15.1: Analysis of prime cattle sourced from the suckler herd 2016-2017

Suckler Dam Conformation Analysis						
	E	U	R	O	P	
2017	0.8%	28.5%	51.9%	17.9%	1.1%	
2016	0.8%	30.1%	52.6%	15.6%	0.9%	
Suckler Dam Fat Class Analysis						
	1	2	3	4	5	
2017	1.6%	17.0%	51.1%	28.9%	1.4%	
2016	1.4%	15.1%	49.5%	32.2%	1.9%	

Figure 15.1: Suckler dam conformation analysis 2016-2017

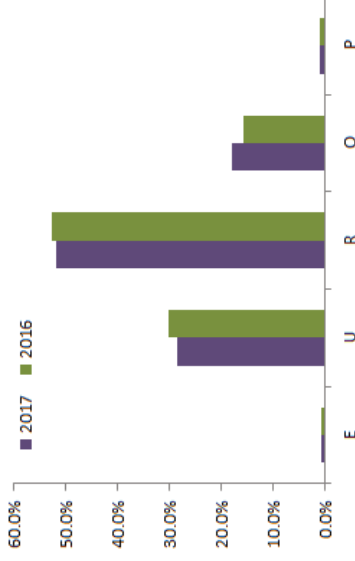


Figure 15.2: Suckler dam fat class analysis 2016-2017

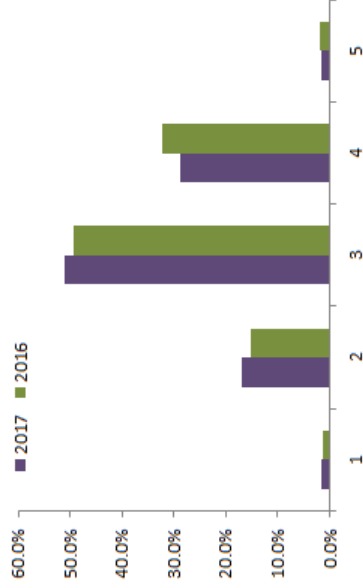


Table 16.1: Analysis of prime cattle sourced from the dairy herd 2016-2017

Dairy Dam Conformation Analysis						
	E	U	R	O	P	
2017	0.0%	1.0%	16.1%	57.6%	25.3%	
2016	0.0%	1.2%	17.5%	56.6%	24.7%	
Dairy Dam Fat Class Analysis						
	1	2	3	4	5	
2017	4.9%	24.2%	46.9%	22.9%	1.0%	
2016	5.6%	25.1%	45.3%	22.8%	1.2%	

Figure 16.1: Conformation analysis of prime cattle sourced from the dairy herd 2016-2017

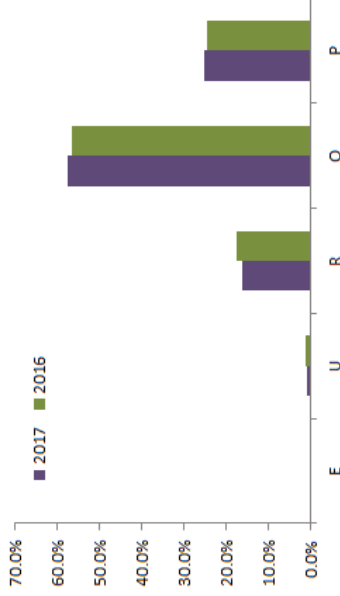
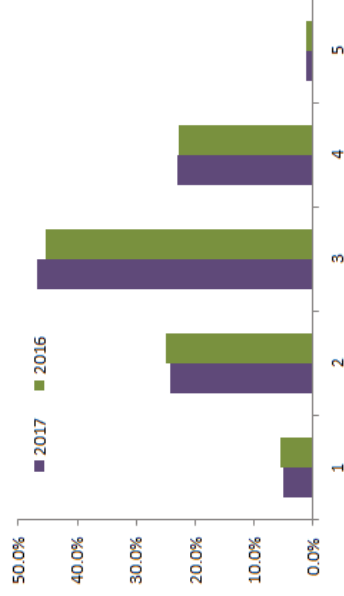


Figure 16.2: Fat class analysis of prime cattle sourced from the dairy herd 2016-2017



SHEEP STATISTICS



Table 17.1: Monthly NI sheep kill by category 2016-2017

	2017			2016		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	30,113	2,998	33,111	31,730	3,974	35,704
February	29,567	1,770	31,337	19,332	2,339	21,671
March	25,423	1,714	27,137	21,374	1,430	22,804
April	21,251	1,486	22,737	20,294	1,492	21,786
May	29,752	2,362	32,114	21,569	1,253	22,822
June	37,166	2,006	39,172	32,565	1,375	33,940
July	38,425	2,169	40,594	52,470	2,089	54,559
August	57,730	3,646	61,376	48,077	1,878	49,955
September	41,964	3,632	45,596	46,743	2,924	49,667
October	41,239	3,103	44,342	51,771	3,709	55,480
November	42,081	3,413	45,494	39,939	3,255	43,194
December	28,536	1,956	30,492	38,032	3,474	41,506
Total	423,247	30,255	453,502	423,896	29,192	453,088

Table 17.2: Proportion of annual sheep kill per month 2016-2017

	2017			2016		
	Lambs & Ewes & Hoggets	Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	7%	10%	7%	7%	14%	8%
February	7%	6%	7%	5%	8%	5%
March	6%	6%	6%	5%	5%	5%
April	5%	5%	5%	5%	5%	5%
May	7%	8%	7%	5%	4%	5%
June	9%	7%	9%	8%	5%	7%
July	9%	7%	9%	12%	7%	12%
August	13%	12%	13%	11%	6%	11%
September	10%	12%	10%	11%	10%	11%
October	10%	10%	10%	12%	13%	12%
November	10%	11%	10%	9%	11%	10%
December	7%	6%	7%	9%	12%	9%
Total	100%	100%	100%	100%	100%	100%

Figure 17.1: Monthly NI lamb/hogget kill 2016-2017

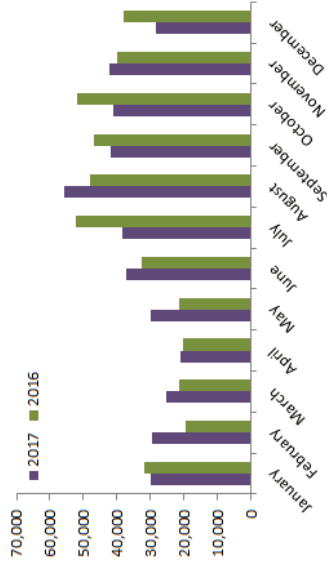


Table 18.1: Monthly NI sheep production ('000 tonnes) 2016-2017

	2017			2016		
	Lambs & Hogggets	Ewes & Rams	Total Sheep	Lambs & Hogggets	Ewes & Rams	Total Sheep
January	675	82	757	696	107	803
February	666	50	716	422	61	483
March	582	49	632	474	39	514
April	475	45	520	443	45	487
May	642	70	712	465	38	503
July	797	61	858	1,090	63	1,153
August	1,199	103	1,302	994	54	1,048
September	913	97	1,010	971	82	1,053
October	867	81	948	1,094	102	1,196
November	905	93	998	861	85	946
December	620	53	673	834	85	919
Total	9,118	844	9,961	9,039	802	9,841

Figure 18.1: Monthly total sheep meat production in NI 2016-2017

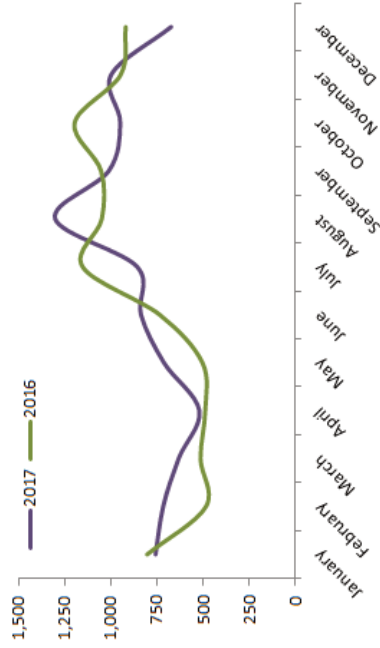


Table 18.2: Average NI carcase weight 2016-2017

	Lambs & Hogggets	Ewes & Rams
2017	21.6	27.9
2016	21.3	27.5

December 2017 Farm Survey Results

The NI agricultural survey is released annually by the Department of Agriculture, Environment and Rural Affairs (DAERA) and provides estimates of the numbers of sheep on NI farms at the beginning of December each year.

The number of breeding ewes in December 2017 increased by three per cent from the previous year but the number of ewe lambs tupped decreased by seven per cent. The total breeding flock recorded in December stood at 927,700, a level not exceeded since December 2005. Lambs present on farms in December decreased by 1 per cent from 2016, when the number of lambs was at a 7 year high. As in 2016, poor weather conditions, particularly in the west of the province hampered the finishing of lambs and thereby contributed to the high numbers present in December.

Overall, the total number of sheep recorded in December 2017 was 1.381 million which is the highest level recorded since December 2004.

Figure 19.1: Total number of breeding ewes on NI farms in December 2000-2017

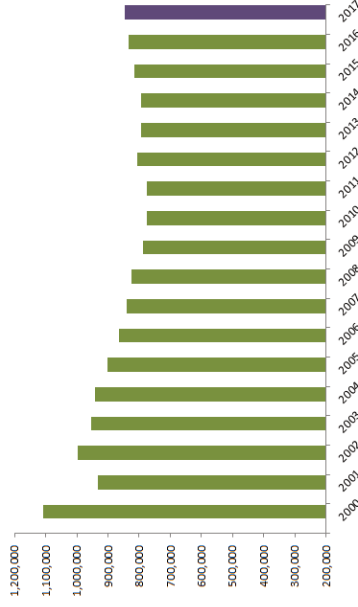


Figure 19.2: Total number of ewe lambs in the NI breeding flock in December 2000-2017

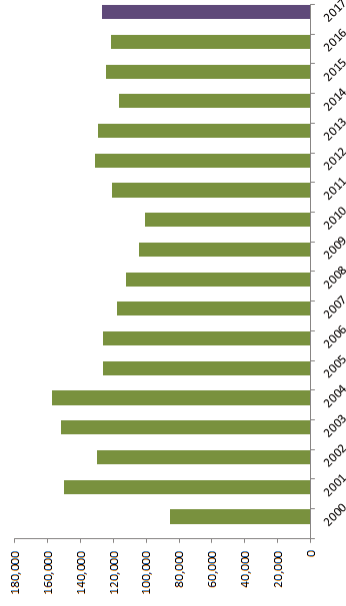


Table 20.1: Monthly NI average carcass weight by category (kg) 2016-2017

	2017			2016		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	22.4	27.3	22.9	21.9	26.9	22.5
February	22.5	28.1	22.8	21.8	26.2	22.3
March	22.9	28.7	23.3	22.2	27.3	22.5
April	22.4	30.0	22.9	21.8	29.9	22.4
May	21.6	29.8	22.2	21.6	30.3	22.1
June	20.9	30.0	21.3	21.3	30.1	21.7
July	20.7	28.0	21.1	20.8	30.1	21.1
August	21.5	28.2	21.9	20.7	28.6	21.0
September	21.8	26.8	22.2	20.8	28.0	21.2
October	21.0	26.2	21.4	21.1	27.4	21.6
November	21.5	27.3	21.9	21.6	26.2	21.9
December	21.7	27.0	22.1	21.9	24.5	22.1
Overall Average	21.6	27.9	22.1	21.3	27.5	21.7

Figure 20.1: Average NI monthly lamb & hogget carcass weights (kg) 2016-2017

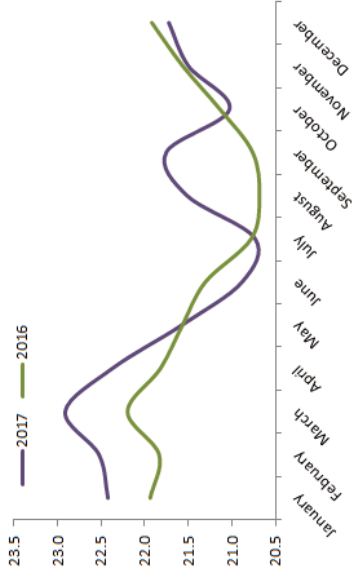


Figure 20.2: Average NI monthly ewe & ram carcass weights (kg) 2016-2017

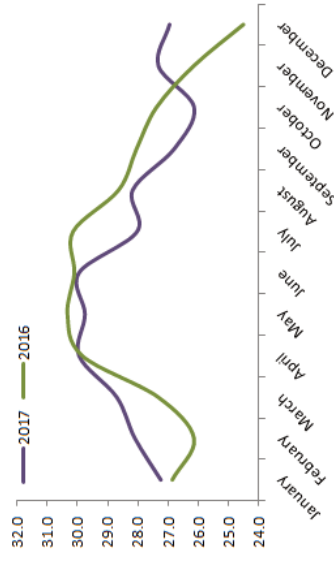


Table 21.1: Monthly imports of sheep into NI for breeding & production from ROI and GB 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	1	1,241	1,242	4	735	739
February	3	963	966	-	596	596
March	4	985	989	4	1,084	1,088
April	-	318	318	-	275	275
May	1	321	322	-	281	281
June	-	506	506	-	52	52
July	1	318	319	2	349	351
August	3	644	647	-	500	500
September	12	1,815	1,827	1	707	708
October	4	2,827	2,831	5	2,650	2,655
November	19	504	523	42	309	351
December	6	252	258	3	193	196
Total	54	10,694	10,748	61	7,731	7,792

Table 21.2: Monthly exports of sheep for breeding & production from NI to ROI and GB 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	8,863	4,168	13,031	6,413	3,219	9,632
February	5,816	4,074	9,890	4,177	4,860	9,037
March	8,030	3,926	11,956	4,143	4,672	8,815
April	7,895	5,789	13,684	4,493	8,249	12,742
May	3,457	4,538	7,995	2,511	7,090	9,601
June	1,555	4,567	6,122	1,840	5,896	7,736
July	5,993	5,822	11,815	2,839	7,225	10,064
August	3,448	6,177	9,625	3,936	8,026	11,962
September	10,652	4,995	15,647	3,649	6,678	10,327
October	8,850	5,436	14,286	7,701	5,720	13,421
November	5,975	3,286	9,261	6,871	4,141	11,012
December	7,081	2,003	9,084	7,066	3,948	11,014
Total	77,615	54,781	132,396	55,639	69,724	125,363

Table 22.1: Monthly sheep exports from NI for direct slaughter in ROI & GB 2016-2017

	2017			2016		
	ROI	GB	Total	ROI	GB	Total
January	41,471	-	41,471	43,887	-	43,887
February	33,396	-	33,396	34,639	-	34,639
March	27,573	-	27,573	29,577	-	29,577
April	25,120	-	25,120	26,372	195	26,567
May	19,636	-	19,636	16,615	62	16,677
June	24,261	-	24,261	20,747	-	20,747
July	36,655	-	36,655	32,740	-	32,740
August	35,233	-	35,233	26,460	-	26,460
September	37,573	-	37,573	38,032	-	38,032
October	43,156	-	43,156	46,407	-	46,407
November	42,899	111	43,010	39,983	-	39,983
December	35,847	-	35,847	38,980	-	38,980
Total	402,820	111	402,931	394,439	257	394,696

Figure 22.1: Monthly sheep exports from NI to ROI for direct slaughter 2016-2017



Figure 22.2: Monthly sheep exports from NI to GB for direct slaughter 2016-2017

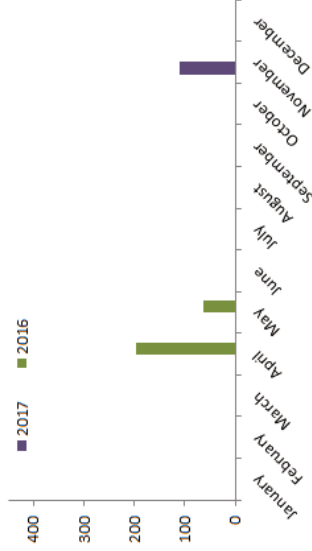


Table 23.1: Monthly UK lamb retail consumer data 2016-2017

	2017			2016		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
	45,000	8.72	5,166	47,900	8.54	5,608
January	46,400	8.96	5,181	47,300	8.38	5,642
February	44,000	8.89	4,954	81,600	6.94	11,756
March	72,800	7.56	9,627	46,300	8.42	5,501
April	39,000	9.32	4,179	42,800	8.67	4,937
May	37,600	9.17	4,104	40,600	8.84	4,596
June	36,700	9.11	4,030	41,900	8.95	4,681
July	39,200	9.10	4,309	40,800	8.88	4,599
August	40,400	8.97	4,510	42,800	8.77	4,882
September	43,000	9.25	4,645	39,800	8.78	4,536
October	44,000	9.36	4,701	45,700	8.66	5,274
November	48,900	9.29	5,268	47,200	8.76	5,387
December	57,200	8.20	6,979	56,700	7.96	7,119
Total	594,200	8.92	67,653	621,400	8.50	74,518

Figure 23.1: Monthly UK average retail price of lamb (£/kg) 2016-2017

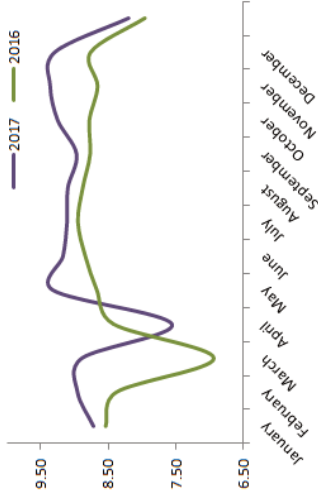


Figure 23.3: Monthly UK retail expenditure on lamb (£000's) 2016-2017

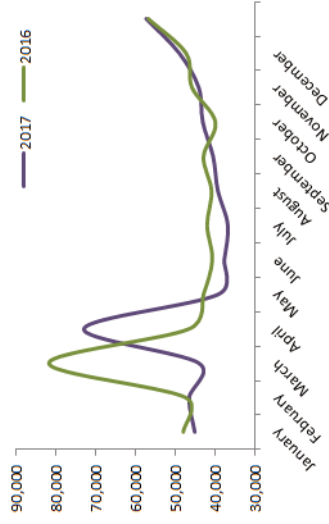


Figure 23.2: Monthly UK retail volume of total lamb sales (tonnes) 2016-2017

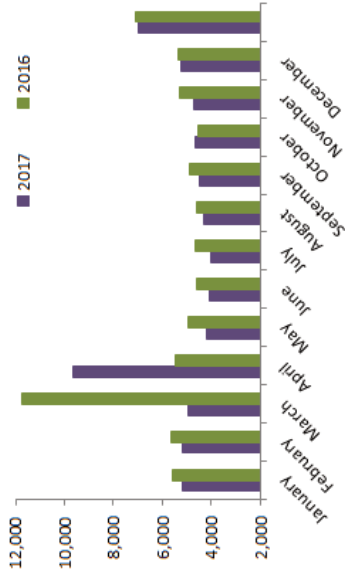


Table 24.1: Monthly NI R3 sheep prices (p/kg) 2016-2017

	2017		2016	
	Hoggets	Lambs	Lambs & Hoggets	Lambs & Hoggets
January	366.6		366.6	371.3
February	371.6		371.6	400.1
March	396.0		396.0	411.2
April	402.4	444.5	423.5	411.9
May	406.8	454.2	440.7	361.0
June		458.3	458.3	
July		421.7	421.7	
August		399.6	399.6	
September		375.2	375.2	
October		359.8	359.8	
November		378.4	378.4	
December		384.8	384.8	
Average	387.1	408.7	401.6	395.3
				390.9
				392.3

Figure 24.2: Average deadweight R3 lamb prices (p/kg) March - December 2016-2017

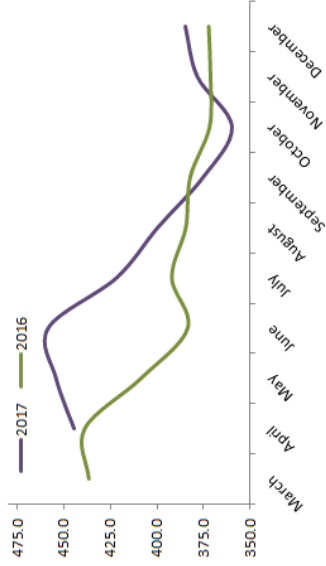


Figure 24.1: Monthly combined R3 lamb & hogget deadweight prices (p/kg) 2016-2017

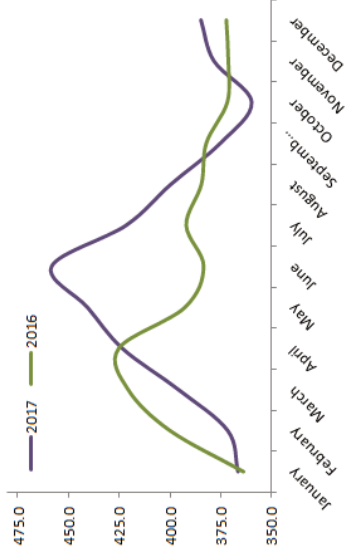


Figure 24.3: Average deadweight R3 hogget prices (p/kg) January - May 2016-2017

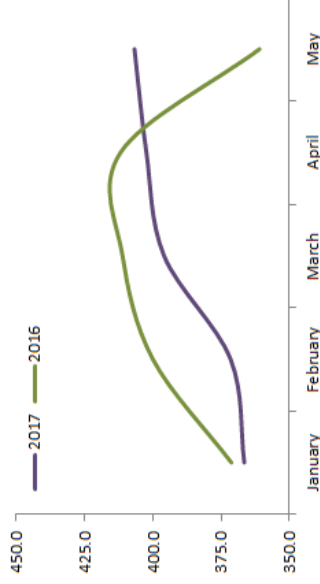


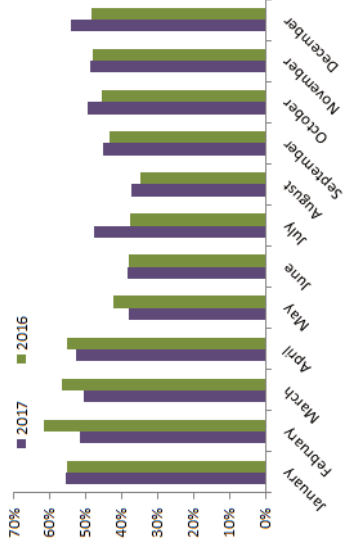
Table 25.1: Total sheep slaughtering and exports for direct slaughter by month 2016-2017

	Export for D/S		Total Slaughtered NI Plants		Total Eligible Kill NI	
	2017	2016	2017	2016	2017	2016
	ROI & GB	ROI & GB	All Sheep	All Sheep	All Sheep	All Sheep
January	41,471	43,887	33,111	35,704	74,582	79,591
February	33,396	34,639	31,337	21,671	64,733	56,310
March	27,573	29,577	27,137	22,804	54,710	52,381
April	25,120	26,567	22,737	21,786	47,857	48,353
May	19,636	16,677	32,114	22,822	51,750	39,499
June	24,261	20,747	39,172	33,940	63,433	54,687
July	36,655	32,740	40,594	54,559	77,249	87,299
August	35,233	26,460	59,376	49,955	94,609	76,415
September	37,573	38,032	45,596	49,667	83,169	87,699
October	43,156	46,407	44,342	55,480	87,498	101,887
November	43,010	39,983	45,494	43,194	88,504	83,177
December	35,847	38,980	30,492	41,506	66,339	80,486
Total	402,931	394,696	451,502	453,088	854,433	847,784

Table 25.2: Proportion of NI sheep killed in NI processors 2016-2017

	2017	2016
January	56%	55%
February	52%	62%
March	50%	56%
April	52%	55%
May	38%	42%
June	38%	38%
July	47%	38%
August	37%	35%
September	45%	43%
October	49%	46%
November	48%	48%
December	54%	48%
Total	47%	47%

Figure 25.1: Proportion of NI sheep exported for direct slaughter in GB & ROI 2016-2017



LMC

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