

Seamus Mc Menamin



Slaughter Trends 2018/19

NI Slaughterings June 2018

NI CATTLE AND SHEEP SLAUGHTERINGS						
	June			Year to Date		
	(4 weeks ended 30/06/18)			(26 weeks ended 30/06/18)		
	Jun-17	Jun-18	% Change	2017	2018	Change
CATTLE - FOODCHAIN						
Steers	11,213	9,857	-12%	83,404	79,438	-5%
Heifers	8,679	8,606	-1%	65,008	67,698	4%
Young Bulls	4,158	4,459	7%	18,492	20,961	13%
Total Prime Cattle	24,050	22,922	-5%	166,904	168,097	1%
Calves	412	441	7%	3,034	3,022	0%
Cows	7,552	6,560	-13%	46,466	49,814	7%
Mature Bulls	295	292	-1%	1,709	1,828	7%
Total Cattle	32,309	30,215	-6%	218,113	222,761	2%
SHEEP						
Lambs & Hoggets	37,166	28,492	-23%	173,272	153,905	-11%
Ewes & Rams	2,006	1,521	-24%	12,336	10,525	-15%
Total Sheepmeat	39,172	30,013	-23%	185,608	164,430	-11%

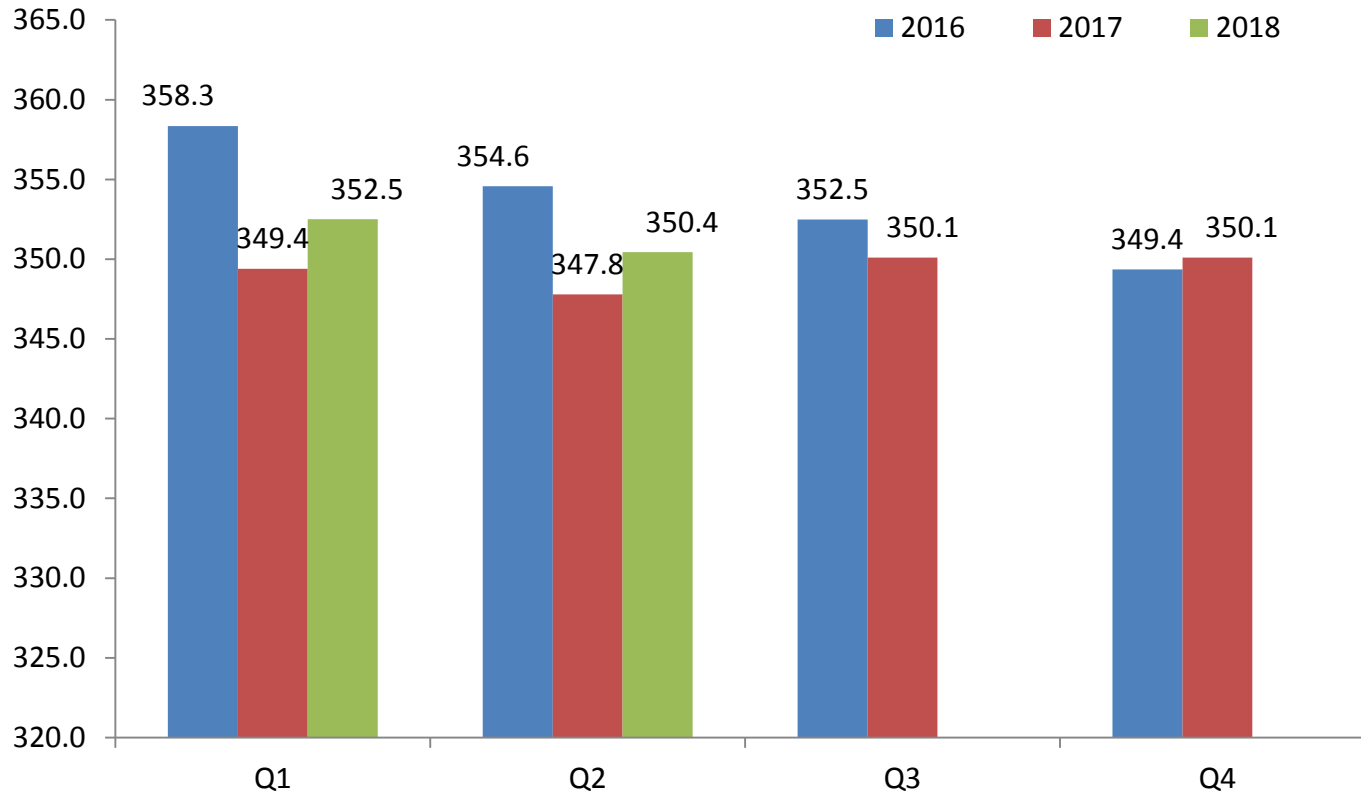
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

NI Beef+ Lamb Production June 2018

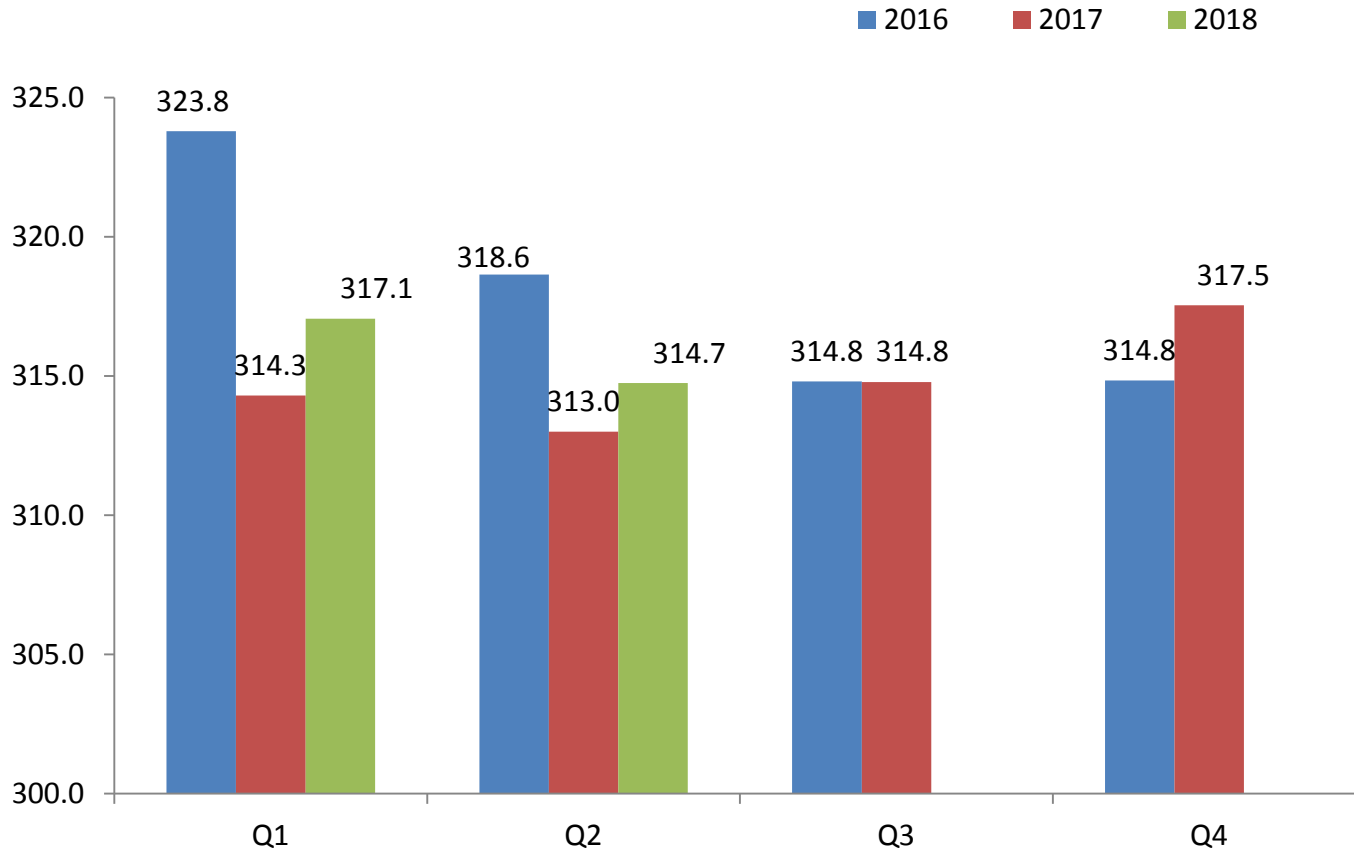
NI BEEF AND SHEEPMEAT PRODUCTION						
	June			Year to Date		
	(4 weeks ended 30/06/18)			(26 weeks ended 30/06/18)		
	Jun-17	Jun-18	% Change	2017	2018	Change
BEEF						
Steers	3,916	3,462	-12%	29,079	27,925	-4%
Heifers	2,722	2,715	0%	20,398	21,390	5%
Young Bulls	1,389	1,517	9%	6,016	6,970	16%
Total Prime Cattle	8,027	7,694	-4%	55,494	56,285	1%
Calves	85	82	-3%	579	575	-1%
Cows	2,292	2,045	-11%	13,957	15,003	7%
Mature Bulls	132	129	-2%	791	797	1%
Total Beef	10,536	9,951	-6%	70,821	72,660	3%
SHEEP						
Lambs & Hoggets	776	595	-23%	3,817	3,298	-14%
Ewes & Rams	60	43	-29%	356	290	-18%
Total Sheepmeat	836	638	-24%	4,173	3,588	-14%

The above figures are provisional and are measured in '000 tonnes; any amendments will be incorporated in the cumulative data (source DAERA).

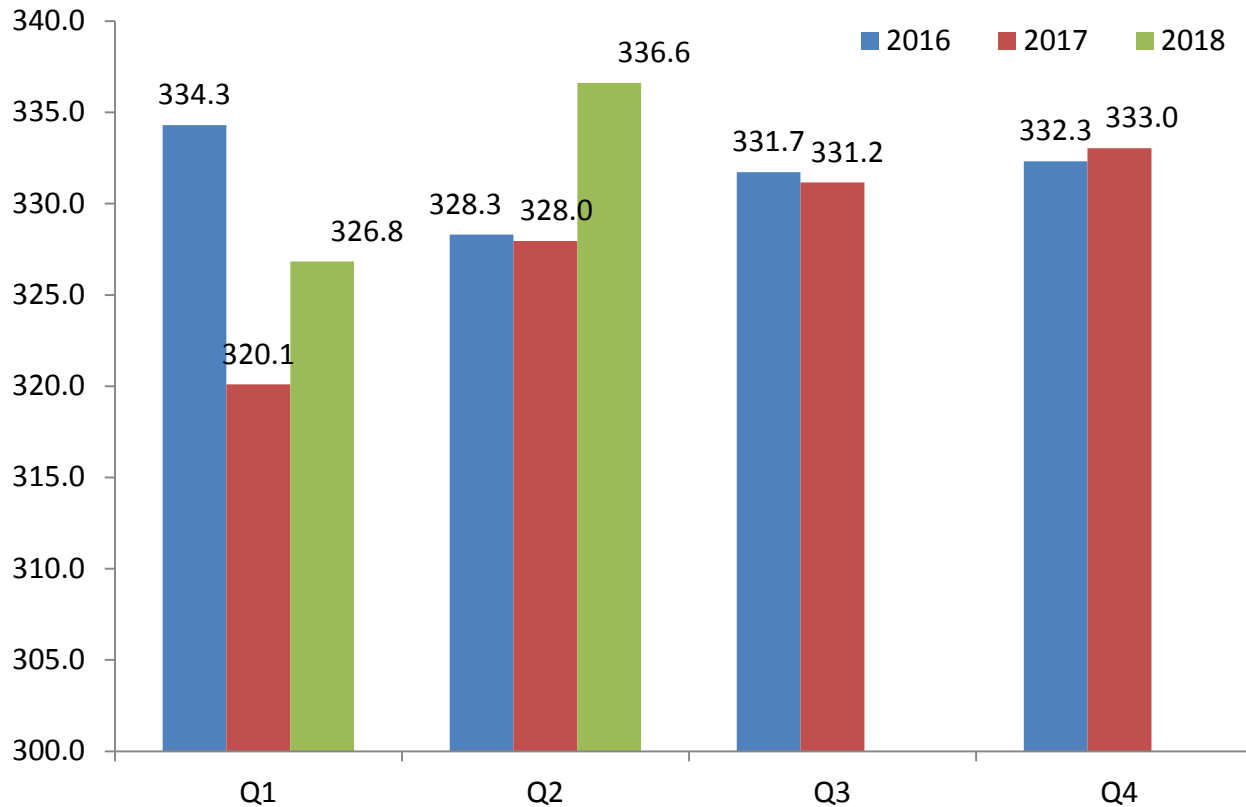
Carcase weights (Steers)



Carcase weights (Heifers)

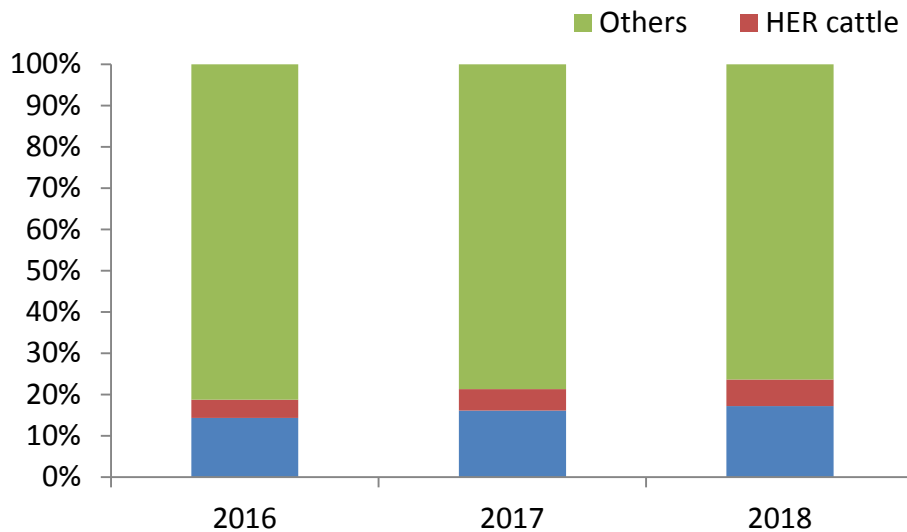


Carcase weights (Young Bulls)



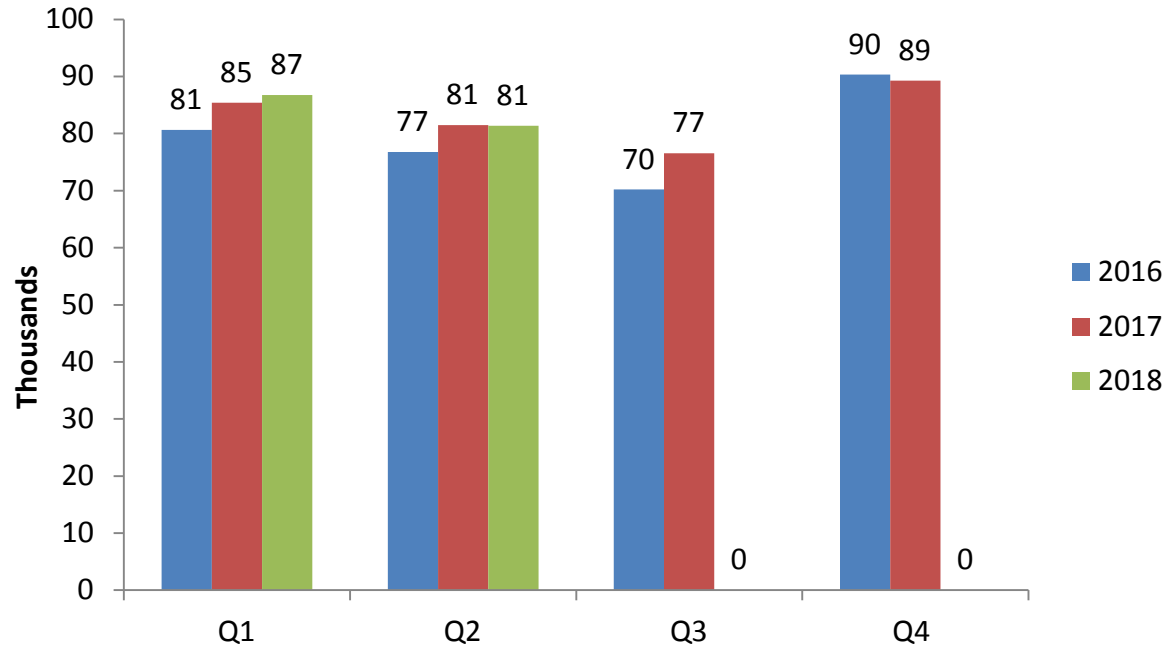
Overview of prime kill

	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
2016	319.9	25.3	354.3	25.2	322.8	15.2
2017	315.4	25.2	349.5	24.8	328.9	15.5
2018	316.6	25.5	351.6	25.2	335.4	15.9



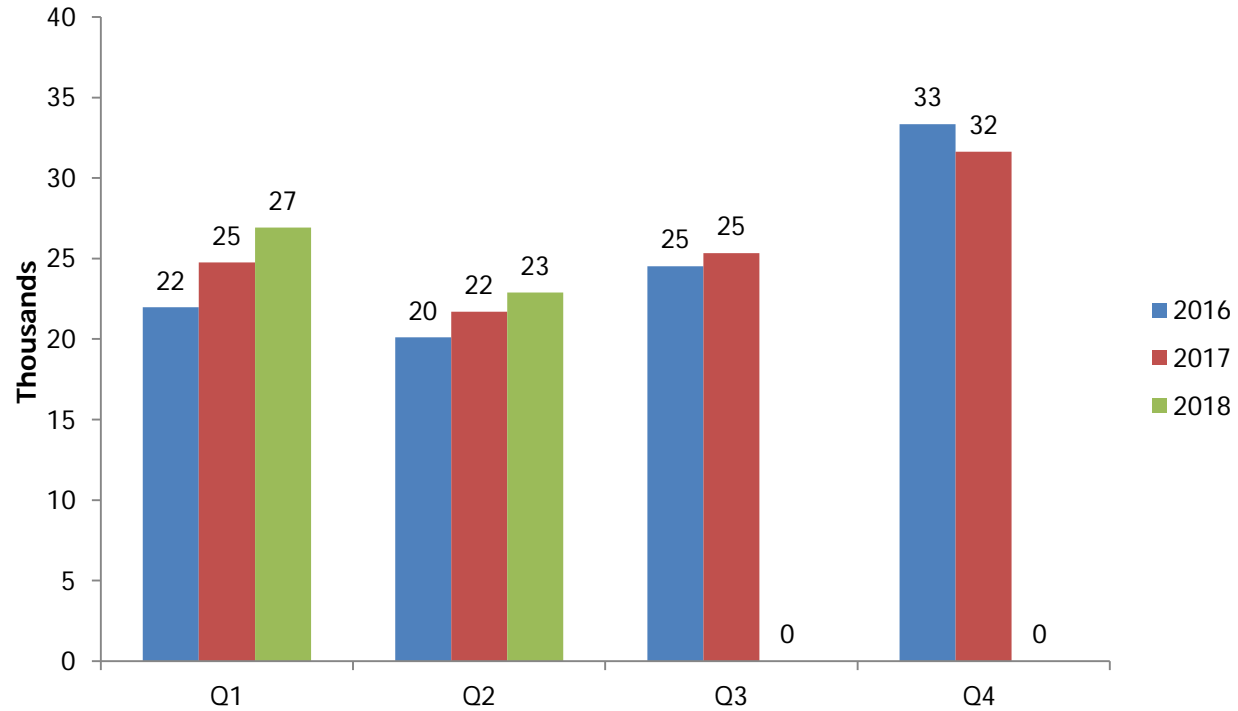
	AA Cattle	HER cattle	Others
2016	14%	4%	81%
2017	16%	5%	79%
2018	17%	6%	76%

Quarterly Prime Cattle Kill



Prime Cattle kill	2016	2017	2018
Q1	80,641	85,430	86,738
Q2	76,751	81,474	81,359
Q3	70,231	76,560	-
Q4	90,336	89,251	-

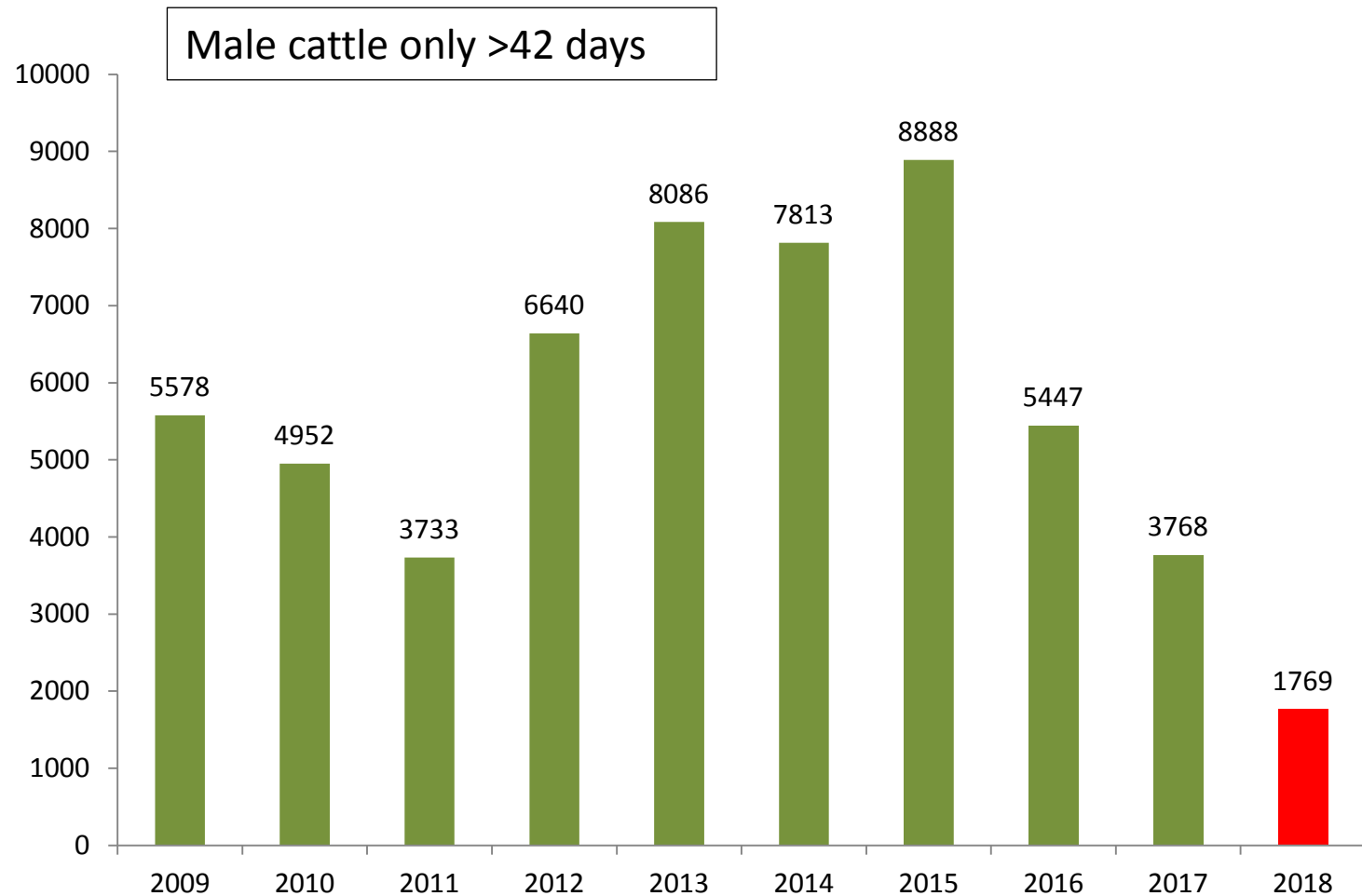
Quarterly Cow Kill



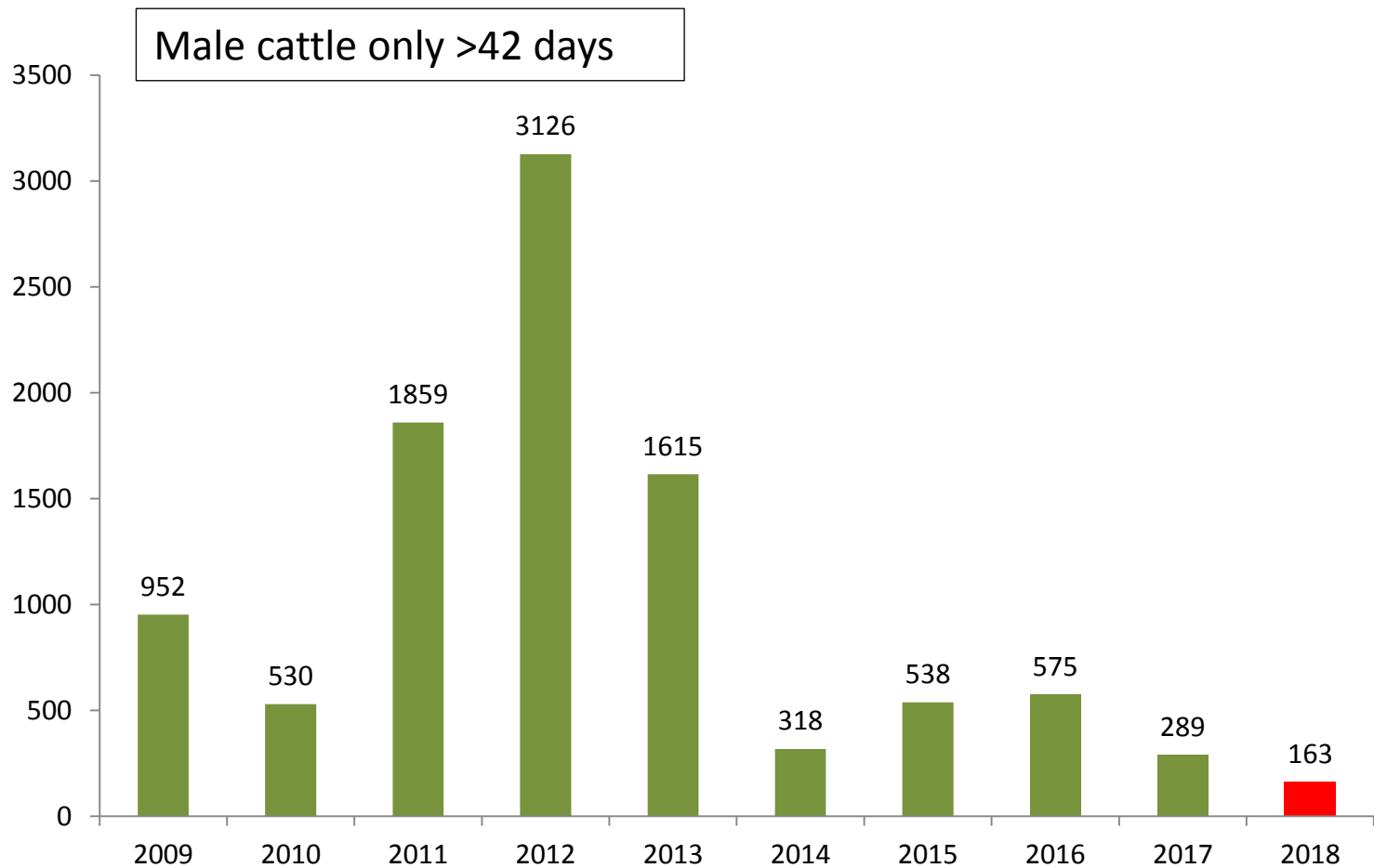
Cow Slaughterings	2016	2017	2018
Q1	21,968	24,760	26,924
Q2	20,110	21,706	22,890
Q3	24,521	25,339	-
Q4	33,344	31,635	-

Live Exports

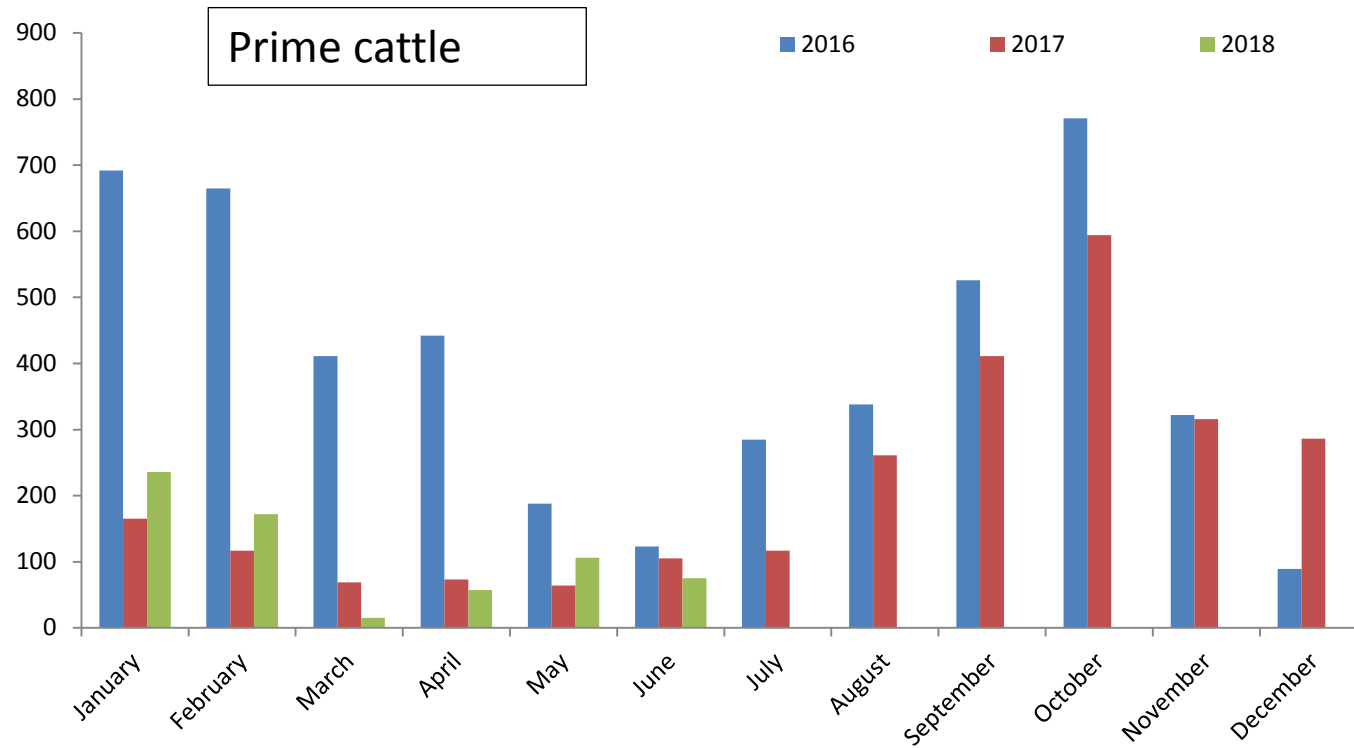
Exports to GB for further production



Exports to ROI for Further Production

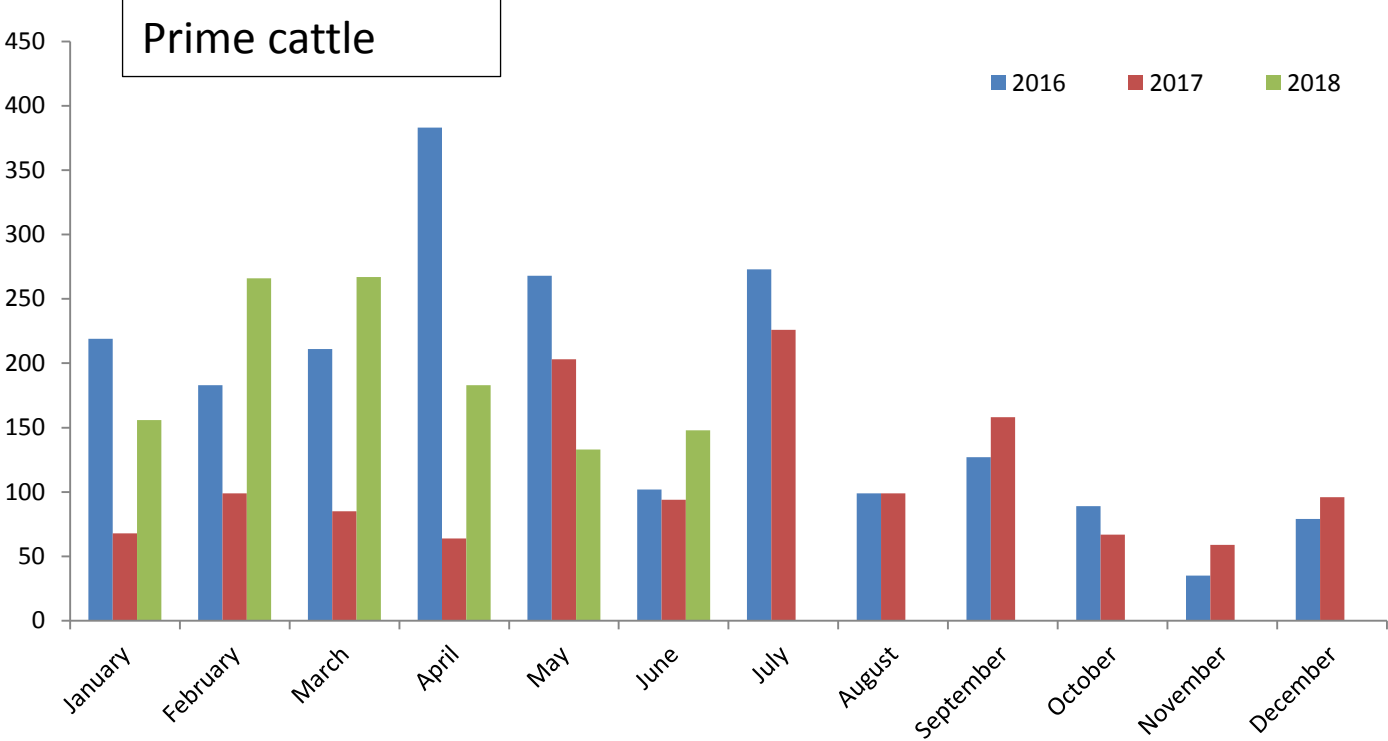


Exports to GB for Direct Slaughter



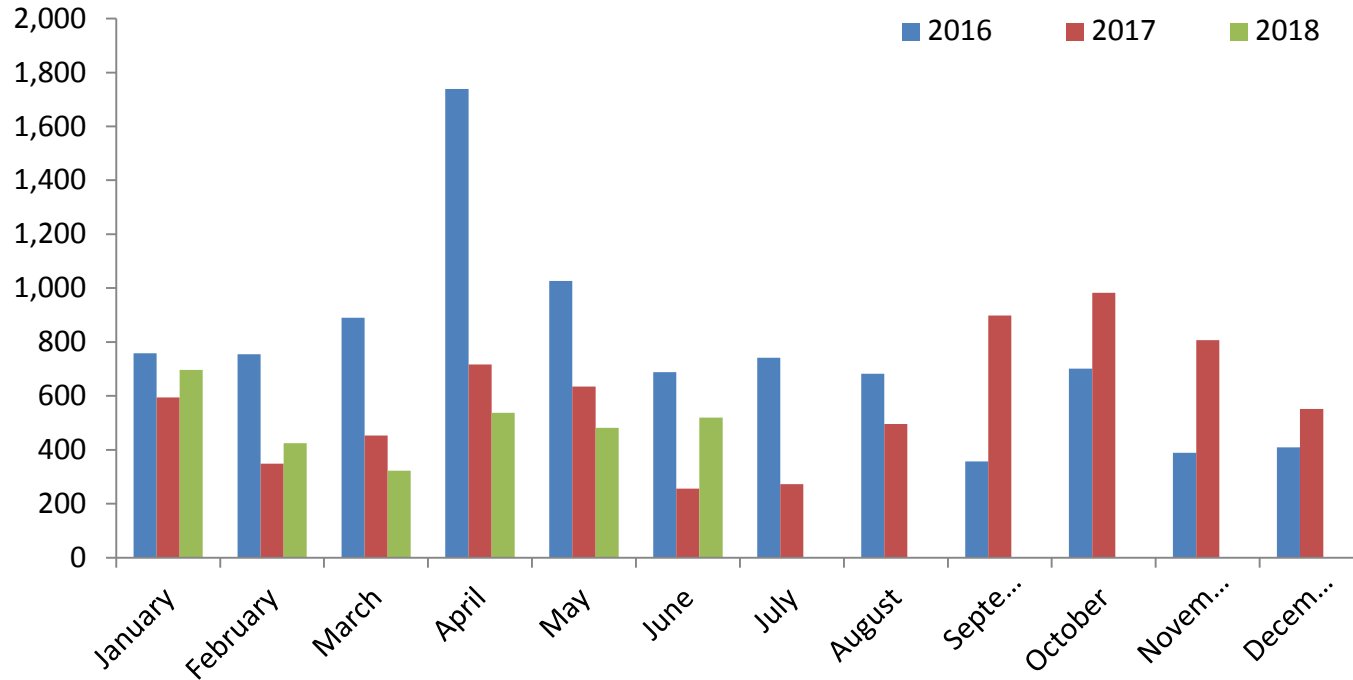
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	692	665	411	442	188	123	285	338	526	771	322	89
2017	165	117	69	73	64	105	117	261	411	594	316	286
2018	236	172	15	57	106	75						

Exports to ROI for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	220	183	211	383	268	102	273	99	127	89	35	79
2017	68	99	85	64	203	94	226	99	158	67	59	96
2018	156	266	267	183	133	148						

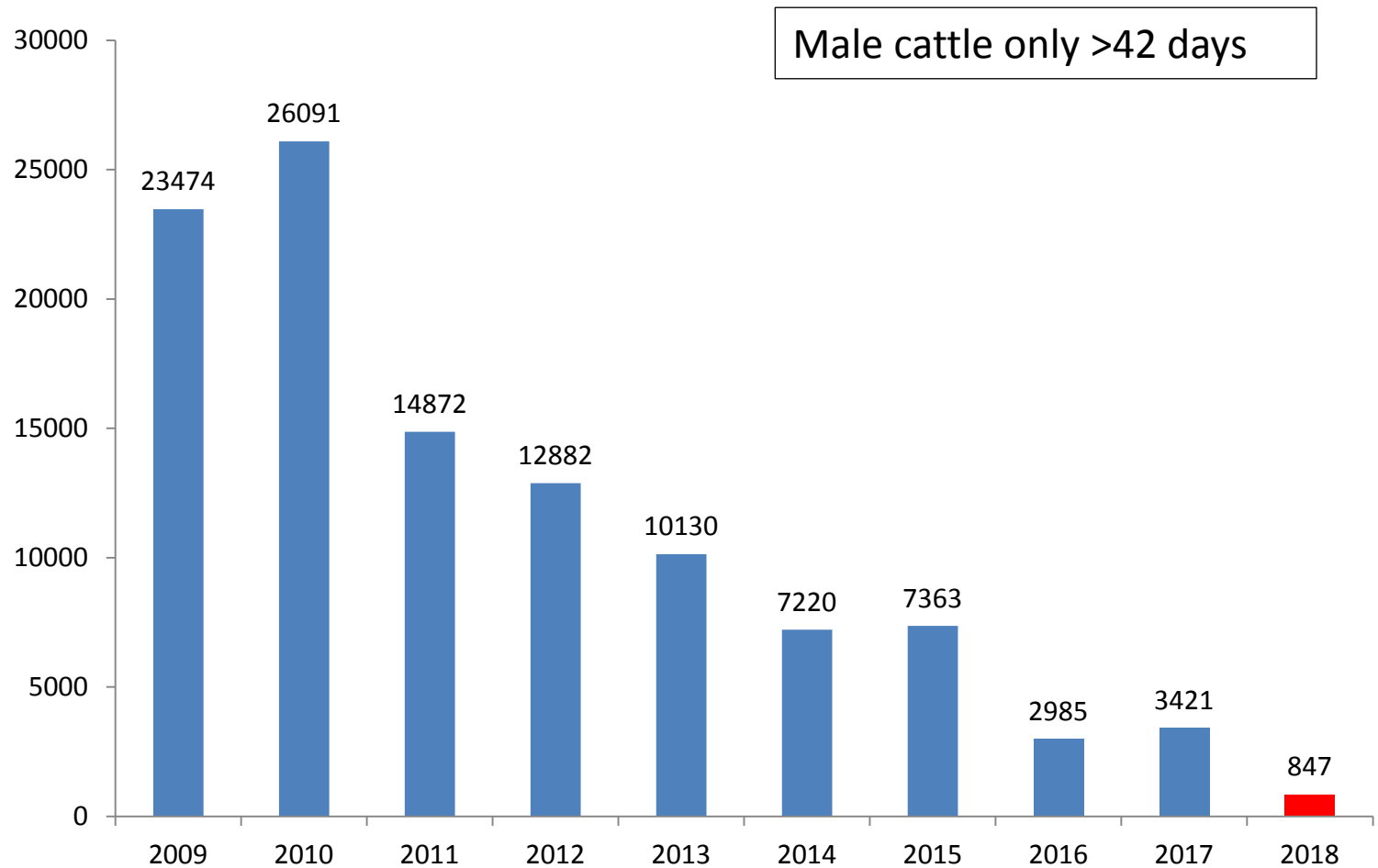
Cow exports to ROI for Direct Slaughter



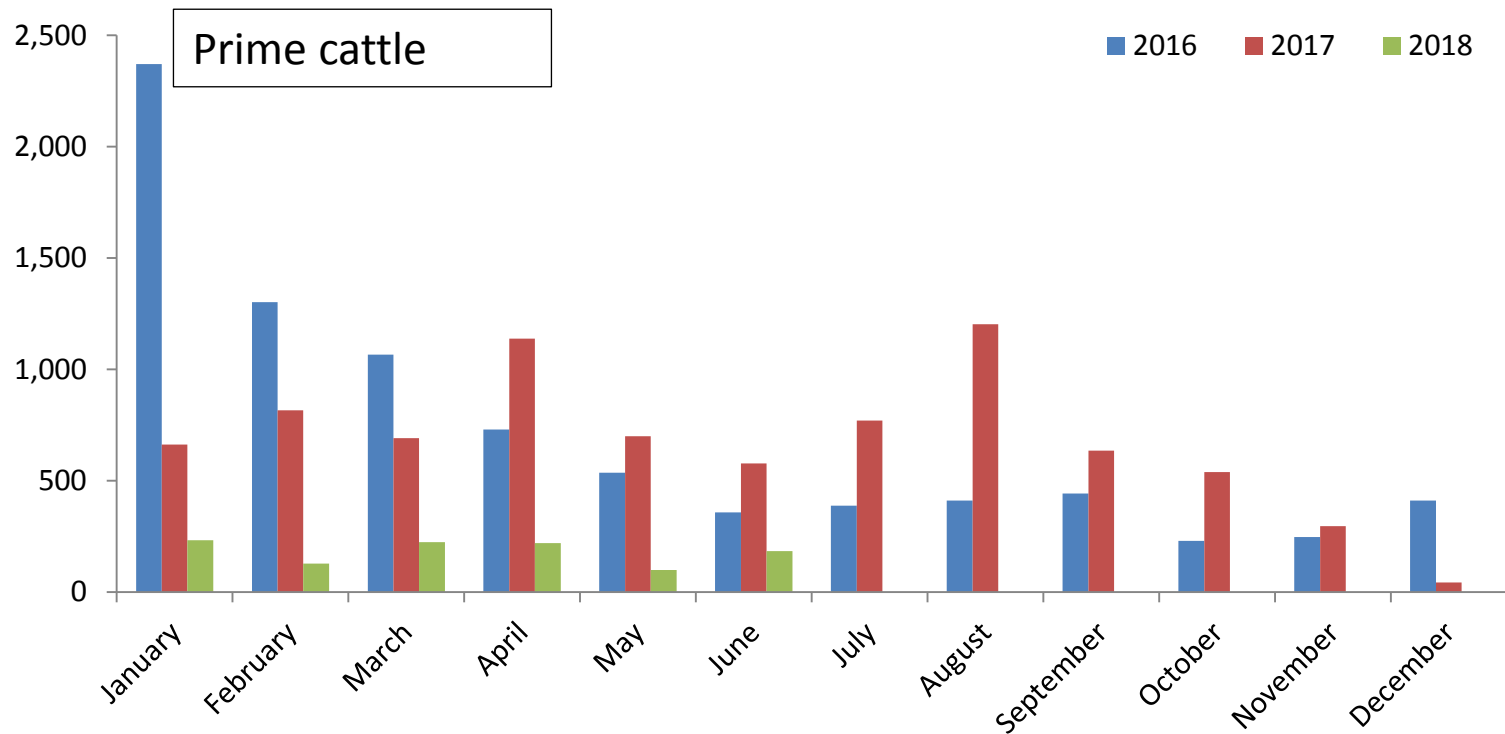
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	758	755	890	1739	1027	688	742	682	357	701	389	409
2017	594	348	453	716	635	256	272	496	898	982	807	551
2018	696	424	322	537	482	520						

Live Imports

Imports from ROI for Further Production

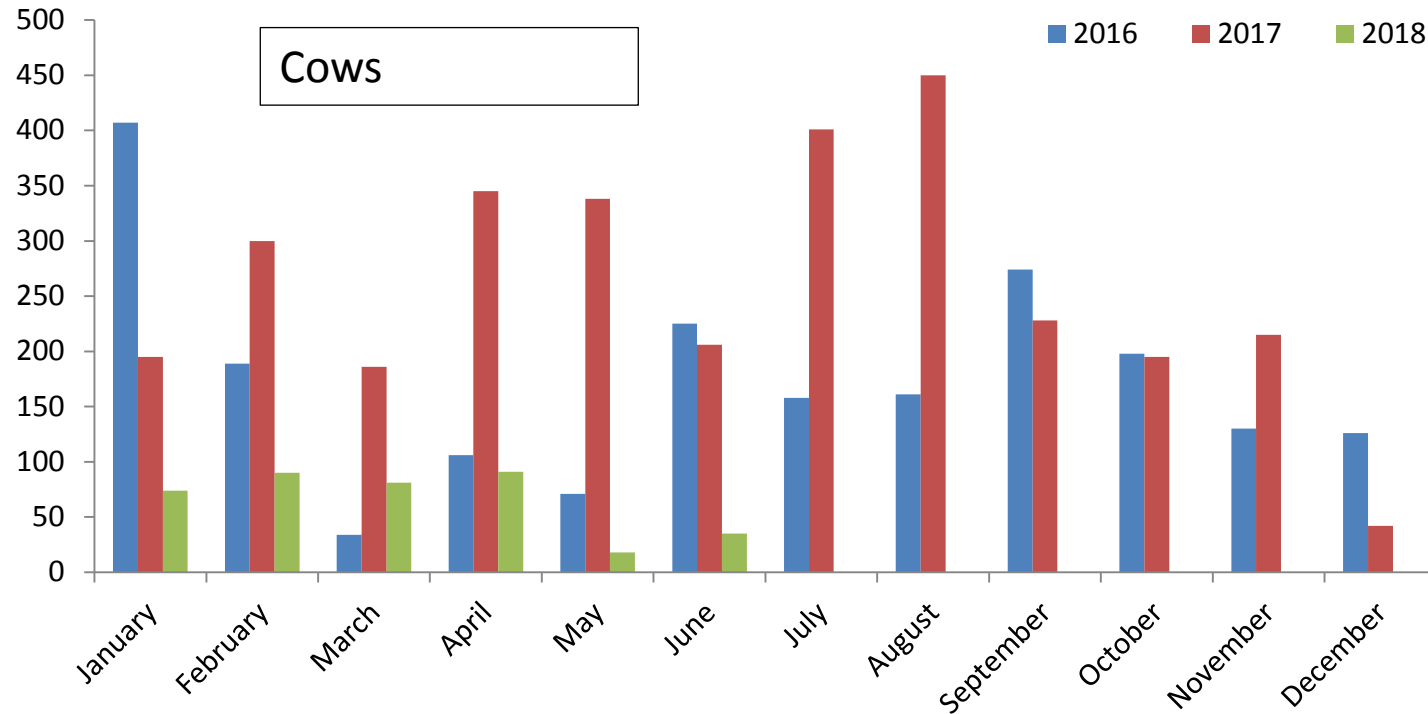


Imports from ROI for Direct Slaughter



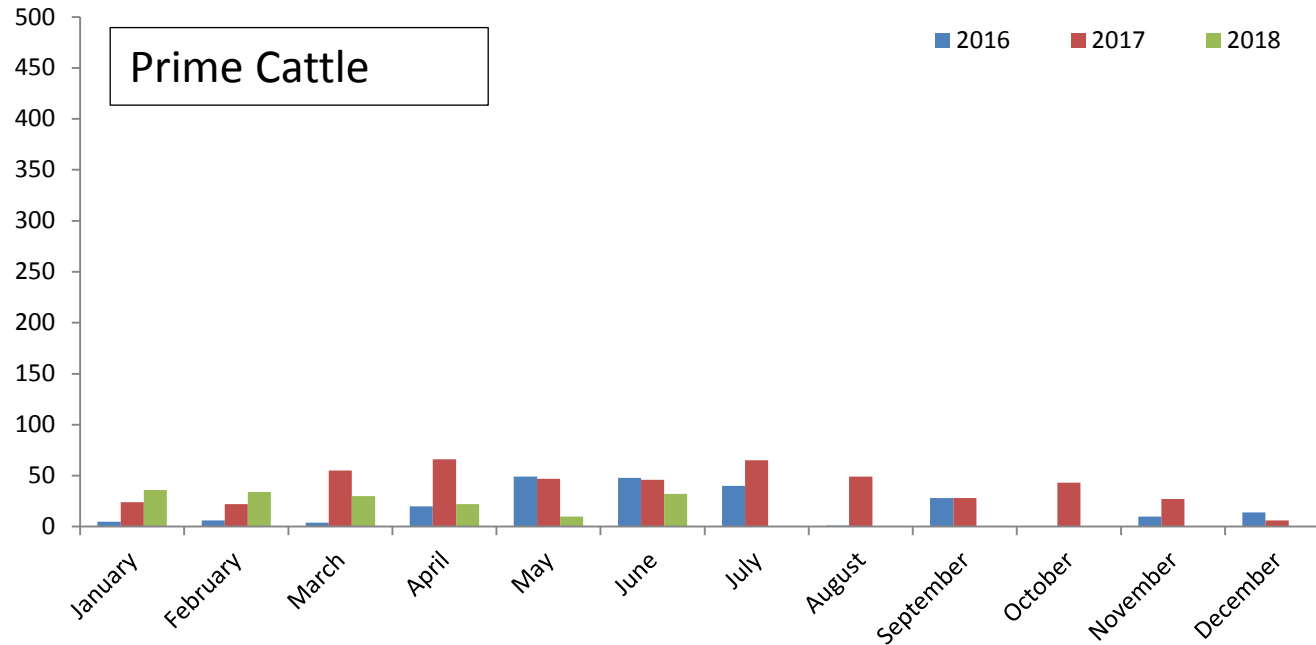
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	2372	1302	1067	731	536	358	388	411	443	230	248	411
2017	663	816	692	1139	700	578	771	1203	635	539	297	44
2018	234	129	225	221	100	185						

Imports from ROI for Direct Slaughter



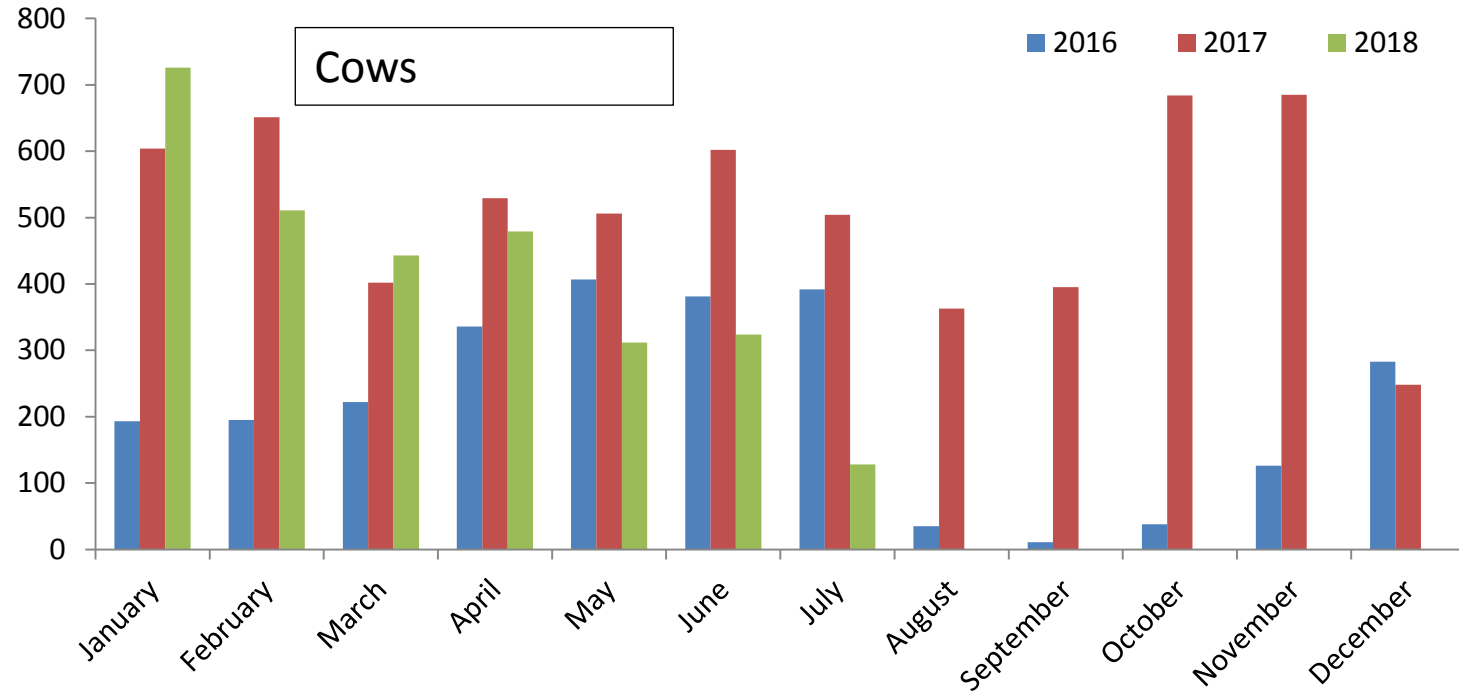
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	407	189	34	106	71	225	158	161	273	198	130	126
2017	195	300	186	345	338	206	401	450	228	195	215	42
2018	74	90	81	91	18	35						

Imports from GB for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2015	5	6	4	20	49	48	40	1	28	0	10	14
2016	24	22	55	66	47	46	65	49	28	43	27	6
2017	36	34	30	22	10	32						

Imports from GB for Direct Slaughter

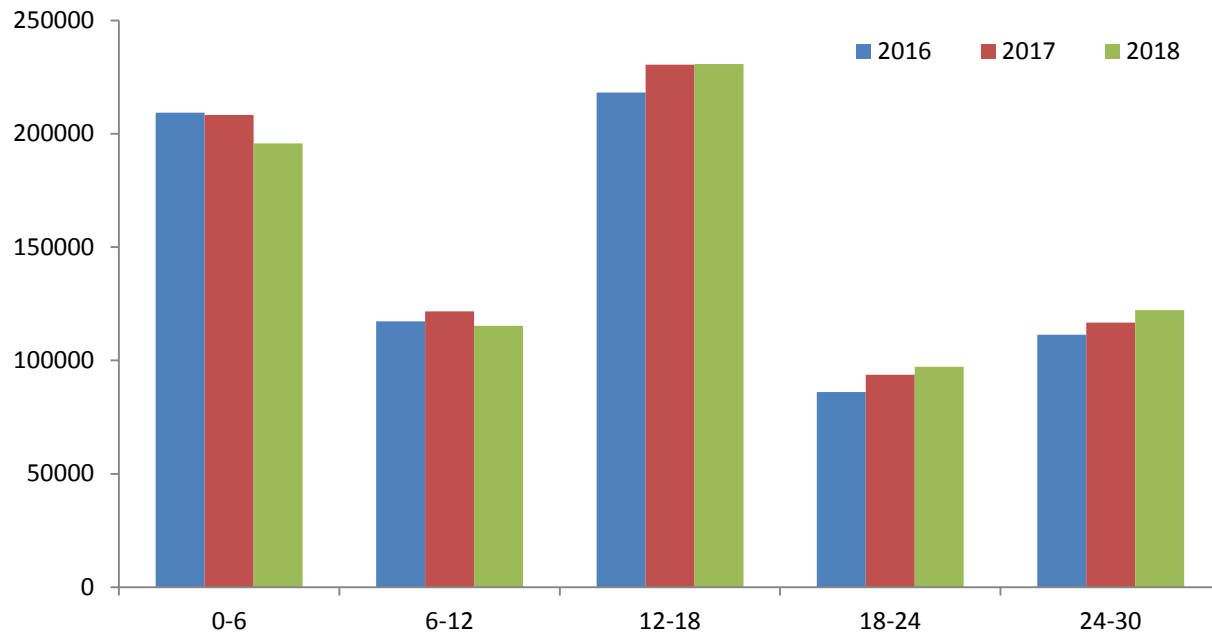


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2015	193	195	222	336	407	381	392	35	11	38	126	283
2016	604	651	402	529	506	602	504	363	395	684	685	248
2017	726	511	443	479	312	324	128					

Cattle Supplies

Beef sired cattle on NI farms

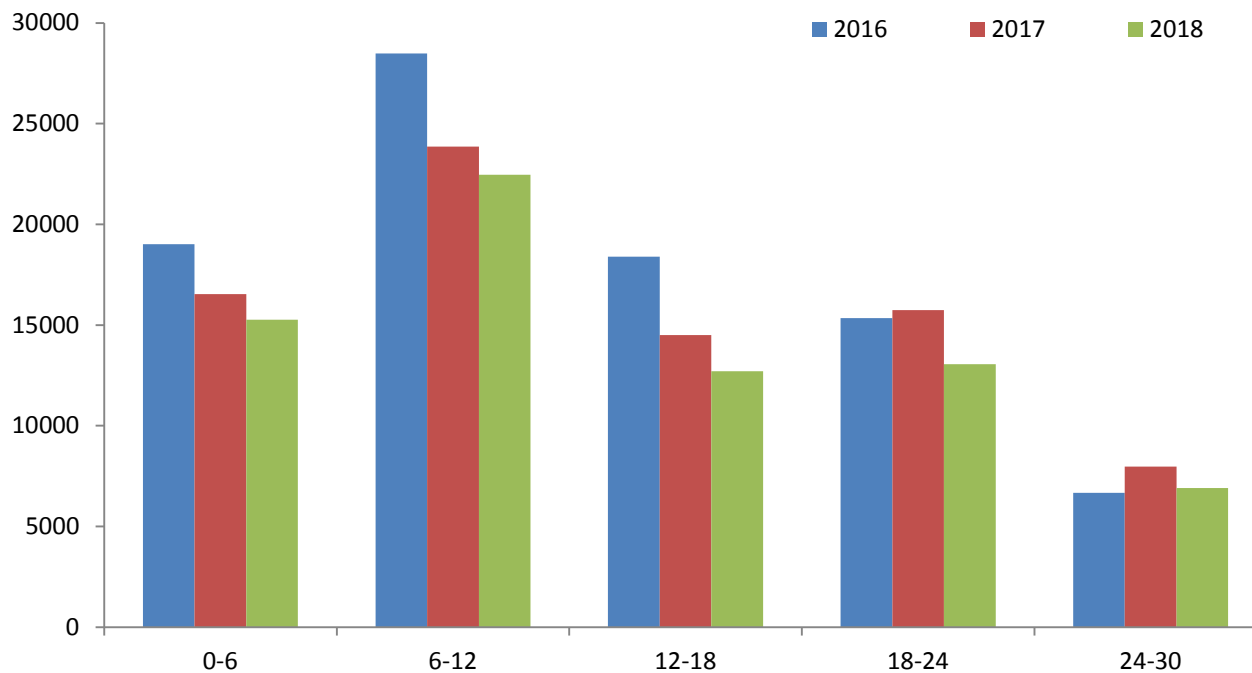
June 2018



Age (Months)	2016	2017	2018	2017/2018	2016/2018
0-6	209330	208384	195826	-6.0%	-6.5%
6-12	117253	121636	115260	-5.2%	-1.7%
12-18	218335	230522	230879	+0.2%	+5.7%
18-24	86148	93705	97243	+3.8%	+12.9%
24-30	111416	116699	122250	+4.8%	+9.7%

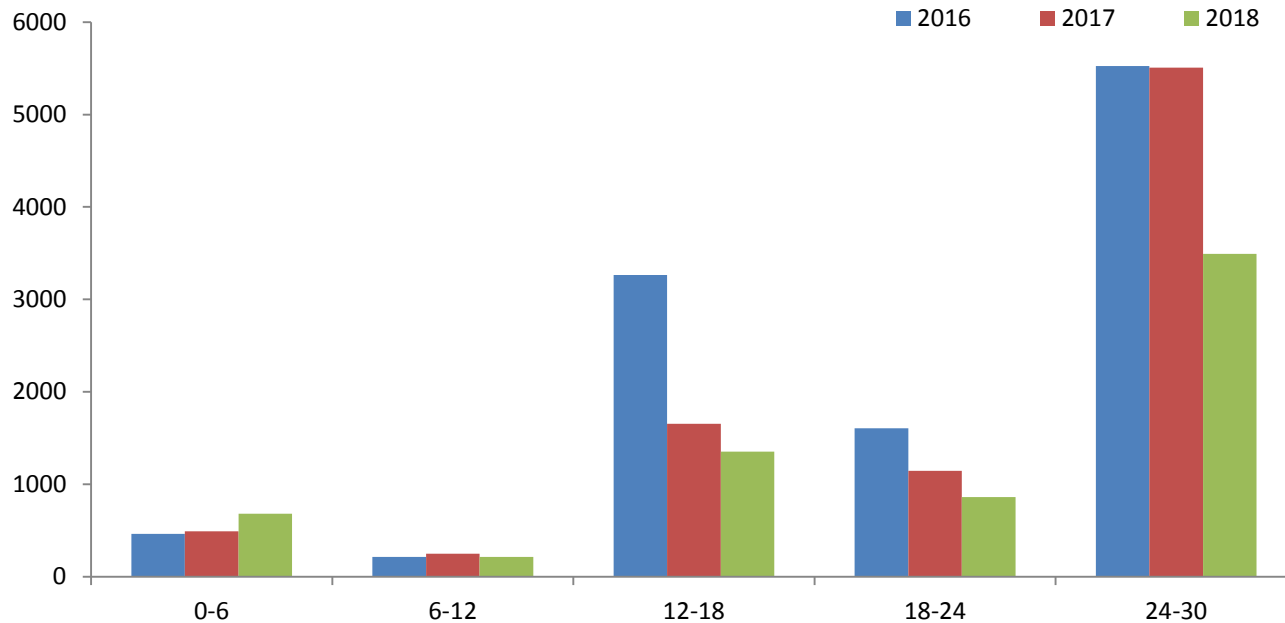
Dairy sired male cattle on NI farms

June 2018



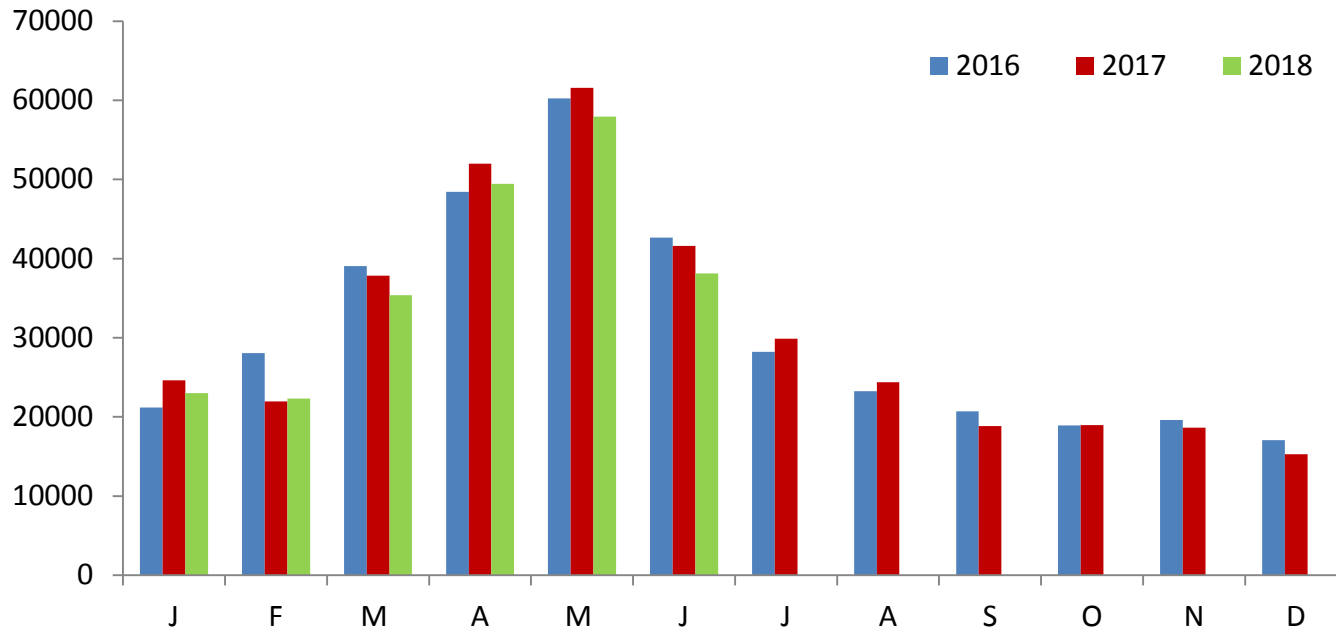
Dairy sired males	2016	2017	2018	2017/2018	2016/2018
0-6	19013	16531	15270	-7.6%	-19.7%
6-12	28485	23857	22467	-5.8%	-21.1%
12-18	18393	14510	12706	-12.4%	-30.9%
18-24	15346	15737	13054	-17.0%	-14.9%
24-30	6667	7978	6911	-13.4%	+3.7%

Nomad cattle on NI farms June 2018



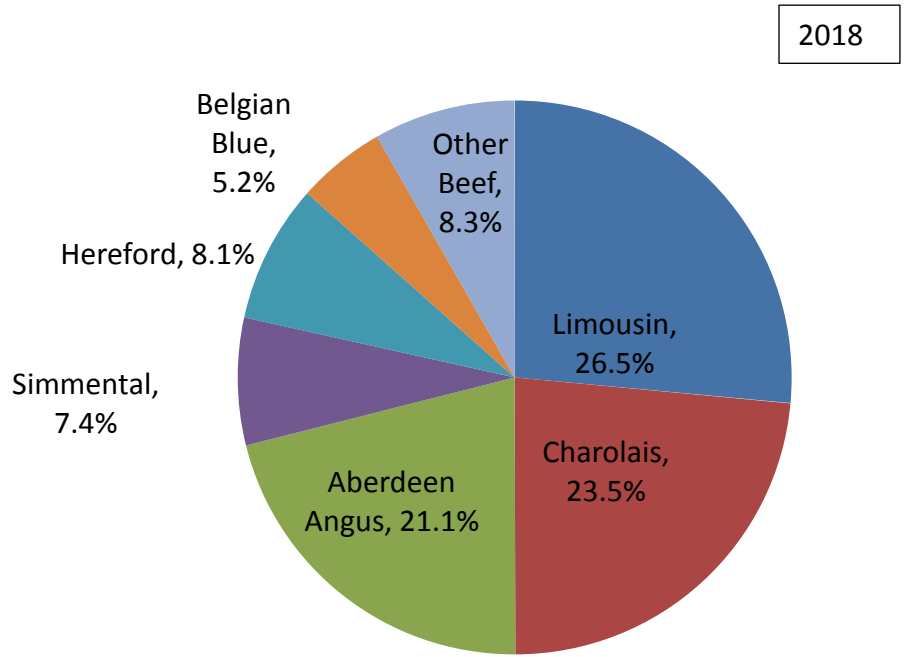
ROI Nomads (beef sired +dairy male)	2016	2017	2018	2017/2018	2016/2018
0-6	464	491	682	+38.9%	+47.0%
6-12	212	247	212	-14.2%	0.0%
12-18	3263	1653	1354	-18.1%	-58.5%
18-24	1605	1146	860	-25.0%	-46.4%
24-30	5526	5508	3491	-36.6%	-36.8%

NI Beef Sired Calf Registrations 2018



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	24641	21956	37825	51997	61589	41625	29881	24390	18838	18961	18621	15273
2018	23001	22323	35389	49451	57945	38126						
% Change	-6.7%	1.7%	-6.4%	-4.9%	-5.9%	-8.4%						

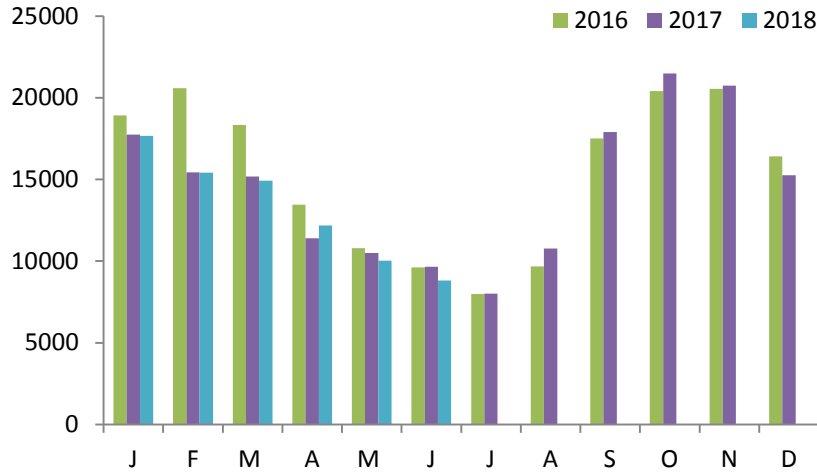
Beef Calf Registrations by Breed



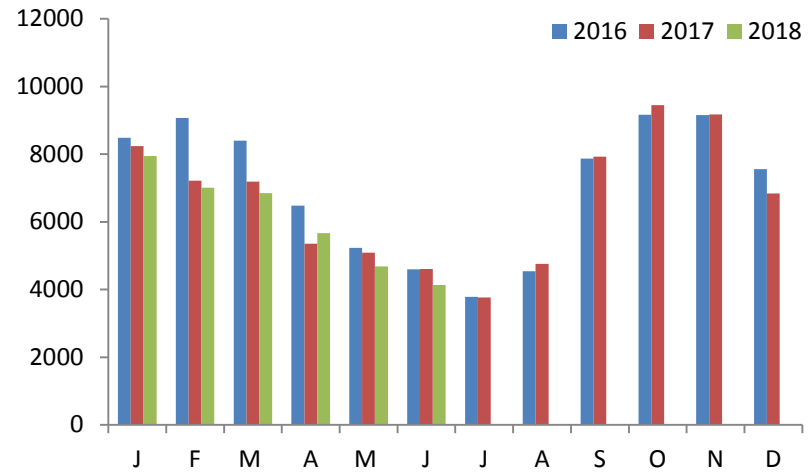
Proportion Dairy Dam	2016	2017	2018
Jan	46%	49%	51%
Feb	43%	51%	51%
Mar	34%	39%	40%
Apr	24%	26%	26%
May	18%	20%	19%
Jun	23%	24%	24%
Jul	26%	27%	
Aug	29%	30%	
Sep	39%	40%	
Oct	47%	47%	
Nov	52%	51%	
Dec	55%	56%	
Grand Total	32%	34%	31%

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2017 YTD	27.9%	24.1%	19.3%	7.5%	7.8%	5.2%	8.1%
2018 YTD	26.5%	23.5%	21.1%	7.4%	8.1%	5.2%	8.3%

NI Dairy Sired Calf Registrations 2018



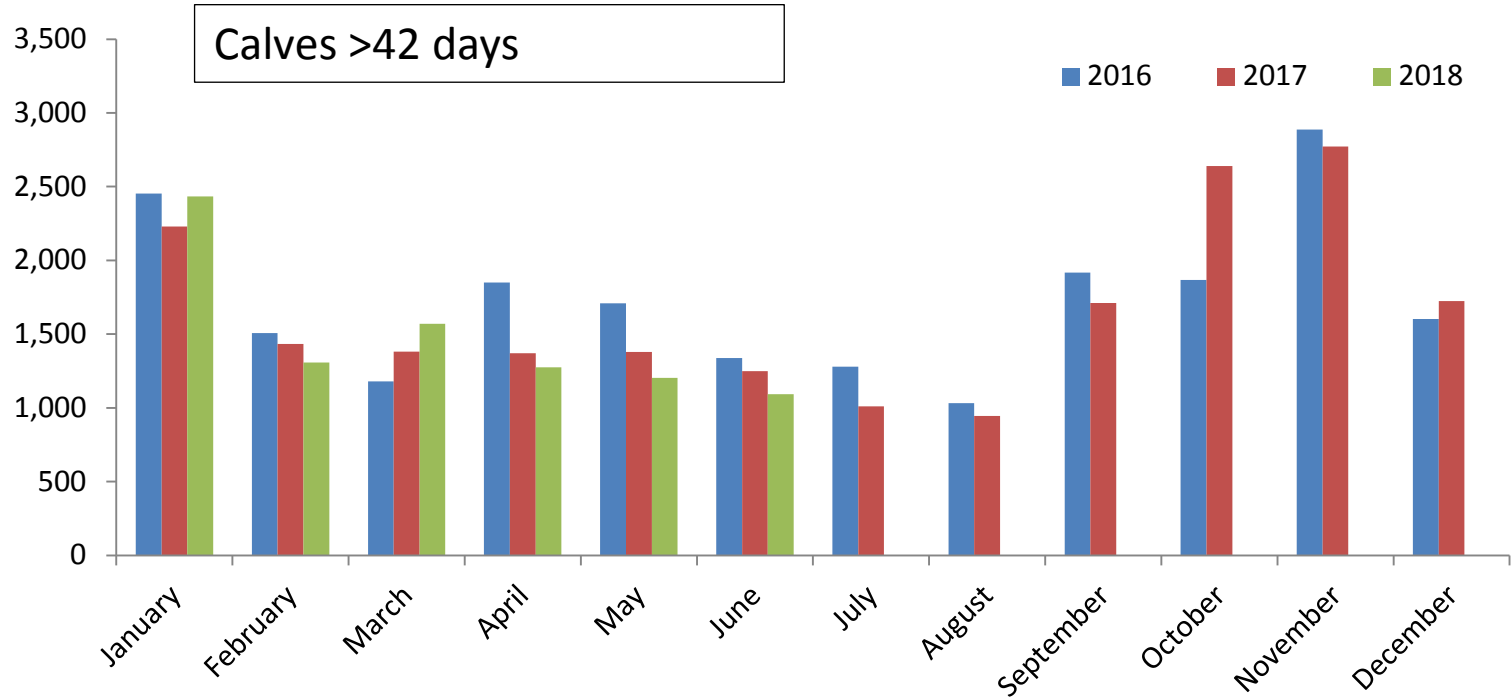
Total dairy calf registrations



Male dairy calf registrations

Males	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	8242	7216	7186	5349	5089	4604	3768	4754	7925	9445	9174	6834
2018	7942	7007	6845	5663	4682	4133						
% Change	-3.6%	-2.9%	-4.7%	5.9%	-8.0%	-10.2%						

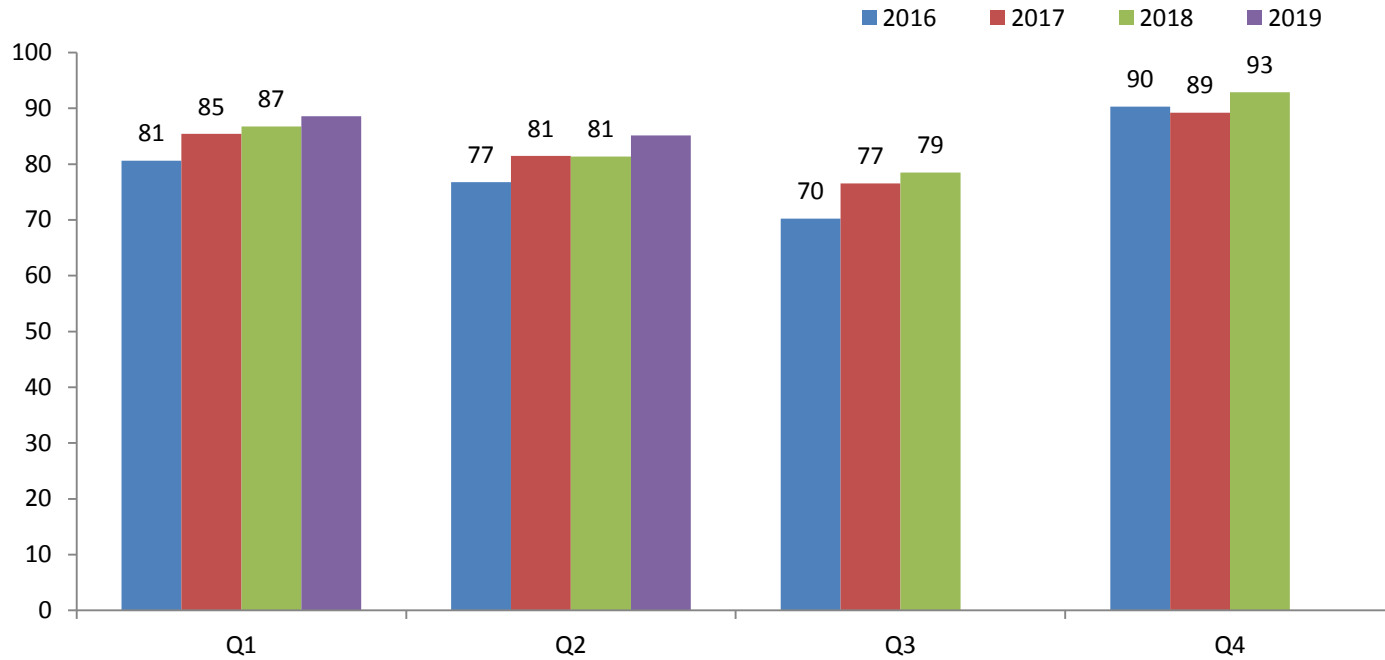
Dairy Bull Calf Exports



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	2453	1508	1179	1849	1709	1339	1279	1032	1918	1868	2888	1602
2017	2230	1433	1382	1371	1380	1248	1011	945	1712	2640	2772	1724
2018	2433	1308	1571	1276	1203	1092						

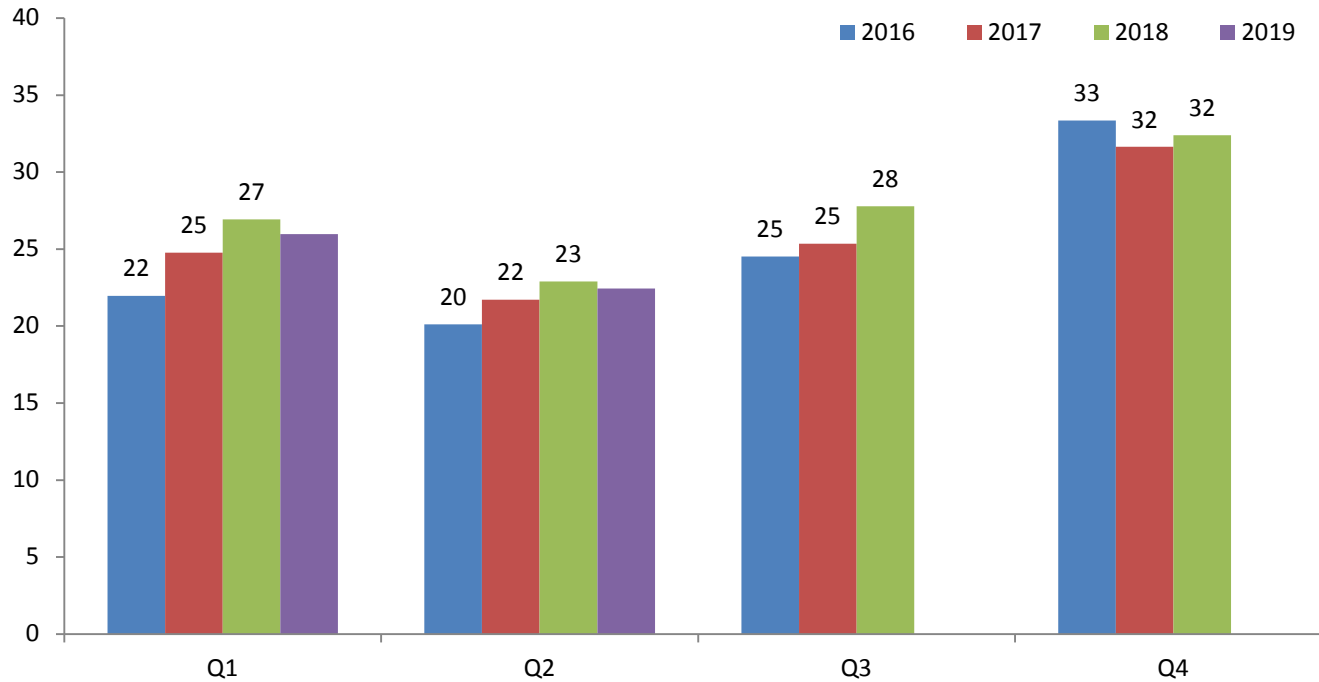
Forecast

Forecast NI Prime Cattle kill 2018/19



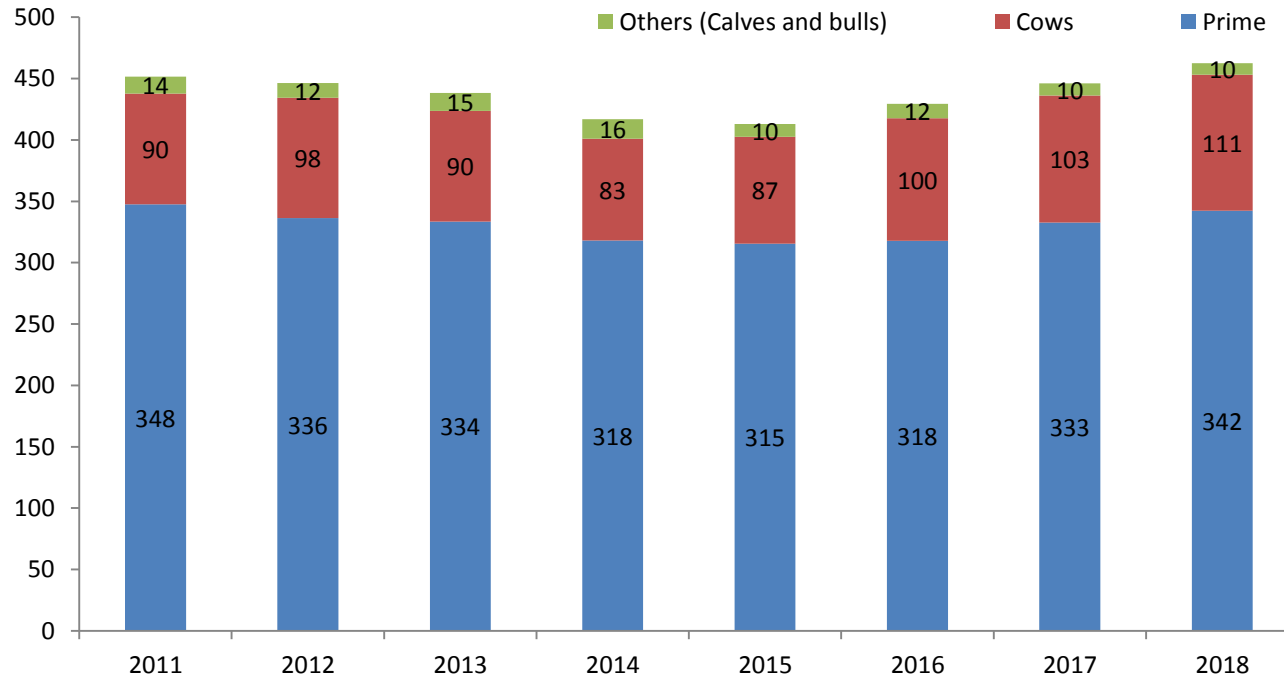
	2016	2017	2018(e)	2019(e)
Q1	80641	85430	86738	88581 (e)
Q2	76751	81474	81359	85177 (e)
Q3	70231	76560	78502 (e)	-
Q4	90336	89251	92883 (e)	-
Total	317959	332715	339482 (e)	-

Forecast NI Cow Kill 2018/19



	2016	2017	2018	2019
Q1	21968	24760	26924	25967(e)
Q2	20110	21706	22890	22442 (e)
Q3	24521	25339	27781 (e)	-
Q4	33344	31635	32396(e)	-
Total	99943	103440	109990(e)	-

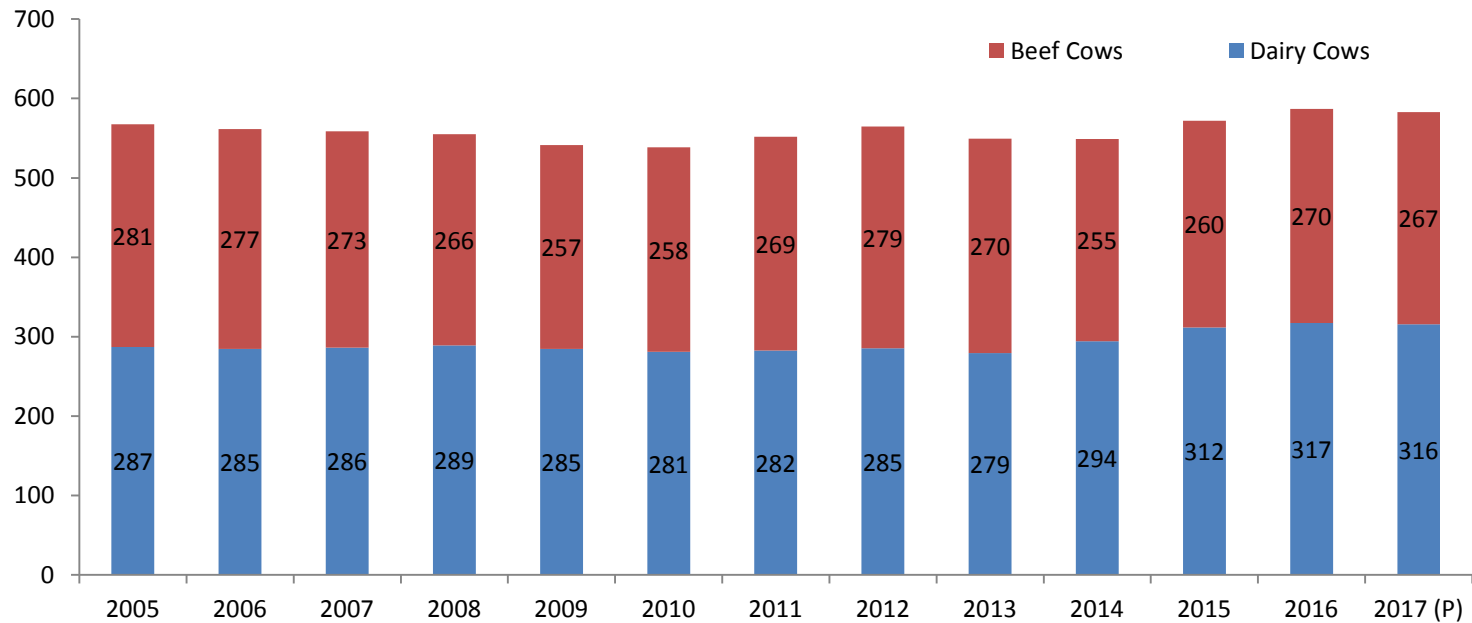
Forecast Total Cattle Kill 2018 (Inc bulls and calves)



Year	2011	2012	2013	2014	2015	2016	2017	2018 (e)
Total cattle throughput	451,716	446,356	438,335	416,989	413,062	429,418	446,112	459,536

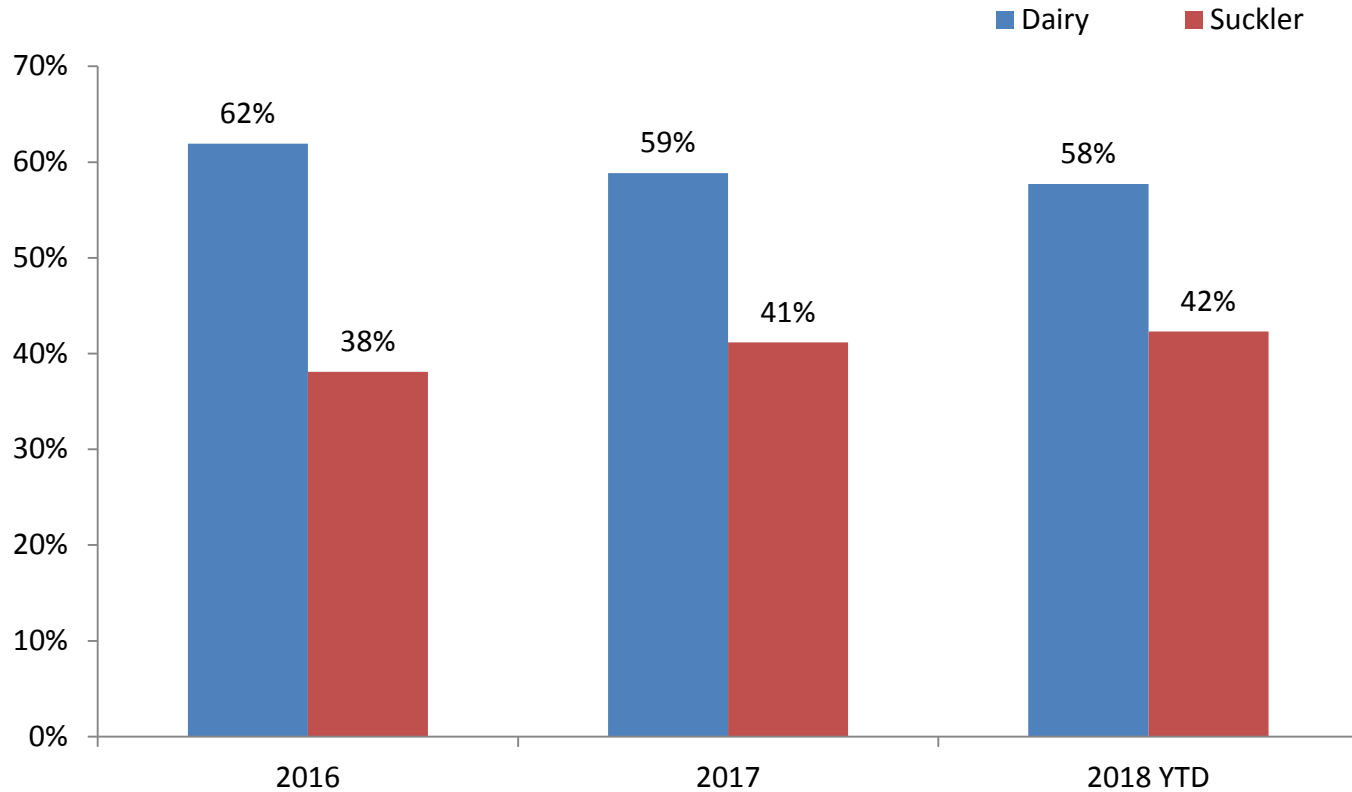
Longer term outlook

Breeding females December Survey



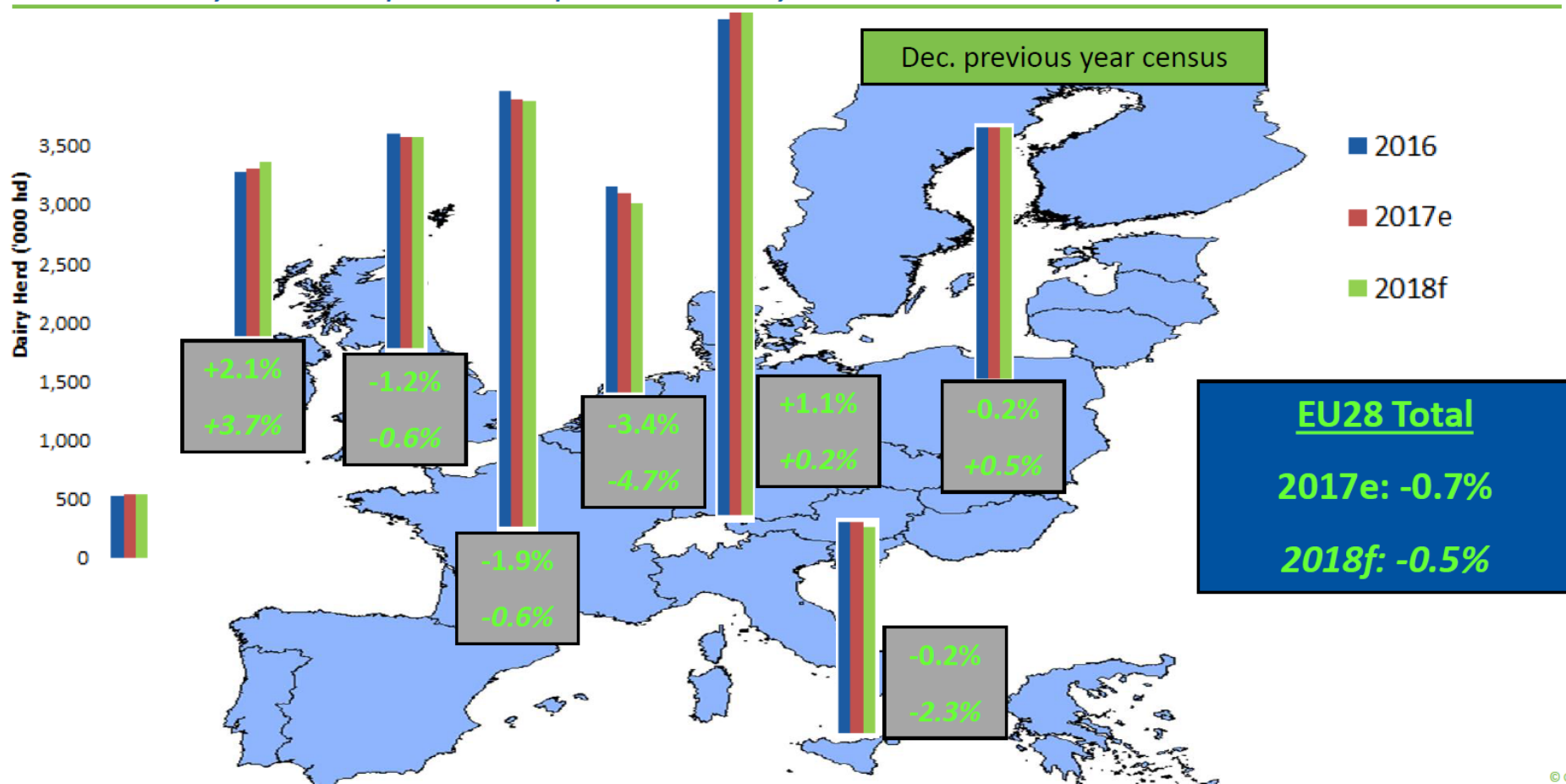
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Dairy Cows	287,094	284,718	286,073	289,247	284,698	281,043	282,487	285,369	279,481	294,192	311,520	317,146	315,800
Beef Cows	280,582	276,734	272,616	265,663	256,776	257,648	269,488	279,195	270,105	254,870	260,325	269,746	267,100

Origin cows in NI slaughter mix



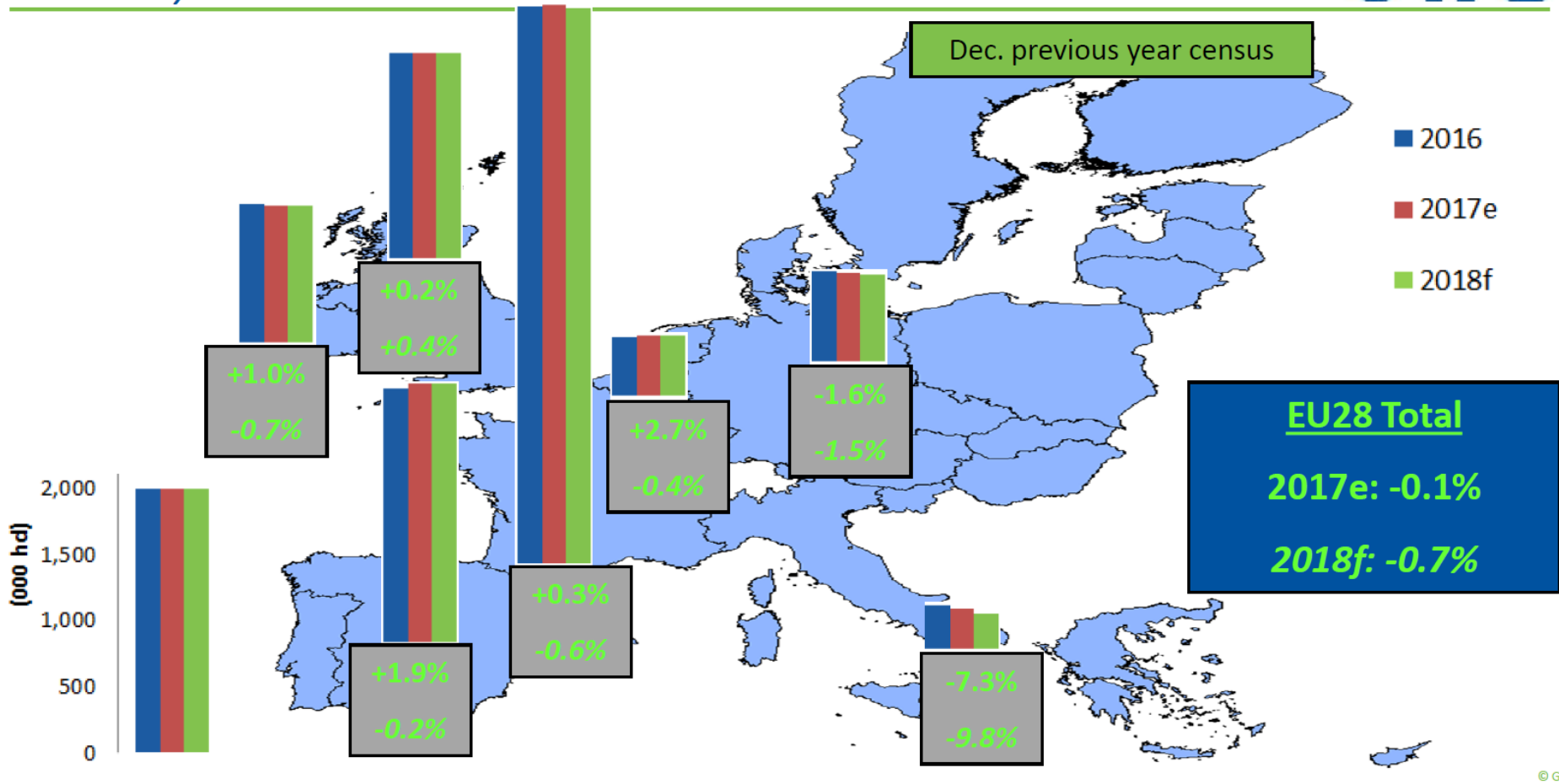
Dairy Cow Herds

Uncertainty on milk price tempers recovery.



EU Beef Cow Herd

A stable year in most but not all markets.



Key Assumptions for Forecast

- Live imports for DS from ROI remain depressed
- Exports to ROI and GB combined unchanged
- Unchanged calf exports to continent
- Current level of beef sires used on dairy herd continues
- No change in relative price trends across British Isles
- No substantial movement in exchange rates
- No substantial disease outbreak
- No substantial changes in disease controls
- Breeding herd to remain steady
- Cow kill increases as exports to ROI reduce
- No change in age at slaughter
- Stability in dairy market
- Brexit?????