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BEEF RETAIL PERFORMANCE UPDATE NOVEMBER 2015

During the twelve week period ending 08 November 2015 the value of retail beef sales in the UK totalled £498 million according to the latest consumer data from Kantar Worldpanel. The value of beef sales was unchanged from the corresponding twelve week period in 2014. The volume of beef sales also remained steady year on year and totalled 63,328 tonnes during the 12 week period ending 08 November 2015.

The average retail price of beef during the 12 week period ending 08 November 2015 was £7.86/kg, almost unchanged from the £7.87/kg retail price of beef during the corresponding 12 week period in 2014. Household penetration also remained similar year on year with 71.5 per cent of households purchasing beef during the 12 weeks ending 08 November 2015.

While the value, volume and average retail price of beef have remained constant year on year there have been notable changes in the volume sales of individual cuts of beef. Volume sales of beef roasting joints remained fairly steady between the two twelve week periods under analysis while sales of mini roasting joints were back by 12.9 per cent between the two periods. Volume sales of stewing beef also recorded a notable decline, back by 16.7 during the 12 weeks ending 08 November 2015 when compared to year earlier levels.

Meanwhile the volume sales of some individual cuts recorded increases in volume sales during the 12 weeks ending 08 November 2015 when compared to year earlier levels. Volume sales of frying and grilling steaks increased by 7.4 per cent between the two periods under analysis while volume sales of mince and beef marinades increased by 1.8 per cent and 6 per cent respectively.

There have also been notable increases in the volume sales of some beef products that have undergone further processing. Volume sales of burgers and grills recorded an 8.9 per cent increase year on year while sales of chilled ready meals increased by 8.1 per cent over the same period. Volume sales of frozen ready meals and pre packed pasties increased by 2.9 per cent and 4.2 per cent respectively. Volume sales of pre packed hot pies and frozen pies performed less strongly with volume sales back by 1.2 per cent and 4.3 per cent respectively.

Table 1: Percentage changes in beef volume sales of a range of beef products during 12 weeks ending 08 November 2015

Beef Product	% Change
Fresh & frozen beef	+0.2
- Roasting	-1.1
- Mini roasting	-12.9
- Stewing	-16.7
- Frying/grilling steak	+7.4
- Mince	+1.8
- Marinade	+6.0
Burgers and grills	+8.9
Chilled ready meals	+8.1
Frozen ready meals	+2.9
Fresh pre-packed hot pies	-1.2
Fresh pre-packed pasties	+4.2
Frozen pies/puddings	-4.3

FQAS MART CLINICS DECEMBER 2015

LMC's Farm Liaison Officer, Terry White, runs Farm Quality Assurance Scheme (FQAS) mart clinics at a range of Livestock Marts across Northern Ireland. Terry is present to assist members of FQAS with non-conformances, general scheme queries and any issues prior to or following an inspection.

Any farmers who wish to join the scheme can also do so through their local FQAS mart clinic. Terry will be available at the livestock marts listed below. For further information call (028) 9263 3024.

LOCATION	DAY	DATE
Omagh	Monday	07/12/2015
Markethill	Tuesday	08/12/2015
Kilrea	Wednesday	09/12/2015
Saintfield	Wednesday	16/12/2015
Enniskillen	Thursday	17/12/2015
Ballymena	Friday	18/12/2015

NI CALF REGISTRATIONS UPDATE NOVEMBER 2015

Beef sired calf registrations in NI totalled 18,423 head during November 2015, an increase of 2,360 head from the 16,063 beef sired calves registered in the corresponding month in 2014. This accounts for a 14.7 per cent increase year on year.

Figure 1 displays beef sired calf registrations for the period January 2014 to November 2015. As indicated in the chart beef sired calf registrations during 2015 to date have been higher than year earlier levels for nine of the eleven months. Beef sired calf registrations for the year to date have totalled 322,513 head compared to 298,455 head during the same period in 2014. This increase by 24,058 head accounts for an 8.1 per cent increase year on year.

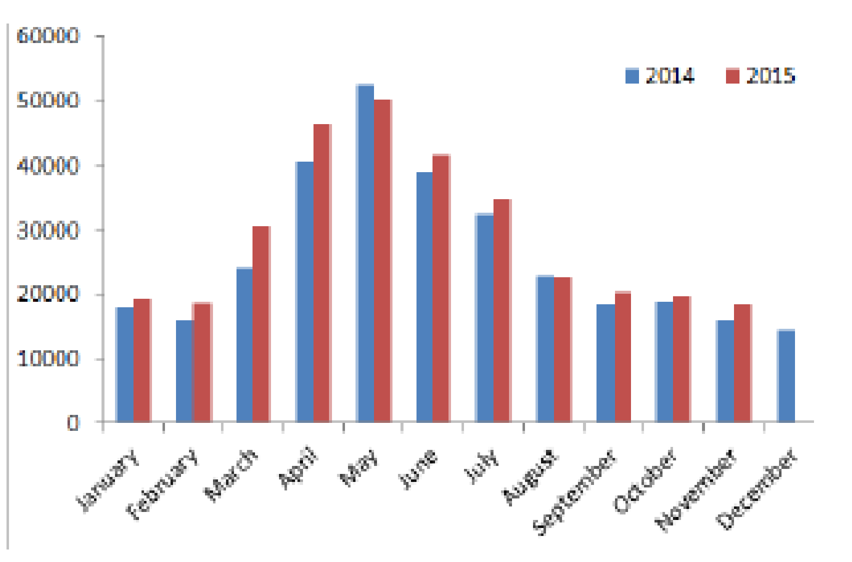
Limousin and Charolais continue to be the most popular beef sires used in NI with 95,795 Limousin calves registered during 2015 to date and 83,408 Charolais calves registered. These accounted for 30 per cent and 26 per cent of total beef sired calf registrations respectively. Aberdeen Angus was the next most popular beef sire used and accounted for 17 per cent of registrations during 2015 to date.

Meanwhile Simmental accounted for eight per cent of beef sired registrations, Hereford for seven per cent while Belgian Blue accounted for a further six per cent. These six breeds accounted for 92 per cent of all beef sired calf registrations during 2015 to date.

The NI dairy herd continues to act as a valuable source of cattle for beef production and during 2015 to date 88,900 beef sired calves were registered to dairy cows in NI and accounted for 27.5 per cent of all beef sired calf registrations. This is a 13 per cent increase from the 78,556 beef sired calves registered to dairy dams during the corresponding period in 2014 and a 26 per cent increase from the 68,370 registrations in the same period in 2013.

During November 2015 9,356 dairy sired male calves were registered in NI, a 5 per cent reduction from the 80,971 male dairy sired calves registered in November 2014. Male dairy calf registrations for 2015 to date have totalled 81,460 head, a slight increase from the 80,971 male dairy calves registered in the same period in 2014.

Figure 1: Beef sired calf registrations for the period January 2014 to November 2015.



WEEKLY BEEF & LAMB MARKETS

CATTLE TRADE

NI FACTORY QUOTES FOR CATTLE

(P/KG DW)	This Week 30/11/15	Next Week 07/12/15
Prime		
U-3	316 - 320p	312 - 316p
R-3	310 - 314p	306 - 310p
O+3	304 - 308p	300 - 304p
P+3	264 - 290p	264 - 290p
	Including bonus where applicable	
Cows		
O+3 & better	220 - 240p	215 - 235p
Steakers	140 - 170p	140 - 170p
Blues	120 - 130p	120 - 130p

Cow quotes vary depending on weight and grade.
Pricing policies vary from plant to plant. Producers are advised to check pricing policies before presenting cattle for slaughter.

REPORTED COW PRICES NI - P/KG

w/e 28/11/15	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	131.8	138.0	150.3	165.3
P2	146.3	161.3	186.3	204.7
P3	163.8	192.4	208.8	219.2
O3	215.0	197.6	227.8	238.2
O4	-	-	215.2	238.3
R3	-	-	239.7	257.0

Deadweight Cattle Trade

THE deadweight trade for prime cattle in NI has remained steady with base quotes for in spec U-3 grade prime cattle this week ranging from 316-320p/kg. Quotes for good quality O+3 grade cows have also remained steady with quotes generally ranging from 220-240p/kg across the plants.

A total of 6,712 prime cattle were slaughtered in NI plants last week, very similar to the 6,990 prime cattle killed in NI during the corresponding week in 2014. Cow throughput in NI has remained strong with throughput increasing to 2,404 head last week. This was also very similar to the corresponding week in 2014 when 2,212 cows were slaughtered in NI.

Cattle imports from ROI for direct slaughter in NI plants last week totalled 389 prime cattle, a decrease of 44 head from the previous week and accounting for six per cent of total prime cattle throughput. In the corresponding week in 2014 579 prime cattle were imported from ROI for direct slaughter and accounted for eight per cent of total prime cattle throughput. A total of 60 cows were also imported from ROI for slaughter in NI plants last week while 311 cows were exported from NI for slaughter in ROI. Exports of prime cattle from NI to GB for direct slaughter totalled 258, similar to the previous week when 243 prime cattle were exported.

The average steer price in NI last week decreased by 2.3p/kg to 311.2p/kg while the R3 steer price remained steady at 322.0p/kg. The average heifer price in NI last week was up by half a penny to 316.9p/kg and similarly the R3 heifer price was up half a penny to 323.1p/kg. The average cow price in NI last week recorded an increase of 5.6p/kg to 214.6p/kg and the O3 cow price remained steady at 236.9p/kg.

Deadweight prices have remained steady in GB with an average steer price last week of 346.4p/kg and an R3 steer price at 352.3p/kg. The differential in R3 steer prices last week between NI and the GB average for R3 steers remained similar to the previous week at 30.3p/kg which is the equivalent of £100 on a 330kg carcase. The average heifer price in GB last week decreased by 1.4p/kg to 344.8p/kg while the R3 heifer price similarly decreased by 1.5p/kg to 351.9p/kg. This puts the differential in R3 heifer prices last week between NI and the GB average at 28.8/kg which is the equivalent of £95 on a 330kg carcase.

In ROI last week deadweight cattle trade held relatively steady with the R3 steer price in ROI at the equivalent of 267.3p/kg while the R3 heifer price was the equivalent of 279.5p/kg, an increase of half a penny from the previous week. The cow trade in ROI recorded declines last week with the O3 cow price back by 5.8p/kg to 214.5p/kg which is a notable 22.4p/kg lower than the equivalent price in NI. Prime cattle throughput increased to 26,122 in ROI last week, the highest weekly throughput of prime cattle this year.

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

W/E 28/11/2015		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	319.7	275.2	375.2	355.6	354.0	357.1	361.2
	R3	322.0	267.3	367.6	350.1	343.1	345.1	352.3
	R4	318.1	267.3	369.6	361.2	344.5	343.9	358.2
	O3	309.4	255.3	348.2	330.3	315.8	318.7	329.2
	AVG	311.2	-	366.9	348.7	330.2	330.8	346.4
Heifers	U3	328.9	287.7	378.0	361.3	357.9	357.0	365.1
	R3	323.1	279.5	367.5	346.2	344.7	343.8	351.9
	R4	319.7	279.8	368.0	351.1	343.8	343.4	353.6
	O3	312.2	270.0	340.2	317.6	309.8	316.9	322.9
	AVG	316.9	-	365.7	342.2	330.9	329.1	344.8
Young Bulls	U3	309.6	269.5	360.8	342.1	347.7	347.9	347.9
	R3	312.6	265.5	361.0	327.9	334.3	341.3	337.0
	O3	294.7	256.1	320.7	291.9	311.5	321.3	309.1
	AVG	300.7	-	335.1	308.2	318.6	315.7	317.5
Prime Cattle Price Reported		5609	-	7090	7512	5871	4685	25158
Cows	O3	236.9	214.5	231.6	219.0	225.6	217.2	224.5
	O4	237.9	216.1	236.6	221.1	228.0	215.6	227.1
	P2	191.5	190.2	172.3	179.1	182.6	168.8	176.3
	P3	215.7	206.8	196.9	192.9	197.1	190.5	195.2
	AVG	214.6	-	225.7	194.8	192.8	185.6	201.8

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=70.32p Stg
(ii) Shading indicates a lower price than the previous week.
(iii) AVG is the average of all grades in the category, not just those listed

LATEST LIVEWEIGHT CATTLE MART PRICES NI

	1st QUALITY			2nd QUALITY		
W/E 28/11/15	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	182	199	195	160	178	170
Friesians	130	136	134	120	126	122
Heifers	186	208	198	160	180	170
Beef Cows	124	150	130	100	123	111
Dairy Cows	91	109	97	60	90	75
Store Cattle (p/kg)						
Bullocks up to 400kg	200	227	211	180	194	187
Bullocks 400kg - 500kg	185	201	191	165	184	175
Bullocks over 500kg	178	187	182	163	173	167
Heifers up to 450kg	186	211	195	160	185	172
Heifers over 450kg	174	186	178	154	173	165
Dropped Calves (£/head)						
Continental Bulls	280	360	305	180	278	230
Continental Heifers	230	330	280	150	228	185
Friesian Bulls	100	160	125	50	98	70
Holstein Bulls	68	140	100	10	65	40

SHEEP TRADE

SHEEP QUOTES

(P/Kg DW)	This Week 30/11/15	Next Week 07/12/15
Lambs	320-325p > 22kg	330p > 22kg

REPORTED SHEEP PRICES

(P/KG)	W/E 14/11/15	W/E 21/11/15	W/E 28/11/15
NI Lambs L/W	289.8	299.6	299.7
NI Lambs D/W	312.2	321.3	326.4
GB Lambs D/W	342.8	351.1	355.9
ROI D/W	310.6	313.9	324.9

Deadweight Sheep Trade

QUOTES from the major NI processors for R3 grade lambs ranged from 320-325p/kg up to 22kg this week. The plants have reported a reduction in supplies of lambs coming forward for slaughter with throughput last week totalling 9,026 head. This was a reduction of 1,070 head from the 10,096 lambs killed in NI during the previous week. A further 6,631 lambs were exported from NI to ROI for direct slaughter last week compared to 8,963 lambs the previous week. The deadweight lamb price in NI last week increased by 5.1p/kg to 326.4p/kg. In ROI last week the deadweight lamb price increased by an equivalent of 11p/kg to 324.9p/kg.

This week's marts

Some marts have indicated a tightening in the numbers passing through the sale rings this week. In Massereene on Monday 903 lambs sold from 290-315p/kg compared to 864 lambs last Monday selling 295-315p/kg. In Saintfield this week 350 lambs sold from 280-335p/kg compared to 904 lambs last week selling from 275-342p/kg. In Rathfriland this week 915 lambs sold to an average of 295p/kg compared to 1,135 lambs last week sold to an average of 296p/kg. In Ballymena this week 1,802 lambs sold from 275-336p/kg compared to 1,999 lambs last week selling from 268-318p/kg. In Armoy an entry of 344 fat lambs sold from 270-315p/kg compared to 324 fat lambs last week selling from 285-324p/kg.

LATEST SHEEP MARTS

From: 27/11/15		Lambs (P/KG LW)			
To: 03/12/15		No	From	To	Avg
Friday	Newtownstewart	488	270	305	-
Saturday	Omagh	1272	296	326	-
	Swatragh	795	269	326	300
Monday	Massereene	903	290	315	-
	Kilrea	560	280	295	-
Tuesday	Saintfield	350	280	335	-
	Rathfriland	915	266	340	295
Wednesday	Ballymena	1802	275	336	290
	Enniskillen	728	292	314	302
	Markethill	980	280	314	290
	Armoy	344	270	315	295

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