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INCREASE IN VALUE OF RED MEAT SALES

DURING the 12 week period ending 10 September 2017 total meat sales in NI were valued at £63.7 million according to the latest available data from Kantar Worldpanel. This is a two per cent increase from the corresponding period in 2016 when meat sales in the region were valued at £62.5 million.

This increase in the value of total meat sales has occurred despite the volume of meat sales in NI holding relatively steady between the two periods. During the 2017 period 10,458 tonnes of meat were sold in NI compared to 10,432 tonnes during the same period in 2016.

Red meat sales in NI were valued at £28.5 million in the 12 weeks ending 10 September 2017, accounting for 45 per cent of total meat sales in terms of value. This share of total meat sales was unchanged from the same period in 2016 when red meat sales were valued at £28.3 million. This accounts for a one per cent increase in the value of beef sales year on year.

The volume of red meat sales in NI totalled 3,598 tonnes during the 12 weeks ending 10 September 2017, a one per cent decline from 3,640 tonnes during the same period in 2016. Beef continues to account for the largest proportion of red meat sales in NI.

Beef sales in NI during the 12 weeks ending 10 September 2017 were valued at £24.5 million, a slight decline from £24.6 million during the corresponding period in 2016 as outlined in Figure 1. The volume of beef sales also recorded a slight decline, back from 3,208 tonnes in the 2016 period to 3,141 tonnes in the 2017 period. This accounts for a two per cent decline year on year.

Some of the decline in volume sales of beef in NI has been offset by an increase in household penetration. During the 2017 period 83.3 per cent of NI households purchased beef compared to 81.4 per cent in the same period on 2016.

This increase in household penetration has occurred despite an increase in the average retail price from £7.66/kg in the 2016 period to £7.80/kg in the 2017 period. The average spend per buyer on beef however has declined marginally from £41.10 in the 2016 period to £39.90 in the 2017 period.

Retail lamb sales in NI during the 12 weeks ending 10 September 2017 were valued at £4.1 million, a 10 per cent increase from the corresponding period in 2016 when they were valued at £3.7 million. This increase in the total value of lamb sales has been supported by a six per cent increase in the volume of lamb sales in NI year on year. However despite this improvement in both the value and volume of lamb sales in NI the overall market share of lamb in NI remains relatively small.

Household penetration for lamb in NI was 28.4 per cent during the 12 weeks ending 10 September 2017, back from 30.6 per cent during the corresponding period in 2016. This decline in household penetration however was offset by an increase in the average spend per shopper. In the 2016 period the average spend was £16.50 and this increased to £19.50 in the 2017 period.

The average retail price of lamb increased from £8.58 in the 2016 period to £8.93 in the 2017 period. This four per cent increase in the average retail price may have contributed to the decline in the number of shoppers purchasing lamb.

Figure 1: Total value of red meat sales Jun- Sept 2015-2017 ('000's)

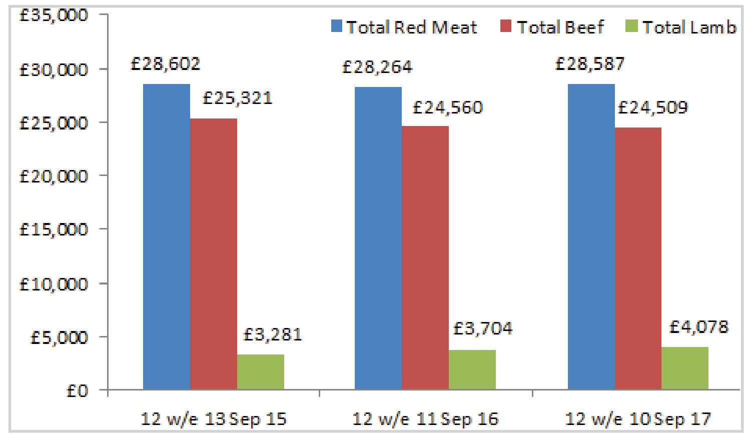
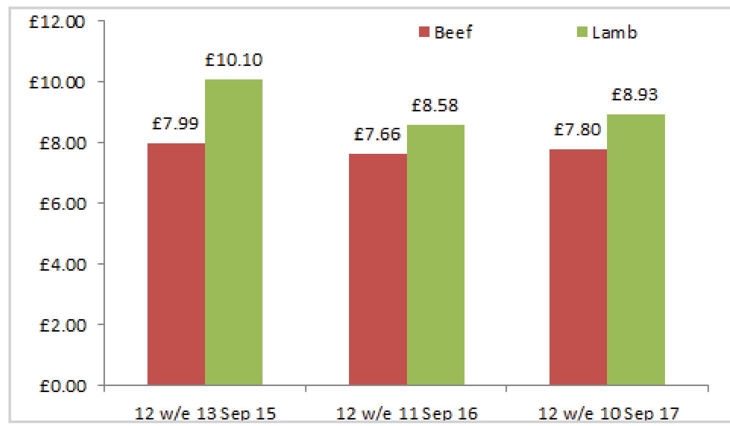


Figure 2: Average retail price of beef and lamb Jun-Sept 2015-2017(p/kg)



STRONG INCREASE IN NI LAMB THROUGHPUT LAST WEEK

THERE was a strong increase in lamb throughput in local plants last week with 12,161 lambs processed. This was an increase of 2,542 head from the previous week and accounted for a 26 per cent increase. This brought the weekly lamb throughput in local plants to its highest recorded level for the year to date.

Figure 3 outlines weekly lamb throughput in NI plants from January 2016 until October 2017. As indicated in the chart lamb throughput in NI plants during summer 2017 has been very changeable from week to week but has generally been running lower than 2016 levels. The strong increase in slaughterings last week brought throughput above the corresponding week last year when 10,210 lambs were processed.

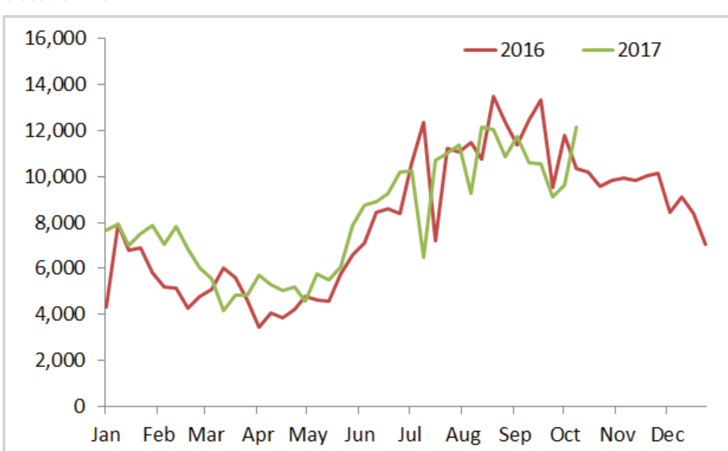
Lamb throughput in NI plants during the 12 week period ending 14 October 2017 totalled 141,194 head. This is a reduction of 8,260 head from the same period in 2016 when 149,454 lambs were killed locally. This accounted for a six per cent decline year on year.

ROI continues to act as a valuable outlet for NI origin lambs with 7,724 lambs exported to the region for direct slaughter last week. This was an increase of 1,436 head from the previous week when 6,288 lambs were exported to ROI plants for direct slaughter. This accounts for a 23 per cent increase.

During the 12 week period ending 14 October 2017 91,510 lambs were exported from NI to ROI for direct slaughter. This was similar to the corresponding period in 2016 when 90,823 lambs were exported to processing plants in ROI. These lambs accounted for 39 per cent of total lamb output from NI during the 2017 period, a slight increase from 38 per cent in the same period last year.

Total lamb output from the NI sheep flock during the 12 weeks ending 14 October 2017 totalled 232,704 head. This is a three per cent decline from the same period in 2016.

Figure 3: Weekly lamb throughput in NI plants from January 2016 to October 2017



NO CHANGE IN FAT CLASS SCORES OF PRIME CATTLE

PRIME cattle throughput in NI totalled 76,560 head during Q3 of 2017. This was an increase of 5,546 head from the corresponding period in 2016 when 71,014 prime cattle were killed in local plants. This accounts for an 8 per cent increase in throughput year on year.

While there has been an increase in the number of prime cattle being killed in local plants there has been little or no change in the fat class scores achieved during Q3 2017 when compared to the same period in 2016 as indicated in Tables 1-3 below.

During the 2017 period 85 per cent of price reported heifers achieved a 3 or 4 for fat cover. This was unchanged from the corresponding period in 2016. Meanwhile 77 per cent of steers achieved a 3 or 4 for fat cover in Q3 2017, back marginally from 78 per cent in the 2016 period.

A slight improvement was recorded in the fat scores achieved by price reported young bulls as indicated in Table 3. The proportion achieving a fat class 3 increased by three percentage points to account for 37 per cent of the kill. The proportion of young bulls achieving a fat class 2 was unchanged at 52 per cent while the proportion awarded a fat class 1 decreased by three percentage points to 9 per cent.

Table 1: Fat class scores achieved by NI heifer kill during Q3 2016 and 2017

Year	1	2	3	4	5
2016	2%	11%	44%	41%	3%
2017	2%	10%	44%	41%	3%

Table 2: Fat class scores achieved by NI steer kill during Q3 2016 and 2017

Year	1	2	3	4	5
2016	2%	20%	56%	22%	0%
2017	2%	20%	56%	21%	0%

Table 3: Fat class scores achieved by NI young bull kill during Q3 2016 and 2017

Year	1	2	3	4	5
2016	12%	52%	34%	2%	0%
2017	9%	52%	37%	2%	0%

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WEEKLY BEEF & LAMB MARKETS

LMC

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 16/10/17	Next Week 23/10/17
Prime		
U-3	348 - 354p	348 - 354p
R-3	342 - 348p	342 - 348p
O+3	336 - 342p	336 - 342p
P+3	288 - 306p	288 - 306p
	Including bonus where applicable	
Cows		
O+3 & better	260 - 280p	260 - 280p
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 NI CATTLE PRICES - P/KG

W/E 14/10/17	Steers	Heifers	Young Bulls
U3	357.3	360.3	349.4
R3	353.5	354.8	347.3
O+3	345.1	346.0	338.5

Prices for w/e 30/09/2017 were unavailable at time of publication. *Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 14/10/17	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	175.0	188.7	198.4	214.5
P2	197.5	216.2	234.2	247.0
P3	186.1	240.7	252.3	257.9
O3	240.0	248.9	266.7	275.7
O4	-	277.6	276.5	279.2
R3	-	-	-	295.1

Deadweight Cattle Trade

QUOTES from the major NI processing plants this week for U-3 grade prime cattle held steady at 348-354p/kg. The majority of plants are quoting 352p/kg for both steers and heifers. Quotes for good quality O+3 grading cows ranged from 260-280p/kg this week. Similar quotes for all types of cattle are expected for early next week.

Prime cattle throughput in NI last week totalled 6,861 head. This was a reduction of 157 head from the previous week when 7,018 prime cattle were killed in local plants. In the same week last year 6,740 prime cattle were killed locally. Cow throughput in NI last week was back marginally from the previous week at 2,405 head and was just above the 2,313 cows killed in local plants in the same week last year.

Imports of prime cattle from ROI for direct slaughter in local plants last week totalled 101 head with a further 7 prime cattle imported from GB. These imported cattle accounted for two per cent of total prime cattle throughput in NI plants. Cow imports from ROI for direct slaughter last week totalled 39 head with a further 134 cows imported from GB. These imported cows accounted for seven per cent of total cow throughput last week.

Prime cattle exports from NI to GB last week totalled 164 head. This was an increase of 39 head from the previous week and is the highest weekly level of export since October 2016. Cow exports out of NI for direct slaughter totalled 240 head last week with 214 head destined for processing plants in ROI and the remaining 26 exported to plants in GB.

The deadweight trade for steers and heifers held relatively steady in NI last week with the majority of reported prices within a penny of the previous week. The average steer price in NI last week was 347.7p/kg, back half a penny from the previous week. The R3 steer price increased by half a penny last week to 358.4p/kg. The average heifer price in NI last week was up 1.3p/kg to 349.7p/kg while the R3 heifer price was unchanged at 357p/kg. The young bull trade came under some pressure in NI last week with the average price back by 2.6p/kg to 335.5p/kg. The U3 young bull price was back by 2.9p/kg to 348.9p/kg while the R3 price was back by 3.5p/kg to 347.2p/kg.

The deadweight trade in GB last week came under pressure across all of the regions. The average steer price was back 2.7p/kg to 365p/kg while the R3 steer price was back by a similar margin to 375.7p/kg. The average heifer price in GB last week was back 4.5p/kg to 364.6p/kg while the R3 heifer price was back by 2p/kg to 374.6p/kg.

Prices in ROI last week came under some pressure in euro terms however a firming in the value of euro against sterling meant prices were almost unchanged in sterling terms. The R3 steer price in ROI last week was the equivalent of 331p/kg while the R3 heifer price was 341.2p/kg. Both prices were within half a penny of the previous week.

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

W/E 14/10/2017		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	357.9	341.6	390.5	375.3	373.0	379.5	379.1
	R3	358.4	331.0	388.4	370.6	371.5	371.6	375.7
	R4	356.9	330.7	390.5	386.6	368.4	368.9	381.3
	O3	346.6	312.6	363.4	340.0	342.8	343.2	347.4
	AVG	347.7	-	385.0	362.7	355.8	353.8	365.0
Heifers	U3	360.5	352.6	396.1	382.8	379.6	378.8	384.6
	R3	357.0	341.2	388.1	369.1	371.0	367.8	374.6
	R4	353.5	340.6	388.4	374.5	371.9	366.2	376.2
	O3	349.0	327.2	364.6	334.6	340.8	349.8	347.8
	AVG	349.7	-	385.9	361.4	355.3	352.5	364.6
Young Bulls	U3	348.9	340.8	381.6	361.6	356.5	375.9	364.4
	R3	347.2	329.8	375.5	362.2	357.1	358.7	362.6
	O3	327.9	313.0	341.0	320.5	324.8	341.0	328.6
	AVG	335.5	-	366.3	348.4	336.7	340.4	345.8
Prime Cattle Price Reported		6274	-	6429	7282	6800	4566	25077
Cows	O3	273.8	282.6	281.0	267.6	272.1	270.0	271.5
	O4	279.0	283.0	280.4	267.4	274.2	265.8	271.6
	P2	236.4	257.0	241.9	220.2	226.5	224.1	226.6
	P3	254.8	274.0	245.0	245.9	236.1	247.3	241.2
	AVG	251.6	-	265.9	239.7	231.3	227.7	236.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.51p 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 14/10/17	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	210	225	216	180	208	195
Friesians	140	163	146	122	138	130
Heifers	200	220	209	164	198	181
Beef Cows	150	205	162	120	149	135
Dairy Cows	105	143	112	60	104	82
Store Cattle (p/kg)						
Bullocks up to 400kg	215	243	229	180	214	198
Bullocks 400kg - 500kg	205	223	214	170	204	187
Bullocks over 500kg	195	214	204	165	194	180
Heifers up to 450kg	200	215	208	170	204	188
Heifers over 450kg	195	219	207	170	194	181
Dropped Calves (£/head)						
Continental Bulls	245	320	280	140	242	200
Continental Heifers	180	300	225	80	178	130
Friesian Bulls	100	145	120	50	98	75
Holstein Bulls	26	45	35	15	25	20

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 16/10/17	Next Week 23/10/17
Lambs >21kg	365p	370p

REPORTED SHEEP PRICES

(P/KG)	W/E 30/09/17	W/E 07/10/17	W/E 14/10/17
NI Lambs L/W	331.9	313.5	325.2
NI Lambs D/W	366.6	359.5	356.4
GB Lambs D/W	380.1	382.5	389.7
ROI D/W	389.4	390.1	387.7

Deadweight Sheep Trade

QUOTES from the plants for R3 grading lambs ended this week at 370p/kg with plants paying up to 21kg. Similar quotes are expected for early next week. There was anuplift in throughput last week with 12,161 lambs killed in local plants, the highest weekly throughput in NI for the year to date. Exports of lambs to ROI for direct slaughter last week totalled 7,724 head. The average liveweight price improved this week to 325.2p/kg, an increase of 11.7p/kg from the previous week. The average deadweight price in NI last week was 356.4p/kg, back 3.1p/kg from the previous week. In ROI last week the average deadweight lamb price was the equivalent of 387.7p/kg, back 2.4p/kg from the previous week.

This week's marts

THE marts have reported steady numbers of lambs passing through the sale rings this week. In Saintfield on Tuesday 441 lambs sold from 322-414p/kg compared to 525 lambs last week selling from 300-345p/kg. In Rathfriland this week a sharper trade saw 694 lambs sold from 310-400p/kg (avg 335p/kg) compared to 1,000 lambs last week selling from 290-371p/kg (avg 320p/kg). In Ballymena this week a large entry of 2,005 lambs sold from 310-355p/kg (avg 324p/kg) compared to 1,679 lambs last week selling from 300-345p/kg (avg 318p/kg). In Markethill a firmer trade this week saw 1,320 lambs sold from 320-351p/kg compared to 1,450 lambs last week selling from 310-341p/kg. Top reported prices for cull ewes generally ranged from £80-95 across the marts this week.

LATEST SHEEP MARTS

From: 13/10/17		Lambs (P/KG LW)			
To: 19/10/17		No	From	To	Avg
Friday	Newtownstewart	100	307	325	-
Saturday	Omagh	1106	335	387	-
	Swatragh	600	314	413	-
Monday	Kilrea	200	327	347	-
	Massereene	612	320	342	-
Tuesday	Saintfield	441	322	414	-
	Rathfriland	694	310	400	335
Wednesday	Ballymena	2005	310	355	324
	Markethill	1320	320	351	-
	Armoy	414	315	365	-

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