

## NI BEEF INDUSTRY KEY PERFORMANCE INDICATORS (FEBRUARY SNAPSHOT)

**D**URING February 2018 the average prime cattle price in NI was 347.7p/kg compared to 340.9p/kg during February 2017. This increase by 6.8p/kg accounts for a two per cent increase year on year as outlined in Table 1. The R3 steer price in NI increased by a similar margin to 357.6p/kg during the 2018 period.

In GB the deadweight trade for prime cattle followed a similar trend to NI with the R3 steer price increasing by 1.6 per cent (5.8p/kg) to 364p/kg during February 2018. The differential in R3 steer prices between the regions was almost unchanged year on year.

Meanwhile in ROI the R3 steer price increased strongly in sterling terms to the equivalent of 342.8p/kg in February 2018. This 23.7p/kg increase from February 2017 levels accounted for a 7.4 per cent increase and much of this was driven by a strengthening in the value of euro against sterling. The differential in R3 steer prices between NI and ROI narrowed from 32.2p/kg in February 2017 to 14.8p/kg in February 2018.

Prime cattle slaughterings in NI during

February 2018 totalled 27,341 head, a 2.9 per cent increase from February 2017 levels when 26,575 prime cattle were slaughtered in local plants. The average carcass weight of prime cattle was 336.3kg during February 2018, up 4kg from February 2017 levels. Both of these factors have contributed to an increase in the volume of beef from prime cattle processed in NI during February 2018.

The firm trade for cows in NI continued during February 2018 with an average cow price of 265.4p/kg compared to 239.6p/kg during February 2017. This increase by 25.8p/kg accounts for a 10.8 per cent increase year on year.

Cow throughput in NI totalled 8,184 head during February 2018, a 5.6 per cent increase from February 2017 levels when 7,751 cows were killed in NI plants. There was however a slight decline in the average cow carcass weight in NI to 299kg (-2.4kg) in February 2018 which offset some of the increase in throughput.

During February 2018 766 cattle were imported into NI for direct slaughter, a notable decline from 1,789 cattle during February 2017. This decline was primarily

driven by a drop in the number of prime cattle being imported from ROI for slaughter in local plants. This decline in total imports was offset slightly by an increase in the number of cows being imported from GB for slaughter locally.

Cattle exports for direct slaughter during February 2018 totalled 905 head, an increase from February 2017 levels when 642 cattle were exported out of NI for direct slaughter. However while there was an increase year on year the number of cattle involved remains low in comparison to previous years.

There were 422,274 cattle for beef production aged between 12-30 months on NI farms at the end of February 2018, a marginal increase from February 2017 levels. The number of beef sired cattle in this age category recorded a 2.3 per cent increase to total 384,064 head during February 2018 while the number of dairy sired males declined by 16.8 per cent to total 38,210 head.

The euro strengthened from €1 = £0.853 in February 2017 to €1 = £0.884 in February 2018. This is a 3.7 per cent increase year on year.

Table 1: NI Beef Industry Key Performance Indicators (February Snapshot)			
	Feb-17	Feb-18	% Change
<b>Finished Cattle Prices (p/kg)</b>			
Average Prime Cattle Price	340.9	347.7	2.0%
Average Cow Price	239.6	265.4	10.8%
Average R3 Steer Price (NI)	351.3	357.6	1.8%
Average R3 Steer Price (ROI)	319.1	342.8	7.4%
Average R3 Steer Price (GB)	358.2	364.0	1.6%
<b>Slaughtering</b>			
Total Clean Slaughtering (Head)	26,575	27,341	2.9%
Total Cow Slaughtering (Head)	7,751	8,184	5.6%
Average Clean Carcass Weight (kg)	332.2	336.3	1.2%
Average Cow Carcass Weight (kg)	301.4	299.0	-0.8%
<b>Trade (Head)</b>			
Live Imports for Direct Slaughter	1,789	766	-57.2%
Live Exports for Direct Slaughter	642	905	41.0%
<b>Availability (Head)</b>			
No. Cattle on the Ground*	421,354	422,274	0.2%
Beef Sired	375,409	384,064	2.3%
Dairy Sired (Male Only)	45,945	38,210	-16.8%
<b>Calf Births Registrations (Head)</b>			
Calf Births	29,171	29,330	0.5%
Beef Sired	21,956	22,323	1.7%
Dairy Sired (Male Only)	7,215	7,007	-2.9%
<b>Euro / Stg Exchange Rate (€ / £)</b>			
	85.3	88.4	3.7%
* Aged between 12-30 mths (Beef + Dairy Male Only)			
<b>All NI Figures Unless Otherwise Stated</b>			

# DIFFERENCE IN BEEF SIRES USED IN NI SUCKLER AND DAIRY HERDS

**D**URING the first two months of 2018 there were 45,324 beef sired calves registered in NI compared to 46,597 head during the corresponding two month period in 2017. This accounts for a 2.7 per cent decline year on year. Most of this decline in beef calf registrations year on year has been from the NI suckler herd with the number of beef sired registrations to dairy cows holding steady.

During the first two months of 2018 beef cross calves accounted for 51 per cent of total beef sired calf registrations in NI, up marginally from 50 per cent of total beef sired registrations in the same period in 2017. There are however key differences in the breed of beef bulls being used between the suckler and dairy herds in NI.

The most popular breed of calf registered to suckler cows during the first two months of 2018 was Charolais as indicated in Figure 1. Charolais calves accounted for 33 per cent of total registrations to suckler cows during 2018 to date, a proportion unchanged from year earlier levels.

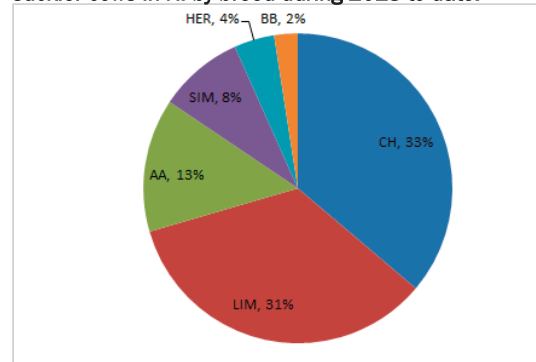
Limousin was a close second during the first two months of 2018 and accounted for 31 per cent of calf registrations to suckler cows, this

was back marginally from 32 per cent of total registrations to suckler cows during the same period in 2017. Meanwhile 13 per cent of calves registered to suckler cows in 2018 to date were Aberdeen Angus, up from 11 per cent of registrations during the corresponding period in 2017.

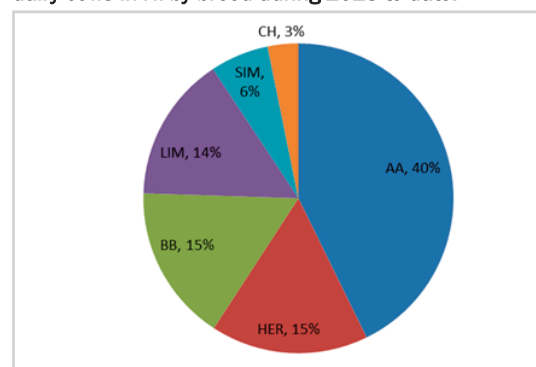
The most popular beef breed of calf registered to a dairy dam was Aberdeen Angus during the first two months of 2018, as outlined in Figure 2. Aberdeen Angus calves accounted for 40 per cent of beef calf registrations to dairy cows during this period, up from 38 per cent during the same period in 2017. Hereford was the second most popular beef sire used on dairy cows and accounted for 15 per cent of registrations during 2018 to date. This was back marginally from 16 per cent during the same period in 2017.

Belgian Blue calves accounted for a further 15 per cent of beef sired registrations to dairy cows during 2018 to date, also back marginally from the same period in 2017. Meanwhile Limousin calf registrations to dairy cows accounted for 14 per cent of total registrations during the first two months of 2018, back from 16 per cent during the corresponding period in 2017.

**Figure 1: Proportion of beef sired calf registrations to suckler cows in NI by breed during 2018 to date.**



**Figure 2: Proportion of beef sired calf registrations to dairy cows in NI by breed during 2018 to date.**



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# WEEKLY BEEF & LAMB MARKETS



## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 12/03/18	Next Week 19/03/18
<b>Prime</b>		
U-3	348 - 358p	350 - 358p
R-3	342 - 352p	344 - 352p
O+3	336 - 346p	338 - 346p
P+3	290 - 308p	292 - 308p
	Including bonus where applicable	
<b>Cows</b>		
O+3 & better	260 - 284p	260 - 290p
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 10/03/18	Steers	Heifers	Young Bulls
U3	360.3	361.8	348.0
R3	355.1	356.9	346.1
O+3	348.8	346.8	332.0

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 10/03/18	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	186.1	196.3	211.9	222.5
P2	205.2	232.7	246.4	259.0
P3	191.1	249.8	261.6	268.7
O3	-	262.5	275.7	289.9
O4	-	250.0	280.4	289.6
R3	-	-	320.0	309.5

## Deadweight Cattle Trade

The deadweight cattle trade remained steady this week with base quotes from the major NI processors for in spec U-3 grade prime cattle ranging from 348-358p/kg. Quotes early next week are expected to be in the region of 350-358p/kg. The trade for good quality O+3 grade cows ranged from 260-290p/kg across the plants this week. Similar quotes are expected for cows next week.

Prime cattle throughput in NI plants last week totalled 6,451 head, an increase of 338 head from the previous week and 98 head lower than the 6,549 prime cattle slaughtered in the corresponding week in 2017. Meanwhile a total of 2,081 cows were killed in NI plants last week, an increase of 311 from the previous week. This is 78 head higher than the 2,003 cows slaughtered in NI plants in the same week in 2017.

Prime cattle imports from ROI for direct slaughter in NI plants last week totalled 117 head, with 32 cows imported for direct slaughter from ROI, in comparison to the corresponding week in 2017 were 168 prime cattle and 62 cows were imported from ROI. Meanwhile 18 prime cattle and 193 cows were imported from GB last week compared to 5 prime cattle and 94 cows in the corresponding week in 2017. Exports from NI to ROI included 114 prime cattle with a total of 88 cows exported to ROI.

The deadweight trade for prime cattle in NI last week strengthened with the average steer price up 0.6p/kg to 349.3p/kg, the R3 steer price also increased by 2.4p/kg to 358.5p/kg. The average heifer price in NI last week was almost unchanged at 350.2p/kg while the R3 heifer price increased by 0.7p/kg to 358.0p/kg. The cow trade in NI firmed last week with the average cow price reported up by 3.8p/kg to 271.0p/kg while the O3 cow price increased by 2.6p/kg to 288.2p/kg. The average young bull price in NI last week was almost unchanged at 330.1p/kg.

In GB last week the average steer price was back slightly by 0.2p/kg to 355.7p/kg while the average R3 steer price was unchanged at 363.9p/kg. The differential in R3 steer prices last week between NI and GB was 5.4p/kg or £19 on a 350kg carcass. The average heifer price in GB last week was up marginally by 0.3p/kg to 359p/kg while the average R3 heifer price was back by 1.5p/kg to 365.3p/kg. This puts the differential in R3 heifer prices last week between NI and the GB average at 7.3p/kg or £23 on a 320kg carcass.

In ROI last week the deadweight cattle trade increased in both sterling and euro terms with a strengthening in euro against sterling. The R3 steer price in ROI last week was up by 2.8p/kg to 347.9p/kg this puts it 10.6p/kg behind the R3 steer price in NI. Meanwhile the R3 heifer price was up by 4.3p/kg to the equivalent of 359.6p/kg which puts it 1.6p/kg higher than the corresponding price in NI. The O3 cow price in ROI last week also recorded an increase of four pence to the equivalent of 294.9p/kg, 6.7p/kg higher than the same price in NI.

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

W/E 10/03/2018	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	361.7	357.9	372.6	367.7	369.5	370.5
	R3	358.5	347.9	368.8	362.8	362.9	363.9
	R4	359.3	350.4	370.4	372.1	360.9	367.3
	AVG	349.3	-	365.9	356.4	350.3	355.7
Heifers	U3	362.1	372.0	377.7	373.2	376.9	376.2
	R3	358.0	359.6	370.2	361.3	365.7	365.3
	R4	355.4	359.5	370.7	366.7	366.3	366.7
	AVG	347.6	343.6	351.6	335.3	337.1	341.7
Young Bulls	U3	348.2	349.4	361.6	350.2	367.5	358.8
	R3	344.3	340.0	359.9	344.1	356.4	354.3
	O3	326.5	325.2	325.2	306.2	325.5	320.3
	AVG	330.1	-	341.2	319.5	339.9	334.7
Prime Cattle Price Reported	5823	-	7062	7286	7540	4560	26448
Cows	O3	288.2	294.9	288.3	279.8	284.0	283.0
	O4	288.9	295.8	287.3	279.8	284.4	282.4
	P2	245.6	261.2	238.2	234.6	236.8	238.8
	P3	265.6	283.7	252.6	253.6	253.8	255.3
	AVG	271.0	-	272.3	256.3	252.1	256.1

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.22p 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

W/E 10/03/18	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>						
Steers	206	218	212	180	204	192
Friesians	158	182	170	131	152	146
Heifers	194	210	205	170	193	184
Beef Cows	153	207	167	120	152	135
Dairy Cows	115	134	125	70	114	95
<b>Store Cattle (p/kg)</b>						
Bullocks up to 400kg	240	286	255	200	239	220
Bullocks 400kg - 500kg	220	259	230	190	219	205
Bullocks over 500kg	195	220	210	165	194	180
Heifers up to 450kg	220	265	240	185	219	200
Heifers over 450kg	200	228	210	170	199	185
<b>Dropped Calves (£/head)</b>						
Continental Bulls	300	410	340	180	298	240
Continental Heifers	225	320	275	120	222	170
Friesian Bulls	120	185	150	60	118	85
Holstein Bulls	90	165	125	5	88	50

# SHEEP TRADE

## SHEEP BASE QUOTES

(P/Kg DW)	This Week 12/03/18	Next Week 19/03/18
Hoggets >22kg	500-510p	500-520p

## REPORTED SHEEP PRICES

(P/KG)	W/E 24/02/18	W/E 03/03/18	W/E 10/03/18
NI L/W Hoggets	402.4	421.6	458.9
NI D/W Hoggets	454.2	462.7	490.3
GB D/W Hoggets	486.3	493.9	506.8
ROI D/W	457.3	461.7	497.2

## Deadweight Sheep Trade

**T**HE deadweight hogget trade strengthened in NI this week with quotes for R3 grade hoggets ranging from 500-510p/kg with plants paying up to 22kg. Quotes for Monday are 500-520p/kg up to 22kg.

The processors have reported an increase in the number of hoggets coming forward for slaughter with throughput last week totalling 6,149 head compared to 5,896 head the previous week. In the corresponding week in 2017 hogget throughput totalled 5,565 head. Exports of sheep to ROI for direct slaughter last week totalled 7,264 head, an increase of 159 head from the previous week. The average deadweight hogget price in NI last week recorded a significant increase of 27.6p/kg to 490.3p/kg while the average deadweight hogget price in ROI last week strongly increased by the equivalent of 35.5p/kg to 497.2p/kg.

### This week's marts

**A** strong trade was reported across the marts this week with increasing numbers of hoggets passing through the sale rings compared to last week. In Swatragh last Saturday 900 hoggets sold from 421-509p/kg compared to 550 hoggets the previous week selling from 423-514p/kg. In Massereene on Monday 1369 hoggets sold from 450-520p/kg compared to 669 hoggets last week selling from 460-532p/kg. In Rathfriland on Tuesday 877 hoggets sold from 434-521p/kg (avg 457p/kg) compared to 595 hoggets last week selling from 400-515p/kg (avg 463p/kg). In Enniskillen on Wednesday 839 hoggets sold from 459-514p/kg compared to 585 hoggets last week selling from 452-496p/kg. The fat ewe trade remained firm this week with top reported prices ranging from £100-146.

## LATEST SHEEP MARTS

From: 09/03/18		Hoggets (P/KG LW)			
To: 15/03/18		No	From	To	Avg
Friday	Newtownstewart	85	398	447	-
Saturday	Omagh	1094	477	523	-
	Swatragh	900	421	509	-
Monday	Massereene	1369	450	520	-
	Kilrea	480	471	524	-
Tuesday	Saintfield	887	450	527	-
	Rathfriland	877	434	521	457
Wednesday	Ballymena	2341	430	518	460
	Enniskillen	839	459	514	-
	Armoy	474	440	500	-
	Markethill	1400	470	514	-

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