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HIGHER RETAIL PRICES IMPACTING BEEF AND LAMB SALES

DURING the twelve week period ending 25 February 2018 total retail expenditure on beef in the UK totalled £574.7 million according to the latest available data from Kantar Worldpanel. This was a 1.4 per cent decline from year earlier levels when UK retail beef sales were valued at £582.7 million.

The average retail price of beef during the 12 weeks ending 25 February 2018 was £7.83/kg. This was a slight increase from year earlier levels when the average retail price of beef was £7.80/kg

With the average price holding relatively steady the decline in the total value of beef sales year on year was driven primarily by a decline in volume sales. During the 12 week period ending 25 February 2018 73,360 tonnes of beef were sold in UK retailers, a 1.8 per cent decline from the corresponding period in 2016/17.

Figure 1 displays the percentage change in volume sales of beef by cut during the 12 week period ending 25 February 2018 when compared to the same period in 2016/17. The majority of major cuts recorded a decline in volume sales year on year however the most notable decline was in sales of beef roasting joints which were back by 7.5 per cent during the 12 weeks ending 25 February 2018. Sales of beef stewing steak recorded a 2.8 per cent decline over the same period while volume sales of burgers and grills declined by 1.2 per cent. There were also marginal declines recorded in volume sales of frying/grilling steaks and mince year on year.

However there was a more positive outlook for processed and value added beef products during the 12 week period ending 25 February 2018. Volume sales of beef marinades recorded a 17.6 per cent increase year on year while sales of frozen ready meals increased by 13.7 per cent. There was also volume growth for chilled ready meals, and pre packed pasties.

Lamb

Retail lamb sales in the UK were valued at 140.6 million during the 12 week period ending 25 February 2018, a 3.4 per cent decline from the same period in 2016/17.

The volume of lamb sold through UK retailers totalled 15,882 tonnes during the 12 week period ending 25 February 2018 according to the latest data from Kantar. This is a notable 8.1 per cent decline from year earlier levels when 17,168 tonnes of lamb were sold through UK retailers.

This sharp decline in lamb sales can be attributed in part to an increase in the average retail price which has impacted the frequency and weight of lamb purchases by UK consumers. During the 12 weeks ending 25 February 2018 the average lamb retail price was £8.85/kg, an increase of 38p/kg from the corresponding period in 2016/17.

There has been a decline in the volume sales of all the major lamb cuts as outlined in Figure 2. Sales of lamb mince recorded the strongest decline, back 11.5 per cent year on year. There were also strong declines recorded in the volume sales of lamb frying steaks/chops and shoulder roasting joints which were back by 9.9 per cent and 8 per cent respectively.

Pork

It is also useful to consider the performance of pork in the UK retail sector as it is a direct competitor for beef and lamb in the food aisles.

During the 12 weeks ending 25 February 2018 retail pork sales in the UK were valued at £177.8 million, up 1.1 per cent from year earlier levels. Volume sales of pork over the same period were back by 2.6 per cent to 37,463 tonnes which indicates that pork had an improved retail performance despite a slight increase in the average retail price.

There was a mixed performance for the major pork cuts with leg roasting joints and pork ribs performing strongly compared to the corresponding period in 2016/17 while pork chops, loin roasting joints and shoulder roasting joints recorded declines in volume sales.

Figure 1: Annual volume change in UK retail sales of beef by major cut during the 12 week period ending 25 February 2018 and the same period in 2016/17.

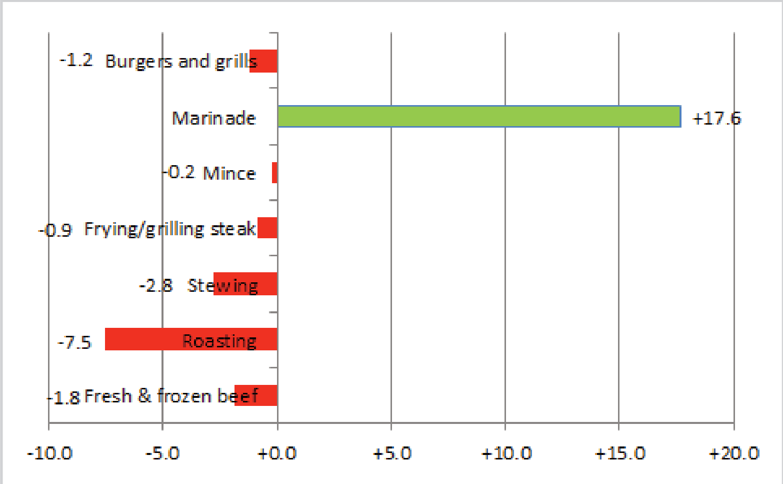
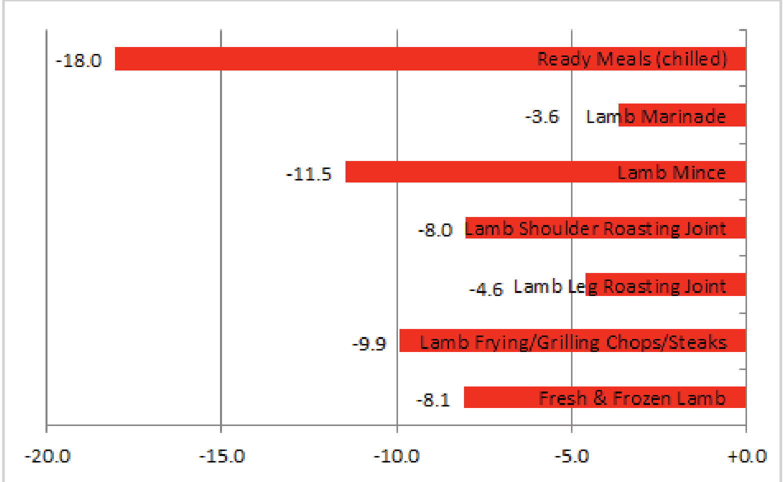


Figure 2: Annual volume change in UK retail sales of lamb by major cut during the 12 week period ending 25 February 2018 and the same period in 2016/17.



FQAS MART CLINICS APRIL 2018

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 above. For further information call (028) 9263 3024.

LOCATION	DAY	DATE
Saintfield	Wednesday	04/04/2018
Enniskillen	Thursday	12/04/2018
Omagh	Monday	16/04/2018
Markethill	Tuesday	17/04/2018
Kilrea	Wednesday	18/04/2018
Ballymena	Friday	27/04/2018

BVD ERADICATION SCHEME UPDATE

IN addition to movement restrictions placed on BVD PI cattle earlier this year an agreement has been reached with the Northern Ireland Meat Exporters Association (NIMEA) to ban PI cattle from slaughter plants. The ban, which comes into effect at NIMEA abattoirs from the **01 May 2018,** has full support from other industry organisations and is a significant step towards eradicating BVD in Northern Ireland. Retaining PI cattle presents a significant disease risk and it is delaying the progress of the BVD Eradication Programme in NI.

Producers with PI cattle currently on farm are encouraged to remove them as soon as possible as they pose a significant disease risk to both the producers own herd and to neighbouring herds. Animals can either be humanely destroyed and disposed of through the fallen stock scheme or if they are at least 12 months of age then they can be presented for slaughter in NIMEA plants before **01 May 2018.**

LMC EASTER HOLIDAY ANNOUNCEMENT

PLEASE NOTE THAT LMC OFFICES WILL BE CLOSED ON MONDAY 02 APRIL and TUESDAY 03 APRIL 2018 FOR THE EASTER HOLIDAYS

LMC OFFICES WILL REOPEN AS NORMAL ON WEDNESDAY 04 APRIL 2018

LMC Quarterly

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FQAS Helpline

If you have had a recent inspection and need help and advice to rectify any non-conformances, contact the FQAS helpline:
028 9263 3024

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WEEKLY BEEF & LAMB MARKETS

LMC

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 26/03/18	Next Week 02/04/18
Prime		
U-3	350 - 358p	350 - 358p
R-3	344 - 352p	344 - 352p
O+3	338 - 346p	338 - 346p
P+3	292 - 308p	292 - 308p
	Including bonus where applicable	
Cows		
O+3 & better	270 - 290p	270 - 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 24/03/18	Steers	Heifers	Young Bulls
U3	363.2	367.1	351.4
R3	358.3	359.5	346.2
O+3	349.4	349.7	341.0

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 24/03/18	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	190.4	205.5	218.0	221.8
P2	211.4	231.5	255.7	264.9
P3	218.7	252.0	268.8	272.7
O3	245.4	263.1	280.3	294.9
O4	232.0	-	293.8	295.9
R3	-	270.0	-	310.2

Deadweight Cattle Trade

QUOTES from the major processors for U-3 grade steers and heifers this week generally ranged from 352-358p/kg with one plant continuing to quote 350p/kg for steers and heifers. The trade for cows has also remained steady with quotes for good quality O+3 grade cows in the region of 270-290p/kg across the plants.

The processors have reported tighter supplies of prime cattle available for slaughter, throughput of prime cattle in NI last week decreased by 11 per cent to 5,831 head. In the corresponding week last year prime cattle throughput in NI totalled 6,576 head. Cow throughput in NI last week totalled 1,695 head and accounted for 22 per cent of total cattle throughput in local plants. This was similar to the same week last year when cow throughput in NI totalled 1,797 head and accounted for 21 per cent of total plant throughput.

Imports from ROI for direct slaughter last week consisted of 28 prime cattle and 13 cows, compared to 177 prime and 32 cows recorded in the corresponding week in 2017. Imports from GB last week for direct slaughter consisted of 1 heifer and 56 cows compared to 6 prime cattle and 90 cows imported during the same week last year. Exports from NI for direct slaughter in ROI last week included 93 prime cattle and 44 cows while there were 15 prime cattle exported to GB for slaughter last week.

The average steer price in NI last week was up by 0.8p/kg to 352.4p/kg while the R3 steer price was up by 2.2p/kg to 361.2p/kg. There was also an improvement in the heifer trade in NI last week with the average heifer price up by 3.7p/kg to 355p/kg while the R3 heifer price increased by 2.5p/kg to 361.2p/kg. The average young bull price also reported an increase by 3.9p/kg to 336.6p/kg however the R3 young bull price was back by 0.5p/kg to 346.3p/kg. Average cow prices reported a notable increase of 7.3p/kg to 274.8p/kg compared to the previous week's price of 267.5p/kg.

In GB last week prime cattle deadweight prices improved slightly. The average R3 steer price in GB was up by a 2.4p/kg last week to 367.7p/kg with the average steer price increasing by 1.1p/kg to 358.6p/kg. A similar trend was recorded in the deadweight heifer trade with R3 heifer price increasing by 2.3p/kg last week to 367.8p/kg with the overall average heifer price up by a penny to 359.2p/kg compared to the previous week's prices.

The deadweight cattle trade in ROI has held relatively steady this week in euro terms but a slight weakening in euro against sterling has meant deadweight prices are back in sterling terms. The R3 steer price was back 3.1p/kg to the equivalent of 343.1p/kg, compared to the previous week. The R3 heifer price recorded a similar decrease to the equivalent of 354.2p/kg last week. The cow trade was back by 1.6p/kg in ROI last week with an equivalent O3 cow price of 290p/kg.

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

	W/E 24/03/2018	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	364.1	352.5	370.4	369.5	371.6	373.8	371.2
	R3	361.2	343.1	373.0	366.1	366.1	365.5	367.7
	R4	361.6	343.9	373.3	372.4	364.5	367.0	369.9
	O3	351.0	327.3	353.7	340.9	335.9	341.4	342.8
	AVG	352.4	-	368.8	359.3	352.1	352.9	358.6
Heifers	U3	367.5	367.1	380.0	372.8	378.5	375.8	377.2
	R3	361.2	354.2	373.5	363.5	367.7	364.4	367.8
	R4	359.5	354.4	373.1	368.1	367.3	365.2	368.7
	O3	352.2	338.4	348.5	341.3	337.3	341.8	342.2
	AVG	355.0	-	370.9	359.3	354.2	351.1	359.2
Young Bulls	U3	351.9	346.8	367.5	358.3	371.2	361.5	364.2
	R3	346.3	336.1	357.7	348.8	356.6	356.6	354.2
	O3	333.4	320.6	330.1	318.1	327.1	334.0	325.4
	AVG	336.6	-	342.6	329.4	337.8	337.4	336.2
Prime Cattle Price Reported		5250	-	6582	7282	7085	4860	25809
Cows	O3	291.9	290.0	293.7	280.1	285.6	283.0	284.6
	O4	295.6	290.6	293.8	278.7	282.6	280.3	282.6
	P2	253.6	260.0	254.3	238.0	235.5	242.9	240.2
	P3	270.2	280.1	254.7	254.7	256.2	265.1	257.8
	AVG	274.8	-	284.4	256.2	253.6	250.6	257.0

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=87.44p 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 24/03/18	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	215	227	220	185	215	200
Friesians	152	158	154	129	150	141
Heifers	209	228	215	175	208	190
Beef Cows	150	193	165	120	149	135
Dairy Cows	120	140	128	70	119	95
Store Cattle (p/kg)						
Bullocks up to 400kg	230	264	250	195	229	212
Bullocks 400kg - 500kg	220	259	230	190	219	205
Bullocks over 500kg	200	225	212	170	199	185
Heifers up to 450kg	210	253	230	175	209	192
Heifers over 450kg	200	229	215	170	199	185
Dropped Calves (£/head)						
Continental Bulls	325	445	360	200	322	260
Continental Heifers	220	345	280	110	218	165
Friesian Bulls	150	265	175	100	148	125
Holstein Bulls	100	180	135	15	98	55

SHEEP TRADE

SHEEP BASE QUOTES		
(P/Kg DW)	This Week 26/03/18	Next Week 02/04/18
Hoggets >22kg	500-505p	475-500p

REPORTED SHEEP PRICES			
(P/KG)	W/E 10/03/18	W/E 17/03/18	W/E 24/03/18
NI L/W Hoggets	458.9	451.2	447.2
NI D/W Hoggets	490.3	514.2	519.7
GB D/W Hoggets	506.8	511.2	529.2
ROI D/W	497.2	507.7	506.4

Deadweight Sheep Trade

QUOTES from the major processors have remained steady this week at 500-505p/kg for R3 grade hoggets up to 22kg. A total of 6,164 hoggets/lambs were killed locally last week, up 7.6 per cent from the previous week when throughput totalled 5,729 head. Exports of hoggets /lambs to ROI last week for direct slaughter totalled 6,976 head, a decline of 21 per cent on the previous week. A total of 109,332 sheep have been exported to ROI for direct slaughter during 2018 to date, up 13 per cent on 2017 figures. The deadweight hogget price in NI last week was 519.7p/kg, up 5.5p/kg from the previous week. Last week in NI small numbers of spring lambs were reported with an average deadweight price of 581.5p/kg. In ROI last week the reported deadweight price was the equivalent of 506.4p/kg, back 1.3p/kg from the previous week.

This week's marts

THE marts have reported smaller numbers passing through the sale rings this week. In Omagh last Saturday 996 hoggets sold from 459-508p/kg compared to 672 hoggets the previous week selling from 444-488p/kg. In Massereene on Monday 890 hoggets sold from 450-510p/kg compared to 806 hoggets last week selling from 460-536p/kg. In Rathfriland this week 516 hoggets sold to an average of 448p/kg compared to 610 hoggets last week selling to an average of 467p/kg. In Markethill this week 850 hoggets sold from 430-482p/kg compared to 1,150 hoggets last week selling from 440-513p/kg. Small numbers of spring lambs have passed through several of the marts this week with liveweight prices ranging from 480-577p/kg. The cull ewe trade remains firm with top reported prices of over £100 in several of the marts.

LATEST SHEEP MARTS					
From: 23/03/18		Hoggets (P/KG LW)			
To: 29/03/18		No	From	To	Avg
Friday	Newtownstewart	102	400	476	-
Saturday	Swatragh	800	412	508	-
	Omagh	996	459	508	-
Monday	Massereene	890	450	510	-
	Kilrea	400	448	516	-
Tuesday	Saintfield	490	400	480	-
	Rathfriland	516	400	510	448
Wednesday	Ballymena	516	400	510	440
	Enniskillen	842	430	482	-
	Armoy	364	400	460	-
	Markethill	850	430	482	-

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