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NI BEEF KEY PERFORMANCE INDICATORS

THE average prime cattle price in NI during April 2018 was 353.8p/kg, an increase of 9.6p/kg from April 2017 when the average prime cattle price was 344.2p/kg. This accounts for a 2.8 per cent increase year on year.

The R3 steer price in NI during April 2018 was 364.6p/kg, a 8.6p/kg increase from April 2017 when the R3 steer price was 356p/kg. In ROI the R3 steer price increased by the equivalent of 12.2p/kg to 346.6p/kg during April 2018 while in GB the R3 steer price was up 14.4p/kg to 372.1p/kg. The differential in R3 steer prices between NI and GB widened from 1.7p/kg in April 2017 to 7.5p/kg in April 2018. Meanwhile the differential in R3 steer prices between ROI and NI narrowed from 21.6p/kg in April 2017 to 18p/kg in April 2018.

Clean cattle throughput in NI during April 2018 totalled 26,821 head, a 10.5 per cent increase from year earlier levels. There was also a notable 36.4 per cent increase in cow throughput with 8,031 cows killed, up from 5,886 head in April 2017. Some of this increase can be attributed to Easter falling in March this year while it was in April last year.

Average carcase weights increased for all classes of cattle slaughtered in NI with the prime carcase weight up by 2kg to 332.6kg (+0.6 per cent) while the cow carcase weight increased by 0.5kg to 295.4kg (+0.2 per cent) during April 2018.

Cattle imports for direct slaughter in local plants totalled 661 head during April 2018, a notable 60.9 per cent decline from the 1,689 cattle imported during April 2017. The number of cows imported from GB increased during April 2018 while cattle imports from ROI recorded a decline. Meanwhile cattle exports from NI for direct slaughter totalled 726 head during April 2018, back marginally from the 741 head exported during April 2017.

The number of beef sired cattle on NI farms aged between 12 and 18 months increased marginally to total 477,048 head in April 2018. The number of beef sired cattle increased by 2.1 per cent to total 441,474 head while the number of dairy sired males in this age category declined by 16.7 per cent to total 35,574 head.

Beef sired calf registrations in NI totalled 49,454 head during April 2018, a 4.9 per cent decline from the 51,997 calves registered in the region during April 2017. There was however a slight increase in the number of dairy sired male calves registered to 5,662 head in April 2018. This was a 5.9 per cent increase from 5,349 calves registered during April 2017.

The euro continued to trade strongly against sterling during April 2018 with €1 = 87.2p. This was a 2.8 per cent increase from April 2017 when €1 = 84.8p

NI Beef Industry Key Performance Indicators (April Snapshot)	Apr-17	Apr-18	% Change
Finished Cattle Prices (p/kg)			
Average Prime Cattle Price	344.2	353.8	2.8%
Average Cow Price	245.3	274.5	11.9%
Average R3 Steer Price (NI)	356.0	364.6	2.4%
Average R3 Steer Price (ROI)	334.4	346.6	3.6%
Average R3 Steer Price (GB)	357.7	372.1	4.0%
Slaughterings			
Total Clean Slaughterings (Head)	24,264	26,821	10.5%
Total Cow Slaughterings (Head)	5,886	8,031	36.4%
Average Clean Carcase Weight (kg)	330.6	332.6	0.6%
Average Cow Carcase Weight (kg)	294.9	295.4	0.2%
Trade (Head)			
Live Imports for Direct Slaughter	1,689	661	-60.9%
Live Exports for Direct Slaughter	741	726	-2.0%
Availability (Head)			
No. Cattle on the Ground*	475,094	477,048	0.4%
Beef Sired	432,400	441,474	2.1%
Dairy Sired (Male Only)	42,694	35,574	-16.7%
Calf Births Registrations (Head)			
Calf Births	57,346	55,113	-3.9%
Beef Sired	51,997	49,451	-4.9%
Dairy Sired (Male Only)	5,349	5,662	5.9%
Euro / Stg Exchange Rate (€ / £)	84.8	87.2	2.8%

* Aged between 12-30 mths (Beef + Dairy Male Only)
All NI Figures Unless Otherwise Stated

HOUSE OF LORDS SEEKS A FOOD SECURITY POLICY

A House of Lords Report issued this week reccomends that the UK Government formulates a food security policy in advance of Brexit. This follows on from a House of Lords' inquiry into the effect that the UK's departure from the EU will have on food prices and food availability.

The report concludes that food security policy was urgently needed because there are too many uncertainties around what kind of deal would be struck between the two parties when the UK finally leaves. Just half of the food currently consumed in the UK is produced in the country.

Most of the rest comes from the EU with another 11% specifically from non-EU countries under the terms of trade deals negotiated by the EU. Being part of the EU customs union has meant food from the EU can be imported with no tariffs or customs barriers but, as part of leaving the EU, the Government has stated that the UK will be leaving the customs union.

The report outlines that if an agreement cannot be negotiated between the UK and EU prior to Brexit the result will be an average tariff on food imports of 22%. To counteract this the Government could cut tariffs on all food imports, EU and non-EU, however this would pose a serious risk of undermining UK food producers who could not compete on price.

The committee further concluded that non-tariff barriers resulting from Brexit could also have significant effect, despite the Government claiming that it can secure an agreement that would allow 'frictionless' imports of food from the EU to continue.

"It is unclear how that would be possible outside of the customs union," the report states. "Any such agreement would be likely to require the UK to mirror all EU standards and regulations; a condition the UK Government may find politically difficult to accept. If no agreement is reached, and food imports from the EU are subject to the same customs and border checks as non-EU imports, the UK does not have the staff, IT systems or physical infrastructure to meet that increased demand," the report points out.

The Government's proposed alternative - to allow EU imports through with no, or very few, checks – was rejected by the committee because it would raise safety concerns as well as questions over how customs charges would be processed. Along with securing a good deal with the EU, the committee notes that the Government must also secure agreements with the non-EU countries from which the UK currently imports food as part of EU trade agreements. There are currently 40 such agreements in place, covering 56 countries and accounting for more than 11% of UK food imports.

The Government may not be worried about the potential for Brexit to impact on the price and availability of food, but the representatives of the food and farming industry, importers, port authorities and consumer organisations involved in the construction of the report were vocal in their concerns," the Lords' report makes clear.

MORE OLDER CATTLE ON NI FARMS IN APRIL 2018

REPORTS from the plants in recent weeks have indicated a tightening in the supply of prime cattle for slaughter while demand for beef from major retailer and foodservice companies has remained relatively stable.

Forage shortages on many farms during late 2017/early 2018 will have impacted production decisions on many beef finishing farms in NI. While some producers will have increased concentrate feeding to push cattle to finish other finishers have opted to turn cattle back out to grass and finish them later in the year.

Analysis of APHIS figures for the end of April 2018 confirm this and indicate an increase in the number of cattle for beef production on NI farms aged 24-30 months in comparison to previous years. There were 125,108 beef sired and dairy male cattle in this age group in April 2018, up 7.8 per cent from year earlier levels and up 14.9 per cent from April 2016 levels.
Meanwhile the number of cattle for beef production in the 18-24 month age bracket totalled 121,714 head, back 5 per cent from 128,087 cattle in this age group on NI farms in April 2017. Numbers however were up marginally from the 120,194 cattle in this age group on NI farms in April 2016. These are the cattle that will provide throughput for local processors over the next six months so it is likely that cattle supplies will remain relatively tight until later in the year.

APHIS statistics recorded 230,226 cattle in the 12-18 month age category on NI farms in April 2018. This was similar to April 2017 levels however they were almost 9 per cent higher than April 2016 levels. Cattle in this age category currently on NI farms will mostly provide throughput for the processors in the final quarter of the year and into early 2019. Prime cattle throughput in local processors was relatively strong in the last quarter of 2017 and a similar trend is being expected this year.

Strong cow throughput in local processing plants over the last year was reflected in the DAERA agricultural census in December 2017 where suckler cow numbers were back two per cent and dairy cow numbers remained stable.

The higher cow throughput has also been reflected by a slight decline in calf registrations in NI with a drop in the number of younger cattle on NI farms as a result. APHIS figures for April 2018 recorded 157,327 cattle aged 6-12 months on NI farms, back 1.7 per cent from April 2017 levels. Meanwhile the number of cattle in the 0-6 month age bracket in April 2018 totalled 158,991 head, a 6.6 per cent decline from year earlier levels.

WEEKLY BEEF & LAMB MARKETS

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 07/05/18	Next Week 14/05/18
Prime		
U-3	356 - 360p	356 - 360p
R-3	350 - 354p	350 - 354p
O+3	344 - 348p	344 - 348p
P+3	298 - 310p	298 - 310p
	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 05/05/18	Steers	Heifers	Young Bulls
U3	368.2	370.3	360.2
R3	363.4	363.5	356.9
O+3	355.8	354.4	343.8

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 05/05/18	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	192.1	204.9	217.8	231.7
P2	213.2	236.0	254.3	269.1
P3	202.8	248.5	269.5	276.7
O3	-	267.8	294.7	298.0
O4	-	280.0	297.2	296.5
R3	-	-	-	315.7

Deadweight Cattle Trade

THE deadweight trade for prime cattle in NI has remained firm with base quotes for prime cattle ranging from 356-360p/kg across the major plants. The cow trade has also remained firm in NI with base quotes for good quality O+3 grading cows ranging from 270-290p/kg. Similar quotes are expected for all types of cattle early next week.

Reports have indicated slightly tighter supplies of both prime cattle and cows available for slaughter. Prime cattle throughput in NI last week totalled 6,780 head. This was back from the 7,269 prime cattle killed locally during the previous week. Cow throughput in NI last week totalled 1,802 head, back from 1,929 cows killed during the previous week.

Imports of prime cattle from ROI for direct slaughter in NI last week totalled 36 head with 10 cows also imported. A further 4 prime cattle and 102 cows were imported from GB for direct slaughter in NI plants last week. Meanwhile 60 prime cattle and 116 cows were exported from NI for direct slaughter in ROI last week with no cattle making the journey to GB for direct slaughter.

The R3 steer price in NI last week was back 0.7p/kg from the previous week to 365.5p/kg. In the corresponding week last year the R3 steer price in NI was 357.5p/kg. The overall average steer price was up by 1.7p/kg to 357.9p/kg. The R3 heifer price in NI last week remained unchanged at 366p/kg. In the corresponding week in 2017 the R3 heifer price in NI was 357.4p/kg. The young bull trade has also continued to improve in NI with an overall average price of 347.1p/kg last week, up 4.3p/kg from the previous week. The O3 cow price increased by 2.6p/kg from the previous week to 296.6p/kg, while the overall average cow price was back by 1.4p/kg to 275.2p/kg.

The deadweight trade for prime cattle has also continued to firm in GB with the average R3 steer price up marginally to 373.8p/kg. The R3 steer price improved in all the GB regions with the exception of Scotland where it was back by 0.4p/kg to 384.5p/kg. The differential in R3 steer prices between NI and the GB average widened a penny from the previous week to 8.3p/kg last week. The average R3 heifer price in GB last week was 375p/kg, up 1.3p/kg from the previous week. This increase was driven by improvements in all of the GB regions. The differential in R3 heifer prices between NI and GB last week also widened to 9p/kg.

In ROI deadweight prices continued to strengthen in both sterling and euros terms. Last week the R3 steer price was the equivalent of 356.2p/kg, up 4.8p/kg from the previous week. This puts the differential between ROI and NI at 9.3p/kg or £33 on a 350kg carcase. The R3 heifer price in ROI last week was the equivalent of 366.5p/kg, up 5.4p/kg from the previous week. This puts the ROI price 0.5p/kg higher than NI R3 heifer price. The O3 cow price in ROI also recorded an increase of 4.3p/kg to the equivalent of 302.5p/kg, 5.9p/kg higher than the same price in NI.

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

W/E 05/05/2018		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	368.5	367.4	384.5	376.5	373.3	378.0	377.8
	R3	365.5	356.2	384.5	370.0	369.6	371.2	373.8
	R4	366.9	358.4	386.6	380.2	370.1	372.4	378.1
	O3	355.8	341.1	360.6	345.1	340.0	348.7	348.4
	AVG	357.9	-	380.4	363.2	356.5	358.7	364.8
Heifers	U3	370.7	379.1	389.6	378.8	382.5	381.4	383.3
	R3	366.0	366.5	382.9	371.7	373.7	370.1	375.0
	R4	363.1	367.7	384.9	376.0	373.1	370.0	376.5
	O3	356.7	351.5	366.3	349.6	345.0	350.7	352.9
	AVG	357.2	-	382.3	365.5	359.4	357.3	366.6
Young Bulls	U3	360.3	363.7	378.8	365.2	370.3	369.4	370.1
	R3	356.9	353.7	370.2	356.8	359.4	362.8	361.1
	O3	338.0	335.4	336.6	318.4	328.8	334.6	327.4
	AVG	347.1	-	362.7	339.0	339.2	353.1	345.8
Prime Cattle Price Reported		6234	-	6470	7335	7342	5044	26191
Cows	O3	296.6	302.5	299.1	282.9	285.4	287.2	286.7
	O4	296.5	302.7	299.8	285.5	286.2	283.2	287.0
	P2	256.5	271.2	257.2	239.0	235.5	241.4	240.1
	P3	273.4	292.1	264.4	260.0	251.4	266.0	257.3
	AVG	275.2	-	290.1	262.5	250.8	253.3	258.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.10p 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 05/05/18	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	214	230	219	185	212	200
Friesians	164	170	167	134	163	149
Heifers	213	233	219	180	210	195
Beef Cows	156	208	170	125	155	140
Dairy Cows	120	149	128	75	119	102
Store Cattle (p/kg)						
Bullocks up to 400kg	230	269	250	200	229	215
Bullocks 400kg - 500kg	220	254	232	190	219	202
Bullocks over 500kg	215	235	220	180	214	195
Heifers up to 450kg	220	246	230	180	219	200
Heifers over 450kg	215	236	225	175	214	195
Dropped Calves (£/head)						
Continental Bulls	300	420	350	190	298	235
Continental Heifers	270	420	300	150	268	200
Friesian Bulls	90	140	115	40	88	65
Holstein Bulls	30	60	45	1	28	15

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 07/05/18	Next Week 14/05/18
Hoggets >22kg	530-550p	540p
Spring Lambs >21kg	570-590p	570-580p

REPORTED SHEEP PRICES

(P/KG)	W/E 21/04/18	W/E 28/04/18	W/E 05/05/18
NI L/W Hoggets	452.4	445.0	436.6
NI D/W Hoggets	559.6	545.4	541.7
GB D/W Hoggets	578.8	553.6	569.5
ROI D/W	526.4	524.0	542.7
NI L/W Spr Lambs	546.0	545.1	544.8
NI D/W Spr Lambs	578.3	563.5	569.4
GB D/W Spr Lambs	600.4	596.9	600.9

Deadweight Sheep Trade

QUOTES from the plants for spring lambs this week were in the region of 570-590p/kg with plants paying up to 21kg. The number of spring lambs coming forward for slaughter has increased in recent weeks in line with normal seasonal trends with spring lambs accounting for one half of the price reported kill last week. The hogget season is coming to an end with the plants quoting 540p/kg for the small numbers coming forward for slaughter. Total lamb/hogget throughput in NI plants last week was 5,290 head compared to 3,534 head during the previous week. In the same week last year 4,592 lambs/hoggets were killed in local plants. The deadweight spring lamb price in NI last week was 569.4p/kg, up 5.9p/kg. The deadweight sheep price in ROI increased by 18.7p/kg to the equivalent price of 542.7p/kg.

This week's marts

SMALL numbers of sheep passed through many of the marts this week with the trade remaining broadly similar to previous weeks. In Massereene on Monday 276 spring lambs sold from 540-590p/kg compared to 151 spring lambs last week selling from 550-613p/kg. In Saintfield this week 244 spring lambs sold from 517-580p/kg compared to 100 spring lambs last week selling from 532-560p/kg. In Ballymena on Wednesday 202 spring lambs sold from 518-618p/kg (avg 550p/kg) compared to 176 spring lambs last week selling from 500-534p/kg (avg 510p/kg). In Enniskillen this week 322 spring lambs sold from 533-578p/kg. In Markethill this week 350 spring lambs sold from 540-609p/kg. The highest recorded cull ewe price was £135 in Swatragh last Saturday.

LATEST SHEEP MARTS

From: 04/05/18		Hoggets (P/KG LW)				Lambs (P/KG LW)			
To: 10/05/18		No	From	To	Avg	No	From	To	Avg
Friday	Newtownstewart	52	441	482	-	95	532	584	-
Saturday	Omagh	234	367	479	-	69	539	587	-
	Swatragh	300	483	538	-	-	-	-	-
Monday	Massereene	232	420	507	-	276	540	590	-
	Kilrea	250	489	535	-	-	-	-	-
Tuesday	Saintfield	130	400	460	-	244	517	580	-
	Rathfriland	31	428	500	-	350	538	581	555
Wednesday	Ballymena	215	400	458	420	202	518	618	550
	Enniskillen	385	420	463	-	322	533	578	-
	Markethill	320	430	487	-	350	540	609	
	Armoy	-	-	-	-	74	510	540	-

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