

CONSUMER PURCHASING OF MEAT EASES BACK IN LATEST KANTAR DATA

ANALYSIS of the latest available data from Kantar has indicated a decline in the volume and value of sales of all types of meat in NI retailers during the 12 week period ending 17 June 2018 when compared to the same period in 2017.

The volume of retail meat sales in NI totalled 12,461 tonnes during the 12 weeks ending 17 June 2018, a five per cent decline from the same period in 2017. Meanwhile the value of meat sales in the region totalled £70.6 million in the 2018 period, back 4.3 per cent from the £73.7 million spend on meat in the same period in 2017.

Beef sales

The volume of retail beef sales in NI totalled 3,454 tonnes during the 12 week period ending 17 June 2018, a 9.2 per cent decline from the same period in 2017 when 3,803 tonnes of beef were sold locally. The volume of all the major beef cuts including frying/grilling steaks, roasting joints and stewing pieces recorded notable declines in volume sales when

compared to the corresponding period in 2017.

Mince sales meanwhile held steady in NI during the 12 weeks ending 17 June 2018 when compared to year earlier levels. Mince continues to be the most popular type of beef sold in the major retailers in NI as outlined in Figure 1. In terms of volume mince sales accounted for 45 per cent of total retail beef sales during the 12 weeks ending 17 June 2018. This was an increase from 41 per cent of sales in the same period in 2017 however it was a similar proportion to 2016 levels.

While volume sales of beef in NI have declined during the 2018 period this was off the back of a very strong sales during the corresponding 12 week period in 2017. Volume sales of beef during the 2018 period were only 1.6 per cent lower than the corresponding 12 week period in 2016.

The strong decline in the volume of beef sales locally has been offset to some degree by an increase in the average

retail price of beef. In the 12 week period ending 17 June 2018 the average retail price of beef was £7.96/kg. This was 47p/kg higher than the same period in 2017 when the average retail price was £7.49/kg and 56p/kg higher than the same period in 2016 when the average retail price was £7.40/kg.

Retail beef sales were valued at £28.5 million in NI during the 12 weeks ending 17 June 2018. This was a 3.6 per cent decline from the corresponding period in 2017 when retail beef sales in the region were valued at £28.5 million. However the value of beef sales in NI during the 12 week period ending 17 June 2018 was 5.7 per cent higher than the corresponding period in 2016 when sales were valued at £26 million.

Lamb sales

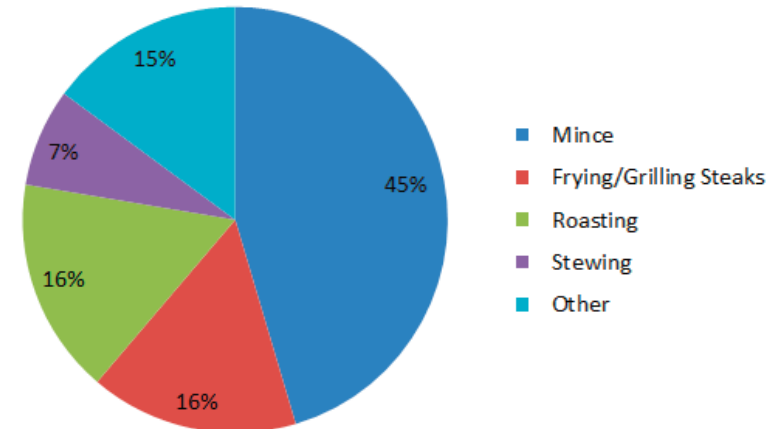
Lamb remains a minority meat in NI with retail lambs sales totalling 702 tonnes during the 12 week period ending 17 June 2018. This meant lamb accounted for 5.9 per cent of total meat sales in NI in terms of volume during

this period. The volume of retail lamb sales in NI during the 2018 period was seven per cent lower than the corresponding period in 2017.

During the 2018 period the value of retail lamb sales in NI was £4.9 million, back 13 per cent from the same period in 2017 when the total retail spend on

lamb in NI was £5.7 million. Much of this decline in the total value of sales has been driven by a drop in the average retail price of lamb. In the 12 weeks ending 17 June 2018 the average retail price of lamb in NI was £7.04/kg compared to £7.50/kg in the same period in 2017.

Figure 1: Retail beef sales in NI broken down by volume of sales by major cut during the 12 weeks ending 17 June 2018.



POOR GRASS GROWTH IMPACTING LAMB PERFORMANCE

THE on-going dry weather and difficult grass growing conditions have had an impact on lamb performance on many NI farms. In addition to longer production times the major processors are reporting an increase in the number of under-finished lambs being presented for slaughter in recent weeks.

Meeting market specifications at point of slaughter will help maximise returns from finishing lambs. The current specification from the major processors is for R grading lambs or better with a fat score of 2 or 3 and a carcass weight of 21kg. Processors also have a strong preference for lambs with FQ status with bonuses available in some plants while other plants will not handle non assured lambs.

Analysis of sheep price reporting figures have indicated that while lamb conformation scores have remained similar to previous years the level of fat cover has shown a slight decline. During the four weeks ending 29 July 2018 29 per cent of price reported lambs in NI achieved a fat class two, this was an increase from 26 per cent during the same period last year. Meanwhile the proportion of lambs achieving a fat class three decreased from 69 per cent in the 2017 period to 66 per cent in the 2018 period.

Lamb output from the NI sheep flock has also been impacted by the dry weather conditions with lambs taking longer to finish than usual. A total of 32,276 lambs were killed in local plants during the four weeks ending 29 July 2018. This is a notable 19 per cent decline from the corresponding period in 2017.

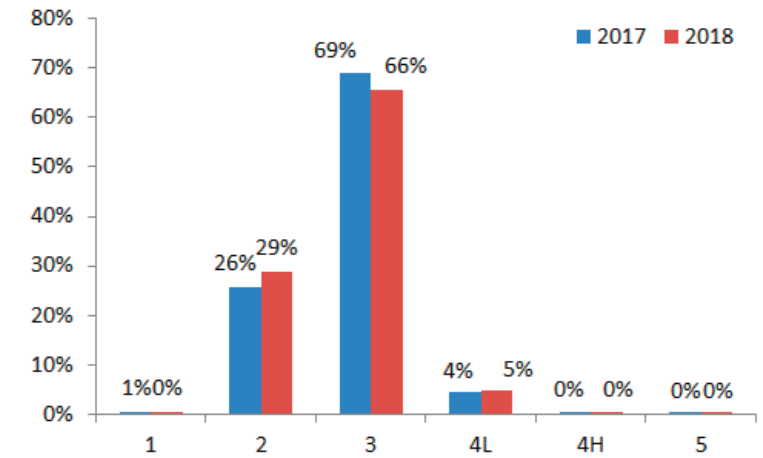
During the four week period ending 29 July 2018 the average lamb carcass weight in NI was 20.9kg, up marginally from the corresponding period in 2017 when the average carcass weight was 20.8kg. With lower lamb throughput and carcass weights almost unchanged the volume of lamb processed in NI during the four weeks ending 29 July 2018 was 26 per cent lower than the same period last year.

Meanwhile there has also been an increase in the number of lambs being exported from NI for direct slaughter in plants in ROI. During the four weeks ending 29 July 2018 26,198 lambs were exported, a 14 per cent increase from the same period in 2017 when 22,911 lambs were exported. This puts the combined lamb output from the NI sheep flock at 58,474 head over the last four weeks compared to 61,336 head in the corresponding period last year. This accounts for a five per cent decline year on year.

Reports from GB have indicated that very high lamb mortality rates during spring 2018 are having an impact on the availability of lambs for slaughter in GB plants. While no figures are currently available for lamb mortality in NI the difficult production conditions earlier this year may also be impacting the availability of lambs for slaughter locally.

Lamb slaughterings in GB during June 2018 (latest available figures) totalled 841,949 head, a notable 16 per cent decline from June 2017 levels. Meanwhile in ROI lamb throughput in the last four weeks has totalled 197,795 head. This is a one per cent decline from the same period last year.

Figure 2: Fat class scores awarded to the price reported lamb kill in NI during the four weeks ending 29 July 2018 and the corresponding period in 2017.



FQAS MART CLINICS AUGUST 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 in the table. For further information call (028) 9263 3024.

LOCATION	DAY	DATE
Saintfield	Wednesday	08/08/2018
Omagh	Monday	13/08/2018
Markethill	Tuesday	14/08/2018
Enniskillen	Thursday	23/08/2018
Ballymena	Friday	24/08/2018
Kilrea	Wednesday	29/08/2018

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

Answerphone Service
Factory Quotes &
Mart Results
Updated 5pm Daily

Tel: 028 9263 3011

Text Service

Free Price Quotes sent to your mobile phone weekly

Email - bulletin@lmcni.com
Tel: 028 9263 3000



WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 30/07/18	Next Week 06/08/18
Prime		
U-3	348 - 352p	348 - 352p
R-3	342 - 346p	342 - 346p
O+3	336 - 340p	336 - 340p
P+3	290 - 300p	290 - 300p
	Including bonus where applicable	
Cows		
O+3 & better	252 - 275p	252 - 270p
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.

Deadweight Cattle Trade

BASE quotes from the plants for U-3 grade prime cattle this week ranged from 348-352p/kg with the majority of plants quoting 350p/kg for steers and heifers. Similar base quotes are expected for Monday. Quotes for good quality O+3 grade cows ranged from 252-270p/kg this week with the majority of plants quoting in the region of 260-270p/kg.

The plants have reported steady supplies of cattle to meet demand for beef with throughput of prime cattle last week totalling 5,750 head. This was a decrease of 357 head from the previous week and 295 head higher than the 5,455 head killed during the same week last year. Throughput of prime cattle in the local plants during July totalled 23,048 head, an eight per cent increase from July 2017 levels when 21,359 prime cattle were killed in local plants. Cow throughput in NI last week also held steady at 2,219 head which brings cow throughput for July 2018 to 7,998 head. This is a 12 per cent increase on the 7,140 cows killed in local plants during July 2017.

Prime cattle imports from ROI for direct slaughter last week totalled 78 head with five cows also imported. Imports from GB for direct slaughter consisted of 12 prime cattle and 129 cows. Meanwhile cattle exports from NI for direct slaughter in ROI last week included seven steers, 198 cows and 14 bulls. A total of 67 prime cattle and seven cows made the journey to GB for direct slaughter.

The NI deadweight trade for prime cattle continued to come under pressure last week with the majority of prices reported indicating a decline compared to the previous week. The average steer price was back by 0.7p/kg to 350.6p/kg while the R3 steer price decreased by a penny to 360.3p/kg. The average heifer price last week was also back by 1.3p/kg to 352.2p/kg while the R3 heifer price decreased by 1.6p/kg to 358.1p/kg. Meanwhile the cow trade continued to come under pressure with the average cow price back 3.2p/kg to 255.3p/kg. The O3 cow price last week was back by 5.1p/kg to 273.4p/kg.

The deadweight trade for prime cattle also continued to come under pressure in all of the GB regions last week. The average steer price was back by 4p/kg to 359.1p/kg last week while the R3 steer price reported a decline of 2.9p/kg to 367p/kg. The R3 steer price recorded a strong decrease in Scotland where it was back by 4.8p/kg to 377.8p/kg. The average heifer price in GB last week was 360.9p/kg, back 3.3p/kg from the previous week while the R3 heifer price was back 5.1p/kg to 366.9p/kg. The R3 heifer price reported the strongest decline in Midlands and Wales where it was back 8.2p/kg to 362.4p/kg.

The deadweight cattle trade has also continued to come under pressure in ROI with prices reporting declines in all cattle grades. The R3 steer price was back by 2.6p/kg to the equivalent of 342.3p/kg while the R3 heifer price was back by 3.2p/kg to the equivalent price of 351.9p/kg. This puts the differential between ROI and NI at 6.2p/kg or £20 on a 320kg carcass.

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

W/E 28/07/2018	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	356.1	350.3	376.9	370.5	364.1	370.8
	R3	360.3	342.3	377.8	365.4	361.3	364.9
	R4	361.3	342.2	384.0	376.1	364.9	360.0
	O3	355.1	326.0	359.9	342.3	337.1	345.3
AVG	350.6	-	376.8	359.3	348.8	350.0	359.1
Heifers	U3	358.9	364.8	381.2	371.0	371.5	369.7
	R3	358.1	351.9	376.8	361.3	362.4	366.6
	R4	357.8	353.0	381.1	370.2	364.6	362.6
	O3	356.8	337.6	363.1	347.8	338.0	345.9
AVG	352.2	-	378.3	361.3	352.1	350.4	360.9
Young Bulls	U3	348.7	350.9	370.8	352.5	353.2	357.4
	R3	347.4	340.7	368.1	346.6	347.4	348.1
	O3	328.8	316.3	331.6	312.4	309.6	312.0
	AVG	338.3	-	364.7	336.5	336.8	341.6
Prime Cattle Price Reported	5341	-	6760	6867	6961	4610	25198
Cows	O3	273.4	267.2	271.8	262.7	265.1	258.2
	O4	276.8	268.3	275.7	265.4	265.3	248.8
	P2	234.5	234.3	226.4	221.4	213.8	214.2
	P3	250.1	255.8	231.9	236.1	230.9	232.1
	AVG	255.3	-	264.1	239.4	225.0	219.6

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.98p 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

REPORTED NI CATTLE PRICES - P/KG

W/E 28/07/18	Steers	Heifers	Young Bulls
U3	355.7	358.2	348.3
R3	355.2	354.7	347.0
O+3	349.9	349.0	336.5

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 28/07/18	Wgt <220kg	Wgt 220- 250kg	Wgt 250- 280kg	Wgt >280kg
P1	163.6	177.7	191.0	199.1
P2	197.2	212.3	230.4	248.1
P3	201.9	231.3	246.5	253.2
O3	230.0	232.9	268.1	274.2
O4	-	264.3	270.3	277.3
R3	-	-	291.7	296.3

LATEST LIVEWEIGHT CATTLE MART PRICES NI

W/E 28/07/18	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	200	208	203	182	199	190
Friesians	162	165	163	122	155	138
Heifers	202	225	213	180	200	190
Beef Cows	155	212	169	130	152	141
Dairy Cows	115	134	120	90	114	102
Store Cattle (p/kg)						
Bullocks up to 400kg	210	224	215	175	209	190
Bullocks 400kg - 500kg	205	222	214	170	204	190
Bullocks over 500kg	195	209	200	165	194	180
Heifers up to 450kg	210	247	215	170	209	195
Heifers over 450kg	190	207	198	170	189	185
Dropped Calves (£/head)						
Continental Bulls	320	425	370	240	315	280
Continental Heifers	250	325	290	170	245	200
Friesian Bulls	145	215	172	50	110	74
Holstein Bulls	50	60	55	42	48	45

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 30/07/18	Next Week 06/08/18
Lambs >21kg	405-410p	410-420p

REPORTED SHEEP PRICES

(P/KG)	W/E 14/07/18	W/E 21/07/18	W/E 28/07/18
NI L/W Lambs	373.5	358.9	370.9
NI D/W Lambs	423.2	402.1	399.2
GB D/W Lambs	440.3	417.3	432.9
ROI D/W	475.9	473.2	473.7

Deadweight Sheep Trade

THE NI deadweight trade for lambs improved early in the week with quotes from the plants ranging from 410-420p/kg up to 21kg. Similar quotes are expected for early next week. Lamb throughput in NI plants last week totalled 9,802 head, an increase of 762 lambs from the previous week. A further 9,441 sheep were exported from NI to ROI for direct slaughter which takes total exports for July to 32,565 head. In the same period last year 28,339 sheep were exported to ROI. The deadweight lamb price in NI last week was 399.2p/kg, back by a smaller margin of 2.9p/kg from the previous week. In ROI last week the deadweight lamb price was the equivalent of 473.7p/kg, up half a penny from the previous week.

This week's marts

GOOD numbers of lambs passed through the marts this week with the live trade strengthening. In Massereene on Monday 1,067 lambs sold from 380-405p/kg compared to 1,005 lambs last week selling from 365-392p/kg. In Saintfield this week 904 lambs sold from 365-416p/kg compared to 977 lambs last week selling from 353-389p/kg. In Rathfriland on Tuesday 751 lambs sold from 352-398p/kg (avg 381p/kg) compared to 660 lambs last week selling from 343-392p/kg (avg 369p/kg). In Enniskillen on Wednesday 842 lambs sold from 364-409p/kg compared to 500 lambs last week selling from 347-402p/kg. A large entry of 1,340 lambs in Markethill this week sold from 355-382p/kg compared to 800 lambs last week selling from 370-400p/kg. The ewe trade remained steady this week with top reported prices ranging from £80-120.

LATEST SHEEP MARTS

From: 27/07/18		Lambs (P/KG LW)			
To: 02/08/18		No	From	To	Avg
Friday	Newtownstewart	257	348	401	-
Saturday	Omagh	885	387	411	-
	Swatragh	765	336	434	-
Monday	Massereene	1067	380	405	-
	Kilrea	400	368	395	-
Tuesday	Saintfield	904	365	416	-
	Rathfriland	751	352	398	381
Wednesday	Ballymena	1850	365	391	375
	Enniskillen	842	364	409	-
	Armoy	812	363	390	-
	Markethill	1340	355	382	-

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THREE LMC BOARD MEMBERS HAVE TERMS EXTENDED

LMC is delighted to confirm that The Department of Agriculture, Environment and Rural Affairs (DAERA) has announced a six month extension to the term of appointment for three members of the LMC Board until 30 December 2018.

The Livestock and Meat Commission board Members are appointed by the Minister of Agriculture, Environment and Rural Affairs (who also appoints the Chairman) for three-year terms. There are currently six members of the Board including the Chairman.

The Board has corporate responsibility for ensuring that LMC fulfils the aims and objectives set by DAERA and approved by the Minister, and for promoting the efficient, economic and effective use of staff and other resources by LMC.

Harry Sinclair, Jim Lennon and Oonagh Chesney were first appointed to the LMC Board on 01 July 2015 and the

extensions to their terms have been made in accordance with the Commissioner for Public Appointments' Code of Practice.

Harry Sinclair is a suckler cow, beef and sheep farmer and as a past President of the UFU, he has extensive experience of advocacy on behalf of the farming community. He has served as Chairman of the UFU's Hill Farming and Beef and Lamb Committees and is a founder member of the Farm Safety Partnership.

Harry has served as Vice-President of the Committee of Professional Agricultural Organisations ("COPA") and has represented the UK on the EU Commission's Sheep and Beef Advisory Committees. He has also served as Chairman of AgriSearch's Beef Committee and as a producer representative on the Red Meat Taskforce.

Jim Lennon is a beef farmer specialising in the production of

Aberdeen Angus cattle and is also involved in the Derrynoose Farming Community Group which promotes investment and training in livestock production. He has significant wider senior public sector experience shown in both his current role as Head of Corporate Service for Middletown Centre for Autism and various senior roles in the National Health Service.

Oonagh Chesney is Company Secretary for Fane Valley Co-op Society Ltd and its group subsidiary companies including Linden Foods Ltd. She has an active role in the family beef farming business. She has represented Fane Valley on a number of bodies including the Area Based Strategy Action Group and cross community programmes in Armagh.

Oonagh combines marketing experience with a good understanding of the challenges facing the LMC and has brought her experience of red meat production and processing to the

work of the LMC Board.

LMC Chairman Gerard McGivern welcomed the announcement of the extensions, 'LMC's core function is to support the development of Northern Ireland's livestock and livestock product industries. I am delighted that

Harry, Jim and Oonagh will continue to bring a wealth of knowledge and experience to the work of the LMC Board as we develop our strategy and design our services to support our industry stakeholders through the uncertain period which lies ahead'.

Image 1: LMC Board Members Harry Sinclair, Oonagh Chesney and Jim Lennon have had their terms extended for six months up to December 2018.



FQAS REMINDER:

NEW STANDARD FOR FQAS PARTICIPANTS WHO KEEP HORSES ON FARM

THE Northern Ireland Beef and Lamb Farm Quality Assurance Scheme (NIBL FQAS) has introduced new standards to prevent cross contamination of cattle and sheep with drugs administered to horses.

FQAS Manager Gillian Davis commented "Following the investigative work carried out by scientists at the Agri-Food and Biosciences Institute (AFBI) there are clear risks of inadvertently contaminating cattle/sheep through the use of Phenylbutazone (Bute). We would encourage farmers to take extreme care when using the non-steroidal anti-inflammatory drug Bute to treat horses."

Bute is a highly effective treatment for inflammation and pain that can be injected intravenously or given orally as a powder or paste to horses. It is not authorised for use in any animal, including horses, destined for the human food chain.

Chairman of the FQAS Standard Setting Committee Ian Stevenson added that "In order to keep pace with the latest scientific advice available to us, raise awareness and to ensure robust standards on farm, the FQAS standards have been updated to capture this requirement. In June 2018 LMC issued an Addendum to the Northern Ireland Beef and Lamb Farm Quality Assurance Scheme Standard (April 2018), which highlights a new standard and associated guidance with regards to Phenylbutazone (Bute) and the cross-contamination risks on farms that have used Bute to treat horses and also keep cattle/sheep."

FQAS inspectors will be inspecting against this requirement from **01 August 2018**.

The studies undertaken by AFBI, using Bute in its powder form have shown there may be cross-contamination of illegal residues in cattle arising through the use of:

- A shared bucket (i.e. if a horse was to be fed from a bucket containing Bute and then the same bucket used to feed cattle)
- A shared pen
- Through contaminated pasture (manure spread and cattle/sheep allowed to graze)



Bute is commonly used in the treatment of horses and many cattle and sheep farmers keep horses on the same holding, it is therefore critically important that those using the drug take extreme care to avoid contamination of their cattle/sheep.

A copy of this Addendum to the Standard and Rules was posted to all FQAS participants in June 2018 and is also available to download/print from the LMC website (www.lmcni.com). If you have any queries or require any further information please call the FQAS helpline on 028 9263 3024.



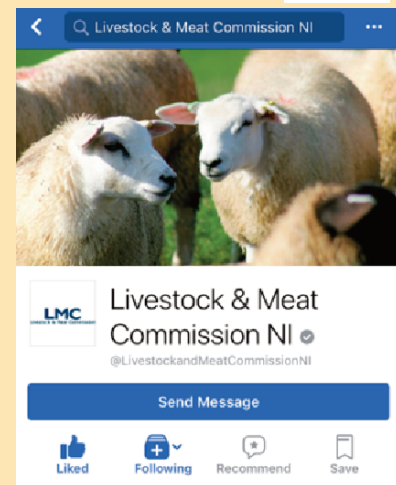
JOIN US ON SOCIAL MEDIA



LMC has recently launched new Facebook and Twitter accounts to keep in contact with our stakeholders and ensure LMC's high level of customer service is maintained.

Our updated social media presence will keep LMC stakeholders up to date with information on the range of services which LMC currently provide to the NI beef and sheepmeat sectors.

LMC stakeholders and the wider community are encouraged to make full use of the LMC Facebook and Twitter pages and provide any feedback to LMC at bulletin@lmcni.com.



LMC MARKET INFORMATION SERVICES

LMC'S Market Information Services are designed to support, examine and inform the NI red meat industry. The service aspires to support producers and processors with their decision making by producing accurate and timely information that creates a better understanding of the trade.

LMC is committed to creating an environment where our stakeholders are well-informed whether this is through our Market Information publications, the provision of basic statistics, further analysis of this data or the delivery of information through public events.

LMC encourages all of its stakeholders to utilise the Market Information section of the LMC website which provides a valuable source of statistics relating to beef and sheep meat production. If you require any further information or analysis please contact us directly via email at bulletin@lmcni.com or via telephone at 028 9263 3000.