

# NI BEEF INDUSTRY SNAPSHOT JULY 2018

THE deadweight cattle trade in NI has come under pressure during July 2018 with prices for all types of cattle now just below July 2017 levels. The major processors have reported quieter demand for beef from major retail customers combined with steady supplies of all types of cattle for slaughter.

The average deadweight price for prime cattle in NI during July 2018 was 351p/kg, back 8.7p/kg from July 2017 when the average deadweight price was 359.7p/kg. The R3 steer price declined by 7.7p/kg over the same period, back from 370.4p/kg in July 2017 to 362.7p/kg in July 2018. In monetary terms this equates to a £27 decline in the value of a 350kg steer carcass.

A decline in the deadweight trade was also recorded in ROI during July 2018 with an average R3 steer price of 346.4p/kg. This was back 7.2p/kg from July 2017 levels when the R3 steer price in the region was 353.6p/kg. The differential in prices between ROI and NI has narrowed slightly from 16.8p/kg in July 2017 to 16.3p/kg in July 2018.

The deadweight trade for prime cattle in GB has also come under

pressure during July 2018, although not to the same extent as recorded in NI. The R3 steer price in GB during July 2018 was 373.2p/kg, back 5.3p/kg from July 2017 levels. This accounts for a 1.4 per cent decline year on year. The differential in R3 steer prices between NI and GB widened slightly from 8.1p/kg in July 2017 to 10.5p/kg in July 2018.

Prime cattle throughput totalled 23,048 head in NI during July 2018, a 7.9 per cent increase from July 2017 levels. The cow throughput also recorded a strong increase to total 7,998 head during July 2018. This was a 12 per cent increase from the 7,140 cows killed in local plants during July 2017.

While throughput of both prime cattle and cows has increased in NI during July 2018 so have average carcass weights. The average carcass weight of prime cattle increased from 333.1kg in July 2017 to 336.7kg in July 2018. Meanwhile the average cow carcass weight increased from 301.4kg in July 2017 to 303.3kg in July 2018.

Imports of cattle for direct slaughter in local plants totalled 577 head during July 2018, less

than half of the 1,277 cattle imported during July 2017. Meanwhile exports for direct slaughter recorded a strong increase, albeit from a low base. During July 2018 851 cattle were exported from NI to GB and ROI for direct slaughter. This was a 45 per cent increase from the 587 cattle exported during July 2017.

APHIS figures have indicated that at the end of July 2018 there were 476,186 cattle on NI farms aged 12-30 months that are intended for beef production. This total was almost unchanged from July 2017 levels. There has however been a shift in the type of cattle for beef production on NI farms. The number of beef sired cattle in the 12-30 month age category has increased by 1.2 per cent to total 444,373 head in July. Meanwhile the number of dairy sired male cattle has declined by 14.9 per cent to total 31,813 head in July 2018.

During July 2018 there were 28,748 beef sired calves registered in NI, a 3.8 per cent decline from the 29,881 beef sired calves registered during July 2017. Dairy male calf registrations totalled 3,721 head during July 2018, back 1.2 per cent from July 2017 levels.

**Table 1: NI Beef Industry Key Performance Indicators (July Snapshot)**

	Jul-17	Jul-18	% Change
<b>Finished Cattle Prices (p/kg)</b>			
Average Prime Cattle Price	359.7	351.0	-2.4%
Average Cow Price	267.9	263.0	-1.8%
Average R3 Steer Price (NI)	370.4	362.7	-2.1%
Average R3 Steer Price (ROI)	353.6	346.4	-2.0%
Average R3 Steer Price (GB)	378.5	373.2	-1.4%
<b>Slaughtering</b>			
Total Clean Slaughtering (Head)	21,359	23,048	+7.9%
Total Cow Slaughtering (Head)	7,140	7,998	+12.0%
Average Clean Carcass Weight (kg)	333.1	336.7	+1.1%
Average Cow Carcass Weight (kg)	301.4	303.3	+0.6%
<b>Trade (Head)</b>			
Live Imports for Direct Slaughter	1,277	577	-54.8%
Live Exports for Direct Slaughter	587	851	+45.0%
<b>Availability (Head)</b>			
No. Cattle on the Ground*	476,679	476,186	-0.1%
Beef Sired	439,309	444,373	+1.2%
Dairy Sired (Male Only)	37,370	31,813	-14.9%
<b>Calf Births Registrations (Head)</b>			
Calf Births	33,649	32,469	-3.5%
Beef Sired	29,881	28,748	-3.8%
Dairy Sired (Male Only)	3,768	3,721	-1.2%
<b>Euro / Stg Exchange Rate (€ / £)</b>	88.6	88.7	+0.1%

\* Aged between 12-30 mths (Beef + Dairy Male Only)

All NI Figures Unless Otherwise Stated

# DECLINE IN BEEF SIRE CALF REGISTRATIONS DURING 2018

**D**URING July 2018 there were 28,748 beef sired calves registered in NI, a 3.8 per cent decline from July 2017 levels when 29,881 beef sired calves were registered in the region. This is the fifth consecutive month during which beef sired calf registrations were lower than the corresponding month in 2017.

Beef sired calf registrations during 2018 to date have totalled 254,983 head, a 5.4 per cent decline from the same seven month period in 2017 when 269,514 beef sired calves were registered. A slightly smaller total cow herd was recorded in the December 2017 census and this combined with a strong cow kill during the final quarter of 2017 and during 2018 to date will have contributed to the overall decline in calf registrations.

Beef sired calf registrations to dairy cows totalled 7,811 head during July 2018, a slight decrease from 8,079 registrations during July 2017. These beef cross calves accounted for 28 per cent of all beef sired calf registrations during July 2018, a similar proportion to

July 2017 levels. During 2018 to date there have been 78,159 beef sired calves registered to dairy cows, a four per cent reduction from the 81,525 registrations to dairy cows during the same period in 2017.

There has also been a slight reduction in the number of dairy sired male calves registered in NI. During July 2018 there were 3,721 of these calves registered compared to 3,768 in the corresponding month last year. During 2018 to date there have been 39,993 dairy sired male calves registered in NI, back 3.5 per cent from the 41,454 registered in the same period last year.

During 2018 to date 9,869 calves have been exported out of NI for further production and these are primarily dairy sired male calves destined for Spain. This was similar to the corresponding seven month period in 2017 when 10,055 calves were exported out of NI.

While the total number of beef sired calf registrations has declined in NI there have also been some shifts in the type of beef sire used on NI farms. However

the six main breeds (Limousin, Charolais, Aberdeen Angus, Simmental, Hereford and Belgian Blue) continue to account for more than 90 per cent of total beef sired calf registrations in the region.

Limousin is the most popular beef sire used in NI and during 2018 to date 26.8 per cent of beef sired calf registrations were to a Limousin bull. However this was a decline from the same period last year when 28.3 per cent of beef sired calves were Limousin.

A total of 60,351 Charolais calves were registered in NI during 2018 to date and these accounted for 23.7 per cent of all beef sired calf registrations. This was also back from the same period in 2017 when Charolais calves accounted for 24.3 per cent of all calf registrations.

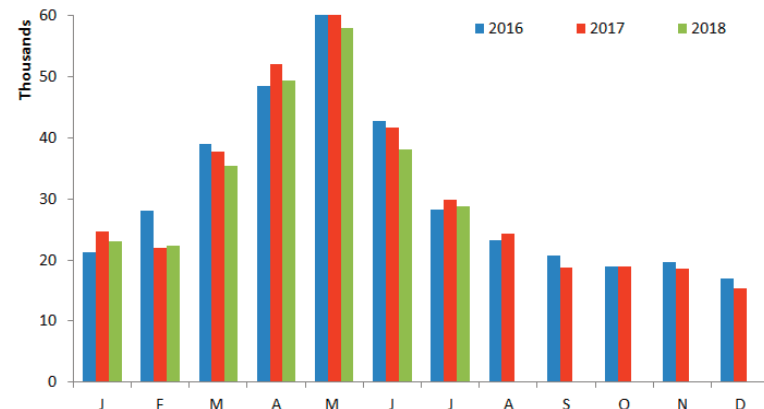
The third most popular beef sire in NI was Aberdeen Angus with 52,855 calves registered during 2018 to date. These calves accounted for 20.7 per cent of all beef sired calf registrations in the first seven months

of 2017.

Meanwhile the proportion of Hereford, Simmental and Belgian Blue sired calves registered in NI during 2018 to date were similar to year earlier levels at 7.4 per cent, 7.9 per cent and 5.2 per cent respectively. The remaining 8.2 per cent of beef sired calf registrations in NI during 2018 to date were to 54 other breeds.

Weather, market conditions, and currency all impact on the pattern of calf registrations, domestic slaughtering and the import and export of live cattle. Perhaps one of the most important parameters over which industry can exercise some influence is the future agricultural policy framework for Northern Ireland post Brexit and LMC encourages its stakeholders to actively engage in this discussion.

**Figure 1: Monthly beef sired calf registrations in NI from January 2016 until July 2018.**



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# WEEKLY BEEF & LAMB MARKETS



## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 06/08/18	Next Week 13/08/18
<b>Prime</b>		
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		
<b>Cows</b>		
O+3 & better	252 - 270p	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.

### REPORTED NI CATTLE PRICES - P/KG

W/E 04/08/18	Steers	Heifers	Young Bulls
U3	353.6	354.0	349.5
R3	350.5	352.4	346.5
O+3	344.5	344.8	336.5

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 04/08/18	Wgt <220kg	Wgt 220- 250kg	Wgt 250- 280kg	Wgt >280kg
P1	157.3	168.8	176.1	182.1
P2	193.8	207.7	227.4	242.2
P3	214.1	226.0	243.8	251.4
O3	235.0	240.7	259.2	270.0
O4	-	258.0	267.7	274.8
R3	-	-	228.0	275.3

## Deadweight Cattle Trade

**B**ASE quotes from the local processors for in spec U-3 grading steers and heifers held steady this week at 348-352p/kg. The majority of plants are quoting 350p/kg for both steers and heifers. Quotes for good quality O+3 grading cows ranged from 252-270p/kg in NI this week. Similar quotes for all types of cattle are expected for early next week.

The processors have reported sufficient supplies of prime cattle coming forward for slaughter to meet demand for beef. Prime cattle throughput last week totalled 5,481 head, back 269 head from the previous week. In the corresponding week in 2017 6,115 prime cattle were slaughtered in local plants. Cow throughput in NI last week totalled 1,735 head, back 484 head from the previous week when the cow kill totalled 2,219 head.

Imports of prime cattle for direct slaughter last week in local plants from ROI included 54 prime cattle and 21 cows with a further 15 prime cattle and 114 cows imported from GB. Meanwhile 135 cows made the journey from NI to ROI for direct slaughter while 36 prime cattle and two cows were exported to processing plants in GB.

The deadweight trade for prime cattle has continued to come under pressure with the average steer price in NI last week back 3.1p/kg to 347.5p/kg. The R3 steer price in NI last week was 354.8p/kg which was back 5.5p/kg from the previous week and was the lowest reported price for R3 steers since early April 2017. The average heifer price in NI last week was back by almost a penny to 351.4p/kg while the R3 heifer price was back by 1.9p/kg to 356.2p/kg.

In GB last week the deadweight trade also continued to come under pressure. The average steer price was back by 3.4p/kg to 355.7p/kg while the R3 steer price was back by 2.9p/kg to 364.1p/kg. The R3 steer price was back by 3-4p/kg in all the UK regions with the exception of Northern England where it was back marginally to 365.3p/kg. The differential between NI and GB was 9.3p/kg or £33 on a 350kg carcass. The average heifer price in GB last week was back 4.1p/kg to 356.8p/kg while the R3 heifer price was back by a similar margin to 362.6p/kg. Strong declines in R3 heifer prices were recorded in Southern England, Scotland and the Midlands while the R3 heifer price in Northern England increased fractionally to 361.4p/kg.

The cow trade in all of the GB regions continued to come under pressure with the average cow price back by 7.1p/kg to 224.1p/kg. The average cow price in NI last week was back 10p/kg to 245.3p/kg while the O3 cow price was back by 2.1p/kg to 268.3p/kg. The O3 cow price in NI was 9.5p/kg higher than the average O3 cow price in GB last week.

In ROI the deadweight trade for prime cattle was generally back in euro terms for the majority of grades however this has been mostly counteracted by a stronger euro. The R3 steer price last week was back by the equivalent of 0.8p/kg to 341.5p/kg while the R3 heifer price was back by a similar margin to 351.3p/kg.

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

W/E 04/08/2018	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	354.3	351.2	372.6	370.5	365.3	368.4	369.0
	R3	354.8	341.5	374.1	365.3	358.0	361.1	364.1
	R4	356.7	342.4	380.4	375.9	362.2	360.0	372.0
	O3	353.1	325.6	351.2	336.9	333.2	344.4	340.8
	AVG	347.5	-	371.9	357.0	345.9	345.9	355.7
Heifers	U3	355.2	364.6	379.9	370.1	370.6	371.4	372.9
	R3	356.2	351.3	371.7	361.4	359.8	357.5	362.6
	R4	357.1	352.1	377.9	370.0	360.6	358.4	368.0
	O3	357.2	336.0	350.7	343.5	333.6	341.7	342.0
AVG	351.4	-	373.8	359.8	346.2	343.3	356.8	
Young Bulls	U3	349.2	348.9	364.5	347.9	347.4	354.1	351.6
	R3	345.6	337.2	359.2	342.3	342.9	344.1	345.9
	O3	330.5	316.1	319.9	307.2	314.1	319.1	312.8
AVG	337.1	-	355.8	328.9	335.7	336.9	338.1	
Prime Cattle Price Reported		4838	-	6249	7048	7011	4284	24592
Cows	O3	268.3	268.1	262.4	258.2	258.4	258.4	258.8
	O4	274.4	269.5	267.5	261.5	257.2	251.4	258.4
	P2	228.1	234.9	216.2	215.7	212.6	222.5	216.0
	P3	248.8	256.1	231.7	235.1	227.4	233.5	230.5
AVG	245.3	-	259.8	232.8	215.5	216.0	224.1	

- Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro= 89.11p 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 LIVELWEIGHT CATTLE MART PRICES NI

W/E 04/08/18	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>						
Steers	185	195	190	160	184	172
Friesians						
Heifers	210	230	215	170	209	190
Beef Cows	145	192	160	125	144	135
Dairy Cows	110	128	117	80	109	95
<b>Store Cattle (p/kg)</b>						
Bullocks up to 400kg	220	250	230	180	219	200
Bullocks 400kg - 500kg	215	238	225	180	214	198
Bullocks over 500kg	200	215	207	160	199	180
Heifers up to 450kg	200	221	210	165	199	182
Heifers over 450kg	185	200	192	165	184	175
<b>Dropped Calves (£/head)</b>						
Continental Bulls	320	420	360	225	315	260
Continental Heifers	240	335	295	160	235	200
Friesian Bulls	100	170	135	48	98	75
Holstein Bulls	60	100	80	40	58	50

# SHEEP TRADE

## SHEEP BASE QUOTES

(P/Kg DW)	This Week 06/08/18	Next Week 13/08/18
Lambs >21kg	410-420p	400-410p

## REPORTED SHEEP PRICES

(P/KG)	W/E 21/07/18	W/E 28/07/18	W/E 04/08/18
NI L/W Lambs	358.9	370.9	376.5
NI D/W Lambs	402.1	399.2	411.6
GB D/W Lambs	417.3	432.9	421.5
ROI D/W	473.2	473.7	475.2

## Deadweight Sheep Trade

**B**ASE quotes from the major processors for R3 grading lambs were 410-420p/kg early this week and have come back to 400-410p/kg as the week has progressed. Similar quotes are expected for early next week with all plants paying up to 21kg. Lamb throughput in local plants last week totalled 9,369 head which was back 433 head from the previous week. Meanwhile exports of lambs from NI for direct slaughter in ROI were back by a similar margin to total 7,039 head. Ewe and ram exports to ROI for direct slaughter last week totalled 1,968 head with 276 ewes/rams slaughtered locally. The average deadweight lamb price in NI last week increased by 12.4 to 411.6p/kg while the average price in GB came back by a similar margin to 421.5p/kg.

## This week's marts

**L**AMB throughput has picked up in the local marts this week which has contributed to a quieter trade in some of the marts. In Omagh last Saturday a slightly sharper trade saw a large entry of 1,230 lambs sold from 374-418p/kg compared to 885 lambs the previous week selling from 387-411p/kg. In Kilrea on Monday 600 lambs sold from 360-377p/kg, a quieter trade from the previous week when 400 lambs sold from 368-395p/kg. In Saintfield this week 702 lambs sold from 350-385p/kg, back from 904 lambs last week selling from 365-416p/kg. A strong entry of 1,847 lambs in Ballymena on Wednesday sold to an average of 369p/kg. Last week in Ballymena 1,850 lambs sold to an average of 375p/kg. Cull ewe numbers have also started to pick up in many of the marts with top prices of over £100 in several of the marts.

## LATEST SHEEP MARTS

From: 03/08/18		Lambs (P/KG LW)			
To: 09/08/18		No	From	To	Avg
Friday	Newtownstewart	582	352	380	-
Saturday	Omagh	1230	374	418	-
	Swatragh	1000	336	389	-
Monday	Massereene	1267	360	398	-
	Kilrea	600	360	377	-
Tuesday	Saintfield	702	350	385	-
	Rathfriland	893	348	384	363
Wednesday	Ballymena	1847	350	400	369
	Markethill	980	340	372	-

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