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LOWER LAMB OUTPUT FROM NI SHEEP FLOCK DURING 2018 SEASON

DURING the last 12 weeks there have been 116,002 lambs processed in local plants. In the same period in 2017 there were 129,024 lambs processed locally which accounts for a ten per cent decline year on year.

Exports from NI to ROI for direct slaughter during the last 12 weeks have totalled 83,545 head. This is a 3.9 per cent increase from the 80,426 lambs exported during the same period in 2017. There have also been a small number of sheep exported from NI to GB for direct slaughter during August and September 2018.

Exports for direct slaughter to ROI accounted for 42 per cent of total lamb output from the NI sheep flock during the 2018 period, an increase from the corresponding period in 2017 when exports accounted for 38 per cent of total output.

If we combine the number of lambs slaughtered locally with those exported for direct slaughter then output from the NI sheep flock totalled 199,547 head during the last 12 weeks. This is a 4.7 per cent decline from the same period in 2017 when output from the NI sheep flock totalled 209,450 head.

The DAERA agricultural census recorded a two per cent decline in lamb numbers on NI farms in June 2018 when compared to year earlier levels. This is perhaps unsurprising given the cold spring and reports of higher lamb mortality.

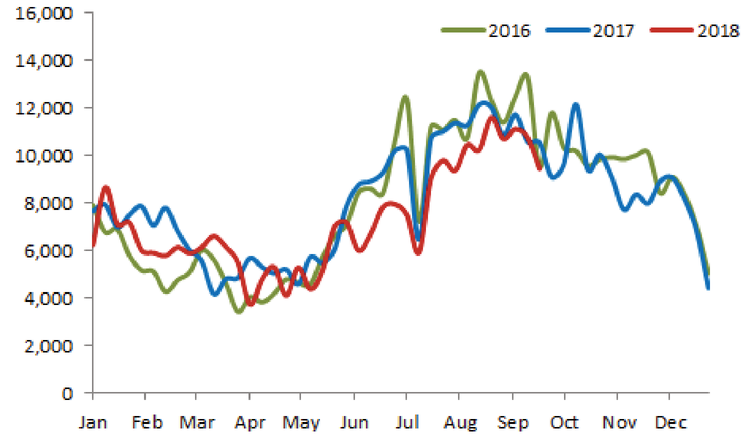
Fewer lambs on the ground may have been one contributing factor to lower lamb output in NI during 2018 to date. However the late spring and drought conditions in some parts of the province will also have impacted lamb performance on many farms and prolonged the finishing process. This is indicated in Figure 1 which shows weekly lamb/hogget throughput in NI from 2016 to 2018.

In previous years there has been an increase in lamb throughput in July but it has been a month later this year. It is also worth noting that for much of the summer 2018 lamb throughput in NI has been operating well below the corresponding period in previous years.

Reports from the marts have indicated a strong increase in throughput over the last few weeks with the lambs on offer generally of very good quality. There has been a steady demand for both finished and store lambs around the sale yards.

While lamb throughput locally has been operating at lower levels than previous years the average carcase weight has held steady. During the last 12 weeks the average lamb carcase weight in NI was 21.0kg. In the same period in 2017 it was 21.1kg and in the same period in 2016 the average carcase weight was 20.7kg. With the major processing plants only paying up to 21kg there is a strong incentive for producers to try and finish lambs within the desired 18-21kg carcase weight range.

Figure 1: Weekly lamb/hogget throughput in NI 2016 to 2018



Reports from GB have also indicated tighter supplies of lambs for slaughter during 2018. During July and August this year (latest available figures) 3 million lambs were killed in GB compared to 3.2 million lambs in the same period in 2017. This accounts for a 4.9 per cent reduction in throughput year on year.

EU R3 HEIFER PRICE LEAGUE TABLE

Table 1: EU Deadweight Cattle Prices – Heifers R3 Equivalent (€ Cents)

Position last Mth	Position this Mth	Country	Price last Mth (w/e 19.08.18)	Price this Mth (w/e 16.09.18)	Change on Mth (cents)
3	1	Great Britain	408.9	420.8	+11.9
1	2	Italy	441.1	406.6	-34.4
4	3	Northern Ireland	398.7	403.1	+4.4
2	4	Sweden	412.4	402.8	-9.7
6	5	France	392.0	390.0	-2.0
8	6	Spain	357.4	388.2	+30.8
5	7	Ireland	394.4	384.1	-10.3
7	8	Germany	360.4	376.4	+16.0
10	9	Austria	354.8	357.2	+2.4
9	10	Denmark	356.2	349.2	-7.0
11	11	Slovenia	333.5	338.4	+4.9
13	12	Belgium	324.0	323.5	-0.5
12	13	Poland	324.6	323.3	-1.3
14	14	Czech Republic	285.5	280.8	-4.7
15	15	Lithuania	259.1	255.8	-3.3
		EU Average	378.6	383.9	+5.3
		Euro (€1=)	89.4	89.1	-0.2

THE EU Deadweight cattle prices table provides a useful update on farmgate R3 heifer prices across the EU.

In the week ending 16/09/2018 the average R3 heifer price in the EU was 383.9c/kg, an increase of 5.3c/kg from 378.6c/kg in the week ending 19/08/2018. The euro decreased marginally to €1= 89.1p in the week ending 16/09/2018.

GB moved to first place on the league table in the week ending 16/09/2018 with an equivalent R3 heifer price of 420.8c/kg. This was an 11.9c/kg increase from the 408.9c/kg paid during the week ending 19/08/2018. The differential between R3 heifer prices in GB and the EU average widened from 30.3c/kg in the week ending 19/08/2018 to 36.9c/kg in the week ending 16/09/2018.

In the week ending 16/09/2018 NI moved up to third place in the EU league table with an R3 heifer price the equivalent of 403.1c/kg. This was a 4.4c/kg increase from the 398.7c/kg paid during the week ending 19/08/2018. The differential between the R3 heifer price in NI and the EU average narrowed slightly from 20.1c/kg in the week ending 19/08/2018 to 19.2c/kg in the week ending 16/09/2018.

In ROI the R3 heifer price was 384.1c/kg in the w/e 16/09/2018, a decrease of 10.3c/kg from the 394.4c/kg paid in the w/e 19/08/2018. This notable decline moved it down into seventh place on the EU league table. The R3 heifer price in ROI was just 0.2p/kg above the EU average price and 19c/kg lower than the equivalent price in NI.

FQAS MART CLINICS OCTOBER 2018

LOCATION	DAY	DATE
Saintfield	Wednesday	03/10/2018
Crossmaglen	Saturday	06/10/2018
Swatragh	Monday	08/10/2018
Markethill	Tuesday	09/10/2018
Camlough	Wednesday	10/10/2018
Omagh	Monday	15/10/2018
Kilrea	Wednesday	17/10/2018
Enniskillen	Thursday	18/10/2018
Hilltown	Saturday	20/10/2018
Dunganon	Wednesday	24/10/2018
Ballymena	Friday	26/10/2018

WEEKLY BEEF & LAMB MARKETS

LMC

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 24/09/18	Next Week 01/10/18
Prime		
U-3	348 - 356p	350 - 356p
R-3	342 - 350p	344 - 350p
O+3	336 - 344p	338 - 344p
P+3	290 - 304p	292 - 304p
	Including bonus where applicable	
Cows		
O+3 & better	255 - 270p	255 - 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 22/09/18	Steers	Heifers	Young Bulls
U3	359.5	365.1	354.5
R3	356.4	359.4	350.2
O+3	349.4	351.5	341.3

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 22/09/18	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	169.3	184.2	195.9	206.7
P2	189.9	213.2	236.9	247.0
P3	184.1	233.6	250.2	257.2
O3	210.0	246.7	265.3	274.7
O4	-	251.0	268.4	279.5
R3	-	-	304.3	295.1

Deadweight Cattle Trade

BASE quotes from the major processing plants for in-spec U-3 grade prime cattle have held relatively steady this week ranging from 348-356p/kg for steers and heifers. Similar quotes are expected for next week and producers are encouraged to use theses base quotes as a starting point for negotiation. The cow trade has also held steady with quotes for good quality O+3 grading cows ranging from 255-270p/kg across the plants.

The plants have reported good supplies of all types of cattle coming forward to meet demand for beef. Prime cattle throughput in NI plants last week increased by 125 head to 6,624 head when compared to the previous week and up by 95 head when compared to the same week last year when 6,529 prime cattle were killed in local plants. Cow throughput in NI plants last week increased by 136 cows to 2,238 head when compared to the previous week though was back 380 cows when compared the same week in 2017.

Imports of prime cattle from ROI for direct slaughter last week totalled 222 head, a 126 head decrease from 348 head the previous week. Meanwhile cow imports from ROI totalled 78 head last week, up 36 cows from the previous week. A further three prime cattle and 71 cows were imported from GB last week for direct slaughter. A total of 24 prime cattle and 80 cows were exported from NI for slaughter in ROI plants last week, while a further 32 prime cattle and 9 cows were exported from NI for slaughter in plants in GB.

The average steer price in NI last week was up half a penny to 351.9p/kg while the R3 steer price was back 2.1p/kg to 359.7p/kg. In the corresponding week last year the R3 steer was 356.8p/kg. The average heifer price in NI last week decreased by 1.7p/kg to 355.1p/kg while the R3 heifer price was up by 0.4p/kg to 362p/kg, when compared to the same week in 2017 the R3 heifer price in NI was 356.2p/kg. The average cow price reported a decrease of 1.8p/kg to 253.2p/kg while the O3 cow price was back 0.9p/kg to 273.2p/kg.

In GB last week the average steer price was up by 0.6p/kg 370.9p/kg while the R3 steer price was up marginally to 380p/kg. There was some variance across the regions with R3 steer prices increasing in Southern England and the Midlands and coming back in Scotland and marginally back in Northern England. There was no change in the average heifer price in GB last week remaining at 371.2p/kg while the R3 heifer price was up by 2.2p/kg to 379.7p/kg. The differential in deadweight prices between NI and GB has continued to widen with R3 steer and heifer prices in GB 20p/kg and 18p/kg higher than the equivalent prices in NI last week.

Reported prices in ROI came under pressure last week this combined with a weaker euro meant the R3 steer price was back 4.8p/kg to 330.2p/kg while the R3 heifer price was back by 4.2p/kg to 340.2p/kg. Prime cattle supplies remain strong in ROI with throughput in the plants running 2.4 per cent ahead of 2017 levels for the year to date.

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

W/E 22/09/2018		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	360.5	340.7	392.4	378.2	382.0	386.1	384.1
	R3	359.7	330.2	388.1	378.1	376.1	378.1	380.0
	R4	359.0	329.2	393.4	387.0	379.6	379.0	385.6
	O3	355.6	312.7	367.6	355.4	346.2	355.0	355.9
	AVG	351.9	-	386.6	371.2	360.6	364.3	370.9
Heifers	U3	365.1	350.7	396.8	385.3	387.9	388.9	389.7
	R3	362.0	340.2	388.4	374.5	378.4	376.2	379.7
	R4	361.9	340.7	391.6	378.0	379.5	374.7	381.5
	O3	359.3	324.9	374.8	349.2	345.2	355.3	356.5
	AVG	355.1	-	388.1	368.9	363.1	363.2	371.2
Young Bulls	U3	354.8	335.3	386.1	367.5	367.0	373.8	371.5
	R3	351.5	327.1	378.1	360.3	361.0	358.8	363.8
	O3	331.8	311.9	346.3	321.7	327.9	332.3	329.8
	AVG	340.1	-	364.1	344.7	344.2	348.9	348.7
Prime Cattle Price Reported		5747	-	6624	7104	7264	4724	25716
Cows	O3	273.2	263.3	280.7	267.6	270.2	271.9	271.2
	O4	278.6	264.7	281.4	269.6	272.2	269.6	272.0
	P2	236.2	230.2	230.9	224.0	228.8	233.1	229.5
	P3	254.7	251.9	252.6	241.5	248.0	249.5	248.0
	AVG	253.2	-	273.4	241.8	232.0	235.5	239.5

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=88.93p 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 22/09/18	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	208	222	212	180	207	195
Friesians	153	162	157	120	140	130
Heifers	205	225	215	175	204	190
Beef Cows	150	188	165	120	149	135
Dairy Cows	115	135	122	65	114	100
Store Cattle (p/kg)						
Bullocks up to 400kg	230	289	245	185	229	205
Bullocks 400kg - 500kg	220	264	235	180	218	200
Bullocks over 500kg	210	230	215	170	209	192
Heifers up to 450kg	210	244	228	175	209	195
Heifers over 450kg	200	231	215	170	199	185
Dropped Calves (£/head)						
Continental Bulls	335	485	385	210	330	270
Continental Heifers	250	370	300	150	245	190
Friesian Bulls	100	180	140	50	95	75
Holstein Bulls	70	120	95	20	68	45

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 24/09/18	Next Week 01/10/18
Lambs >21kg	370 - 375p	370 - 375p

REPORTED SHEEP PRICES

(P/KG)	W/E 08/09/18	W/E 15/09/18	W/E 22/09/18
NI L/W Lambs	351.7	344.8	342.8
NI D/W Lambs	388.5	382.6	374.2
GB D/W Lambs	422.1	412.8	403.1
ROI D/W	409.0	398.4	-

Deadweight Sheep Trade

QUOTES from the plants this week for R3 grading lambs ranged from 370-375p/kg up to 21kg with similar quotes expected for early next week. The plants are reporting steady supplies of lambs to meet demand with 9,450 lambs killed locally last week. This is a decline of 1,318 lambs when compared to the previous week and back 1,098 lambs when compared to the 10,548 lambs killed in local plants the same week last year. Exports of sheep to ROI for direct slaughter last week totalled 9,011 back 183 head from the 9,194 head exported to ROI the previous week. The deadweight lamb price in NI last week was back 8.4p/kg to 374.2p/kg when compared to the previous week.

This week's marts

GOOD numbers passed through many of the marts this week with a similar trade reported for good quality lambs. In Massereene on Monday 1,222 lambs sold from 335-370p/kg compared to 968 lambs last week selling from 335-369p/kg. In Saintfield on Tuesday a similar trade to last week, 712 lambs sold from 330-376p/kg compared to 624 lambs selling from 330-370p/kg. In Rathfriland this week 753 lambs sold from 324-389p/kg (avg 345p/kg) compared to 873 lambs selling from 325-390p/kg (avg 341p/kg). A good entry of 2,111 lambs in Ballymena this week sold from 320-376p/kg (avg 336p/kg) compared to 1,401 lambs last week selling from 320-361p/kg (Avg 339p/kg). Top reported prices for cull ewes generally ranged from £75-90 across the marts with a top reported price of £100 in Swatragh last Saturday.

LATEST SHEEP MARTS

From: 21/09/18		Lambs (P/KG LW)			
To: 27/09/18		No	From	To	Avg
Friday	Newtownstewart	434	328	357	-
Saturday	Omagh	1266	362	447	-
	Swatragh	1100	325	372	-
Monday	Massereene	1222	335	370	-
	Kilrea	350	326	358	-
Tuesday	Saintfield	712	330	376	-
	Rathfriland	753	324	389	345
Wednesday	Ballymena	2111	320	376	336
	Enniskillen	698	330	378	-
	Markethill	1150	330	358	-

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