

BEEF AND SHEEP FEED STATISTICS UPDATE

THE latest animal feed statistics released by DAERA have indicated a general increase in the amount of concentrates fed on NI beef and sheep farms during the third quarter of 2016 when compared to year earlier levels.

As outlined in Figure 1, deliveries of beef cattle compounds and course mixes/blends by Northern Ireland feedstuffs manufacturers during quarter three of 2016 totalled 67.7 thousand tonnes. This was an increase of four per cent from the corresponding period during 2015 when 65.1 thousand tonnes of beef concentrates were delivered to NI farms.

Deliveries of growing and finishing sheep compounds and course mixes/blends also recorded an increase during the third quarter of 2016 with 7.1 thousand tonnes delivered to NI farms. This is a notable 31.4 per cent increase from 2015 levels when deliveries of sheep concentrates totalled 5.4 thousand tonnes.

The increases recorded in cattle and sheep feedstuff deliveries in quarter three follow on from reduced volumes of concentrate usage in NI in the first

half of 2016. An earlier spring and good grass growing conditions reduced the need for concentrate feeding in the first half of the year however unsettled and wet weather conditions in quarter three resulted in many producers having to supplement cattle and sheep with concentrates at grass and in some cases house stock earlier. This led to an increase in total concentrate usage during the summer/autumn months.

Total concentrate usage on NI farms can generally be correlated with cattle and sheep output from the region. It is important that we consider slaughtering in local plants but also the number of cattle and sheep being imported and exported for direct slaughter when analysing feed statistics to establish the number of cattle and sheep fed/finished in NI.

During the third quarter of 2016 a total of 98,833 cattle were slaughtered in NI plants with two per cent of these imported from ROI/GB for direct slaughter. In the corresponding period in 2015 total cattle throughput totalled 96,182 head with nine per cent of cattle throughput imported from ROI/GB for direct slaughter. The increase in concentrate usage on NI farms can

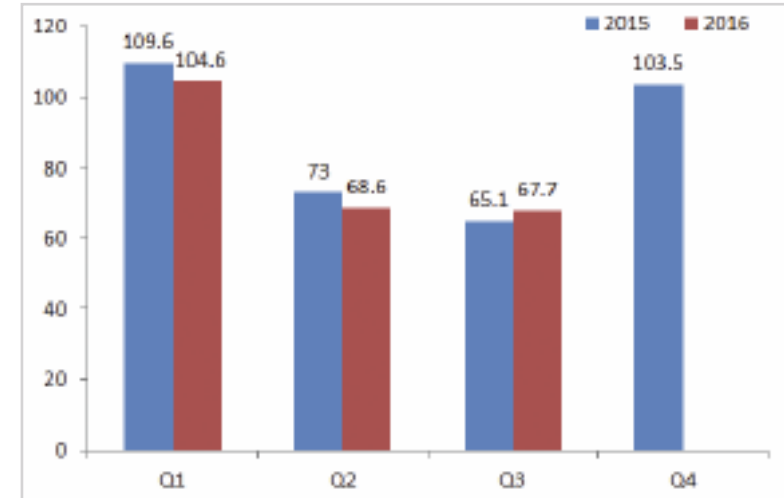
therefore be partly attributed to the increase in the proportion of the NI kill sourced from local farms. However with unsettled weather this summer it is likely that increased supplementary feeding at grass to maintain performance was also a factor behind the increased use of beef concentrates.

The poor weather conditions will also have been a factor behind the increase in concentrate usage within the NI sheep sector during the third quarter of 2016. The poorer grazing conditions and unsettled weather during summer/autumn 2016 than previous years will have increased the amount of concentrates required to bring lambs through to finish and will also have contributed to longer finishing periods.

Another factor behind the increased demand for sheep concentrates on NI farms is the rise in lamb production levels during 2016. Results of the June Agricultural Census 2016 indicated a two per cent increase in lamb numbers on the ground when compared to 2015 levels.

However despite the increase in lamb numbers recorded combined sheep slaughtering and exports from NI

Figure 1: Combined deliveries of beef cattle compounds and beef mixes/blends to NI farms 2015/2016 (Tonnes)



during the third quarter of 2016 totalled 253,039 head, a two per cent decrease from 259,191 head in the corresponding period in 2015. This indicates that lambs were slower to finish off grass this year and this will have contributed to more lambs on NI farms needing supplementary feeding at grass and thus the increase in concentrate usage recorded.

Feed costs

According to industry sources prices for cattle rations have held steady despite merchants reporting growing volumes being traded. For store cattle and weanlings a 16% crude protein general-purpose ration is typically £190-200 /t, with a 17% calf ration selling up to £210/t and some 15% rations trading at £180/t. Prices for finishing rations are generally trading at £170-185/t.

CHANGES TO NI PRIME CATTLE SLAUGHTER MIX

PRIME cattle throughput in the local plants has totalled 39,865 head during the six weeks ending 26 November 2016. This was fairly similar to the corresponding six week period in 2015 when 40,002 prime cattle were processed in local plants. APHIS figures have indicated an increase in the number of beef cattle available for slaughter on NI farms in recent months when compared to year earlier levels and this has helped to sustain throughput in NI plants despite a notable reduction in the number of prime cattle being imported from ROI for direct slaughter.

During the six week period ending 26 November 2016 a total of 314 prime cattle were imported from ROI for direct slaughter in NI, accounting for less than one per cent of total NI prime cattle throughput. In the corresponding period last year imports of prime cattle from ROI totalled 3,295 head which accounted for eight per cent of total throughput in local plants.

There have also been some changes to the proportion of steers, heifers and young bulls in the NI slaughter mix year on year. In the six week period ending 26 November 2016 55 per cent of the NI prime cattle kill were steers compared to 58 per cent in the corresponding period in 2015.

Meanwhile the proportion of heifers in the slaughter mix increased from 35 per cent to 37 per cent while the proportion of young bulls increased by two percentage points to account for 9 per cent of the NI kill in the 2016 period.

The carcass weights of prime cattle slaughtered in NI plants has also recorded a general decline year on year as outlined in Figure 2. The average carcass weight of steers slaughtered in NI plants during the six weeks ending 26 November 2016 was 348kg, back 10kg from the corresponding period in 2015 when the average carcass weight was 358kg. The average heifer carcass weight during the 2016 period was 312kg, back 11kg from year earlier levels while the average young bull carcass weight was 324kg, back 18kg from year earlier levels.

These declines in average carcass weights may be due to poorer cattle performance at grass this summer but there have also been some key changes in the source of prime cattle and the age at slaughter which will also have impacted carcass weights.

During the six week period ending 26 November 2016 59 per cent of price reported steers were sourced from the suckler herd with an average carcass weight of 364kg compared to 61 per

cent in the corresponding period in 2015 with an average carcass weight of 371kg. Suckler origin steers were killed on average 33 days earlier during the 2016 period when compared to the 2015 period which may have been one contributory factor to the lower carcass weights.

Meanwhile beef cross steers killed in the six weeks ending 26 November 2016 accounted for 23 per cent of the price reported steer kill, up from 18 per cent in the corresponding period in 2015. The average carcass weight of beef cross steers was back by 9kg to 335kg in the 2016 period with steers killed an average of 21 days earlier year on year. Dairy sired steers accounted for 17 per cent of the kill in the six weeks ending 26 November 2016, back from 19 per cent in the 2015 period. The average carcass weight of these dairy sired steers declined by 7kg to 303kg in the 2016 period.

Suckler origin heifers accounted for 67 per cent of price reported heifers in local plants during the six weeks ending 26 November 2016, back from 72 per cent in the 2015 period. Suckler origin heifers were slaughtered an average of five days earlier in the 2016 period with an average carcass weight of 321kg, back from 331kg in the corresponding period in 2015. Beef cross heifers

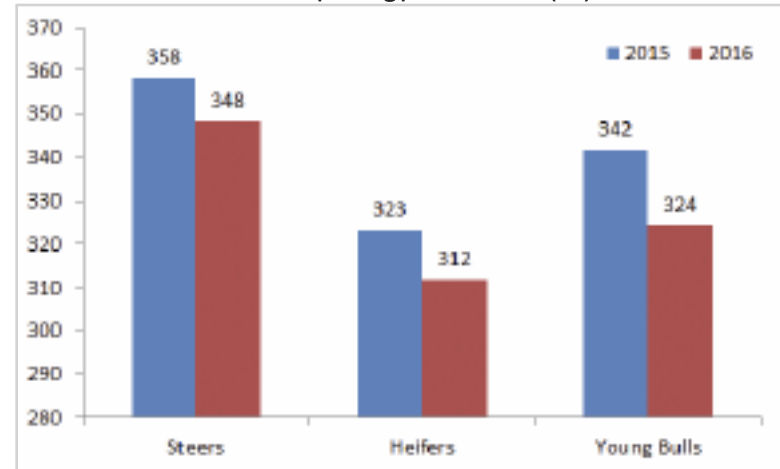
accounted for 25 per cent of the price reported heifer kill in NI during the 2016 period, up from 22 per cent in the 2015 period. The average carcass weight of beef cross heifers was back by 9kg to 297kg in the 2016 period and were killed an average of 14 days earlier than the same period in 2016.

Suckler origin young bulls accounted for 44 per cent of price reported young bull throughput in local plants in the six weeks ending 26 November 2016 compared to 47 per cent in the same period in 2015. The average carcass weight was back by 8kg to 367kg despite young bulls being an average of

seven days older at point of slaughter.

Beef cross young bulls accounted for 11 per cent of young bull throughput during the 2016 period, back from 14 per cent in the 2015 period. The average carcass weight was almost unchanged year on year at 326kg with age at slaughter up slightly to 494 days. The proportion of dairy sired young bulls in the price reported slaughter mix increased from 37 per cent in the 2015 period to 43 per cent in the 2016 period. The average age at slaughter increased slightly to 15.6 months (479 days) while the average carcass weight was almost unchanged at 279kg.

Figure 2: Average prime cattle carcass weight by category six weeks ending 26 November 2016 and the corresponding period in 2015 (KG)



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WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 28/11/16	Next Week 05/12/16
Prime		
U-3	344 - 348p	344 - 348p
R-3	338 - 342p	338 - 342p
O+3	332 - 336p	332 - 336p
P+3	278 - 296p	278 - 296p
	Including bonus where applicable	
Cows		
O+3 & better	240 - 250p	240 - 250p
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 26/11/16	Steers	Heifers	Young Bulls
U3	353.5	355.9	347.7
R3	349.1	349.4	340.3
O+3	341.6	341.7	333.9

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

w/e 26/11/16	Wgt <220kg	Wgt 220- 250kg	Wgt 250- 280kg	Wgt >280kg
P1	158.3	170.4	177.6	187.1
P2	169.7	195.8	216.1	230.3
P3	173.3	212.8	230.5	237.5
O3	182.4	222.7	251.2	255.5
O4	-	254.0	241.0	257.8
R3	-	-	-	272.3

Deadweight Cattle Trade

BASE quotes from the major processors for in spec U-3 grade steers and heifers ranged from 344-348p/kg this week with similar quotes expected for early next week. The trade for good quality O+3 grade cows remained steady this week ranging from 240-250p/kg across the plants.

Prime cattle throughput in NI plants last week totalled 6,583 head, an increase of 149 head from the previous week however 129 head lower than the corresponding week in 2015. Meanwhile strong numbers of cows have continued to come forward for slaughter in NI with the highest weekly cow kill recorded since November 2012 last week. A total of 2,828 cows were killed in NI last week, an increase of 125 head from the previous week and 424 head higher than the same week last year.

Prime cattle imports from ROI for direct slaughter in NI plants last week continued at a low level with 33 prime cattle imported, accounting for less than one per cent of the total NI prime cattle kill. In the corresponding week in 2015 389 prime cattle were imported for direct slaughter in NI which accounted for six per cent of the total NI prime cattle kill. The number of cows imported from ROI for direct slaughter in NI last week totalled 29 compared to 60 in the same week last year. Meanwhile 92 cows were exported from NI for direct slaughter in ROI last week, notably lower than the 311 cows exported during the corresponding week in 2015. Exports from NI for direct slaughter in GB last week remained minimal with 56 prime cattle and 6 cows exported.

The deadweight trade for prime cattle generally improved in NI last week with the average steer price up by 3.6p/kg to 343.3p/kg while the R3 steer price increased by 3.3p/kg to 353.4p/kg. The average heifer price in NI last week was up by 1.9p/kg to 345.1p/kg while the R3 heifer price was almost unchanged at 351.7p/kg. The average cow price in NI last week recorded an increase of 2.2p/kg to 230.2p/kg while the O3 cow price was almost unchanged at 254.3p/kg.

In GB last week the deadweight cattle trade generally strengthened with the average steer price up by 1.3p/kg to 353.2p/kg while the average R3 steer price increased by 1.9p/kg to 362.8p/kg. The differential in R3 steer prices between NI and the GB average continued to decline reaching 9.4p/kg, the equivalent of £33 on a 350kg carcass and the narrowest differential between the regions since early July this year. The average heifer price in GB last week was up by 1.8p/kg to 355.5p/kg while the average R3 heifer price increased by 2.4p/kg to 362.5p/kg. The differential in R3 heifer prices last week between NI and the GB average was 10.8p/kg which is the equivalent of £38 on a 350kg carcass.

Deadweight prices for prime cattle in ROI strengthened in euro terms however they weakened in sterling terms as sterling made gains against the euro. The R3 steer price in ROI last week was the equivalent of 307.7p/kg, back by a penny from the previous week while the R3 heifer price decreased by the equivalent of 1.5p/kg to 320p/kg.

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

W/E 26/11/2016	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	354.4	316.4	376.7	360.0	361.3	362.2	365.1
	R3	353.4	307.7	376.7	357.6	359.1	356.4	362.8
	R4	354.6	306.8	376.2	371.4	355.5	358.2	368.0
	O3	343.1	292.2	349.1	341.1	327.1	331.1	338.0
	AVG	343.3	-	371.3	355.2	341.3	339.3	353.2
Heifers	U3	356.3	330.9	384.4	364.6	369.2	366.9	371.7
	R3	351.7	320.0	374.7	354.4	359.8	357.5	362.5
	R4	349.1	319.6	374.9	362.7	358.3	358.6	364.3
	O3	346.7	307.9	360.3	339.4	333.7	337.1	343.0
	AVG	345.1	-	373.7	353.6	346.0	344.5	355.5
Young Bulls	U3	347.5	315.4	363.3	338.2	342.2	354.8	346.8
	R3	340.7	306.2	359.5	329.1	340.3	339.8	341.0
	O3	325.7	294.1	314.5	301.5	313.0	314.3	310.6
	AVG	325.1	-	340.0	303.9	325.3	324.9	322.6
Prime Cattle Price Reported	5875	-	7253	7798	6673	4856	26580	
Cows	O3	254.3	244.2	232.1	229.8	230.4	227.1	229.8
	O4	257.0	245.3	233.4	229.5	234.7	227.0	232.0
	P2	218.0	218.8	189.5	187.4	185.6	183.9	186.0
	P3	233.2	234.4	193.5	200.7	200.0	199.1	199.1
	AVG	230.2	-	217.8	201.0	197.3	189.8	198.8

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.30p 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

W/E 26/11/16	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	200	225	208	165	199	178
Friesians	153	161	157	142	152	149
Heifers	200	222	210	160	199	178
Beef Cows	140	183	149	110	143	125
Dairy Cows	100	118	108	60	99	80
Store Cattle (p/kg)						
Bullocks up to 400kg	210	240	225	175	209	193
Bullocks 400kg - 500kg	200	218	208	165	199	182
Bullocks over 500kg	195	206	200	160	194	175
Heifers up to 450kg	200	216	208	155	199	180
Heifers over 450kg	190	205	200	150	189	170
Dropped Calves (£/head)						
Continental Bulls	265	365	315	190	262	225
Continental Heifers	200	325	265	100	198	150
Friesian Bulls	110	195	150	40	108	75
Holstein Bulls	70	145	110	1	68	35

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 28/11/16	Next Week 05/12/16
Lambs	375 > 22kg	375 > 22kg

REPORTED SHEEP PRICES

(P/KG)	W/E 12/11/16	W/E 19/11/16	W/E 26/11/16
NI Lambs L/W	335.4	340.6	340.5
NI Lambs D/W	368.9	372.6	372.6
GB Lambs D/W	383.7	379.8	382.9
ROI D/W	374.8	370.8	372.7

Deadweight Sheep Trade

THE deadweight lamb trade in NI remained steady this week with quotes for R3 grade lambs at 375p/kg with plants paying up to 22kg. Similar quotes are expected for early next week. The plants have reported a slight increase in the number of lambs coming forward for slaughter with throughput last week totalling 10,134 head. In the corresponding week in 2015 a total of 9,026 lambs were killed in NI plants accounting for an increase of 12 per cent year on year. Exports of sheep to ROI for direct slaughter last week remained steady at 10,491 head, compared to 7,448 head during the same week last year. The average deadweight lamb price in NI last week was unchanged at 372.6p/kg while in ROI the deadweight lamb price was very similar at 372.7p/kg.

This week's marts

REPORTS from the marts this week generally indicated a slightly tighter trade with smaller numbers of lambs passing through most of the sale rings. In Kilrea on Monday 300 lambs sold from 336-362p/kg compared to 340 lambs the previous week selling from 336-353p/kg. In Saintfield on Tuesday 702 lambs sold from 315-372p/kg compared to 1,024 lambs the previous week selling from 320-388p/kg. In Ballymena on Wednesday 1,804 lambs sold to an average of 333p/kg compared to 2,501 lambs the previous week selling to an average of 335p/kg. In Arroy on Wednesday 314 lambs sold to an average of 342p/kg compared to 464 lambs the previous week selling to an average of 338p/kg. The cull ewe trade held steady this week with a top reported price of £95 in Omagh on Saturday.

LATEST SHEEP MARTS

From: 25/11/16		Lambs (P/KG LW)			
To: 01/12/16		No	From	To	Avg
Friday	Newtownstewart	257	320	348	-
Saturday	Omagh	1144	344	379	-
	Swatragh	1000	319	382	-
Monday	Kilrea	300	336	362	-
	Massereene	1236	335	364	-
Tuesday	Saintfield	702	315	372	-
	Rathfriland	1110	328	379	339
Wednesday	Ballymena	1804	320	370	333
	Enniskillen	434	338	362	-
	Markethill	1580	325	358	-
	Arroy	314	325	358	342

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PERSONAL REFLECTIONS ON THE 21ST WORLD MEAT CONGRESS

LMC recently hosted a visit to the recent 21st World Meat Congress in Uruguay for a group of local beef industry representatives. It is a major event, organised every 2 years by the International Meat Secretariat (IMS), which draws together meat and livestock professionals from across the world. The visiting group was headed up by LMC Chairman Gerard McGivern and Chief Executive Ian Stevenson.

LMC is one of 94 current meat and livestock member organisations which are brought together under the IMS umbrella which acts as a global forum for exchange of ideas and experience on issues influencing the meat and livestock sector. LMC's Chief Executive Ian Stevenson said "Our visit provided us with a unique opportunity to get an international perspective on many of the challenges facing the livestock sector. These included production and consumption forecasts, international trade, free trade negotiations, market outlooks, promotional activity, animal welfare matters, animal disease threats, antibiotic usage and sustainability initiatives."

LMC's chairman said the overarching message coming out of the Congress was that communication is crucial. McGivern added: "The industry needs to compete for the attention of consumers to prove its sustainability credentials and Northern Ireland has a good news story to tell in this regard. However the industry often remains on the back foot. Instead of reacting to negative publicity, our messaging needs to be proactive and

positive. A greater use of social media is advocated. LMC's role in keeping a finger on the pulse in terms of global trends and technical knowhow and its role in interpreting and applying these to the local industry may be understated."

McGivern also pointed out that the global animal meat market is becoming all the more complicated, with competition across different species very much supply driven. "Our focus needs to be on adding value, not chasing prices. Better use can be made of technology to share information from the consumer back through the supply chain. The challenge is how to communicate better, and together."

Linden Foods' managing director Gerry Maguire was another member of the visiting group from Northern Ireland to Uruguay. Reflecting on the scope of the congress, he said: "Global beef players are building and strengthening their supply chains on the back of future world demand for protein. They are looking to differentiate within the market place. This will entail a focus on premium breeds, a reduction in antibiotics' usage and creating a clear distinction between grass and grain based supplies. Taking carbon out of beef production will be a key focus for the industry at an international level.

Maguire added that the protein market will become very competitive in 2017. "This means an increase in supply chains and, probably, a lack of margin. White meat production continues to grow."

The Linden Foods' managing director confirmed that a number of key consumer messages emanated from the congress. These are: simplicity, authenticity and trust.

"Most key speakers touched on this. The McDonald speaker wanted progress on these and referred to their schemes in Canada and Ireland, There was a lot of reference to the bad publicity that beef gets and the US speaker was trying to promote the idea that we should have a media vehicle to promote the positive messages associated with red meat."

Maguire concluded: "Global meat companies seem to work very closely with their own governments. Here in Northern Ireland, we don't and won't get the same level of support. Hence, we will continue to be on the back foot. "What changes will "Brexit" bring? We need to get our government, the European Commission and the World Organisation for Animal Health to remove these BSE hurdles which we have carried for 20 years. "It continues to hold us back from getting markets open, we still have the cost of the regulations surrounding the BSE controls and generally the margin deficit weighed against the rest of the world leaves us less competitive."

Image 1: Hereford cattle grazing on a technical visit to a suckler producer in Uruguay



SOME REFLECTIONS ON A MORE THAN INTERESTING BEEF CONFERENCE.....RICHARD HALLERON

THE recent 'Progressive Beef Production' conference, which was co-hosted by LMC, AFBI, CAFRE and UFU highlighted the many opportunities that exist for red meat producers in a post Brexit world. In the first instance we heard that the UK supermarkets remain committed to paying a quality price for beef, provided it is produced from animals that are both born and reared in the United Kingdom.

But this is only the starting point: retailers will want Farm Quality Assurance as an all embracing confirmation of the certification they need. But within this scenario it is now envisaged that the supermarkets will want other quality criteria included. Amongst these will be an ever stronger demand for higher on-farm welfare standards and the almost certain introduction of taste as a key determinant of meat quality. This latter point is already a reality in countries such as the United States.

For their part, the retailers will expect

all of these criteria to be communicated and then delivered by an independent body, which has the expertise and track record to meet these requirements. From a Northern Ireland perspective the organisation most suited to take on such a role is the LMC. The Commission is already at the helm of the current Farm Quality assurance. Moreover, its strong heritage as the body which delivered carcass classification in Northern Ireland makes it the most obvious candidate to facilitate the introduction as a quantifiable meat quality trait.

Image 2: Ian Stevenson (LMC), Gerard Mc Givern (LMC), Barclay Bell (UFU), Martin McHendry (CAFRE) and Sinclair Mayne (AFBI) at the beef conference.



But the facet of the LMC's work which most qualifies it as the go-to partner for the supermarkets is its undeniable track record in communicating effectively with every livestock farmer here in Northern Ireland. And this is a two way process, given the degree of trust that producers place in the advice and information they receive from the Commission. All of this has been hard won over many years. And it is the foundation upon which all future communications' campaigns, specifically targeting livestock farmers, must be built!

CATTLE SHOULD BE CONSIDERED PART OF THE SOLUTION TO GLOBAL WARMING

Recent years have seen ruminant livestock targeted by many scientists as key contributors to global warming, as a result of their gaseous emissions. Methane, for example, produced by the rumination process, is 25 times more potent than carbon dioxide as a greenhouse gas.

However, delegates attending the recent World Meat Congress in Uruguay, were given a different perspective entirely on how cattle and grazing techniques can actually ameliorate the impact of global warming. The views were expressed by Alan Savory, courtesy of his presentation to the event.

He said that land is desperate for animals, adding: "It is actually the opposite of the concept that is being used to explain global warming. In other words, livestock are not the problem but the solution." A native of Zimbabwe, Savory has spent the last 50 years studying the causes of desertification around the world. In 2009, he set up the

Savory Institute in Colorado. This centre is one of 11 finalists in the Virgin Earth Challenge, a US\$25m initiative for the successful commercialisation of ways to capture greenhouse gases from the atmosphere and keep them out without any compensatory impact.

According to his vision, based on studies and years of experience, it is guaranteed that if we graze livestock on grasslands these will recover. "We need to take the animals to the grasslands. The earth needs animals," he said.

"The hooves of the animals break up the crust of algae that forms on bare soil in dry areas. Breaking it up encourages the growth of grass. By trampling vegetation and coating it with manure, the livestock produce a mulch that ensures the soil absorbs and retains more water." Savory added that countries like Uruguay in which extensive pastures abound could easily double their beef output by adopting more efficient grazing techniques.



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