LMC
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NI RED MEAT SALES STRUGGLE

RED meat sales have continued to struggle in Northern Ireland according to the latest available sales data from Kantar Worldpanel. Red meat sales have recorded a four per cent decline in terms of both value and volume during the 12 week period ending 16 June 2019 when compared to the same period in 2018.

The pressure on the meat market has not been confined to red meat with sales for all meat categories in Northern Ireland coming under pressure. All categories reported declines during the 12 weeks ending 16 June 2019 in terms of both the value and volume.

The value of total meat sales in Northern Ireland was back by £2.7 million (3.8 per cent) to £67.8 million during the 2019 period. Meanwhile the volume of meat sales was back by 251 tonnes (2.1 per cent) to total 11,585 tonnes during the 2019 period when compared to the same period last year.

Beef

Beef sales in NI were valued at £26.4 million during the 12 week period ending 16 June 2019. This was a 3.9 per cent decline from the same period last year when beef sales were valued at £27.5 million. In volume terms beef sales totalled 3,383 tonnes, a two per cent decline from year earlier levels.

On a more positive note beef has been holding market share and accounted for 29 per cent of all meat sales in Northern Ireland in terms of volume during the 12 weeks ending 16 June 2019. This proportion was unchanged from the same period in previous years.

Mince continues to be the most popular beef product and accounted for 43 per cent of beef sales in terms of volume during the 12 weeks ending 16 June 2019. There was however a 6.4 per cent decline in the volume of mince sales year on year. This decline has occurred despite a slight decline in the average retail price to £5.56/kg, back from £5.83/kg during the same period last year.

Volume sales of frying and grilling steaks totalled 524 tonnes during the 12 weeks ending 16 June 2019, back by 4.3 per cent from year earlier levels. Meanwhile sales of stewing beef in Northern Ireland were unchanged at 257 tonnes year on year.

Image 1: Sales of beef roasting joints have improved while sales of other beef cuts have generally struggled.

There has however been a notable 26.4 per cent increase in the volume of beef roasting joints sold in Northern Ireland during the 2019 period. It is however worth pointing out that sales of these joints only accounted for one fifth of total beef sales. A 7.8 per cent drop in the average retail price from £8.19/kg in the 2018 period to £7.55 in the 2019 period and an increase in the popularity of mini roasts will have contributed to this improvement in volume sales.

Lamb

Lamb continues to be a minority protein in Northerm Ireland with retail sales accounting for 5.2 per cent of volume sales during the 12 weeks ending 16 June 2019. This is back slightly from 5.9 per cent in the same period last year.

Lamb sales in Northern Ireland were valued at £4.7 million during the 12 weeks ending 16 June 2019. This was a 4.3 per cent decline from the same period in 2018 when lamb sales were valued at £4.9 million.

The volume of lamb sales in Northern Ireland totalled 604 tonnes during the 12 weeks ending 16 June 2019, back by 98 tonne (14 per cent) from the same period last year.

Some of this decline in volume sales may stem from the strong increase in the average retail price. During the 12 weeks ending 16 June 2019 the average retail price of lamb in Northern Ireland was £7.84/kg, an 11.3 per cent increase from the same 12 week period in 2018.

Figure 1: Retail beef sales in Northern Ireland have struggled during the last quarter in terms of both the volume and value of sales.

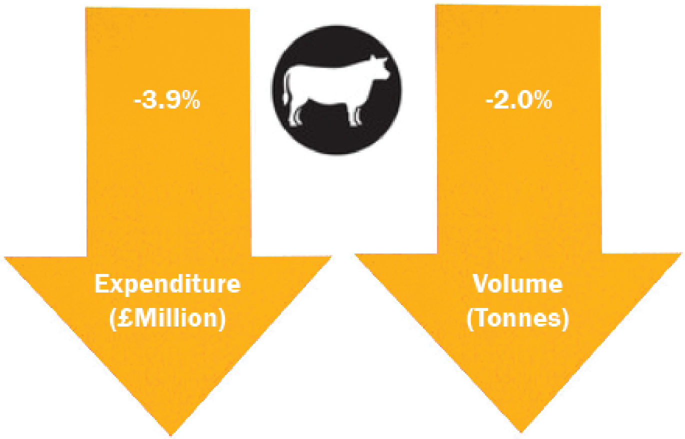
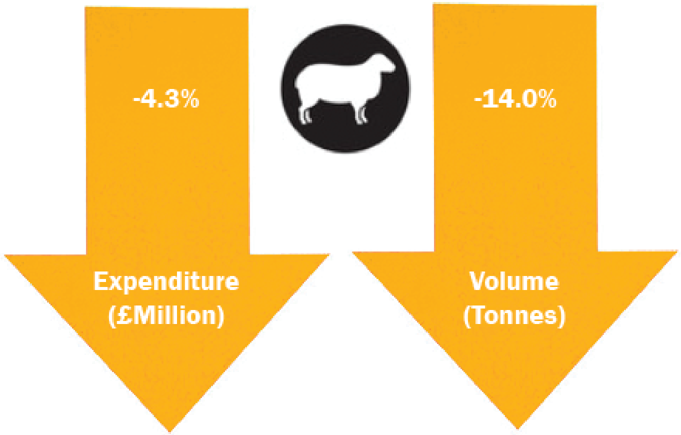


Figure 2: Retail lamb sales in Northern Ireland have struggled during the last quarter in terms of both the volume and value of sales.



EU LEAGUE TABLE OF R3 HEIFER PRICES

A weak sterling and a weakening domestic beef market have kept Great Britain and Northern Ireland down in sixth and seventh place respectively on the league table of EU R3 heifer prices. One Euro was worth 89.7p during the week ending 07 July 2019 which was similar to the previous month.

Deadweight prices for heifers have come under pressure across the EU in recent times with the majority of countries recording a decline in R3 heifer prices as outlined in Table 1. The EU average R3 heifer price was 369c/kg during the week ending 07 July 2019, back by 8.8c/kg from the previous month.

The R3 heifer price in Northern Ireland during the week ending 07 July 2019 was the equivalent of 368.5c/kg, a decrease of 18.3c/kg from the previous month. This places it behind the equivalent price in both Great Britain and Ireland and just below the EU average price.

In Great Britain the R3 heifer price was the equivalent of 373.8c/kg during the w/e 07 July 2019, back 18.8c/kg from the w/e 09 June 2019 when the R3 heifer price was the equivalent of 392.6c/kg. This places in 4.8c/kg above the EU average R3 heifer price.

In Ireland the R3 heifer price during the w/e 07 July 2019 was 377.1c/kg, back 20.5c/kg from the previous month when it was 397.6c/kg. This was one of the strongest declines recorded in all EU countries listed in Table 1 and moved Ireland down one position into fifth place in the league table.

Strong declines in the deadweight beef trade were also recorded in Spain and Poland in recent weeks while the trade in France held relatively steady. There has been a slight improvement in the beef market in some EU countries including Sweden, Italy and Austria.

Reports have indicated that overall the EU beef market has been under pressure with good supplies of cattle for slaughter, weaker consumer demand and competition from other proteins all contributing to the downward pressure on farmgate prices.

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

Position last Mth	Position this Mth	Country	Price last Mth (w/e 09.06.19)	Price this Mth (w/e 07.07.19)	Change on Mth (cents)
2	1	Sweden	400.0	403.6	+3.6
1	2	Luxembourg	405.1	402.7	-2.5
3	3	Italy	399.0	401.8	+2.8
5	4	France	394.0	393.0	-1.0
4	5	Ireland	397.6	377.1	-20.5
6	6	Great Britain	392.6	373.8	-18.8
7	7	Northern Ireland	386.8	368.5	-18.3
8	8	Spain	382.2	361.8	-20.5
9	9	Austria	352.7	354.4	+1.7
10	10	Germany	352.2	350.7	-1.5
11	11	Denmark	342.4	340.2	-2.2
12	12	Slovenia	329.8	336.0	+6.2
13	13	Belgium	326.5	327.0	+0.5
14	14	Poland	319.3	306.3	-13.0
15	15	Lithuania	305.3	289.1	-16.2
16	16	Czech Republic	280.4	286.3	+5.9
EU Average			377.8	369.0	-8.8
Euro (€1=)			88.6	89.7	+1.0

WEEKLY BEEF & LAMB MARKETS

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CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 15/07/19	Next Week 22/07/19
Prime		
U-3	320 - 328p	320 - 330p
R-3	314 - 322p	314 - 324p
O+3	308 - 316p	308 - 318p
P+3	260 - 272p	260 - 274p
	Including bonus where applicable	
Cows		
O+3 & better	235 - 250p	235 - 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 13/07/19	Steers	Heifers	Young Bulls
U3	328.4	336.6	321.3
R3	328.2	331.0	321.0
O+3	320.8	322.2	311.6

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 13/07/19	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	150.5	163.7	175.9	184.9
P2	173.0	192.5	215.9	228.3
P3	175.0	223.0	227.2	238.6
O3	-	236.6	244.7	255.3
O4	-	-	259.5	259.4
R3	-	-	-	272.9

Deadweight Cattle Trade

BASE quotes from the local plants remained steady this week ranging from 320-328p/kg for in-spec U-3 grade steers and heifers. Quotes are expected to range from 320-330p/kg early next week. The deadweight trade for good quality O+3 grade cows also remained steady this week with quotes ranging from 235-250p/kg with similar quotes excpected for next week.

Prime cattle throughput in NI last week totalled 5,145 head, back 1,069 head from the previous week. This strong decline was mainly due to the reduced working week in many of the local plants. Cow throughput last week totalled 1,550 head, back 291 head from the previous week. In the corresponding week in 2018 a total of 4,896 prime cattle and 1,221 cows were killed in local plants.

Imports of cattle for direct slaughter from ROI last week consisted of 166 prime cattle and 16 cows with a further 54 cows imported from GB for direct slaughter in local plants. Exports of cattle from NI to ROI for direct slaughter last week included 24 cows with no cattle making the journey from NI to GB for direct slaughter.

The deadweight trade for prime cattle continued to come under some pressure in NI last week. The average steer price in NI last week reported an increase of a penny from the previous week to 324.4p/kg, while the R3 steer price was back just under a penny to 331.8p/kg. The average heifer price in NI last week remained steady at 326.4p/kg while the R3 heifer price was back 0.6p/kg to 331.8p/kg. The deadweight cow trade reported an improvement last week with the average cow price notably up by 8.1p/kg to 241.8p/kg. The O3 cow price in NI last week also increased by 2.8p/kg from the previous week to 254.2p/kg.

In GB last week the deadweight cattle trade came under pressure with the majority of price reported grades indicating a decline from the previous week. The average steer price was back 1.5p/kg to 326.7p/kg. Meanwhile the R3 steer price in GB was marginally up to 334.6p/kg. The R3 steer price recorded increases in all of the GB regions except for Southern England were the R3 steer price was back 3.5p/kg to 325.3p/kg when compared to the previous week. The average heifer price in GB last week was back 0.8p/kg to 330.5p/kg while the R3 heifer price was back by a similar margin to 336.4p/kg. The R3 heifer price recorded declines in all of the GB regions last week with the exception of Southern England were the R3 heifer price held steady at 330.7p/kg when compared to the previous week.

Deadweight prices for prime cattle in ROI also continued to come under pressure last week. The R3 steer price was back by the equivalent of 5p/kg to 324.8p/kg while the R3 heifer price was back 3.6p/kg to 336.5p/kg. The deadweight cow trade was also back in ROI with the O3 cow price reporting a 2.4p/kg decline to 256.3p/kg. This puts it 2.1p/kg above the equivalent O3 cow price in NI.

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

W/E 13/07/19		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	329.3	331.5	341.7	337.6	331.2	331.1	335.3
	R3	331.8	324.8	344.1	340.5	330.0	325.3	334.6
	R4	334.2	324.4	344.8	344.8	330.8	329.9	339.7
	O3	326.9	310.4	323.8	320.7	306.4	303.3	314.0
	AVG	324.4	-	339.9	332.8	316.7	314.3	326.7
Heifers	U3	337.1	349.7	353.3	346.2	339.7	335.4	343.6
	R3	331.8	336.5	344.5	341.5	330.5	330.7	336.4
	R4	331.3	335.1	347.6	341.4	332.3	330.5	338.8
	O3	327.3	321.7	322.7	326.3	299.1	306.4	313.3
	AVG	326.4	-	344.5	335.6	319.7	319.1	330.5
Young Bulls	U3	321.8	327.0	330.3	328.0	326.6	322.1	327.3
	R3	321.4	313.7	325.7	323.6	323.5	317.4	323.4
	O3	301.0	290.6	296.2	286.9	287.6	301.5	290.6
	AVG	307.5	-	326.0	312.7	311.8	305.1	313.8
Prime Cattle Price Reported		4,458	-	6,579	6,768	6,727	4,135	24,209
Cows	O3	254.2	256.3	256.9	255.0	256.0	255.8	255.8
	O4	259.4	257.6	258.6	259.0	259.1	249.9	257.3
	P2	217.8	231.4	219.1	218.7	210.4	216.4	214.3
	P3	235.6	248.6	234.1	237.9	231.4	227.7	231.4
	AVG	241.8	-	257.1	241.9	227.6	224.2	233.4

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.82p 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 06/07/19	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	202	215	210	178	198	189
Friesians	154	175	165	140	148	145
Heifers	200	217	208	176	199	188
Beef Cows	144	186	158	120	143	132
Dairy Cows	102	113	107	60	100	80
Store Cattle (p/kg)						
Bullocks up to 400kg	215	242	230	190	214	205
Bullocks 400kg - 500kg	210	238	220	185	209	195
Bullocks over 500kg	170	190	180	150	169	160
Heifers up to 450kg	200	221	210	170	199	185
Heifers over 450kg	175	190	185	150	174	165
Dropped Calves (£/head)						
Continental Bulls	335	435	365	235	330	280
Continental Heifers	230	330	280	125	225	180
Friesian Bulls	140	205	170	60	135	85
Holstein Bulls	95	175	135	1	90	45

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 15/07/19	Next Week 22/07/19
Lambs up to 21kg	380-390p	375p

REPORTED SHEEP PRICES

(P/KG)	W/E 29/06/19	W/E 06/07/19	W/E 13/07/19
NI L/W Lambs	362.7	353.2	365.1
NI D/W Lambs	411.2	391.2	387.0
GB D/W Lambs	449.7	433.5	414.9
ROI D/W	433.6	421.5	421.1

Deadweight Sheep Trade

QUOTES from the plants for R3 grade lambs have come under some pressure this week as increased supplies of lambs become available for slaughter. The major processors were quoting 380-390p/kg for lambs up to 21kg this week. Quotes for early next week are expected to be in the region of 375p/kg up to 21kg. With the reduced kill last week lamb throughput in local plants was back by 1,674 head to 7,921 head. In the same week in 2018 5,927 lambs were slaughtered in local plants. Exports to ROI for direct slaughter were back 230 head to 4,854 head from the previous week. The deadweight lamb price in NI last week came back by 4.2p/kg to 387p/kg compared to the previous week.

This week's marts

GOOD numbers of lambs passed through the sale rings this week with some of the marts closed last week. In Swatragh last Saturday 1000 lambs sold from 340-464p/kg compared to 820 lambs selling from 338-401p/kg the previous week. In Massereene on Monday 806 lambs sold from 345-366p/kg compared to 798 lambs selling from 348-384p/kg last week. In Rathfriland on Tuesday 623 lambs sold from 338-370p/kg (avg 353p/kg) compared to 583 lambs last week selling from 365-402p/kg (avg 376p/kg). In Markethill on Wednesday a large entry of 1,280 lambs sold from 340-383p/kg compared to last week when 950 lambs sold from 350-391p/kg. Good numbers of cull ewes also passed through the marts with top reported prices of over £100 across the majority of marts.

LATEST SHEEP MARTS (P/KG LW)

From: 13/07/19		Lambs			
To: 18/07/19		No	From	To	Avg
Saturday	Swatragh	1000	340	464	-
Monday	Massereene	806	345	366	-
	Kilrea	650	348	373	-
Tuesday	Rathfriland	623	338	370	353
Wednesday	Ballymena	1464	330	369	336
	Enniskillen	502	339	374	-
	Armoy	424	345	405	-
	Markethill	1280	340	383	-

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