

## BEEF AND SHEEPMEAT SECTORS CONTINUED TO GROW THROUGHOUT THE PANDEMIC

### Notice

Out of respect and following the death of HM Queen Elizabeth II there may be some changes to planned activities and communications over this national period of mourning.



Drilling down into the statistics at a sectoral level the Beef and Sheepmeat subsector recorded a gross turnover of £1,469.6 million in 2020, a 5.3 per cent increase on 2019 levels. Of the ten subsectors that make up the annual report, Beef and Sheepmeat accounted for 27 per cent of the Northern Ireland gross turnover total for Food and Drinks Processing in 2020.

the beef and sheepmeat subsector which was up by £29.2 million year on year to £61.2 million. When net profit is considered in the context of gross turnover, £61.2 million is equivalent to 4.1 per cent of the Beef and Sheepmeat subsector turnover for 2020. By comparison, net profit in the Drinks subsector was 9.5 per cent of subsector turnover for 2020.

From these sales statistics it is very clear just how important market access to external markets is to the Northern Ireland Beef and Sheepmeat industry. Historically export sales generated a greater share of the gross turnover of Northern Ireland Beef and Sheepmeat Processing. In 1995, prior to the BSE beef export ban, export sales accounted for 31 per cent of the gross turnover figure in Northern Ireland.

At the end of August 2022, the Department of Agriculture, Environment and Rural Affairs (DAERA) published its annual report on the Northern Ireland Food and Drinks Processing Sector for 2019 and 2020. The importance of the sector to the Northern Ireland economy continues to shine through in the statistics.

The Animal By-Products Subsector which comprises businesses which process red offals and fats for the human food chain contributed £48.4 million to the Northern Ireland gross turnover in 2020 and raw material from the Beef and Sheepmeat industry would be an important part of this subsector.

In terms of destination of sales from the Beef and Sheepmeat subsector the Northern Irish market generated gross turnover of £224.1 million with Great Britain sales accounting for £1,002.6 million. At £1,226.7 million the UK market therefore provided 83.5 per cent of gross turnover for the Northern Ireland Beef and Sheepmeat Processing subsector in 2020. Export sales accounted for 16.5 per cent of gross turnover in 2020 with a value of £242.9 million.

In summary, having accurate data on the scale and performance of the Northern Ireland Food and Drinks Processing Sector is essential in helping to inform decision making by both industry and government in so many ways such as targeting investment, deployment of capital, designing of policy, advising marketing strategies, developing support tools, gaining access to appropriate research and development etc.

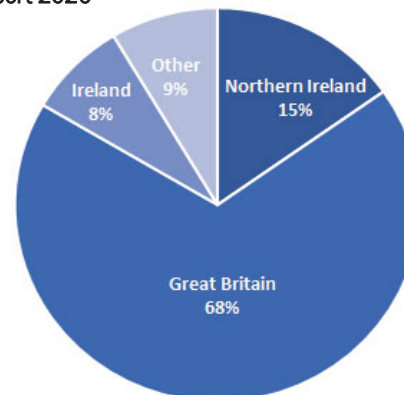


Despite the ravages to everyday life and business that was caused by the Covid-19 pandemic which struck the UK in March 2020 the Food and Drinks Processing Sector recorded an increase in gross turnover of 0.9 per cent in 2020 to £5,424 million. Provisional estimates for 2021 project that gross turnover increased by a further 6.4 per cent to £5,769 million. Northern Ireland Food and Drinks Processing businesses invested heavily in the early days of the pandemic to put Covid-19 operating protocols in place that enabled businesses and their work forces to keep functioning safely and ensure that consumers continued to be supplied with fresh, quality and nutritious produce at all times.

In terms of employment the Beef and Sheepmeat subsector recorded 5,639 full-time equivalent direct employees in 2020 which was the largest number of all ten subsectors and accounted for 22.5 per cent of the total Northern Ireland Food and Drinks Processing sector. Wages and salaries accounted for £154.3 million of the total value added by the Beef and Sheepmeat subsector of £235.6 million in 2020. Whilst value added accounted for 20.1 per cent of the total gross turnover of the Northern Ireland Food and Drinks Processing sector in 2020 the subsector figure for Beef and Sheepmeat processing was 16 per cent. This was an increase in the previous year's value added by the Beef and Sheepmeat subsector which was 13.6 per cent for 2019.

A very important aspect of value added is net profit with five of the ten Food and Drinks Processing subsectors recording an increase in net profit between 2019 and 2020, the largest of which was

Figure 1: NI Beef and sheepmeat £1,469.6 million gross turnover in 2020 - Destination of Sales Source: DAERA NI food and drinks processing report 2020



From an LMC perspective, as an organisation funded almost entirely by the Northern Ireland Beef and Sheepmeat Processing and Farming Sectors, having key datasets such as this annual report enables the design of services to best add value to levy and FQAS income and meet with ever evolving stakeholder needs.

For more information you can download the DAERA NI food and drinks processing report at: [www.daera-ni.gov.uk/publications/size-and-performance-ni-food-and-drinks-processing-sector](http://www.daera-ni.gov.uk/publications/size-and-performance-ni-food-and-drinks-processing-sector)

## NI CALF REGISTRATIONS UPDATE

The latest available data on calf registrations from APHIS between January and August 2022 reported there were 378,029 calves registered

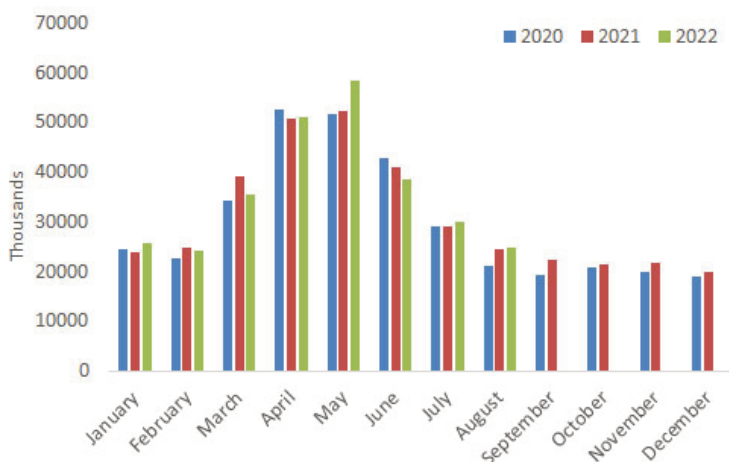
in Northern Ireland, a slight increase from the 377,934 calves registered during the corresponding eight month period in 2021.

During 2022 to date 76 per cent of the calves registered in Northern Ireland were beef sired while the remaining 24 per cent were dairy sired. This has changed slightly from 75 per cent and 25 per cent respectively during the same period last year.

Aberdeen Angus and Limousin continue to be the most popular beef sire used in Northern Ireland during 2022 to date with both accounting for 24.9 per cent of registrations from January to August 2022. Aberdeen Angus has slightly increased from 2021 levels of 24.8 per cent of beef sired calf registrations with Limousin levels slightly back from the same period in 2021 when 25.2 per cent of beef calves registered were Limousin.

is up from 6.3 per cent in corresponding period in 2021. Meanwhile the proportion of Hereford beef sired calves registered has dropped slightly to 6.8 per cent between January to August 2022 from 7.2 per cent in the same period in 2021.

Figure 2: Monthly beef sired calf registrations in Northern Ireland January to August 2020-2022 Source: APHIS



### Beef sired calf registrations

During August 2022 there were 24,880 beef calves registered in Northern Ireland which brings the total for the year to date to 288,687 head, an increase of 3,542 head or 1.2 per cent from the same period last year.

Between January and August 2022 beef sired calf registrations to suckler cows increased by 1,928 head from the same period in 2021 and accounted for 67 per cent of all beef sired calf registrations. The remaining 33 per cent of beef sired calf registrations were to dairy cows and these increased by 1,658 head during 2022 to date.

Charolais was the third most commonly registered calf in NI during the eight months of 2022 with 63,284 calves registered. These accounted for almost 22 per cent of overall beef sired calf registrations, back slightly from 22.4 per cent in the same period in 2021. There have also been slight changes in the proportion of other breeds of beef sired calves registered. Belgian Blue accounted for 6.7 per cent of beef sired calf registrations to date in 2022 which

### Dairy sired calf registrations

Between January and August 2022 there were 89,342 dairy sired calves registered in Northern Ireland with 68 per cent of these registered as female calves. In the corresponding period in 2021 there were 92,789 dairy sired calves registered with 63 per cent of these calves registered as female. Meanwhile during 2022 to date there have been 28,206 dairy sired male calves registered in Northern Ireland back by 18 per cent or 6,240 head from the 34,446 calves registered in the same eight month period in 2021.

### 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 base quotes & mart results Updated 5pm Daily Tel: 028 9263 3011

### Text Service

Free weekly base quotes sent to your mobile phone Email: [bulletin@lmnci.com](mailto:bulletin@lmnci.com) Tel: 028 9263 3000

# WEEKLY BEEF & LAMB MARKETS

## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

| (P/KG DW)                        | This Week<br>05/09/22 | Next Week<br>12/09/22 |
|----------------------------------|-----------------------|-----------------------|
| <b>Prime</b>                     |                       |                       |
| U-3                              | 412 - 426p            | 414 - 426p            |
| R-3                              | 406 - 420p            | 408 - 420p            |
| O+3                              | 400 - 414p            | 402 - 414p            |
| P+3                              | 344 - 358p            | 346 - 358p            |
| Including bonus where applicable |                       |                       |
| <b>Cows</b>                      |                       |                       |
| O+3                              | 330 - 350p            | 330 - 350p            |

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 major processing plants ended this week ranging from 414-426p/kg for in spec U-3 grade prime cattle. With the range of quotes available producers are encouraged to shop around to get the best possible deal. Quotes for good quality O+3 grading cows continued to range from 330-350p/kg across the plants this week.

Prime cattle throughput in local plants last week increased slightly from the previous week to 6,529 head. This brings the total prime cattle throughput for August to 32,667 head which accounts for a 3.7 per cent decrease on the corresponding period in 2021 when 33,920 prime cattle were processed in NI plants. Cow throughput in NI plants last week totalled 1,932 head, back 281 head from the previous week when 2,213 cows were processed. This brings cow throughput for August to 10,797 cows, marginally back from 10,974 cows processed during August 2021.

Imports for direct slaughter from ROI last week consisted of 359 prime cattle and 98 cows. Prime cattle imports from ROI for direct slaughter during 2022 to date have totalled 8,460 head, a decline of 19 per cent or 2,017 head from the same period in 2021 when 10,477 prime cattle were imported. Meanwhile live cattle exports from NI to ROI for direct slaughter last week included four steers and 47 cows. This brings the total year to date cattle exports to 2,689 head, an increase of 873 head when compared to the same period in 2021 when 1,816 cattle were exported to ROI for direct slaughter.

The local deadweight trade for prime cattle generally reported increases last week when compared to the previous week. The average steer price remained steady at 422.5p/kg while the R3 steer price was back 1.4p/kg to 434p/kg. The average heifer price was up by 1.1p/kg to 425.8p/kg last week while the R3 heifer price increased by almost a penny to 436.7p/kg. The average young bull price increased by 3.5p/kg to 416.6p/kg last week with the R3 young bull price up by 2.5p/kg to 427.2p/kg. Meanwhile the average cow price in NI increased by 2.8p/kg to 331.7p/kg while the O3 cow price decreased by a penny from the previous week to 361.1p/kg.

In GB last week the deadweight cattle trade generally firmed from the previous week with the average steer price up 2.1p/kg to 437.3p/kg while the R3 steer price increased just over a penny to 444.1p/kg. The R3 steer price in GB was just over 10p/kg higher than the R3 steer price in NI last week. The average heifer price in GB last week was up 2.4p/kg to 436p/kg while the R3 heifer price remained steady from the previous week at 442p/kg. The R3 heifer price in GB was 5.3p/kg higher than the R3 heifer price in NI last week.

In ROI last week the deadweight prime cattle trade strengthened from the previous week primarily due to the weakening of sterling against the euro. In ROI last week the R3 steer price was the equivalent of 414.5p/kg. This was up 8p/kg from the previous week and 19.5p/kg lower than the R3 steer price in NI. The R3 heifer price in ROI was 417.3p/kg, up 6.9p/kg from the previous week and 19.4p/kg below the R3 heifer price in NI.

### REPORTED NI CATTLE PRICES - P/KG

| W/E<br>03/09/22 | Steers | Heifers | Young<br>Bulls |
|-----------------|--------|---------|----------------|
| U3              | 437.0  | 440.1   | 431.9          |
| R3              | 431.8  | 434.9   | 427.5          |
| O+3             | 424.8  | 425.0   | 419.9          |

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

| W/E<br>03/09/22 | Weight Bands |           |           |        |
|-----------------|--------------|-----------|-----------|--------|
|                 | <220kg       | 220-250kg | 250-280kg | >280kg |
| P1              | 256.2        | 267.7     | 281.7     | 285.0  |
| P2              | 281.7        | 301.1     | 322.5     | 336.4  |
| P3              | 295.2        | 316.1     | 342.8     | 347.2  |
| O3              | 288.0        | 337.3     | 351.4     | 363.9  |
| O4              | -            | 344.9     | 356.3     | 363.0  |
| R3              | -            | -         | -         | 379.5  |

## SHEEP TRADE

### NI SHEEP BASE QUOTES

| (P/Kg DW)              | This Week<br>05/09/22 | Next Week<br>12/09/22 |
|------------------------|-----------------------|-----------------------|
| R3 Lambs<br>up to 21kg | 485 - 490p            | 490 - 495p            |

### REPORTED SHEEP PRICES

| (P/KG)       | W/E<br>20/08/22 | W/E<br>27/08/22 | W/E<br>03/09/22 |
|--------------|-----------------|-----------------|-----------------|
| NI L/W Lambs | 470.9           | 441.2           | 423.3           |
| NI D/W Lambs | 504.8           | 492.8           | 478.6           |
| GB D/W Lambs | 542.8           | 536.2           | 534.3           |
| ROI D/W      | 541.1           | 533.6           | 529.8           |

### Deadweight Sheep Trade

Quotes from the plants for R3 grading lambs ended this week ranging from 490-495p/kg up to 21kg across the plants. Lamb slaughterings in local plants totalled 10,035 head last week, back by 1,148 head from the previous week. This brings the total lamb throughput in August to 51,569 head, a decrease of 1,600 head when compared to the same period in 2021 when 53,169 lambs were processed in NI plants. Exports of lambs to ROI for direct slaughter last week decreased to 5,533 head. This brings the total lambs exported to ROI during August to 27,848 head, an 8.2 per cent decrease when compared to the 30,323 lambs exported in August 2021. The deadweight lamb price in NI last week decreased by 14.2p/kg from the previous week to 478.6p/kg.

### Liveweight Sheep Trade

Good numbers of lambs continue to pass through the marts this week with a slightly firmer liveweight trade reported from last week. In Omagh last Saturday 997 lambs sold from 451-519p/kg compared to 623 lambs the previous week selling from 422-508p/kg. In Kilrea on Monday 500 lambs sold from 432-460p/kg compared to 690 lambs last week selling from 438-476p/kg. In Saintfield this week 750 lambs sold from 440-490p/kg compared to 925 lambs last week selling from 430-485p/kg. On Wednesday in Ballymena a good entry of 1,901 fat lambs sold to an average of 450p/kg an improvement on last week when 1,843 lambs sold to an average of 420p/kg. Top prices for cull ewes ranged from £130-195 across the marts with a top reported price of £195 in Ballymena.

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

| W/E<br>03/09/22                | Northern<br>Ireland | Rep of<br>Ireland | Scotland | Northern<br>England | Midlands<br>& Wales | Southern<br>England | GB    |
|--------------------------------|---------------------|-------------------|----------|---------------------|---------------------|---------------------|-------|
| Steers                         | U3                  | 437.3             | 423.6    | 446.3               | 444.4               | 445.4               | 448.5 |
|                                | R3                  | 434.0             | 414.5    | 448.6               | 443.5               | 441.3               | 444.3 |
|                                | R4                  | 430.0             | 415.7    | 448.3               | 448.6               | 440.1               | 440.0 |
|                                | AVG                 | 422.5             | -        | 444.4               | 440.9               | 430.9               | 430.6 |
| Heifers                        | U3                  | 440.0             | 428.6    | 453.5               | 449.7               | 451.6               | 449.2 |
|                                | R3                  | 436.7             | 417.3    | 448.1               | 441.6               | 439.9               | 438.3 |
|                                | R4                  | 433.0             | 418.5    | 449.3               | 445.0               | 439.7               | 441.1 |
|                                | AVG                 | 425.8             | -        | 447.6               | 440.8               | 427.1               | 424.2 |
| Young<br>Bulls                 | U3                  | 432.1             | 412.8    | 437.4               | 444.7               | 444.2               | 443.2 |
|                                | R3                  | 427.2             | 403.0    | 434.0               | 436.8               | 433.5               | 433.0 |
|                                | O3                  | 409.5             | 385.9    | 417.9               | 402.6               | 407.1               | 410.6 |
|                                | AVG                 | 416.6             | -        | 431.4               | 424.8               | 426.8               | 424.2 |
| Prime Cattle<br>Price Reported |                     | 5,275             | -        | 5,973               | 6,134               | 6,243               | 3,876 |
| Cows                           | O3                  | 361.1             | 375.3    | 378.2               | 376.6               | 376.2               | 371.4 |
|                                | O4                  | 362.6             | 374.6    | 380.5               | 378.9               | 376.9               | 372.2 |
|                                | P2                  | 322.5             | 345.7    | 342.6               | 330.3               | 337.2               | 326.1 |
|                                | P3                  | 343.3             | 364.5    | 349.4               | 353.7               | 356.9               | 345.5 |
| AVG                            |                     | 331.7             | -        | 376.2               | 349.3               | 341.8               | 328.9 |

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.01p 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<br>03/09/22                | 1st QUALITY |     |     | 2nd QUALITY |     |     |
|--------------------------------|-------------|-----|-----|-------------|-----|-----|
|                                | From        | To  | Avg | From        | To  | Avg |
| <b>Finished Cattle (p/kg)</b>  |             |     |     |             |     |     |
| Steers                         | 251         | 277 | 261 | 210         | 250 | 230 |
| Friesians                      | 210         | 227 | 219 | 172         | 206 | 195 |
| Heifers                        | 240         | 267 | 250 | 200         | 239 | 220 |
| Beef Cows                      | 216         | 270 | 230 | 170         | 215 | 192 |
| Dairy Cows                     | 150         | 179 | 160 | 105         | 149 | 127 |
| <b>Store Cattle (p/kg)</b>     |             |     |     |             |     |     |
| Bullocks up to 400kg           | 250         | 297 | 270 | 200         | 249 | 225 |
| Bullocks 400kg - 500kg         | 235         | 288 | 255 | 175         | 234 | 210 |
| Bullocks over 500kg            | 230         | 261 | 241 | 150         | 229 | 190 |
| Heifers up to 450kg            | 240         | 335 | 258 | 200         | 239 | 215 |
| Heifers over 450kg             | 231         | 292 | 250 | 160         | 228 | 195 |
| <b>Dropped Calves (£/head)</b> |             |     |     |             |     |     |
| Continental Bulls              | 370         | 490 | 418 | 200         | 310 | 255 |
| Continental Heifers            | 340         | 470 | 385 | 200         | 295 | 252 |
| Friesian Bulls                 | 130         | 230 | 187 | 40          | 120 | 70  |
| Holstein Bulls                 | 100         | 200 | 150 | 10          | 70  | 40  |

### LATEST SHEEP MARTS (P/KG LW)

| From: 03/09/22 |             | Lambs |      |     |     |
|----------------|-------------|-------|------|-----|-----|
| To: 08/09/22   |             | No    | From | To  | Avg |
| Saturday       | Swatragh    | 1320  | 410  | 528 | -   |
|                | Omagh       | 997   | 451  | 519 | -   |
| Monday         | Kilrea      | 500   | 432  | 460 | -   |
|                | Massereene  | 741   | 425  | 454 | -   |
| Tuesday        | Saintfield  | 750   | 440  | 490 | -   |
|                | Rathfriland | 812   | 430  | 500 | 450 |
| Wednesday      | Ballymena   | 1901  | 430  | 481 | 450 |
|                | Enniskillen | 702   | 430  | 467 | -   |
|                | Armoy       | 354   | 435  | 525 | -   |
|                | Markethill  | 1250  | 440  | 488 | -   |

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