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NI RED MEAT MARKET UPDATE JULY 2022

Total red meat sales in NI were valued at £136.1 million during the 52 week period ending 12 June 2022 according to the latest available data from Kantar Worldpanel. This was a notable 4.8 per cent decrease from the same period in 2021 when total red meat sales in the region were valued at £142.9 million.

Retail beef sales in NI during the 52 weeks ending 12 June 2022 were valued at £119.5 million, a 3.1 per cent decrease from the corresponding period in 2021 when beef sales were valued at £123.4 million. Beef's share of the total meat market in terms of volume sales increased by 0.3 percentage points to 28.5 per cent in the 52 weeks ending 12 June 2022. The volume of beef sold by NI retailers during the 52 week period totalled 14,154 tonnes, a ten per cent decrease from the 52 weeks ending 13 June 2021 when volume sales of beef totalled 15,742 tonnes.

The increase in the average retail price of beef shown in **Figure 2** largely explains the decline recorded in the total volume and value of beef sales. During the the 52 w/e 12 June 2022 the average retail beef price was £8.44/kg, up from £7.84/kg in the 52 week period ending 13 June 2021. This increase of 60p/kg accounts for a 7.7 per cent increase in the average beef retail price year on year. This increase in price has seen beef sales decline in NI year on year, with the average spend per buyer on beef down by £6 to £169 during the 52 w/e 12 June 2022 as shown in **Figure 3.**

Like the beef market, in the 52 weeks ending 12 June 2022 the lamb market has struggled in terms of both the value and volume of sales. Retail lamb sales in NI were valued at £16.6 million in the 52 week period ending 12 June 2022, back from £19.6 million in the 52 w/e 13 June 2021.

Figure 1: Summary of beef and lamb retail market in NI during the 52 weeks ending 12 June 2022 compared to the corresponding period ending 13 June 2021. Source Kantar Worldpanel.

Figure 2: Price per kilo of red meat in NI by category during the 52 weeks ending 12 June 2022 and the corresponding periods of 2021 and 2020. Source: Kantar Worldpanel.

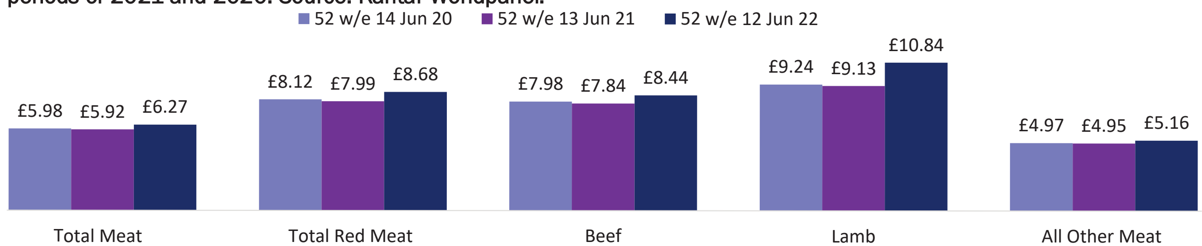
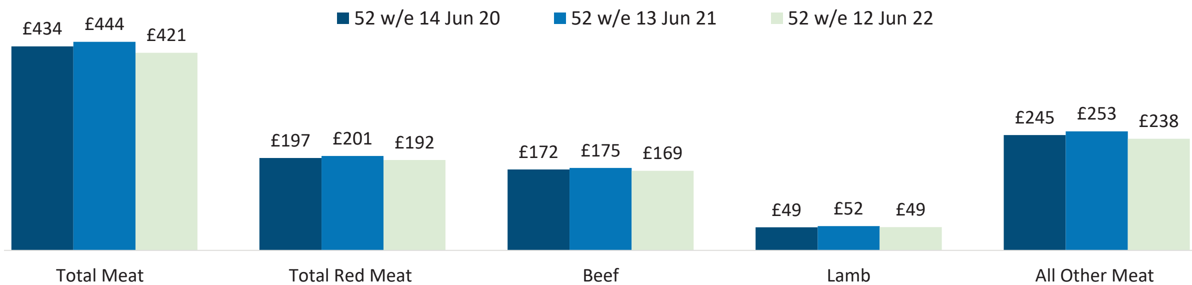


Figure 3: Average spend per purchaser on beef and lamb in NI by category during the 52 weeks ending 12 June 2022 and the corresponding periods of 2021 and 2020. Source: Kantar Worldpanel.



This accounts for a 15 per cent decrease in the value of lamb sales year on year. Some of this decline in sales can be attributed to the increase in the average retail price from £9.13/kg in the 52 week period ending 13 June 2021 to £10.84/kg in the period ending 12 June 2022 . This accounts to a significant 18.7 per cent increase in price year on year.

The decline in the total retail value of lamb sales in NI will have been impacted by the decline in the volume of lamb sales. The volume of retail lamb sales in NI during the 52 week period ending 12 June 2022 totalled 1,532 tonnes, a 28.5 per cent decline from year earlier levels when the volume of lamb sales totalled 2,142 tonnes during the 52 week period. Lamb's share of the total meat market in terms of value in the 52 weeks ending 12 June 2022 was 5.3 per cent, back from 5.9 per cent in the corresponding period ending 13 June 2021.

In terms of volume sales lamb declined from 3.8 per cent of the market in the 2021 period to 3.1 per cent in the 2022 period. The average spend per buyer declined from £52 in the 52 week period ending 13 June 2021 period to £49 in the 52 week period ending 12 June 2022, equating to a six per cent decline on expenditure per buyer on lamb.

It is important to note all meats recorded an increase in price during the 52 weeks ending 12 June 2022 as shown in Figure 2. Meanwhile Figure 3 also shows the average spend per customer of all meat catergories in NI declined correspondingly during the 52 weeks ending 12 June 2022. Importantly, £4 of the decline seen in consumer spend on beef year on year has occurred recently in the 12 week period ending 12 June 2022.

DAIRY MALE CALF REGISTRATIONS CONTINUE TO DECLINE

During the first six months of 2022 there was a total of 306,762 calves registered on Northern Irish farms. This was a marginal decrease of 66 head from 2021 levels when 306,828 calves were registered during the six month period.

Beef calf registrations

Beef sired calf registrations on Northern Irish farms from January to June 2022 totalled 233,810 head, up 2,091 head or 0.9 per cent from 2021 levels. Beef sired calf registrations accounted for 76.2 per cent of the total calves registered in Northern Ireland. This is similar to figures from the previous year when 75.5 per cent of calf registrations were beef sired.

Beef sired calf registrations to suckler cows during 2022 increased by 1,059 head from 2021 levels as shown in **Figure 4.** Registrations to suckler cows accounted for 66 per cent of total beef sired calf registrations. Beef sired calf registrations to dairy cows in 2022 also increased over 1,119 head from the previous year. These accounted for the remaining 34 per cent of beef sired registrations.

During 2022 Aberdeen Angus was the most popular beef sire, accounting for 25.5 per cent of total beef sired calf registrations. This is slightly higher than 2021 levels when 25.2 per cent of beef sired calf registrations were Aberdeen Angus. It should also be noted that the Aberdeen Angus breed was the most popular beef sire in NI during 2021.

The second most popular beef sire in 2021 was Limousin which accounted for 24.6 per cent of beef sired calf registrations. This is back slightly from the previous year when 25 per cent of beef calf registrations were Limousin.

Charolais continued to be the third most popular beef sire, accounting for 21.6 per cent of calves registered. This is similar to 2021 levels when Charolais sire accounted for 22.2 per cent of beef sired calf registrations. 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 in 2022 which is up marginally from 6.2 per cent in 2021.

The proportion of Hereford beef sired calves registered has dropped slightly from 7.2 per cent in 2021 to 6.9 per cent in 2022.

Dairy calf registrations

Dairy sired calf registrations in Northern Ireland totalled 72,952 head during the first six months of 2022, down 2,157 head from 2021 levels. Dairy sired calves accounted for 23.8 per cent of total calf registrations on NI farms during the first half of 2022 compared to 24.5 per cent of dairy sired calves in the corresponding period in 2021..

Figure 5 displays during January to June 2022, dairy sired male calf registrations totalled 23,372 head. This accounted for 32 per cent of the total dairy sired calf registrations, down by 5,252 head or 18 per cent from 2021 levels. If this downward trend continues during the second half of 2022 the number of dairy sired male calves born on NI farms will have decreased to half of 2012 levels. This decline can be attributed to the successful use of sexed semen by NI dairy producers

Figure 4: Beef sired calf registrations on NI farms by dam type during January to June 2016-2022. Source: APHIS.

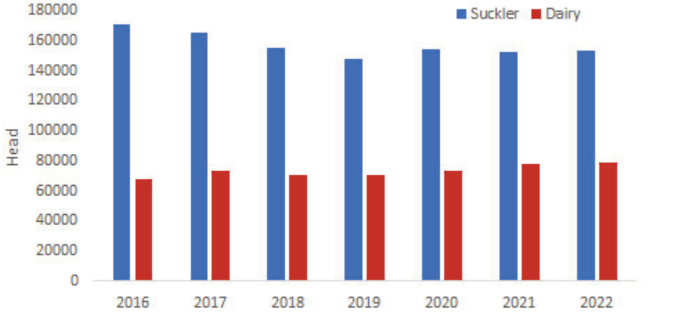
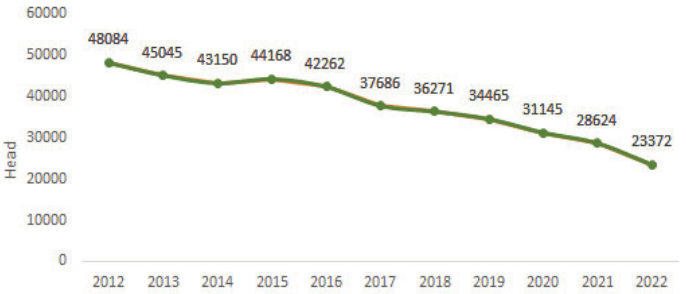


Figure 5: Dairy male calf registrations born on NI farms from January to June 2012-2022 Source: APHIS.



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

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WEEKLY BEEF & LAMB MARKETS

LMC Livestock & Meat Commission

CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 25/07/22	Next Week 01/08/22
Prime		
U-3	420 - 426p	412 - 424p
R-3	414 - 420p	406 - 418p
O+3	408 - 414p	400 - 412p
P+3	352 - 358p	344 - 356p
	Including bonus where applicable	
Cows		
O+3	335 - 376p	330 - 374p

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 23/07/22	Steers	Heifers	Young Bulls
U3	441.9	445.1	439.7
R3	438.4	440.3	433.2
O+3	430.8	432.4	422.4

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 23/07/22	Weight Bands <220kg	220-250kg	250-280kg	>280kg
P1	269.9	286.0	294.5	302.7
P2	286.0	316.5	335.9	345.0
P3	293.1	342.2	356.8	361.3
O3	-	351.4	371.1	378.8
O4	-	364.5	379.7	382.1
R3	-	-	-	394.3

Deadweight Cattle Trade

Base quotes this week for in spec U-3 grade steers and heifers ended at 420-424p/kg. Quotes for next week are expected to be back 8p/kg at the lower end to range from 412-424p/kg across the local plants. The cow trade also reported a similar downward movement with quotes for good quality O+3 cows ranging from 335-374p/kg. Quotes for early next week are expected to be back 5p/kg at the lower end.

Prime cattle slaughterings in local plants last week totalled 6,048 head which brings prime cattle throughput for the last six weeks to 38,174 head. This is an increase of 3.7 per cent (1,345 head) from the corresponding period in 2021 when prime cattle throughput totalled 36,829 head. Cow slaughterings in NI last week totalled 2,275 head which brings cow throughput for the last six weeks to 12,199 head, 14.2 per cent more than the 10,680 cows killed in the same period in 2021.

Cattle imports from ROI last week for direct slaughter recorded a significant increase from the week before, consisting of 453 prime cattle and 146 cows while no cattle were imported from GB. Meanwhile exports from NI for direct slaughter in ROI consisted of three prime cattle, 30 cows and one bull, and no cattle made the journey to GB for direct slaughter.

The deadweight trade for prime cattle in NI continued to report downward movement across the majority of grades last week. The average steer price was 427.8p/kg, back 3.1p/kg from the previous week while the R3 steer price was back by 3.8p/kg to 438.4p/kg. Meanwhile the average heifer price in NI last week was back by 2.5p/kg to 432p/kg with the R3 heifer price back by 1.4p/kg to 440.4p/kg. The average young bull price in NI last week decreased by 2.6p/kg to 421.8p/kg with the R3 young bull price back slightly from the previous week to 432.9p/kg. The cow trade struggled in NI last week, with the average cow price recording a decrease of 10p/kg to 351.7p/kg, while O3 cow price was back by a penny from the previous week to 378p/kg.

In GB price reported figures also show the deadweight trade was under pressure across the regions last week, while Northern England reported improvements. The average steer price was back just under a penny to 440.4p/kg last week while the R3 steer price recorded a decline of 1.7p/kg to 445.6p/kg. The R3 steer price recorded the largest declines in Southern England (-4.4p/kg) and Scotland (-2p/kg). The average heifer price in GB last week was back marginally to 439.6p/kg while the R3 heifer price indicated an overall decline of 1.7p/kg to 444.9p/kg from the previous week. The R3 heifer prices reported the largest declines in Northern England (-4.6p/kg) and Scotland (-2.8p/kg) with the only increase recorded in the Midlands and Wales (+1.1p/kg).

In ROI last week the deadweight trade for prime cattle continued to come under pressure. The R3 steer price in ROI last week was the equivalent 416.5p/kg, back 3.4p/kg from the previous week while the R3 heifer price indicated a decline of 3.8p/kg to 420.2p/kg. Meanwhile the O3 cow price recorded a decrease of 1.3p/kg to 374p/kg, 4p/kg less than the

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

W/E 23/07/22		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	441.4	424.9	446.4	453.4	450.3	447.5	449.5
	R3	438.4	416.5	450.4	448.9	444.5	439.1	445.6
	R4	435.6	419.6	452.9	454.2	441.9	448.0	451.0
	O3	426.4	403.9	438.1	435.6	423.3	422.9	428.5
	AVG	427.8	-	447.5	446.9	434.3	431.6	440.4
Heifers	U3	444.8	433.1	454.0	457.4	453.0	449.6	453.5
	R3	440.4	420.2	450.0	447.3	444.3	438.8	444.9
	R4	437.1	423.4	453.7	453.8	443.3	443.2	450.5
	O3	430.0	411.6	433.6	437.6	417.4	414.3	423.3
	AVG	432.0	-	451.0	447.3	431.3	424.6	439.6
Young Bulls	U3	439.0	422.3	442.5	446.8	446.4	440.3	444.2
	R3	432.9	412.8	437.0	438.9	438.0	434.0	437.5
	O3	416.9	388.9	414.3	407.2	410.3	406.0	410.4
	AVG	421.8	-	435.5	433.3	430.7	429.7	432.9
Prime Cattle Price Reported		3,996	-	6,380	6,769	6,969	4,720	24,838
Cows	O3	378.0	374.0	384.0	377.9	386.2	377.6	381.8
	O4	381.4	375.4	385.7	379.7	388.8	375.3	383.1
	P2	332.6	343.7	335.7	334.6	347.1	335.8	341.3
	P3	359.2	364.3	356.1	353.9	362.6	358.1	359.1
	AVG	351.7	-	385.1	363.9	357.2	344.1	359.4

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.18p 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 23/07/22	1st QUALITY From	To	Avg	2nd QUALITY From	To	Avg
Finished Cattle (p/kg)						
Steers	260	290	272	210	259	235
Friesians	187	227	200	161	186	173
Heifers	242	281	256	205	241	215
Beef Cows	215	254	230	160	213	185
Dairy Cows	145	186	165	100	144	120
Store Cattle (p/kg)						
Bullocks up to 400kg	250	300	275	210	249	225
Bullocks 400kg - 500kg	240	274	255	200	239	220
Bullocks over 500kg	220	249	235	190	219	210
Heifers up to 450kg	240	275	260	200	239	220
Heifers over 450kg	220	242	230	170	219	200
Dropped Calves (£/head)						
Continental Bulls	400	610	460	275	395	330
Continental Heifers	275	355	315	160	270	215
Friesian Bulls	120	200	150	40	115	85
Holstein Bulls	100	150	120	1	95	50

SHEEP TRADE

NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 25/07/22	Next Week 01/08/22
R3 Lambs up to 21kg	540-550p	500p

REPORTED SHEEP PRICES

(P/KG)	W/E 09/07/22	W/E 16/07/22	W/E 23/07/22
NI L/W Lambs	575.8	493.8	495.8
NI D/W Lambs	599.2	586.3	546.7
GB D/W Lambs	645.9	639.1	622.5
ROI D/W	629.5	608.1	582.2

Deadweight Sheep Trade

Quotes from the plants this week continued to come under pressure as more lambs become available for slaughter. The plants ended this week quoting 540-550p/kg for R3 grading lambs up to 21kg with quotes early next week expected to be back to 500p/kg. Lamb throughput in local plants last week totalled 9,577 head which is 903 head behind the same week last year when 10,480 lambs were killed locally. Exports of lambs to ROI for direct slaughter increased from the previous week, to total 6,140 head last week. This was 620 lambs more than the 5,520 lambs exported to ROI for direct slaughter in the same week last year. The deadweight lamb price in NI last week was notably back by 39.6p/kg from the previous week to 546.7p/kg. In ROI last week the deadweight lamb price was back by the equivalent of 25.9p/kg to 582.2p/kg.

Liveweight Sheep Trade

Demand for lambs has remained fairly firm for good quality lambs across the marts however the liveweight trade has come under pressure as the week advanced. In Omagh on Saturday 582 lambs sold from 488-517p/kg compared to last week when 827 lambs sold from 498-534p/kg. In Kilrea on Monday 680 lambs sold from 486-524p/kg compared to 650 lambs last week selling from 492-524p/kg. In Massereene this week 799 lambs sold from 488-523p/kg. In Ballymena on Wednesday a strong entry of 2,150 lambs sold from 440-478p/kg (avg 460p/kg) compared to 1,776 lambs last week selling from 470-544p/kg (avg 505p/kg). Across the marts this week top reported prices for ewes ranged from £138-£190.

LATEST SHEEP MARTS (P/KG LW)

From: 23/07/22		Lambs			
To: 28/07/22		No	From	To	Avg
Saturday	Swatragh	1190	460	520	-
	Omagh	582	488	517	-
Monday	Kilrea	680	486	524	-
	Massereene	799	488	523	-
Tuesday	Saintfield	790	485	525	-
	Rathfriland	753	460	532	480
Wednesday	Ballymena	2150	440	478	460
	Enniskillen	702	460	505	-
	Armoy	372	440	465	-
	Markethill	1250	440	476	-

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