

GLOBAL MEAT MARKET OUTLOOK: GIRA MID-YEAR UPDATE

Representatives from LMC recently attended a mid-year global meat market outlook presentation for members of the Gira Meat Club.

Gira is a strategic consultancy and market research firm founded over 50 years ago and through analysing in detail all the accelerators and brakes on markets, using a mixture of empirical research and sector experience, they are specialists in forecasting at every level of the food supply chain.

Perhaps the most striking aspect of the mid-year update for 2022 was the array of issues currently challenging the global meat industry. After a year of economic recovery in 2021 for some countries, 2022 is becoming more characterised by a weakening in demand linked to global economic downturn and the impact of the war in Ukraine.

The direct meat market impact of the Russia - Ukraine situation is not a huge one as both countries are relatively small producers, consumers, and traders of meat in a global context.

However, the indirect impacts of the war on global meat markets are mostly negative through production cost inflation on oil, gas, electricity, fertiliser, grains & oilseeds, and a decline in global consumer disposable income putting pressure on meat consumption.

Prior to the war in Ukraine the meat industry was already facing additional inflationary pressures because of labour shortages and increasing costs of labour, higher logistical costs due to availability and cost of freight containers and ongoing disruptions linked to the global Covid-19 pandemic.

Animal disease issues also continue to impact global meat markets and are causing market access issues for certain countries. African Swine Fever (ASF) has moved further west across parts of the European Union and Highly Pathogenic Avian Influenza was very prevalent across the EU and UK through the final quarter of 2021 and first half of 2022.

At the peak of the ASF impact on domestic pig production in China this



market was importing huge volumes of all meats from international suppliers around the world peaking at a monthly import of 465,000 tonnes of pork (product weight) in March 2021. Monthly pork imports to China have tailed off significantly through 2022 to a low of 121,000 tonnes in April 2022. The expectation is that more pork will be imported by China in the second half of 2022 to try and curb rising food inflation in the country.

China is such an important driver of global meat markets it is important to watch closely what is taking place there. Coronavirus lockdowns have hit the Chinese economy hard in the first half of 2022, with a strict lockdown in Shanghai hampering international trade. On 1st July 2022, lockdowns or partial lockdowns were still in effect in

26 cities, affecting 140 million people. Covid quarantines and lockdowns discourage consumption particularly in the high-end food service sector in China where much of the beef and lamb is eaten. Until May 2022, beef imports remained close to ASF peak levels. However, the internal China price for imported frozen beef abruptly weakened in June, falling 20%. Falling demand due to Covid lockdowns and resulting economic weakness has led to a build-up of frozen beef inventory. Reduced import orders for Quarter 3 of 2022 will be the result.

Whilst there are some real warning signals to global beef exporters as China import demand weakens it is not all bad news in the international marketplace. The world's biggest consumer market for beef, the United

States of America (USA), which accounts for over 21% of the beef consumed annually in the world, started 2022 with a strong growth in beef imports which were up over a third by the end of April 2022. Like the rest of the world, consumer inflation is rising in USA and has reached a 40 year high with gasoline prices in particular having risen sharply.

Consumer confidence has declined in the USA on the back of these rises and more general concerns about economic prospects, however beef demand remains strong and Gira is forecasting a record level of beef imports for 2022.

In summary there are difficult times for all but opportunities for some. Perhaps the biggest challenge facing our beef and lamb industry is passing on rising costs to pressured consumers without seriously impacting consumption levels. Perhaps the best opportunity comes from ensuring the widest possible market access to sell every component of the beef or lamb carcass to the best paying markets around the world.

DOWNWARD MOVEMENT IN LAMB PRICES

Quotes from the major NI processors for R3 grading lambs have come under some pressure in recent weeks with quotes ending this week at 495p/kg up to 21kg. However, some recovery is expected with quotes of 500p/kg for early next week. The market remains firmer than this time last year when quotes from the plants for R3 grade lambs were in the region of 480-485p/kg up to 21kg.

The deadweight lamb trade usually comes under some pressure at this time of the year. **Figure 1** displays deadweight lamb prices during the 12 weeks ending 30 July 2022 in NI and ROI. This is due to increased numbers of lambs becoming available for slaughter as shown in **Figure 2**. There

were 11,004 lambs killed in local plants last week, the highest weekly throughput for 2022 to date, and was a higher throughput than the corresponding week in 2021 when 10,062 lambs were killed locally. This takes total lamb throughput during the twelve weeks ending 30 July to 100,121 head a 7.7 per cent decrease from the 108,417 head processed in the corresponding period of 2021.

Average lamb carcase weights have increased slightly year on year in NI plants with an average carcase weight last week of 21.2kg compared to 21kg during the corresponding week of 2021.

The seasonality of lamb production in

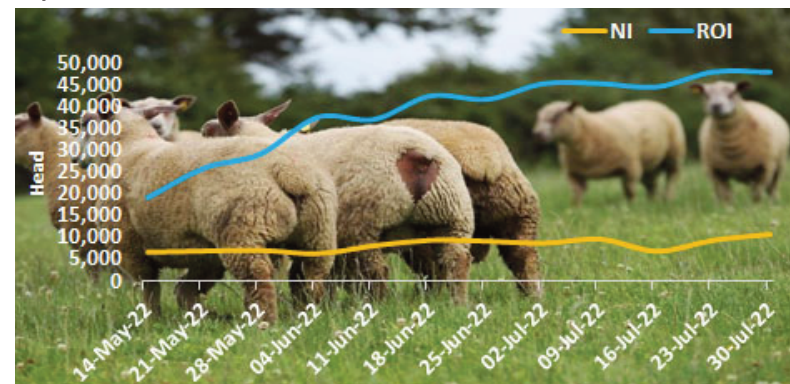
NI makes it difficult to balance supply and demand and in times of peak production there will inevitably be pressure on deadweight prices.

Producers are encouraged to liaise with processors and shop around to ensure they get the best possible deal for their lambs. It is also important however that producers aim to produce lambs within current market specifications as this will help maximise returns to their farm business.

The processors currently want R and U grading lambs under 21kg with a fat class of 2 or 3. There is also a strong preference for Farm Quality Assured lambs across the plants. Lambs that meet these requirements can be used to fulfil orders from higher value retail and export customers.

ROI continues to act as an important outlet for locally produced lambs with 5,769 lambs exported for direct slaughter to processing plants in the region last week. This was a decrease of 371 head from the previous week when 6,140 lambs made the journey to ROI processing plants. This brings lamb exports from NI to ROI for direct slaughter during the last twelve weeks to 52,943 head which have accounted for almost 53 per cent of total lamb output from the NI sheep flock.

Figure 2: Weekly lamb throughput in NI and ROI during the 12 weeks ending 30 July 2022. Source: DAERA and Bord Bia.



Republic of Ireland

The deadweight lamb trade in ROI this year has also remained firmer than previous years with fewer lambs being ready for slaughter. This is attributed to variable grass growth across the country slowing the growth rates of lambs. Last week the deadweight lamb price was 557.2p/kg in ROI back by 25p/kg. In the same week last year the deadweight lamb price was 516.3p/kg.

Great Britain

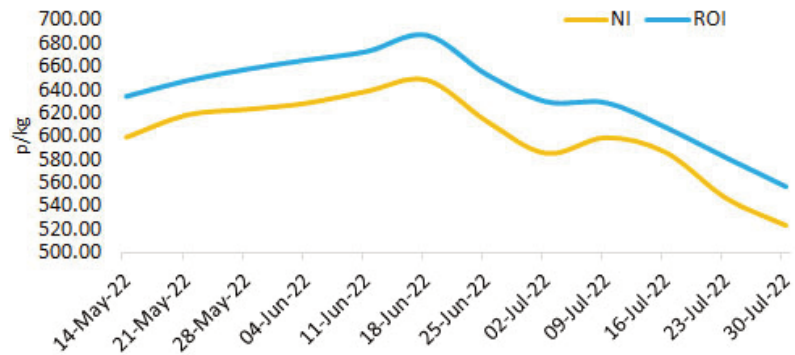
Last week the deadweight lamb price was 574.5p/kg, back by a significant 48p/kg from the previous week. Despite the decline the GB lamb price remains ahead of last year, when during the corresponding week the deadweight

lamb price in GB was 565.5p/kg.

It should be noted that the deadweight lamb prices in NI, GB and ROI are determined by the relative authority in each region. Slightly different methods are used to calculate these prices due to various factors such as EU Commission agreed distinctions for individual member states (and regions of member states).

For this reason it is not possible to make direct comparisons between the deadweight lamb prices in the three regions. However the data does provide a key insight into the direction of the trade in each of the three regions.

Figure 1: Weekly lamb deadweight prices in NI and ROI during the 12 weeks ending 30 July 2022. Source: DAERA and Bord Bia.



FQAS Helpline

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WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 01/08/22	Next Week 08/08/22
Prime		
U-3	412 - 424p	410 - 424p
R-3	406 - 418p	404 - 418p
O+3	400 - 412p	398 - 412p
P+3	344 - 356p	342 - 356p
	Including bonus where applicable	
Cows		
O+3	330 - 374p	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 30/07/22	Steers	Heifers	Young Bulls
U3	441.8	446.9	435.4
R3	436.7	439.2	428.6
O+3	430.2	431.1	419.9

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 30/07/22	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	269.7	282.0	291.8	269.8
P2	288.2	312.3	330.2	340.3
P3	278.6	319.6	345.1	355.4
O3	-	357.3	367.2	374.7
O4	350.0	385.0	369.8	378.3
R3	-	-	395.0	395.7

Deadweight Cattle Trade

Base quotes from the local plants continued to come under pressure this week ranging from 412-424p/kg for in-spec U-3 grade steers and heifers. Quotes are expected to be back further next week to range from 410-424p/kg. The deadweight trade for good quality O+3 grade cows remained steady this week with quotes ranging from 330-374p/kg with quotes expected to be similar next week.

Prime cattle throughput in NI last week totalled 5,881 head, back 167 head from the previous week. Cow throughput last week totalled 2,285 head, similar levels to the previous week. Comparatively, in the corresponding week in 2021 a total of 6,622 prime cattle and 2,023 cows were killed in local plants.

The levels of imports into NI remained high for the second consecutive week with a total of 468 cattle imported from ROI for direct slaughter. This comprised of 355 prime cattle and 113 cows. No cattle were imported from GB for direct slaughter in local plants. Exports of cattle from NI to ROI for direct slaughter last week included two prime cattle and 37 cows with no cattle leaving NI for direct slaughter in GB.

The deadweight trade for prime cattle continued to come under pressure in NI last week. The average steer price in NI last week reported a decrease of 2.2p/kg from the previous week to 425.6p/kg, while the R3 steer price was back 1.4p/kg to 437p/kg. The average heifer price in NI last week also recorded a decrease of 1.9p/kg to 430.1p/kg while the R3 heifer price was back 0.8p/kg to 439.6p/kg. The deadweight cow trade reported pressure across all grades last week with the average cow price notably back by 7.8p/kg to 343.9p/kg. The O3 cow price in NI last week was back by 4.5p/kg from the previous week to 373.5p/kg.

In GB last week the deadweight cattle trade continued to report a mixed performance, however the majority of price reported grades indicate a decline from the previous week. The average steer price and R3 steer price was back across all regions, both back by a penny on average to 439.4p/kg and 444.6p/kg respectively. The average heifer price in GB last week was back 0.6p/kg to 439p/kg while the R3 heifer price was back by 0.3p/kg to 444.6p/kg. The R3 heifer price recorded declines in all of the GB regions last week with the exception of Scotland where it remained steady, and in Northern England were the R3 heifer price recorded an increase of 2.6p/kg from 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 7.1p/kg to 409.4p/kg while the R3 heifer price was back 6.6p/kg to 413.6p/kg. During the same week last year this R3 steer price in ROI was 366.2p/kg, and the R3 heifer price was 369.2p/kg. The deadweight cow trade was also back in ROI last week with the O3 cow price reporting a 5.3p/kg decline to 368.7p/kg.

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

W/E 30/07/22	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	441.5	417.7	448.0	449.4	446.4	451.4	448.3
	R3	437.0	409.4	449.6	447.8	442.8	438.6	444.6
	R4	435.8	410.0	453.4	455.5	442.9	444.7	451.2
	O3	425.0	396.7	432.4	431.1	422.7	417.0	425.4
AVG	425.6	-	447.1	446.4	433.0	429.2	439.4	
Heifers	U3	446.2	426.4	455.1	453.5	453.3	454.3	454.1
	R3	439.6	413.6	450.0	449.9	441.2	437.9	444.6
	R4	436.5	415.2	453.0	450.6	441.8	441.5	448.6
	O3	427.4	406.3	433.0	433.9	418.1	420.4	425.2
AVG	430.1	-	450.0	449.0	428.5	425.4	439.0	
Young Bulls	U3	435.0	412.6	439.9	446.7	445.1	442.1	442.5
	R3	429.6	403.6	435.1	435.9	435.3	437.0	435.6
	O3	416.8	383.6	405.6	409.5	409.1	416.7	409.2
	AVG	419.9	-	435.9	431.1	430.0	426.8	431.6
Prime Cattle Price Reported	4,058	-	5,986	6,887	7,188	4,638	24,699	
Cows	O3	373.5	368.7	382.3	380.4	379.4	376.6	379.7
	O4	377.5	369.3	382.6	383.5	379.4	373.4	379.7
	P2	331.0	339.6	336.7	335.5	341.2	340.8	340.2
	P3	352.1	358.2	348.8	355.3	361.1	355.2	357.5
AVG	343.9	-	381.7	360.4	347.9	343.7	354.4	

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=84.22p 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 30/07/22	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	255	285	270	208	254	232
Friesians	183	211	193	164	182	176
Heifers	240	283	255	200	239	215
Beef Cows	215	262	236	150	214	182
Dairy Cows	155	196	168	110	154	130
Store Cattle (p/kg)						
Bullocks up to 400kg	250	293	270	200	249	222
Bullocks 400kg - 500kg	245	279	260	205	244	225
Bullocks over 500kg	225	268	240	195	224	210
Heifers up to 450kg	235	278	262	190	234	215
Heifers over 450kg	230	267	240	180	229	205
Dropped Calves (£/head)						
Continental Bulls	410	580	460	285	405	345
Continental Heifers	350	505	400	200	345	250
Friesian Bulls	100	170	135	30	95	70
Holstein Bulls	85	135	110	1	80	40

SHEEP TRADE

NI SHEEP BASE QUOTES

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

REPORTED SHEEP PRICES

(P/KG)	W/E 16/07/22	W/E 23/07/22	W/E 30/07/22
NI L/W Lambs	493.8	495.8	469.2
NI D/W Lambs	586.3	546.7	523.0
GB D/W Lambs	639.1	622.5	574.5
ROI D/W	608.1	582.2	557.2

Deadweight Sheep Trade

Lamb quotes from the plants came back to end this week at 495p/kg for R3 grading lambs up to 21kg. Base quotes of 500p/kg are expected for early next week. Lamb throughput in NI plants last week increased by 1,427 head to 11,004 head. This was well ahead of the same week last year when 10,062 lambs were killed in local plants. A further 5,769 lambs were exported from NI to ROI for direct slaughter last week, back 371 head from the previous week. The deadweight lamb price in NI last week was 523p/kg, back 23.7p/kg. In the same week last year the deadweight lamb price was 469.9p/kg. In ROI last week the deadweight lamb price was the equivalent of 557.2p/kg, back 25p/kg from the previous week.

Liveweight Sheep Trade

Smaller shows of lambs passed through the sale rings this week. In Swatragh last Saturday 985 lambs sold from 453-506p/kg compared to 1190 lambs selling from 460-520p/kg the previous week. In Massereene on Monday 764 lambs sold from 430-465p/kg compared to 799 lambs selling from 488-523p/kg last week. In Rathfriland on Tuesday 791 lambs sold from 430-502p/kg (avg 450p/kg) compared to 753 lambs last week selling from 460-532p/kg (avg 480p/kg). In Markethill on Wednesday a large entry of 1,490 lambs sold from 440-470p/kg compared to last week when 1,250 lambs sold from 440-476p/kg. Good numbers of cull ewes passed through the marts with top reported prices ranging from £148-£206.

LATEST SHEEP MARTS (P/KG LW)

From: 30/07/22		Lambs			
To: 04/08/22		No	From	To	Avg
Saturday	Swatragh	985	453	506	-
	Omagh	546	429	486	-
Monday	Kilrea	400	435	475	-
	Massereene	764	430	465	-
Tuesday	Saintfield	760	435	500	-
	Rathfriland	791	430	502	450
Wednesday	Ballymena	1276	430	482	454
	Armoyn	406	460	495	-
	Markethill	1490	440	470	-

Information supplied by LMC / DAERA/ AHDB/ DAFM

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FQAS – THE STORY IS ONLY BEGINNING

What started out as a general aspiration for a code of good practice within the beef and lamb sectors just over 30 years ago has now become a fundamental imperative for every farmer finishing cattle and sheep in Northern Ireland.



In very simple terms, the Northern Ireland Beef and Lamb Farm Quality Assurance Scheme (FQAS) represents a unique selling point that delivers so much assurance to consumers, both in the UK and abroad, when they purchase locally produced beef and lamb. In a very rudimentary way, it is easy to define the added value that FQAS delivers at farm level.

The price returned by the marketplace for cattle and sheep not having quality assured status relative to those that have it relates a very telling story. But the bigger picture, in terms of what FQAS can deliver for the beef and lamb sectors into the future comes with a price benefit tag that will rise exponentially as each year goes by. This is because the scheme has been developed over the years to verify and progress, when necessary, the husbandry, environmental and food safety practices that underpins every aspect of Northern Ireland's beef and lamb industries.

Put simply, FQAS is at the heart of everything that is positive about cattle and sheep production and processing here in Northern Ireland. Moreover, this unique supply chain initiative can be further tailored to ensure that the core drivers relating to the sustainability of local production and the quality of our red meat are improved in an ongoing and totally quantifiable way.

The NI Beef & Lamb Farm Quality Assurance Scheme (FQAS) is celebrating its 30th birthday and it is more important than ever in providing assurance to our industry's customers about the quality standards of cattle and sheep produced in Northern Ireland by our excellent farmers. Its success stems from a number of very important factors, including its unique funding and delivery model as well as the sensible and practical management of the scheme by the Livestock and Meat Commission since 1992. FQAS truly is an excellent supply chain initiative. It is unique in these islands, in that it is the only farm quality assurance scheme that is funded by both farmers and processors and it continues to be supported strongly by the entire industry. It's unique delivery model, with a single, not-for-profit, certification body (NIFCC), has helped to ensure a uniform approach to all farm inspections, and synergies through joint inspections across the beef and dairy sectors, reducing the burden on farms.

As the market and regulatory environment has changed over the years, FQAS has responded and moved with the times. With the strong support of industry, FQAS has led the evidence-based development of its standards to address new and emerging challenges in a practical and proportionate way. It was at the forefront of the development of the unique Food Fortress scheme to address the fallout of the 2008 Dioxin Crisis. The NI Farm Quality Assurance Scheme was the first in the UK to introduce mandatory Anti-Microbial Resistance training for all its member farmers. It has directly supported the BVD eradication programme through the inclusion of new FQAS standards, with the full support of its farming and processing stakeholders.

The world does not stand still. There is a growing focus from customers on the environmental impact of farming, particularly on carbon, biodiversity along with water, soil and air quality. The evolution of our Farm Quality Assurance Scheme standards may ultimately be part of the industry's response to these challenges. With a strong track record of following the evidence, practical delivery, co-operating with other sectors and a proportionate approach, there is every reason to have confidence that the NI FQAS can continue to deliver for the entire supply chain, whatever future challenges emerge, in a way that we can all get behind.

-Conall Donnelly, Chief Executive NIMEA

Livestock and Meat Commission (LMC) chief executive Ian Stevenson takes up the story: "The scheme was formally launched in 1992 with over 1000 participants and 100k cattle assured at that time. "It was initially developed to underpin the marketing and improve understanding of the qualities of Northern Irish beef being sold under the Greenfields brand in the Netherlands by the Heijn Group.

"One of the main aims from the very outset was to demonstrate the naturalness of the product on sale. "FQAS has been designed to assure consumers of good production methods being used and good quality of care of animals and the environment in the production of beef and lamb which is wholesome, safe and free from unnatural substances. "These priorities have remained fundamental to the evolution of the scheme over the past three decades."

FQAS is owned and managed by LMC on behalf of the beef and sheep meat industry in Northern Ireland. An FQAS Industry Board comprising membership from the main processing and farming groups in Northern Ireland advises LMC on the commercial management of the FQAS.

A separate Standard Setting Committee - comprising LMC, industry representatives and external specialists - continually reviews and updates the standards and rules of the scheme.

Over the past 30 years, FQAS has constantly evolved to meet industry, customer and legislative requirements. "In the initial years of scheme development farmers were incentivised by processors to participate in FQAS through the payment of additional bonuses. "This approach was taken in order to increase the volume of beef that could be assured as part of the scheme. "Driving all of this was the servicing of premium customers in Europe, who were paying some of the best prices available for beef from Northern Ireland at that time." However, the 1996 onset of the BSE

crisis fundamentally changed the market outlets available for Northern Irish beef. During the 10 years of export market restrictions, the UK retail and food service market became the new premium market for locally produced beef. This continues to be the case to present day with 80% of sales going into this market.

Ian further explained, "Northern Ireland's beef and lamb processors have successfully built up their reputation and scale of their business with all of the main UK retail and food service businesses, including McDonald's who are a major market outlet for beef forequarter and flanks. "Currently, over £1.2bn of beef and lamb sales from Northern Ireland are now generated courtesy of UK customers. "This level of business has been developed through Northern Ireland showing its ability to meet exacting customer specifications and service customer needs. "Having a world-leading FQAS, that continually evolves to meet the specific needs of customers and those of the 12,000 farming and processing members who voluntarily participate in it, has been fundamental in making all of this happen."

Over the years FQAS has evolved to become an ISO 17065 independently accredited quality assurance scheme. Significantly, it is fully integrated with Northern Ireland's world-leading livestock traceability system APHIS. The scheme has also incorporated the ground-breaking 'Food Fortress' animal feed material testing initiative and is mutually recognised by Red Tractor, Quality Meat Scotland and Farm Assured Welsh Livestock.

Ian Stevenson commented: "Occasionally, some farmers will ask the question: what happened to the initial bonus for FQAS participation? "The simple answer is that the premium now comes in the price you get from the ability to sell your beef and lamb to the best paying customers in the UK and EU markets.

"Without independently accredited assurance provided by FQAS, local farmers would be selling their produce in wholesale markets in direct competition with lower cost suppliers from around the world."

Looking forward, driving improved sustainability within Northern Ireland's beef and sheep sectors remains a key priority for LMC and its farming and processing stakeholders. The Commission is centrally involved in the work to have Northern Ireland included as part of an application for protected geographical indication (PGI) for Irish Grass Fed Beef to be registered by the EU. Provided such a registration can be reached, the capability of verifying that any producers of 'Irish Grass Fed Beef' within Northern Ireland meet the requirements that will be set out in the agreed amended PGI specification becomes an absolute necessity. "And it is in this context that FQAS will contribute as a critically important platform for information gathering. This can be achieved by including several additional questions that can be addressed as part of an FQAS inspection process," said Ian Stevenson "Information gathering of this nature will also be critically important in determining the beef and sheep sectors' response to climate change and the evolution of new farm support measures.

"FQAS remains one of the most successful supply chain initiatives in the beef and lamb sector with the animal feed supply, farming, livestock haulage, livestock marts, slaughterhouses, processing plants, retailers and food service businesses all totally engaged in driving forward a premium and sustainable offering to discerning consumers of Northern Irish beef and lamb."

"LMC is extremely proud of FQAS and it remains an integral part of the marketing and communication of the qualities, credibility, story and unique selling points of our world leading beef and lamb."

Ulster Farmers' Union (UFU) President, David Brown said since the inception of the Northern Ireland Beef & Lamb Farm Quality Assurance Scheme (FQAS) almost 30 years ago the UFU have been supportive of the scheme. As beef and lamb producers we would expect that it provides improved opportunities and returns in accessing important internal and export markets. We would also expect our local retailers to fully get behind locally sourced FQAS beef and lamb. Farmers work hard to comply with the scheme, it has its challenges like any other, so it is important that they are rewarded for their efforts. FQAS is a recognised equivalent scheme to AFS/Red Tractor and many retailers which use the Red Tractor Logo to market their product can be readily accessed by NI beef and lamb because of this equivalence but the key thing for NI beef and lamb producers is that by having our own scheme, we are able to tailor it to our own needs. Without this equivalence farmers in NI would be greatly disadvantaged compared to their GB counterparts as our beef and lamb would not be able to get on to the major retailer shelves.

During the covid-19 pandemic the scheme worked very well with farmers and by having our own decision-making powers we were able to postpone inspections for a period of time, then offer remote inspections for those who wanted to avail of this option before returning to normal. Farmers have remained committed to the voluntary FQAS scheme to avail of the benefits from it. In conclusion there remains a clear need for farm assurance with continuing development to support the needs of the industry and its markets. FQAS has evolved over the last 30 years and will do so in the future as sustainability becomes the new focus for industry and consumers going forward.

-Daryl McLaughlin, UFU Beef & Lamb / Hill Farming Policy Officer



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