

## NI DEADWEIGHT COW TRADE STRENGTHENS

The deadweight cow trade in Northern Ireland has strengthened in recent weeks with processors reporting a reduction in availability of cows. Quotes from local processing plants for good quality O+3 grading cows have increased this week to 275-300p/kg with most of the plants quoting in the region of 284-300p/kg. Producers should use these quotes as a starting point for negotiation with price reporting analysis indicating higher prices are available.

### Deadweight Prices

The local cow trade has gradually improved in recent weeks as outlined in **Figure 2**. Last week's O3 cow price was 307.9p/kg in Northern Ireland, up 5.6p/kg from the previous week. Last

week's price was 21.6p/kg above the same week last year and 56.7p/kg ahead of the relative period in 2019 which equates to an additional £65 and £170 on a 300kg cow carcass from 2020 and 2019 respectively. It should be noted that cow prices in 2020 were very unsettled especially in the spring as COVID-19 hit and restrictions were put in place disrupting markets across the UK and EU.

### Throughput

Cow throughput in NI processing plants during the last 12 weeks has totalled 20,367 head, a 6.7 per cent increase from the corresponding period last year when 19,097 cows were killed in local plants. Cows have accounted for 20

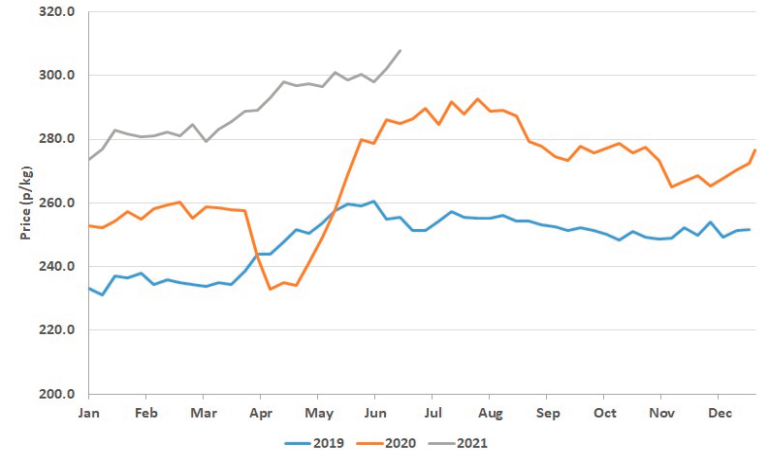
per cent of total throughput in NI during the 12 week period in 2021 which is unchanged from the corresponding period in 2020.

### Average Carcass Weight

The average carcass weight of cows slaughtered in local processing plants during the last 12 weeks was 316.9kg, a 2.3kg increase from the same period in 2020 and a more notable 7.9kg increase from the relative period in 2019.

The increase in average carcass weight alongside the increase in throughput has led to a notable increase in amount of beef processed. The volume of cow beef handled during the 12 week period in 2021 totalled 6,456

**Figure 2: Weekly O3 cow price in Northern Ireland during 2021, 2020 and 2019.**  
Source: LMC Deadweight Cattle Price Reporting



tonnes, a seven per cent increase from the 6,030 tonnes in 2020 and a 12 per cent increase from the 5,753 tonnes processed in the corresponding 12 weeks in 2019.

the relative period in 2019. Imported cows accounted for 4.3 per cent of cow throughput in NI plants during the last 12 weeks, back from nine per cent in 2020.

### Imports/Exports for Direct Slaughter

During the last 12 weeks 880 cows have been imported from the ROI for direct slaughter in local plants with no cows imported from GB during 2021 to date. This is a notable decrease from 2020 when 1,714 cows were imported from ROI and GB for direct slaughter however these levels remains similar to

Cow exports from NI for direct slaughter totalled just over 600 head during the last 12 weeks with 94 per cent being exported to ROI and the remaining six per cent making the journey to GB. This is an increase of 195 head from 2020 levels and decrease of 179 cows from the same period in 2019.

**Figure 1: O3 cow price in NI during the week ending 26 June 2021 and the relative weeks in 2020 and 2019.**



# REDUCTION IN LAMB EXPORTS TO ROI FOR DIRECT SLAUGHTER

The number of lambs exported to the Republic of Ireland from Northern Ireland for direct slaughter can vary considerably from week to week as outlined in **Figure 3**. Exports of lambs from Northern Ireland to the Republic of Ireland have been running behind previous years levels during 2021 to date.

Last week 2,573 lambs made the

journey from Northern Ireland to the Republic of Ireland for processing which is back just over 100 head from the previous week. This takes total lamb exports during the last 12 weeks to 34,440 head which is a 31 per cent decline from the same period last year when 50,174 lambs were exported for direct slaughter. Similarly it is a 24 per cent or 10,909 head reduction from 2019 when 45,349 lambs were

exported to the Republic of Ireland for direct slaughter.

Northern Ireland lamb exports for direct slaughter during the 12 weeks in 2021 made up seven per cent of the lamb throughput in Ireland. This is a slight change from last year when NI lamb exports made up 9.2 per cent of lamb throughput in ROI processing plants and 8.1 per cent during the corresponding period in 2019.

## Ewes and Rams

There has also been a reduction in the number of ewes and rams being exported from Northern Ireland to the Republic of Ireland for direct slaughter during the last 12 weeks. Last week 773 ewes and rams were exported to Ireland for direct slaughter which was an increase of 149 head from the previous week.

This takes the total number of ewes and rams exported to 7,207 during the last 12 weeks which is a 31 per cent or 3,255 head reduction from 2020 and 26 per cent or 2,569 head decline from the corresponding period in 2019.

# DECLINE IN SHEEPMEAT PRODUCTION

Recent processing figures have reported a year on year decrease in sheepmeat production in Northern Ireland. Last week 9,927 lambs were processed in local plants which is the highest weekly throughput during 2021 to date. This takes total lamb throughput in Northern Ireland during the last six weeks to 51,546 head which is back 4,120 head or 7.4 per cent from 2020 figures during the same period.

While lamb slaughterings are back year on year, total ewe and ram throughput has increased during the last six weeks. Last week 462 ewes and rams were processed in NI plants taking the total throughput during the

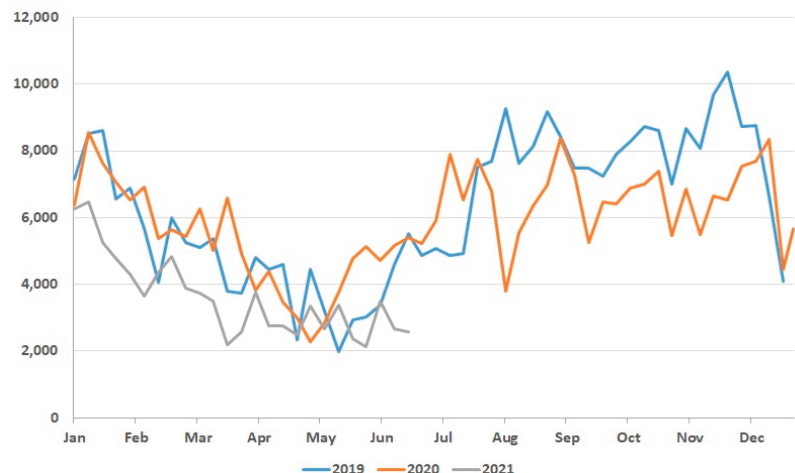
last six weeks to 2,998 head. This is an increase of 311 head or 11.5 per cent relative to the corresponding period last year.

Although the average lamb carcass weight has increased year on year during the six week period ending 26 June 2021 this did not offset the decline in throughput leading to a decline in sheepmeat production. Lamb meat production during the last six weeks totalled 1,101 tonnes and meat production from ewes and rams totalled 88 tonnes taking total sheepmeat production to 1,189 tonnes. This is a reduction of 69 tonnes relative to the same period in 2020.

**Table 1: Tonnes of sheepmeat produced during the six weeks ending 26 June 2021 compared to the relative period in 2020 and 2019. Source: DAERA**

NI Sheepmeat Production (tonnes)			
6 weeks ending 26/06/21 compared to 6 weeks ending 27/06/20			
	2020	2021	% Change
Lambs & Hoggets	1,178	1,101	-7%
Ewes & Rams	80	88	+10%
<b>Total Sheep</b>	<b>1,258</b>	<b>1,189</b>	<b>-5%</b>

**Figure 3: Weekly lamb exports from NI to ROI for direct slaughter during 2021, 2020 and 2019. Source: DAERA**



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# WEEKLY BEEF & LAMB MARKETS



## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 28/06/21	Next Week 05/07/21
<b>Prime</b>		
U-3	376 - 392p	380 - 392p
R-3	370 - 386p	374 - 386p
O+3	364 - 382p	368 - 382p
P+3	310 - 330p	314 - 330p
	Including bonus where applicable	
<b>Cows</b>		
O+3	275 - 300p	275 - 300p

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 NI plants for in spec U-3 grade prime cattle continued to strengthen this week to 376-392p/kg with quotes for early next week expected to range from 380-392p/kg. The cow trade also strengthened across the plants this week at 275-300p/kg for good quality O+3 grade cows with similar quotes expected for early next week.

Prime cattle throughput in local plants last week totalled 6,183 head, a decrease of 195 head on the 6,378 prime cattle processed the previous week. In the same week last year prime cattle throughput totalled 6,727 head. In NI last week the number of cows processed increased by 124 head to 1,747 cows. However this is back 461 cows from the same week in 2020 when cow throughput totalled 2,208 head.

Imports for direct slaughter from ROI last week increased from the previous week to 423 prime cattle and 142 cows with no cattle imported from GB for direct slaughter. Exports from NI for direct slaughter in ROI plants last week consisted of five prime cattle, 12 cows and seven bulls with a further 33 prime cattle and six cows exported out of NI for direct slaughter in GB.

Tight prime cattle supplies continue to influence the NI deadweight trade with increases in the region of 4-8p/kg reported across the majority of grades last week. In NI last week the highest recorded R3 steer price and R3 heifer price were reported at 395.1p/kg and 398p/kg respectively with both prices up over 4p/kg from the previous week. Meanwhile the average steer price in NI last week was 385.3p/kg, up 3.5p/kg from the previous week while the average NI heifer price increased by 5p/kg to 389.9p/kg. The NI cow trade also strengthened last week with the average NI cow price up by almost 2p/kg from the previous week to 281.6p/kg with the O3 cow price increasing by 5.6p/kg to 307.9p/kg.

The GB deadweight prime cattle trade generally increased across the GB regions last week from the previous week. The average steer price was up 2.3p/kg to 395.7p/kg while the R3 steer price was up by a similar margin to 401p/kg. The R3 steer price reported increases in Northern England (+2.3p/kg), the Midlands (+1.9p/kg) and Southern England (+5.8p/kg) with a marginal decline reported in Scotland. The average heifer price in GB last week increased by 1.5p/kg to 395.4p/kg with the R3 heifer price up by 3.6p/kg to 401.6p/kg from the previous week. Last week the R3 heifer price increased across all of the GB regions with the strongest increase reported in Northern England of 6.6p/kg to 402.4p/kg. The average cow price in GB was up by 1.7p/kg last week to 287.5p/kg with the O3 cow price increasing by 3.6p/kg from the previous week to just over 310p/kg.

In ROI last week the deadweight cattle trade increased from the previous week across all of the price reported grades. The R3 steer price in ROI was up just over 3p/kg to the equivalent of 363.6p/kg, 31.5p/kg less than the R3 steer price in NI. The R3 heifer price in ROI was up by almost 3p/kg to 365.3p/kg last week, 32.7p/kg lower than the equivalent NI R3 heifer price.

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

	W/E 26/06/21	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	399.8	370.7	412.7	407.3	401.9	405.2	406.9
	R3	395.1	363.6	410.2	399.6	397.7	398.7	401.0
	R4	394.0	365.3	412.8	403.8	394.9	404.0	405.5
	AVG	385.3	-	408.6	396.0	388.4	389.7	395.7
Heifers	U3	402.3	375.9	416.0	407.5	411.6	407.4	410.9
	R3	398.0	365.3	413.3	402.4	398.8	396.1	401.6
	R4	394.5	366.9	414.8	401.0	396.7	397.7	404.6
	AVG	385.6	357.6	398.7	385.3	374.4	373.1	379.8
Young Bulls	U3	391.0	362.2	407.6	398.9	401.3	394.8	403.3
	R3	386.9	352.6	403.2	391.9	394.7	389.7	396.8
	O3	373.0	335.9	367.8	355.9	362.5	371.3	363.3
	AVG	378.2	-	399.2	385.9	388.6	383.5	391.0
Prime Cattle Price Reported	4876	-	6086	6653	6877	4643	24259	
Cows	O3	307.9	295.9	314.4	310.0	310.8	306.5	310.1
	O4	310.7	295.3	314.0	313.3	311.2	308.8	311.7
	P2	269.3	271.9	276.8	261.1	267.0	269.7	267.9
	P3	291.3	287.6	289.1	279.5	283.6	286.7	284.3
AVG	281.6	-	306.1	296.1	282.3	279.8	287.5	

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.70p 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 26/06/21	1st QUALITY			2nd QUALITY		
		From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>							
Steers		245	261	253	210	244	228
Friesians		181	207	185	135	179	165
Heifers		234	261	244	215	233	222
Beef Cows		185	230	198	145	184	166
Dairy Cows		130	155	142	110	129	120
<b>Store Cattle (p/kg)</b>							
Bullocks up to 400kg		255	320	280	220	250	230
Bullocks 400kg - 500kg		242	315	265	210	241	225
Bullocks over 500kg		216	256	236	197	214	208
Heifers up to 450kg		250	290	265	220	249	230
Heifers over 450kg		222	259	245	200	221	212
<b>Dropped Calves (£/head)</b>							
Continental Bulls up to 3 months		420	595	470	300	415	350
Continental Heifers up to 4 months		320	465	395	200	315	260
Friesian Bulls		150	240	195	90	145	120
Holstein Bulls up to 3 months		125	180	150	15	120	65

### REPORTED NI CATTLE PRICES - P/KG

W/E 26/06/21	Steers	Heifers	Young Bulls
U3	400.0	401.4	391.0
R3	392.8	394.9	386.8
O+3	385.4	385.2	375.1

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 26/06/21	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	196.6	213.9	226.2	239.4
P2	212.3	241.1	269.1	281.2
P3	258.4	277.0	285.7	293.5
O3	232.0	293.7	305.8	308.8
O4	-	290.0	315.0	310.8
R3	-	-	-	326.5

# SHEEP TRADE

## NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 28/06/21	Next Week 05/07/21
R3 Lambs up to 21kg	470 - 500p	470 - 480p

## REPORTED SHEEP PRICES

(P/KG)	W/E 12/06/21	W/E 19/06/21	W/E 26/06/21
NI L/W Lambs	544.3	528.6	480.4
NI D/W Lambs	576.8	567.1	531.4
GB D/W Lambs	665.2	634.5	587.2
ROI D/W	620.4	604.0	569.8

## Deadweight Sheep Trade

Quotes from the major processors for R3 grade lambs continued to come under pressure as the week progressed and ended this week ranging from 475-490p/kg up to 21kg. Quotes for early next week are expected to range from 470-480p/kg up to 21kg. Throughput in local plants has continued to increase with 9,927 lambs processed last week, up by 175 lambs from the previous week. However this is back 1,132 head when compared to the 11,059 lambs processed in the same week last year. Lamb exports to ROI last week for direct slaughter totalled 2,573 head back slightly from the previous week. The average deadweight lamb price in NI last week notably declined by 35.7p/kg from the previous week to 531.4p/kg. Meanwhile in ROI the deadweight trade for lambs last week decreased by the equivalent of 34.2p/kg to 569.8p/kg.

## Liveweight Sheep Trade

Many of the marts reported a decline in the number of lambs passing through the sale rings this week with the liveweight trade well back from last week. In Omagh last Saturday 527 lambs sold from 443-480p/kg compared to 607 lambs the previous week selling from 524-556p/kg. In Massereene this week 839 lambs sold from 430-450p/kg compared to 812 lambs last week selling from 500-537p/kg. On Tuesday in Saintfield 590 lambs sold from 430-470p/kg compared to 725 lambs last week selling from 480-525p/kg. In Ballymena on Wednesday 1,100 lambs sold from 420-519p/kg (avg 443p/kg) compared to 1,409 lambs last week selling from 480-511p/kg (490p/kg). Top reported prices for good quality ewes ranged from £112-£189 across the marts.

## LATEST SHEEP MARTS (P/KG LW)

From: 26/06/21		Lambs			
To: 01/07/21		No	From	To	Avg
Saturday	Omagh	527	443	480	-
	Swatragh	1,100	421	472	-
Monday	Kilrea	410	427	470	-
	Massereene	839	430	450	-
Tuesday	Saintfield	590	430	470	-
	Rathfriland	425	410	490	430
Wednesday	Ballymena	1100	420	519	443
	Enniskillen	589	400	436	-
	Armooy	264	420	500	-
	Markethill	800	435	459	-

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## REFLECTIONS ON 10 YEARS OF THE GREENHOUSE GAS IMPLEMENTATION PARTNERSHIP

The Greenhouse Gas Implementation Partnership (GHGIP), established in 2011, is a DAERA-chaired partnership initiative, comprising government, agri-food industry and environmental stakeholders as well as research and knowledge transfer providers. The partnership was charged with the responsibility of ensuring that local food production is undertaken in the most carbon efficient manner possible. The Livestock and Meat Commission for Northern Ireland (LMC) has been actively involved with GHGIP from the outset and is current chair of the Red Meat Sub Group of the Partnership.

Commission CEO Ian Stevenson commented: "The Partnership has successfully rolled out two 5-year implementation plans, the out workings of which have made a very real and significant contribution to the response of the farming industry to the challenges posed by global warming. In the initial stages of its work, GHGIP set out to raise awareness and educate farmers regarding the impact of greenhouse gas emissions and how agriculture can help to mitigate emissions through a focus on efficiency within production systems. This work took place alongside the work of the Sustainable Land Management Strategy which considered the impact that ammonia emissions from local farms is having on our environment, and potential options for mitigation of these.

"As it evolved GHGIP identified a number of critically important action points, the implementation of which has fundamentally shaped best practice on the ground, where climate change mitigation measures within farming and food are concerned. GHGIP members are now looking towards the future and the development of the next phase of partnership working. However, I feel there is a lot to be learned at this stage from a review of the principles agreed for the second GHGIP action plan, covering the period 2016 to 2020.

**Image 1: The agri-food industry in NI will continue to look ahead and plan the significant measures and support that will be needed to help the sector reach the target of UK Net Zero by 2050.**



"The implementation of this initiative has seen a sea change in the way that many farmers view greenhouse gas emissions and the issue of climate change. But, in many ways, it is still a work in progress and continues to offer production agriculture with viable solutions, when it comes to securing the future sustainability of the industry as a whole." The GHGIP action plan for the period 2016 to 2020 contained five core activity areas:

### Supporting and facilitating the implementation of efficiency measures

According to Ian Stevenson, this aspect of the partnership's work led directly to the establishment of the farm business development groups. He said: "Today 3,200 farmers are involved in these groups, covering all facets of agriculture in NI. This initiative is helping to drive new thinking at grass roots levels, with a very strong focus on productivity, resilience, supply chain and future sustainability.

"The work has been complemented by the support given courtesy of the current Rural Development Programme. The introduction of the Farm Business Improvement Scheme is an excellent example of how the action points agreed by GHGIP have been facilitated in a very practical and meaningful way, for example through the widespread use of Low Emission Slurry Spreading Equipment.

"The funding opportunities agreed for the current Rural Development Programme will remain in place until 2023. As a consequence, the proposed measures contained with the second GHGIP implementation plan will remain very relevant for the next two years."

### Improving, monitoring and measurement of progress

As Ian Stevenson is quick to confirm, unless the scale of a problem can be accurately measured

and assessed, it will not be possible to quantify the impact of any remedial measures that are introduced. He added: "The work carried out to develop a carbon intensity indicator for the milk produced in NI has been particularly valuable in this regard." The application of this tool has been used to confirm that the amount of carbon directly associated with the production of a kilogram of milk on local farms has been reduced by 34 per cent over the past three decades.

"The even better news is that a carbon intensity indicator for beef is in the final throes of development. It should be available for the red meat sector over the coming months."

### Providing research and evidence

The second GHGIP Implementation Plan cites the need to ensure that robust science and evidence underpins the measures it recommends. Such an approach will ensure that both farmers and policy makers can be confident that the actions they take to reduce emissions will be both effective and achievable, without risking production levels or farm performance. Specifically, the implementation plan highlights the significance of future research assisting the farming and food sectors achieving their growth ambitions, in tandem with a reduction in their carbon footprint.

Ian Stevenson believes that research organisations such as the Agri-Food and Biosciences Institute (AFBI) have played a key role in delivering solutions for local agriculture as well as necessary evidence to support informed policy development by decision makers. He said: "The ongoing AFBI research, looking at carbon sequestration levels across our grassland areas will play a critical role in helping to shape our climate change policies and ensure appropriate recognition within greenhouse gas inventories moving forward. Work of this nature is providing the science-based facts that will drive continuing change at farm level."

### Communicating efficient farm practices

According to the Commission's CEO, a substantive effort has been made - involving all the stakeholder groups making up GHGIP - to communicate all the recommendations of the 2016-2020 implementation plan. He said: "The plan was structured around the fundamental strategic theme: efficient farming cuts greenhouse gases.

"The business development groups are being used to communicate and visualise this message in the most effective way possible at farm levels. This activity has been complemented by the many on-farm demonstrations and webinars hosted by CAFRE, AFBI and AgriSearch with the support of industry partners."

Ian further explained: "Efficiency is an all-embracing term. We know, for example, that finishing cattle at 21 months of age, rather than the price reported average of 25 months takes a full four months of methane emissions out of the production equation. Improved management

systems across all aspects of production agriculture; including our soils, grassland management, animal health and animal genetics; are now making a real difference at farm level. But we need to build on this again for the future."

### Effective partnership working

The GHGIP Implementation Plan confirmed the need for a robust partnership approach to problem solving, involving all relevant stakeholder organisations. Specific areas for collaboration highlighted in the report were: sustainability, livestock genetic improvement and sustainable land use management. Ian Stevenson again: "By continuing to work together we can support the industry to make further progress towards environmental and economic sustainability. There is ample evidence to confirm that such an approach has been successful over the past ten years."

### So what next?

The 2016-2020 GHGIP Implementation Plan took account of the following factors:

- 1) Climate change will increase pressure on natural resources and the capacity to produce food on a global scale.
- 2) The global population is growing and demand for food is expected to grow by 60 per cent by 2050.
- 3) Local agriculture contributes to climate change through the emission of greenhouse gases, primarily methane and nitrous oxide, related to naturally occurring processes, which are more complex and harder to treat than in other sectors.
- 4) Agriculture accounts for 92 per cent of total ammonia emissions in NI, which act as a catalyst for greenhouse gases.
- 5) The agri-food sector dominates the local economy and is the largest source sector of greenhouse gas emissions at 28 per cent
- 6) Farming outputs are directly affected by the weather and climate, meaning production and profitability is highly exposed to climate change.
- 7) Agriculture can also contribute to reducing greenhouse gas emissions through increased efficiency and by storing carbon in soil and biomass.

But what it did not – or could not – take account of was Brexit and the global impact of the Covid pandemic.

Ian Stevenson concluded: "The NI agri-food industry is already looking ahead to planning the significant measures and support that will be needed to help the sector on the journey to UK Net Zero by 2050. The pace of change impacting on farming and food is increasing at an exponential rate. It is imperative that both industries are able to respond with equal vigour and that new policies developed by government are designed to enable the industry response. There is also a need for continuity, so as to ensure that the work of GHGIP does not lose momentum. The good news is that the availability of rural development funding for the next two years will help greatly in this regard."



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