LMC
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GROWTH IN UK BEEF EXPORTS

DURING June 2019 the UK exported 10,523 tonnes of beef, taking exports for the first half of the year to 62,632 tonnes. This 6,106 tonne increase in beef exports when compared to the same period in 2018 accounts for an 11 per cent increase year on year.

UK BEEF EXPORTS
Jan-June 2019
62,632 tonnes
+11% yoy

In the first half of 2019 457,391 tonnes of carcase beef was processed in the UK and assuming a meat yield of 75 per cent this will have provided 343,043 tonnes of beef for sale. As outlined in Table 1 this would mean UK beef exports in the first half of 2019 accounted for an 18.2 per cent of total beef production, up from 16.7 per cent in the same period last year.

Exports to the EU

Figure 1 outlines the destination of UK beef exports to the EU during the first half of 2019. As indicated in the chart Ireland accounts for the largest market share with 19,077 tonnes of beef exported during the 2019 period. With many of the larger meat plants having processing facilities in both the UK and ROI a proportion of these exports represent in company trading. The volume of exports to Ireland was back by three percent from the same period in 2019.

There were also declines in the volume of beef exported from the UK to Belgium (-10 per cent), Germany (-41 per cent) and Spain (-2 per cent) however the volumes involved remain relatively small in comparison to the level of trade with Ireland.

Meanwhile exports of beef from the UK to the Netherlands increased by eight per cent to total 14,407 tonnes during the first half of 2019. The Netherlands is the UK's second largest export market for beef and accounted for almost a quarter of total exports. There was also growth in the volume of beef exported to France (+28 per cent), Italy (+25 per cent) and Denmark (+9 per cent) during the 2019 period.

The EU continues to be the UK's primary outlet for beef exports with 81 per cent of all beef exports destined for countries within the trading bloc during the first half of 2019. This proportion however is back from 88 per cent during the same period in 2018 which indicates a broadening in the UK's export markets.

Exports to non-EU markets

During the first half of 2019 UK beef exports to non-EU markets increased to 11,717 tonnes. This increased the market share of non-EU countries to 19 per cent, up from 12 per cent in the same period in 2018.

Exports of beef from the UK to Hong Kong totalled 5,659 tonnes in the first half of 2019, accounting for almost half of all exports to non-EU markets during this period. This level of trade has almost doubled from the corresponding period in 2018 and is a reflection of the scope of the Export Health Certificate currently in place and a growing demand for imports in the region.

There has also been strong growth in the volume of beef being exported from the UK to the Philippines and to South Africa during the first half of 2019. Exports to the Philippines totalled 1,300 tonnes (+157 per cent) while exports to South Africa totalled 1,048 tonnes (+110 per cent).

Future trading

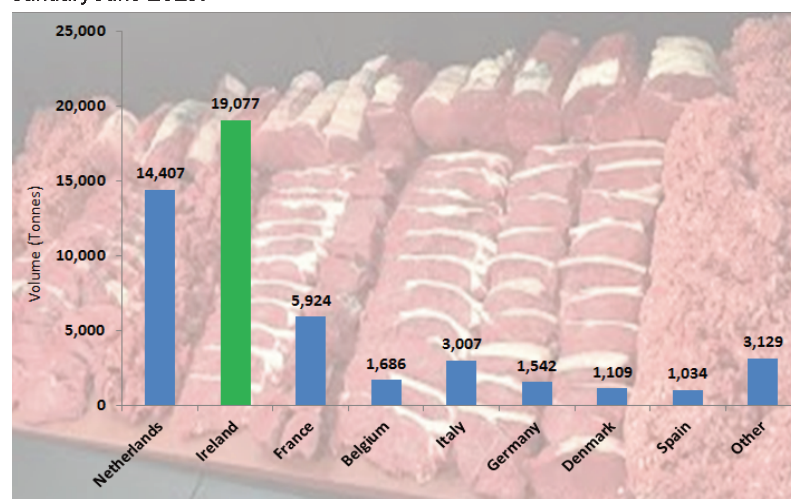
Export markets provide an important carcase balancing function for local processors and offer an outlet for beef products that are under-utilised locally. While growth in beef exports is welcomed, particularly to non-EU markets it is important to note that the domestic market remains the biggest market outlet for UK beef and this needs to be protected.

The potential of a no deal Brexit has been increasing and if this was to occur the application of significant tariffs on UK beef exports to the EU would effectively switch off this trade. In addition the proposed Tariff schedule released by the UK government back in March 2019 could have a detrimental impact on the UK beef industry, and in particular NI. The plan would see the UK apply lower tariffs than the EU on a range of agri-food products and includes a tariff free quota of 230,000 tonnes of beef. There is also a commitment that goods from ROI could cross into NI and then onto mainland GB without any checks or tariffs which could undermine the local market. Clarity and progress on this issue is urgently required.

Table 1: UK beef exports accounted for a larger proportion of total production during the first half of 2019.

	2018 Jan-June	2019 Jan-June
Total Carcase weight processed (Tonnes)	451,554	457,391
Total Boneless Yield (Tonnes)	338,665	343,043
Total beef exports (Tonnes)	56,526	62,632
% Exported	16.7%	18.3%

Figure 1: Exports to the EU accounted for 81 per cent of UK beef exports during January-June 2019.



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LMC Quarterly

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FQAS MART CLINICS TIMETABLE SEPTEMBER

LMC's Farm Liaison Officer, Terry White, runs Farm Quality Assurance Scheme (FQAS) mart clinics at a range of Livestock Marts across Northern Ireland. Terry is present to assist members of FQAS with non-conformances, general scheme queries and any issues prior to or following an inspection.

During Autumn 2019 LMC has extended the FQAS liaison service to a larger number of marts following the success of this initiative in 2018. Terry will cover the majority of quality assured marts in Northern Ireland which will allow all members a chance to use this service in their local area.

It is well known that some producers can find a number of the scheme requirements, such as the completion of records, a little daunting. The Liaison Service is in place to assist farmers and to ensure that as many producers as possible can continue to benefit from being a member of the scheme.

The daily FQAS helpline that LMC also provides continues to be available alongside the enhanced number of mart clinics. Producers can use the service for any general enquiries in relation to FQAS membership, to help prepare for an inspection and also to help resolve any non-conformances identified during a farm inspection. Table 2 shows the marts Terry will be attending during September 2019.

Any farmers who wish to join the scheme can also do so through their local FQAS mart clinic. Terry will be available at the livestock marts listed in the table. For further information call (028) 9263 3024.

Table 2: FQAS Clinics for September 2019

Mart	Day	Date
Omagh	Monday (Day)	02/09/2019
Saintfield	Wednesday (Day)	04/09/2019
Markethill	Tuesday (Day)	10/09/2019
Enniskillen	Thursday (Day)	12/09/2019
Pomeroy	Thursday (Evening)	12/09/2019
Draperstown*	Friday (Day)	13/09/2019
Lisnaskea	Tuesday (Day)	17/09/2019
Kilrea	Wednesday (Day)	18/09/2019
Ballymena	Friday (Day)	20/09/2019
Keady	Friday (Day)	27/09/2019
Hilltown	Saturday (Day)	28/09/2019

*O'Kane and Beattie Draperstown

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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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Updated 5pm Daily

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WEEKLY BEEF & LAMB MARKETS

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CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 26/08/19	Next Week 02/09/19
Prime		
U-3	316 - 322p	314 - 322p
R-3	310 - 316p	308 - 316p
O+3	304 - 310p	302 - 310p
P+3	254 - 264p	252 - 264p
	Including bonus where applicable	
Cows		
O+3 & better	235 - 250p	235 - 250p
Steakers	140 - 170p	140 - 170p
Blues	120 - 130p	120 - 130p

Cow quotes vary depending on weight and grade.
Pricing policies vary from plant to plant. Producers are advised to check pricing policies before presenting cattle for slaughter.

REPORTED NI CATTLE PRICES - P/KG

W/E 24/08/19	Steers	Heifers	Young Bulls
U3	328.2	331.5	319.8
R3	326.1	327.3	318.7
O+3	318.3	320.0	307.9

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 24/08/19	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	150.6	164.2	178.8	196.2
P2	170.2	191.4	216.4	227.7
P3	190.9	215.7	236.3	237.5
O3	-	238.4	250.1	254.8
O4	-	-	237.9	258.6
R3	-	-	270.0	273.2

Deadweight Cattle Trade

BASE quotes from the major processing plants this week ranged from 316-322p/kg for in spec U-3 grade prime cattle with the majority of plants quoting 322p/kg for steers and heifers. Quotes for Monday are expected to range from 314-322p/kg. The cow trade has remained firm with quotes ranging from 235-250p/kg for good quality O+3 grading cows.

The plants have reported good supplies of prime cattle available for slaughter with 6,082 head killed in local plants last week. This was an increase on the previous week when 5,977 prime cattle were killed locally. Cow slaughterings have also remained firm with 1,911 cows slaughtered in NI last week back from the 2,042 killed the previous week.

Imports of cattle from ROI for direct slaughter last week consisted of 147 prime cattle and 65 cows with a further six prime cattle and 99 cows imported from GB. Exports of prime cattle from NI to ROI for direct slaughter last week consisted of four prime cattle and 94 cows.

The deadweight prime cattle trade came under pressure in NI last week with the average steer price back by 1.7p/kg to 321.8p/kg and the R3 steer price back by just over a penny to 330.9p/kg. The average heifer price in NI last week was 324.7p/kg, back 4.5p/kg from the previous week while the R3 heifer price decreased by 5.7p/kg to 330.6p/kg. The average young bull price was back by 3.4p/kg to 309.9p/kg while the R3 young bull price decreased by 5.1p/kg to 318.2p/kg. The cow trade also came under pressure last week with the average cow price back by 3.5p/kg to 234.3p/kg. While the O3 cow price decreased by 1.8p/kg to 254.2p/kg compared to the previous week.

Meanwhile in GB last week the deadweight prime cattle trade generally held steady across the grades. The average steer price in GB last week was back 0.4p/kg to 326.9/kg while the R3 steer price came back slightly to 333.8p/kg. The R3 steer price improved in Southern England (+1.5p/kg) and Scotland (+ 2.3p/kg) with declines reported in in Northern England (-2.8p/kg) and the Midlands and Wales (-1.9p/kg). The average heifer price in GB last week was up 0.7p/kg to 328.6p/kg while the R3 heifer price increased by 1.8p/kg to 334.9p/kg. All of the regions reported increases in prices paid for R3 heifers with Northern England reporting the strongest increase of 2.7p/kg to 336.8p/kg. The overall average cow price decreased in GB last week by 3.9p/kg to 225.2p/kg while the O3 cow price came back by half a penny to 253.1p/kg.

In ROI last week the deadweight cattle trade came under pressure in both euro and sterling terms. Last week the R3 steer price was the equivalent of 316.2p/kg back by 3.1p/kg from the previous week. This puts the ROI R3 steer price 14.7p/kg below the NI price. The R3 heifer price in ROI last week decreased by 4p/kg to 323.8p/kg compared to the previous week. This puts the ROI R3 heifer price 6.8p/kg lower than the equivalent NI price.

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

W/E 24/08/19		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	330.1	325.2	343.6	335.4	332.2	329.9	335.3
	R3	330.9	316.2	345.9	336.5	327.8	326.9	333.8
	R4	330.0	315.6	347.9	344.6	327.3	327.3	338.9
	O3	323.2	298.9	323.2	316.8	307.0	308.2	313.9
	AVG	321.8	-	342.0	329.7	318.3	316.3	326.9
Heifers	U3	333.7	335.3	351.8	342.3	335.7	333.5	340.9
	R3	330.6	323.8	344.2	336.8	331.5	328.2	334.9
	R4	332.6	322.4	349.9	338.8	331.2	329.4	337.7
	O3	323.6	308.2	326.7	318.9	309.4	307.4	314.9
	AVG	324.7	-	345.8	331.6	320.2	316.0	328.6
Young Bulls	U3	318.9	310.9	332.7	327.4	325.8	323.1	327.4
	R3	318.2	301.0	324.9	318.9	318.4	311.7	319.4
	O3	303.2	283.1	291.0	291.4	289.1	302.6	291.0
	AVG	309.9	-	323.1	315.4	310.6	304.2	313.4
Prime Cattle Price Reported		5,244	-	6,631	6,464	7,287	4,826	25,208
Cows	O3	254.2	258.7	253.1	251.3	255.3	251.6	253.1
	O4	258.3	259.4	254.7	253.7	253.9	248.9	252.9
	P2	220.7	226.6	218.2	199.0	208.7	218.6	211.0
	P3	236.2	249.6	232.4	224.3	227.3	232.7	228.8
	AVG	234.3	-	246.7	229.4	219.8	220.5	225.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=91.27p Stg
(ii) Shading indicates a lower price than the previous week.
(iii) AVG is the average of all grades in the category, not just those listed

LATEST LIVEWEIGHT CATTLE MART PRICES NI

	1st QUALITY			2nd QUALITY		
W/E 24/08/19	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	201	215	207	175	200	188
Friesians	140	145	142	106	137	116
Heifers	200	213	206	180	198	190
Beef Cows	151	184	168	120	148	135
Dairy Cows	108	136	114	60	107	80
Store Cattle (p/kg)						
Bullocks up to 400kg	200	237	218	170	199	185
Bullocks 400kg - 500kg	200	219	210	165	199	182
Bullocks over 500kg	180	195	190	160	179	170
Heifers up to 450kg	190	207	198	160	189	175
Heifers over 450kg	180	199	190	160	179	170
Dropped Calves (£/head)						
Continental Bulls	350	470	400	230	345	290
Continental Heifers	300	430	335	190	295	235
Friesian Bulls	120	150	135	65	115	90
Holstein Bulls	80	120	95	10	60	40

SHEEP TRADE

SHEEP BASE QUOTES		
(P/Kg DW)	This Week 26/08/19	Next Week 02/09/19
Lambs up to 21kg	360-370p	355-365p

REPORTED SHEEP PRICES			
(P/KG)	W/E 10/08/19	W/E 17/08/19	W/E 24/08/19
NI L/W Lambs	353.5	340.8	330.2
NI D/W Lambs	374.8	374.0	367.3
GB D/W Lambs	395.2	394.4	392.0
ROI D/W	415.3	412.1	391.7

Deadweight Sheep Trade

QUOTES from the local plants for R3 grading lambs ended this week at 360-370p/kg up to 21kg. Quotes for next week are expected to range from 355-365p/kg up to 21kg. The availability of lambs for slaughter has continued to remain strong in line with normal seasonal trends with 10,324 lambs killed locally last week. This is a decrease of 923 lambs compared to the previous week. Lamb exports to ROI for direct slaughter last week totalled 8,133 head, an increase of 508 head when compared to the 7,625 head exported the previous week. The average deadweight lamb price in NI last week was 367.3p/kg, back 6.7p/kg from the previous week. The deadweight sheep price in ROI last week was the equivalent of 391.7p/kg, back 20.4p/kg from the previous week.

This week's marts

GOOD numbers of lambs passed through the marts this week with trade slightly back from last week. In Swatragh last Saturday 1,100 lambs sold from 310-348p/kg compared to 1,200 lambs the previous Saturday selling from 310-361p/kg. In Kilrea on Monday 440 lambs sold from 328-370p/kg compared to 550 lambs the previous week selling from 327-375p/kg. In Saintfield this week 566 lambs sold from 320-375p/kg compared to 711 lambs last week selling from 320-370p/kg. In Ballymena on Wednesday 1,546 lambs sold from 312-328p/kg (avg 317p/kg) compared to 1,921 lambs last week selling from 315-340p/kg (avg 323p/kg). Strong numbers of cull ewes passed through the marts this week with a top reported price of £120 in Ballymena on Wednesday.

LATEST SHEEP MARTS (P/KG LW)					
From: 23/08/19		Lambs			
To: 29/08/19		No	From	To	Avg
Friday	Newtownstewart	558	297	358	-
Saturday	Swatragh	1100	310	348	-
	Omagh	1140	339	420	-
Monday	Massereene	1116	325	352	-
	Kilrea	440	328	370	-
Tuesday	Saintfield	566	320	375	-
	Rathfriland	670	310	381	334
Wednesday	Ballymena	1546	312	328	317
	Enniskillen	581	322	346	-
	Markethill	1080	325	350	-
	Armoy	468	310	338	-

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