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UPDATE ON CONFORMATION OF PRIME KILL IN QUARTER 1 2015

ANALYSIS of the conformation scores for the prime cattle kill in NI has indicated that there has been no significant change in the conformation of steers and heifers during the first quarter of 2015 when compared with the corresponding period in 2014.

Steers

Figure 1 outlines the conformation scores awarded to the price reported NI steer kill during quarter 1 of 2014 and 2015. The proportion of steers achieving a U grade in the 2015 period decreased slightly on year earlier levels to 21.2 per cent while the proportion awarded an R grade increased by 0.7 percentage points to account for 39.5 per cent of the price reported steer kill.

O grade steers accounted for 29.7 per cent of the NI steer kill during quarter 1 with P grades accounting for a further 9.2 per cent. These are broadly similar to year earlier levels.

Changing market preferences have resulted in a notable reduction in the proportion of young bulls in the NI slaughter mix. As a result the proportion of steers has increased from 41 per cent of the total prime kill in the 2014 period to 53 per cent in the 2015 period.

While there have been changes to the number of steers in the slaughter mix year on year there has been no change to the dairy/suckler slaughter mix. In the 2015 period 36 per cent of the steer kill were sourced from the dairy herd compared to 37 per cent in the 2014 period.

The average price reported steer carcase weight during quarter 1 2015 increased from 346kg in the 2014 period to 350kg in the 2015 period. While suckler origin steer carcases increased by 3kg from 362kg to 365kg between the two periods dairy origin carcases increased by 7kg from 317kg to 324kg.

Heifers

During quarter 1 2015 U grading heifers accounted for 21.5 per cent of the NI heifer kill, a 1.5 percentage point increase on the corresponding period in 2014. The proportion of heifers awarded a an R grade in quarter 1 2015 was back slightly on year earlier levels to 51 per cent while the proportion awarded an O grade was back by 1.3 percentage points to account for 23.4 per cent of the price reported heifer kill. Meanwhile the proportion of heifers awarded a P grade increased by 0.6 percentage points year on year to account for 3.9 per cent of the heifer kill in the 2015 period.

In the first quarter of 2015 38 per cent of the prime cattle kill were heifers, down three percentage points from the corresponding period in 2014. The average heifer carcase weight has also recorded an increase year on year. In the first quarter of 2014 the average price reported carcase weight was 312kg and by the first quarter of 2015 this had increased to 318kg.

Young bulls

The biggest change in NI conformation scores has been in the young bull kill. As discussed above changes to market requirements have resulted in a reduction in the young bull kill. In the first quarter of 2015 9 per cent of the NI prime cattle kill were young bulls compared to 18 per cent in the corresponding period in 2014.

There have also been key changes to the dairy/suckler balance in the young bull kill (including veal and rose veal). In the 2015 period 68 per cent of the price reported young bull kill were of dairy origin, an 8 percentage point increase from the corresponding period in 2014. The increased dairy influence on the young bull kill will have been a key factor behind the general downward movement in conformation scores.

R grading young bulls accounted for 17.3 per cent of the NI young bull kill in the first quarter of 2015, a 4.8 percentage point reduction on the corresponding period in 2014. Meanwhile O grading carcases accounted for 41.1 per cent (+4.5 percentage points) and P grades accounted for 27.5 per cent (+3.6 per cent).

Figure 1: Conformation scores of price reported steer kill Quarter 1 2014-2015

Year	E	U	R	O	P
2014	0.4%	21.6%	38.8%	29.4%	9.8%
2015	0.3%	21.2%	39.5%	29.7%	9.2%

Figure 2: Conformation scores of price reported heifer kill Quarter 1 2014-2015

	E	U	R	O	P
2014	0.2%	20.0%	51.8%	24.7%	3.3%
2015	0.2%	21.5%	51.0%	23.4%	3.9%

Figure 3: Conformation scores of price reported young bull kill Quarter 1 2014-2015

Year	E	U	R	O	P
2014	1.5%	16.0%	22.1%	36.6%	23.9%
2015	1.2%	12.8%	17.3%	41.1%	27.5%

SHEEP TRADE

SHEEP QUOTES

(P/Kg DW)	This Week 20/04/15	Next Week 27/04/15
Hoggets	300-320>22kg	300-320>22kg
Spring Lambs	400-410>21kg	400-410>21kg

REPORTED SHEEP PRICES - P/KG

(P/KG)	W/E 04/04/15	W/E 11/04/15	W/E 18/04/15
NI Hoggets L/W	339.4	345.8	322.8
NI Hoggets D/W	401.7	396.9	378.9
GB Hoggets D/W	440.6	443.2	445.4
ROI D/W	410.4	410.3	404.9
NI Spr Lmbs L/W	432.0	421.6	388.0
NI Spr Lmbs D/W	418.9	450.6	431.8
GB Spr Lmbs D/W	-	-	514.3

Deadweight Sheep Trade

THE deadweight sheep trade in NI has continued to come under pressure with quotes for hoggets ending the week at 300-320p/kg up to 22kg and quotes for spring lambs at 400-410p/kg with plants paying up to 21kg. Throughput in the NI plants last week totalled 5,543 head, the highest weekly throughput since mid-February. Meanwhile exports of sheep to ROI last week totalled 3,187 head as the uncertainty over new country of origin labelling rules continues. The average deadweight hogget price in NI last week was back to 322.8p/kg while the deadweight spring lamb price was back to 431.8p/kg.

This Week’s Marts

SMALLER numbers of hoggets passed through most of the sale rings this week with the hogget season starting to come to an end. A combination of heavy hoggets, mixed quality and weak demand has resulted in a subdued trade across the marts. In Massereene on Monday 506 hoggets sold from 305-330p/kg compared to 696 hoggets the previous Monday selling from 330-372p/kg. A quieter trade in Saintfield this week saw 340 hoggets sold from 250-320p/kg compared to 362 hoggets last week selling from 300-350p/kg. Small numbers of spring lambs have also passed through the sale rings this week with average reported prices ranging from 368-385p/kg. Top reported prices for well fleshed ewes across the marts generally ranged from £100-133 this week.

LATEST SHEEP MARTS

From: 18/04/15		Hoggets (P/KG LW)				Spring Lambs (P/KG LW)			
To: 24/04/15		No	From	To	Avg	No	From	To	Avg
Saturday	Omagh	414	268	359	-	49	357	382	-
	Swatragh	435	292	355	-	-	-	-	-
Monday	Kilrea	350	380	406	-		380	406	-
	Massereene	506	305	330	-	107	400	432	-
Tuesday	Saintfield	340	250	320	-	50	340	380	-
	Rathfriland	255	251	343	295	187	336	386	368
Wednesday	Ballymena	404	250	328	285	71	336	447	385
	Enniskillen	308	274	318	280	78	362	398	375
	Markethill	700	250	300	275	125	350	380	-
	Armoy	430	250	300	-	80	340	380	-

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WEEKLY BEEF & LAMB MARKETS

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CATTLE TRADE

NI FACTORY QUOTES FOR CATTLE

(P/KG DW)	This Week 20/04/15	Next Week 27/04/15
Prime		
U-3	328 - 334p	328 - 334p
R-3	322 - 328p	322 - 328p
O+3	316 - 322p	316 - 322p
P+3	278 - 300p	278 - 300p
	Including bonus where applicable	
Cows		
O+3 & better	230 - 250p	230 - 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 18/04/15	Steers	Heifers	Young Bulls
U3	349.6	345.7	336.1
R3	342.9	337.8	326.6
O+3	327.5	326.5	306.2

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

w/e 18/04/15	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	137.6	139.6	153.0	169.2
P2	142.6	176.3	193.6	208.4
P3	141.3	194.7	212.8	225.7
O3	182.0	195.8	234.6	243.0
O4	130.0	226.0	232.1	247.8
R3	-	-	257.8	266.1

Deadweight Cattle Trade

BASE quotes from the major NI plants this week for U-3 grade prime cattle ranged from 328-334p/kg with the majority of plants quoting from 330-334p/kg. Quotes for good quality O+3 cows ranged from 230-250p/kg this week with most plants quoting in the region of 250p/kg. Similar quotes are expected for early next week.

Some processors in NI have reported a tightening in the supplies of cattle coming forward for slaughter in recent weeks with reports indicating that prime cattle numbers are also tightening in GB. Last week prime cattle throughput in the NI plants totalled 5,875 head, the lowest weekly kill since the first week of the year with the exception of Easter week. Imports of prime cattle from ROI last week for direct slaughter totalled 463 head with 55 cows also imported. Meanwhile exports to ROI for direct slaughter consisted of 69 prime cattle and 197 cows with a further 42 prime cattle exported to GB for direct slaughter.

The deadweight trade for prime cattle in NI last week was generally similar to the previous week. The average steer price in NI was back in the region of 1p/kg to 331.6p/kg last week while the R3 steer price increased by 1.7p/kg to 344.2p/kg. Meanwhile the average heifer price was back by 1.5p/kg to 331.5p/kg while the R3 heifer price was back by 1p/kg to 338.8p/kg.

In GB last week trade has continued to come under pressure with the average steer price back by 2p/kg to 341.4p/kg. All GB regions recorded a decline in average steer prices of 2-3 p/kg with the exception of Southern England where the average price increased by 1.4p/kg to 328.6p/kg. The average R3 steer price in GB last week was 346.9p/kg, back 1.6p/kg from the previous week. R3 steer prices in the Midlands and Northern England were both back by a margin of 4p/kg last week to 342.9p/kg and 346.8p/kg respectively. Meanwhile the R3 steer price in Scotland increased by 1p/kg to 354.2p/kg with the Southern England price up by 1.5p/kg to 341.9p/kg.

The heifer trade in GB last week was also under pressure with the average heifer price back by 4p/kg to 341.6p/kg. The average heifer price recorded declines in all the GB regions last week with the most notable declines in the Midlands and Southern England where prices were back by 5.3p/kg and 6.4p/kg respectively. The R3 heifer price in GB last week was back by 3.8p/kg to 346.1p/kg putting the differential with NI at 7.3p/kg. The R3 heifer price recorded declines in all the GB regions with the biggest declines recorded in the Midlands and Northern England where prices were back in the region of 5p/kg.

The deadweight cattle trade in ROI remained fairly steady in euro terms last week but a weakening in euro against sterling has meant prices are generally back in sterling terms. The R3 steer price was back the equivalent of 2.6p/kg to 296.3p/kg last week while the R3 heifer price was back by 1.9p/kg to 304.9p/kg.

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

W/E 18/04/2015		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	349.8	305.0	358.8	355.1	354.0	351.9	355.4
	R3	344.2	296.3	354.2	346.8	342.9	341.9	346.9
	R4	339.4	296.5	352.6	360.8	347.3	337.0	352.0
	O3	320.5	282.8	335.5	316.5	314.6	319.0	322.1
	AVG	331.6	-	351.6	346.6	333.6	328.6	341.4
Heifers	U3	346.0	315.4	361.1	360.5	356.4	352.5	358.6
	R3	338.8	304.9	353.6	345.4	343.6	338.6	346.1
	R4	335.2	304.8	352.8	350.8	346.4	338.0	348.2
	O3	324.1	291.7	330.1	327.4	309.7	313.8	321.3
	AVG	331.5	-	351.7	346.6	334.5	324.8	341.6
Young Bulls	U3	335.4	297.7	355.6	338.4	347.0	338.4	342.0
	R3	325.7	290.2	346.1	320.1	326.6	324.6	325.9
	O3	301.2	277.0	310.1	293.0	306.2	315.0	303.7
	AVG	306.8	-	330.6	304.8	312.0	317.0	312.8
Prime Cattle Price Reported		4866	-	6318	5626	5025	3733	20702
Cows	O3	241.1	251.0	263.4	253.6	242.3	240.6	251.5
	O4	246.0	252.8	263.4	254.5	246.4	245.4	253.2
	P2	193.4	219.5	190.6	209.4	189.0	189.1	193.1
	P3	220.1	245.3	212.9	227.8	209.7	213.7	214.6
	AVG	217.7	-	244.3	235.9	210.7	213.4	226.7

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=71.98p 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 18/04/15	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	192	209	200	170	191	180
Friesians	137	156	145	120	136	128
Heifers	188	204	190	160	187	183
Beef Cows	135	180	140	110	134	120
Dairy Cows	109	128	115	65	108	86
Store Cattle (p/kg)						
Bullocks up to 400kg	210	230	220	175	209	192
Bullocks 400kg - 500kg	213	238	224	185	212	195
Bullocks over 500kg	204	231	213	175	203	190
Heifers up to 450kg	200	220	210	167	199	185
Heifers over 450kg	190	209	200	160	189	175
Dropped Calves (£/head)						
Continental Bulls	280	400	330	135	278	205
Continental Heifers	250	390	300	100	248	170
Friesian Bulls	120	180	140	40	118	75
Holstein Bulls	65	140	100	10	62	35

FQAS NOTICE ONLINE PAYMENTS

LMC has launched an online payment system for the Farm Quality Assurance Scheme. This allows producers to pay annual membership renewal and initial registration fees through the LMC website.

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UK CONSUMER EXPENDITURE ON BEEF STEADY AS LAMB SALES STRUGGLE

ACCORDING to the latest consumer data from Kantar the value of beef sales in the UK during the 12 weeks ending 01 March 2015 remained fairly similar to the corresponding period in 2014 at £568.4 million.

While the total value of UK beef sales has remained steady year on year there have been changes to the volume of beef purchased by UK consumers. Volume sales of beef during the twelve week period ending 01 March 2015 totalled 72,410 tonnes, a two percent increase on the 70,990 tonnes of beef sales recorded in the corresponding twelve week period in 2014.

This two per cent increase in volume sales year on year can be attributed to the slight drop in the average retail price of beef to £7.85p/kg. In the corresponding period in 2014 the average retail price was £7.94 which represented a one per cent decline.

While total volume sales of beef have increased by 2 per cent year on year there has been some notable variation at individual cut level. Roasting joints have performed well during the twelve weeks ending 01 March 2015 with volume sales up 4.7 per cent from year earlier levels. Sales of stewing steak have also recorded an increase in volume sales by 2 per cent year on year with volume sales of mince also showing year on year growth.

A strong increase in volume sales was recorded for beef marinades which increased by 10.7 per cent on year earlier levels during the twelve week period ending 01 March 2015. In terms of volume growth in sales it was only second to burgers and grills which increased by 11.1 per cent from year earlier levels.

There has also been strong growth in sales of convenience beef products with volume sales of chilled ready meals and pre packed pasties recording 6.6 per cent and 7.9 per cent growth respectively between the 12 week comparable periods ending 02 March 2014 and the 01 March 2015.

Lamb

While expenditure on beef has remained steady during the twelve weeks ending 01 March 2015 retail sales of lamb have recorded a year on year decline in terms of both expenditure and volume sales.

Total UK expenditure on lamb during the twelve weeks ending 01 March 2015 totalled £151.1 million, an 8.7 per cent decline from the corresponding period in 2014. This drop in the total value of sales has been driven by an 9.2 per cent decline in total volume sales year on year to 18,182 tonnes in the 12 weeks ending 01 March 2015.

Much of the decline in the value and volume of sales can be attributed to the lower availability of New Zealand lamb on retail shelves during the 2015 period when compared to year earlier levels.

All the major lamb cuts have recorded notable declines in volume sales during the twelve weeks ending 01 March 2015 when compared to year earlier levels. The one exception to this was volume sales of lamb mince which recorded a 9.3 per cent increase year on year.

In the run up to Easter during March 2015 LMC intensified its beef and lamb advertising campaign to encourage local consumers to choose NIFQAS beef and lamb for their meat purchases.

FQAS Helpline

If you have had a recent inspection and need help and advice to rectify any non-conformances, contact the FQAS helpline:
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