LMC BULLETIN

WEEKLY PUBLICATION OF THE LIVESTOCK AND MEAT COMMISSION FOR NORTHERN IRELAND

Saturday 02 March 2013 Issue No. 2257

BEEF AND SHEEP FEED STATISTICS UPDATE

THE unsettled and unpredictable weather during 2012 resulted in higher concentrate inputs in both the beef and sheep sectors as producers altered production practices to cope with poor grass growth during the summer months and lower forage availability, and quality, during the autumn and winter months.

This increased dependence on concentrates to maintain animal performance coincided with an increase in the cost of already expensive concentrates due to reduced crop yields in many parts of the world and an ever increasing global demand for cereals for feed and fuel. The latest figures released from DARD for concentrate usage in 2012 has indicated notable increases in concentrate usage in both the beef and sheep sectors when compared to 2011.

Total deliveries of beef cattle compounds and beef coarse mixes and blends in Northern Ireland during 2012 was 400.2 thousand tonnes, a thirteen per cent increase on the 354.6 thousand tonnes delivered during 2011. This increase in concentrate usage is apparent in Figure 1 which plots beef concentrate deliveries over the course of 2011 and 2012.

Total deliveries during summer 2012 were markedly higher than during summer 2011 and this higher level of concentrate usage continued right through until December 2012. Beef concentrate deliveries in the third quarter of 2012 resulted in concentrate deliveries being 31 per cent higher than the corresponding period in 2011. Beef concentrate usage in the final quarter of 2012 was eleven percent higher than the corresponding period in 2011.

Total beef concentrate usage and cattle slaughterings are usually closely linked but the poor weather experienced in 2012 increased the amount of concentrates required to bring animals through to slaughter. This resulted in a thirteen per cent increase in beef concentrate usage at a time when total cattle slaughterings were back by 1.2 per cent when comparing 2012 with 2011.

When analysing feed statistics it is also important that we consider the balance of NI slaughterings with the number of cattle imported and exported for direct slaughter. By doing this it is possible to establish the number of cattle fed/finished in NI. In 2012 424,670 head were finished on farms in NI, a reduction of 9,000 head on 2011 figures. This represents a decline of two per cent in the number of finishing cattle fed in 2012 while concentrate inputs were thirteen per cent higher.

The amount of concentrates used by the sheep sector in 2012 totalled 74.9 thousand tonne, a 12.8 per cent increase on the 66.4 thousand tonne delivered during 2011 as outlined in Figure 2. While total sheep feed deliveries increased in all quarters of 2012 there was a significant variation in the increase recorded across the quarters. The biggest increases were recorded in the second and fourth quarter of 2012 when deliveries were up 20.6 per cent and 21.5 per cent respectively.

There was also significant variation in the amount of particular types of concentrates being purchased between 2011 and 2012 as outlined in Table 1. The quantity of breeding sheep compounds delivered increased by 4.5 thousand tonne to 25.1 thousand tonne in 2012, an increase of 21.6 per cent year on year. The biggest increase recorded is in growing and finishing sheep compounds which increased by 7.5 thousand tonne to 28.3 thousand tonne, a 36 per cent increase year on year.

Table 1: Breakdown of total sheap concentrate deliveries in NI in 2011 and 2012 ('000 tonne)

	2011	2012	Change (tonnes)	Change (%)
Breeding sheep compounds	20.6	25.1	4.5	21.6
Growing and finishing sheep compounds	20.8	28.3	7.5	36.0
Coarse mixes or blends	24.8	21.3	-3.5	-14.3
Protein concentrates	0.1	0.3	0.2	111.6
Total sheep	66.4	74.9	8.6	12.9

Some of this increase in concentrate usage can be attributed to an increase in the level of concentrates required to bring lambs through to finish due to the poor weather conditions but it must also be remembered that lamb production levels during 2012 in Northern Ireland were 13.2 per cent higher than during 2011. This will also have increased demand for sheep concentrates on NI farms.

Figure 1: Total deliveries of beef cattle compounds and beef coarse mixes and blends in Northern Ireland during 2011 and 2012 ('000 tonnes)

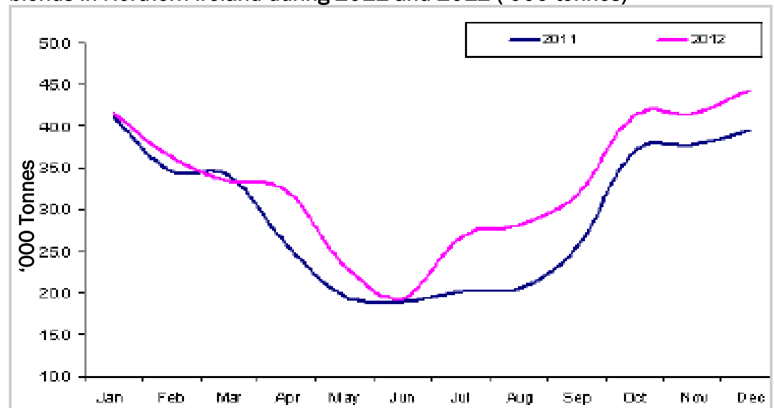
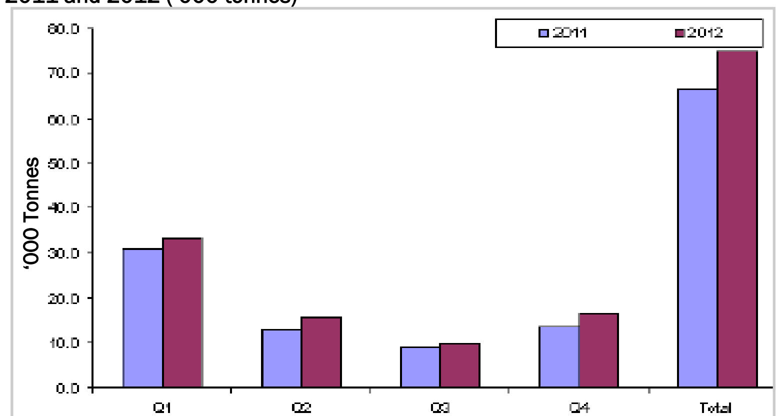


Figure 2: Quarterly deliveries of sheep concentrates in Northern Ireland during 2011 and 2012 ('000 tonnes)



Total hogget/lamb slaughterings during 2012 in Northern Ireland were 385,143 head, a 46.5 per cent increase on the 262,906 head slaughtered during 2011. While a 4.7 per cent decline in exports for direct slaughter to ROI and the UK between 2011 and 2012 may have had played some part in the increased slaughterings of lambs in NI plants the majority of the increase in slaughterings can be attributed to the increase in lamb production.

FQAS NOTICE

SCHEME DOCUMENTATION

All FQAS producer members should recently have received the following documents:

- FQAS Newsletter
- Addendum to the FQAS Standard
- Welfare Codes for Cattle and Sheep.

Any FQAS Member who has not yet received this documentation, please contact FQAS helpline on (028) 9263 3024 and we can provide you with the relevant documents.

NI BEEF INDUSTRY KEY PERFORMANCE INDICATORS (JANUARY SNAPSHOT)

AVERAGE prime cattle prices in NI during January 2013 were 4.1 per cent higher than January 2012 at 331.6p/kg with NI R3 steer prices up by the same margin to 340.3p/kg. Meanwhile R3 steer prices in ROI were up 1.6 per cent over the same period to 334p/kg with R3 steer prices in GB up 10.4 per cent to 369.6p/kg.

Clean cattle slaughterings in NI during January 2013 totalled 33,653 head, a 2.9 per cent increase on the 32,705 slaughtered in January 2012. Meanwhile the average clean carcase weight during January 2013 was 332.5kg, 9.2kg lighter than the average carcase weight in January 2012 (-2.7 per cent). The average cow carcase weight in January 2013 was also lighter at 294.7kg, a reduction of 7.7kg on the average carcase weight in January 2012 when it was 302.4kg.

Imports for direct slaughter in January 2013 totalled 2,778 head, a 43.5 per cent increase on the 1,936 imported in January 2012. Exports out of NI for direct slaughter also increased with 2,563 head exported, a 44.6 per cent increase on the 1,773 exported in January 2012.

A snapshot of the number of cattle on the ground during January 2013 identified a total of 387,234 head of cattle between 12-30 months of age destined for beef production. This is a 2.8 per cent increase on the 376,685 on the ground in January 2012. Between the two periods the number of beef sired animals on the ground aged 12-30 months increased by 1.8 per cent while the number of dairy sired animals on the ground increased by 10.2 per cent.

Calf registrations during January 2013 were 2.2 per cent higher than during January 2012 with beef sired calf registrations up 1.8 per cent and dairy sired calf registrations up 2.9 per cent.

	Jan-12	Jan-13	% Change
Finished Cattle Prices (p/kg)			
Average Prime Cattle Price	318.5	331.6	+4.1%
Average Cow Price	248.2	249.9	+0.7%
Average R3 Steer Price (NI)	326.9	340.3	+4.1%
Average R3 Steer Price (ROI)	328.8	334.0	+1.6%
Average R3 Steer Price (GB)	334.7	369.6	+10.4%
Slaughterings			
Total Clean Slaughterings (Head)	32,705	33,653	+2.9%
Total Cow Slaughterings (Head)	8,232	9,737	+18.3%
Average Clean Carcase Weight (kg)	341.7	332.5	-2.7%
Average Cow Carcase Weight (kg)	302.4	294.7	-2.5%
Trade (Head)			
Live Imports for Direct Slaughter	1,936	2,778	+43.5%
Live Exports for Direct Slaughter	1,773	2,563	+44.6%
Availability (Head)			
No. Cattle on the Ground*	376,685	387,234	+2.8%
Beef Sired	332,758	338,822	+1.8%
Dairy Sired (Male Only)	43,927	48,412	+10.2%
Calf Births Registrations (Head)			
Calf Births	28,066	28,687	+2.2%
Beef Sired	18,428	18,766	+1.8%
Dairy Sired (Male Only)	9,638	9,921	+2.9%
Euro / Stg Exchange Rate (€ / £)	83.2	83.3	+0.1%

* Aged between 12-30 mths (Beef + Dairy Male Only)

All NI Figures Unless Otherwise Stated

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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

Answerphone Service

Factory Quotes & Mart Results
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WEEKLY BEEF & LAMB MARKETS

LMC

CATTLE TRADE

NI FACTORY QUOTES FOR CATTLE

(P/KG DW)	This Week 25/02/13	Next Week 04/03/13
Prime		
U-3	342-346p	344-348p
R-3	336-340p	338-342p
O+3	330-334p	332-336p
* Plus 8p/kg in spec bonus where applicable		
Cows		
O+3 & better	285-290p	265-295p
Steakers	180-255p	180-255p
Blues	160-190p	160-190p

REPORTED NI CATTLE PRICES - P/KG

W/E 23/02/13	Steers	Heifers	Young Bulls
U-3=	347.1	352.8	335.7
U=3=	351.0	354.3	337.6
U=4=	343.4	355.4	-
R=3=	346.9	351.1	330.7
R=4=	346.4	346.1	320.0
O+3=	345.4	345.4	322.0
O=3=	331.4	336.6	320.3
Average	339.7	344.7	324.5

REPORTED COW PRICES NI W/E 23/02/13

Grades	Price (p/kg)	Avg Wgt
O+3=	293.6	322.4
O-3+	273.1	311.4
P+2+	253.2	295.6
P+3+	265.3	302.6
P-1-	172.2	208.4

COMMODITIES

COMMODITY PRICE

W/E 23/02/13	Price (£) per tonne / 1000litre	% weekly change
Barley	212.50	+1.0
Wheat	230.00	+1.5
Soya	488.00	+3.6
Straw	17.40	-
Red Diesel	720-750	-

* Table shows the latest available commodity data in NI

Base Quotes a Starting Point for Negotiation

BASE quotes from the plants early this week for U-3 grade prime cattle were 338-344p/kg and increased to 344-348p/kg as the week progressed. Plants are reporting tighter supplies of prime cattle this week which has helped to increase competition for prime cattle, particularly for in-spec and Farm Quality Assured cattle. Quotes for cows this week ranged from 285-290p/kg with similar quotes expected for Monday.

Prime cattle slaughterings in NI last week totalled 6,697 head, a reduction of 353 head on the previous week. Meanwhile cow slaughterings were also back on the previous week, down 263 head to 1,631 head. Imports of prime cattle for direct slaughter from ROI last week totalled 439 head and accounted for 6.5 per cent of the total prime kill with a total of 66 cows also imported from ROI for direct slaughter. Exports of cows from NI to ROI for direct slaughter have remained similar to previous weeks at 257 head but are significantly higher than the corresponding week last year when 94 cows were exported.

Average steer prices in NI last week increased by 3.2p/kg to 339.7p/kg while the average heifer price increased by 4p/kg to 344.7p/kg. The top base quote for U-3 grade heifers last week was 340p/kg and the average price paid was 4.7p/kg above this which indicates that higher prices are available than base quotes would suggest. Base quotes should therefore be used as a starting point for negotiation and producers should shop around to ensure that they get they get the best possible deal.

Deadweight prices have also shown an improvement across GB with average steer prices up 2.2p/kg to 370.7p/kg and average heifer prices up 2.5p/kg to 368.0p/kg. Steer prices in Southern England increased by 4.6 p/kg to 363.1p/kg while heifer prices in the region increased by 3.8p/kg to 359.5p/kg. The differential between R3 prices in NI and Southern England last week was 24.9p/kg for steers and 18.7p/kg for heifers with the differential widening further as you move north.

The increasing value of Euro against Sterling has meant ROI prices have continued to increase in sterling terms. The R3 steer price last week increased by 3p/kg to 350.1p/kg while the R3 heifer price increased by 3.3p/kg to 365.6p/kg.

This week's Marts

A strong trade across the marts this week seen first quality finished heifers selling to an average of 210p/kg compared to an average of 200p/kg last week. Second quality finished heifers sold to an average of 190p/kg (+13p/kg). Finished first quality steers sold to an average of 209p/kg this week with second quality selling to 190p/kg.

The good trade for store cattle has also continued with average prices for all classes of store cattle showing an increase. First quality bullocks up to 400kg sold to an average of 209p/kg (+9p/kg) with second quality bullocks in the same weight range selling to 184p/kg (+13p/kg).

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

W/E 23/02/13		Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	348.6	357.5	378.9	380.6	378.9	382.7	379.8
	R3	346.5	350.1	375.6	375.5	372.5	371.4	373.8
	R4	345.3	351.3	376.8	377.8	373.4	372.7	375.7
	O3	337.2	336.0	363.2	364.1	357.7	354.4	360.2
	AVG	339.7	-	374.9	372.1	369.8	363.1	370.7
Heifers	U3	353.8	378.3	379.5	382.3	380.3	381.6	380.8
	R3	351.0	365.6	372.2	372.1	373.8	369.7	371.9
	R4	347.4	365.9	374.5	373.8	371.0	368.9	372.6
	O3	339.5	348.0	359.2	360.2	352.8	352.7	356.5
	AVG	344.7	-	372.9	368.4	368.0	359.5	368.0
Young Bulls	U3	337.4	348.9	364.6	362.9	372.1	370.3	367.7
	R3	333.3	344.0	352.1	352.0	356.6	366.3	355.1
	O3	320.8	333.8	337.5	333.7	345.1	361.3	346.5
	AVG	324.5	-	346.7	343.3	348.5	353.3	348.2
Prime Cattle Price Reported		5356	-	7487	6129	5312	4123	23051
Cows	O3	279.6	288.7	293.4	278.9	289.8	263.3	279.6
	O4	283.2	291.7	296.4	286.4	291.1	270.6	285.6
	P2	233.5	248.5	246.0	236.9	231.5	218.3	232.7
	P3	260.5	278.1	258.0	263.7	239.5	228.3	248.8
	AVG	255.3	-	288.3	264.3	273.9	228.6	261.1

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=86.49p 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 23/02/13	1st QUALITY From	1st QUALITY To	1st QUALITY Average	2nd QUALITY From	2nd QUALITY To	2nd QUALITY Average
Finished Cattle (p/kg)						
Steers	200	218	209	180	199	190
Friesians	150	164	157	134	149	141
Heifers	200	218	210	180	199	190
Beef Cows	160	192	173	120	159	139
Dairy Cows	123	159	130	100	122	111
Store Cattle (p/kg)						
Bullocks up to 400kg	199	224	209	170	198	184
Bullocks 400kg - 500kg	202	220	207	175	200	188
Bullocks over 500kg	198	230	205	175	196	186
Heifers up to 450kg	190	209	200	170	189	180
Heifers over 450kg	196	221	205	175	195	185
Dropped Calves (£/head)						
Continental Bulls	200	360	245	140	198	170
Continental Heifers	170	300	210	100	168	130
Friesian Bulls	100	150	125	20	95	55
Holstein Bulls	70	140	90	2	68	30

SHEEP TRADE

HOGGET QUOTES		
(P/Kg DW)	This Week 25/02/13	Next Week 04/03/13
NI Factories	370-380p	385-390p
ROI Factories	370-380p	390p

Notes: (i)Hoggets up to 22kg
(ii)ROI prices converted at 1 euro=86.49p Stg

REPORTED HOGGET PRICES - P/KG			
(P/KG DW)	W/E 09/02/13	W/E 16/02/13	W/E 23/02/13
NI Liveweight	310.2p	322.7p	337.3p
NI Deadweight	340.6p	347.2p	359.3p
ROI Deadweight	346.9p	354.2p	372.7p
GB Deadweight	346.4p	359.7p	362.8p

Deadweight Sheep Trade

QUOTES from the plants this week have continued to improve with base quotes of 385-390p/kg for R3 grading hoggets. The plants have been reporting a tightening in the availability of hoggets over the last few weeks with slaughterings last week totalling 4,258 head. This is 887 head lower than the previous week. The NI deadweight lamb price last week was 359.3p/kg, an increase of 12.1p/kg on the previous week. This has narrowed the differential with GB deadweight prices to 3.5p/kg where the deadweight price was 362.8p/kg. Meanwhile deadweight prices in ROI last week increased by the equivalent of 18.5p/kg to 372.7p/kg. A total of 10,574 lambs were exported to ROI from NI last week, back almost 2,000 head on the previous week.

This week's marts

THE strong live trade for hoggets has continued this week with 540 hoggets in Kilrea selling to an average of 350p/kg compared to an average of 340p/kg last week. In Rathfriland on Tuesday 398 hoggets sold from 322-384p/kg (avg 355p/kg) compared to 552 hoggets last week selling from 321-400p/kg (avg 340p/kg). In Ballymena on Wednesday 1,228 hoggets sold to an average of 352p/kg compared to 1,118 hoggets last week selling to an average of 338p/kg. The trade for cull ewes has also remained strong with top prices in excess of £90 reported in a number of the marts for well fleshed lots.

LATEST SHEEP MARTS					
From: 23/02/13 To: 28/02/13		Hoggets (P/KG LW)			
		No.	From	To	Average
Saturday	Omagh	857	321	371	-
	Downpatrick	350	318	351	-
	Donemana	272	346	384	359
	Newtownstewart	150	333	352	345
	Swatragh	577	348	391	369
Monday	Massereene	1260	335	376	-
	Kilrea	540	340	366	350
Tuesday	Saintfield	705	340	372	355
	Rathfriland	398	322	384	355
	Armoy	222	340	362	354
Wednesday	Enniskillen	580	348	385	
	Ballymena	1228	330	386	352
	Markethill	500	340	378	355

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