

LMC

Livestock & Meat Commission

NI BEEF AND SHEEP YEARBOOK 2018



LMC Market Information Department
January 2019

LMC MARKET INFORMATION SERVICES

LMC's Market Information Services are designed to support, examine and inform the NI red meat industry. The service aspires to support producers and processors with their decision making by producing available accurate and timely information that creates a better understanding of the trade. LMC is committed to creating an environment where our stakeholders are well-informed whether this is through the provision of basic statistics, further analysis / examination of this data or the delivery of information through public events. This publication provides a summary of the beef and sheep trade in NI during 2018.

During 2018 LMC has continued to communicate detailed market information to producers and processors through its various publications. The Bulletin remains LMC's primary market information tool and is published each Saturday in the Farming Life newspaper. This publication is complimented by a mid-week market update in the Irish Farmers' Journal and the Farm Week newspapers. LMC also continued to provide weekly deadweight trade updates through the text service with a significant increase in subscribers during 2018. In addition to these weekly publications the LMC Quarterly was published and distributed to approximately 12,800 stakeholders over the course of the year. The Market Information section of the LMC website continues to host all bulletin and quarterly publications, including additional market reports and updates of both the liveweight and deadweight trade.

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REVIEW OF THE YEAR

Relatively strong supplies of prime cattle came available for slaughter throughout 2018 with throughput running 1.3 per cent higher than 2017 levels. These strong supplies are expected to carry into the first half of 2019. Total cow throughput in local plants totalled 103,533 head during 2018 and while this was similar to 2017 levels there were some changes in availability for slaughter over the course of the year. Production difficulties early in 2018 resulted in higher than expected culling rate however this was offset by a drop in cow throughput in the last quarter of the year.

With an increase in carcase weights of all types of cattle there was a two per cent increase on the volume of beef handled by local processors when compared to 2017. The deadweight cattle trade in NI started the year relatively strongly for all types of cattle however it came under pressure as the year progressed. Higher beef throughput combined with weaker consumer demand for beef contributed to the downward pressure on deadweight prices. Exports to mainland UK for direct slaughter were back from previous years while imports from ROI for slaughter in local plants were also operating at lower levels than in 2017.

Total lamb and hogget throughput in NI plants during 2018 was back 7.2 per cent compared to 2017 levels. There was a fairly strong carryover of hoggets into 2018 however a difficult spring impacted lamb numbers and lamb performance which resulted in tighter supplies, particularly in the second half of the year.

A strengthening euro against sterling also made NI lambs very attractive to processors in ROI with 51 per cent of NI lambs/hoggets exported to the region for direct slaughter. There was a strong deadweight trade for lamb/hoggets during 2018 with a combined average R3 lamb/hogget price of 458.6p/kg, up a notable 57p/kg from 2017 levels. It was a difficult year for lamb in terms of UK retail sales with an increase in the average price combined with reduced consumer demand. The weaker sterling against euro did however make NI origin lamb much more competitive on key EU markets which helped firm the deadweight trade.

BEEF MARKET 2018

Prime cattle throughput in NI during 2018 totalled 336,991 head, a 1.3 per cent increase on 2017 levels. There was also an increase in the carcass weights of prime cattle slaughtered in NI plants with an average prime cattle carcass weight during 2018 of 336kg, a 2.3kg increase from an average carcass weight of 334kg during 2017. NI processors handled 111,379 tonnes of prime cattle beef, a two per cent increase on 2017 levels of prime cattle beef production.

Cow throughput in NI totalled 103,533 head during 2018, a marginal increase from 2017 levels when 103,440 cows were killed. There was however a notable decline in cow throughput in the final quarter of 2018. The average cow carcass weight recorded an increase to 300kg during 2018. Local processors handled 31,055 tonnes of cow beef during 2018, a 1.2 per cent increase from 2017 levels.

The average R3 steer price in NI during 2018 was 360.6p/kg, a penny per kilo increase from the 359.6p/kg paid during 2017. The deadweight trade for prime cattle started the year strongly but started to come under pressure in the later six months of 2018. The average cow price in NI during 2018 was 255.6p/kg, back 3.2p/kg from year earlier levels. The average O3 cow price in NI was 274.1p/kg during 2018, an increase of 2.6p/kg on 271.5p/kg O3 cow price reported in 2017. However as with the prime cattle trade prices came under pressure in the second half of the year with strong cattle throughputs and weaker demand for beef from the major retailers.

There was a decline in beef sired calf registrations on NI farms during 2018 with a total of 346,675 beef calves registered. This was a five per cent decrease from 2017 levels when 365,597 beef sired calves were registered. Limousin continued to be the most popular beef sire used on NI farms and accounted for 26 per cent of beef registrations although there has been a notable increase in the number of Aberdeen Angus calves being registered. The number of dairy sired male calves registered in NI during 2018 was 74,998, a six per cent decline from 2017 levels when 79,583 dairy sired male calves were registered.

Total imports of cattle for direct slaughter in NI during 2018 totalled 12,696 head, a 28.6 per cent decrease from 17,789 head imported for direct slaughter during 2017. Total cattle exports for direct slaughter also recorded a decline during 2018. Exports totalled 10,930 head compared to 12,378 head during 2017. During 2018 there was a decrease in the number of cows exported to ROI for direct slaughter while the number of prime cattle exported to GB for direct slaughter was well back from 2017 levels.

Total retail expenditure on beef in the UK during 2018 was similar to year earlier levels and totalled £2.2 billion. The average retail price of beef also remained steady during 2018 at £7.88 while the volume of retail beef sales remained at similar levels from 2017 to total 279,534 tonnes during 2018.

SHEEP MARKET 2018

Lamb/hogget throughput in NI totalled 392,867 head during 2018, back 7.2 per cent from 2017 levels when 423,247 lambs/hoggets were killed in NI plants. A smaller ewe flock combined with a difficult spring impacted the availability of lambs for both slaughter and export during 2018 and has resulted in a smaller carryover of hoggets into 2019. Total ram/ewe throughput in NI plants during 2018 was 24,744 head, a 18 per cent decrease from the 30,255 rams/ewes killed in NI plants during 2017.

ROI continues to act as an important market for NI origin lambs with exports for direct slaughter during 2018 totalling 432,970 head, a 7.5 per cent increase from 2017 levels when 402,820 sheep were exported. Exports from NI to ROI for direct slaughter accounted for 51 per cent of total NI sheep output during 2018, which was up four per cent from 2017 levels.

There was a strong deadweight trade for lambs/hoggets during 2018. The average R3 lamb/hogget price in NI during 2018 was 459p/kg, an increase from an average of 402p/kg during 2017. This increase of 57p/kg is the equivalent of £12 on a 21kg lamb.

Consumer data has indicated a 2.7 per cent decline in the value of UK retail lamb sales during 2018 to total £578 million. The average retail price of lamb during 2018 was £9.42/kg, an increase of 50p/kg from the average retail price in 2017. Meanwhile the volume of UK lamb retail sales during 2018 was at lower levels than 2017 at 62,047 tonnes.



Table 1.1: Monthly NI cattle kill by category 2017-2018

	2018						2017					
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	13,491	11,193	2,534	27,218	8,645	36,577	13,627	10,760	2,564	26,951	7,993	35,858
February	13,978	11,638	2,705	28,321	8,566	37,721	13,570	10,633	2,385	26,588	8,121	35,553
March	14,881	12,778	3,540	31,199	9,713	41,809	16,534	12,548	2,809	31,891	8,646	41,341
April	12,454	11,196	3,171	26,821	8,031	35,624	12,192	9,576	2,496	24,264	5,886	30,845
May	14,777	12,287	4,552	31,616	8,299	40,815	16,268	12,812	4,080	33,160	8,268	42,207
June	9,857	8,606	4,459	22,922	6,560	30,215	11,213	8,679	4,158	24,050	7,552	32,309
July	9,875	8,133	5,040	23,048	7,998	32,029	9,936	7,754	3,669	21,359	7,140	29,206
August	12,233	10,296	5,865	28,394	9,429	38,969	15,008	10,381	3,668	29,057	9,200	39,161
September	12,984	9,488	3,669	26,141	8,652	35,703	14,585	8,868	2,691	26,144	8,999	36,135
October	15,306	10,598	2,992	28,896	9,064	38,851	15,577	9,853	2,367	27,797	10,122	38,656
November	18,564	14,843	3,612	37,019	11,772	50,000	19,139	14,044	2,885	36,068	13,531	50,751
December	12,332	10,358	2,706	25,396	6,804	33,026	12,831	10,227	2,328	25,386	7,982	34,090
Total	160,732	131,414	44,845	336,991	103,533	451,339	170,480	126,135	36,100	332,715	103,440	446,112

Table 1.2: Summary of NI cattle kill by category 2017-2018

	2018		2017	
Steers	160,732	36%	170,480	38%
Heifers	131,414	29%	126,135	28%
Young Bulls	44,845	10%	36,100	8%
Cows	103,533	23%	103,440	23%
Other	10,815	2%	9,957	2%
Total	451,339		446,112	

Figure 1.1: Proportion of the NI cattle kill by category 2018

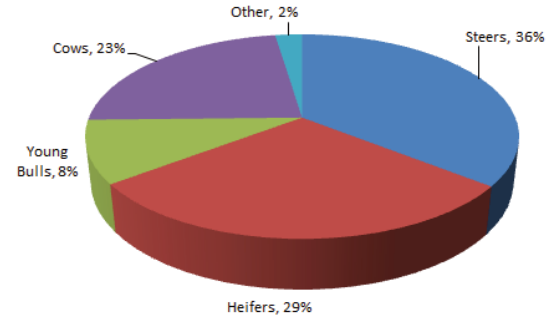


Table 2.1: Monthly NI volume of beef produced by category ('000 tonnes) 2017-2018

	2018						2017					
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Total Cattle
January	4,779	3,551	827	9,157	2,607	11,889	4,780	3,408	814	9,001	2,391	11,529
February	4,930	3,722	884	9,536	2,564	12,221	4,755	3,342	757	8,854	2,460	11,436
March	5,220	4,017	1,158	10,395	2,900	13,428	5,746	3,921	911	10,578	2,561	13,273
April	4,358	3,514	1,051	8,922	2,375	11,432	4,232	2,984	803	8,019	1,734	9,870
May	5,177	3,871	1,533	10,581	2,510	13,246	5,652	4,022	1,341	11,014	2,519	13,684
June	3,462	2,715	1,517	7,694	2,045	9,869	3,916	2,722	1,389	8,027	2,292	10,451
July	3,456	2,556	1,740	7,753	2,423	10,400	3,438	2,435	1,233	7,106	2,148	9,381
August	4,270	3,195	2,008	9,473	2,780	12,474	5,227	3,244	1,262	9,732	2,726	12,644
September	4,570	3,005	1,246	8,820	2,583	11,582	5,094	2,800	922	8,817	2,614	11,589
October	5,466	3,373	1,023	9,862	2,715	12,749	5,460	3,117	782	9,359	2,957	12,452
November	6,616	4,743	1,220	12,578	3,508	16,331	6,678	4,467	974	12,120	3,887	16,180
December	4,379	3,335	893	8,606	2,045	10,808	4,503	3,250	767	8,520	2,387	11,002
Total	56,683	41,596	15,100	113,379	31,055	146,430	59,479	39,712	11,956	111,147	30,676	143,489

Table 2.2: Average monthly carcass weights by category (kg) 2017-2018

	2018					2017				
	Steers	Heifers	Young Bulls	Prime Cattle	Cows	Steers	Heifers	Young Bulls	Prime Cattle	Cows
January	354.2	317.3	326.4	336.4	301.6	350.7	316.7	317.6	334.0	299.2
February	352.7	319.8	327.0	336.7	299.4	350.4	314.3	317.6	333.0	302.9
March	350.8	314.4	327.1	333.2	298.6	347.5	312.5	324.3	331.7	296.2
April	349.9	313.9	331.3	332.7	295.8	347.1	311.6	321.9	330.5	294.6
May	350.3	315.0	336.8	334.7	302.4	347.4	313.9	328.6	332.1	304.6
June	351.3	315.5	340.2	335.7	311.8	349.2	313.6	334.2	333.8	303.5
July	350.0	314.3	345.3	336.4	302.9	346.0	314.1	336.2	332.7	300.9
August	349.1	310.3	342.3	333.6	294.8	348.3	312.5	343.9	334.9	296.3
September	352.0	316.7	339.5	337.4	298.5	349.3	315.7	342.7	337.2	290.5
October	357.1	318.3	342.0	341.3	299.5	350.5	316.4	330.2	336.7	292.1
November	356.4	319.5	337.8	339.8	298.0	348.9	318.1	337.7	336.0	287.2
December	355.1	321.9	330.1	338.9	300.5	350.9	317.8	329.5	335.6	299.0
Overall Average	352.7	316.5	336.7	336.4	300.0	348.9	314.8	331.2	334.1	296.6

Table 2.3: Average annual carcass weight by category (kg) 2017-2018

	Steers	Heifers	Young Bulls	Prime Cattle	Cows
2018	352.7	316.5	336.7	336.4	300.0
2017	348.9	314.8	331.2	334.1	296.6

December 2018 Farm Survey Results

The NI agricultural survey is released annually by the Department of Agriculture, Environment and Rural Affairs (DAERA) and provides estimates of the numbers of cattle on NI farms at the beginning of December each year.

The December 2018 survey identified 245,100 beef cows on NI farms, a five per cent decrease on year earlier levels. This is the second consecutive year in which suckler cow numbers in NI have declined.

The number of beef heifers in calf in December 2018 totalled 45,400 head, similar levels when compared to December 2017. Meanwhile dairy cow numbers recorded a one per cent decrease in December 2018 to 309,000 head while the number of dairy heifers in calf was back marginally to 59,700 head.

The survey has identified a five per cent increase in the number of cattle on NI farms 2 years old and older when compared to year earlier levels. The number of beef cattle aged 1-2 years decreased by two per cent to 350,900 in December 2018 while the number of cattle aged less than 1 year decreased by five per cent to total 266,800 head.

Figure 2.1: Total beef heifers in calf in Dec 2000-2018

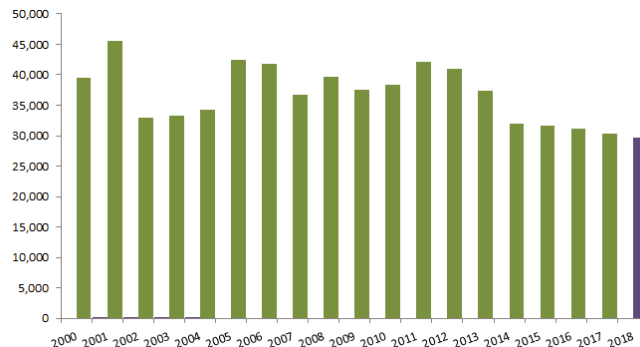


Figure 2.2: Total beef cows in Dec 2000-2018



Table 3.1: Monthly calf registrations by category 2017-2018

	2018			2017		
	Beef	Dairy Males	Total	Beef	Dairy Males	Total
January	23,001	7,942	30,943	24,641	8,242	32,883
February	22,323	7,007	29,330	21,956	7,215	29,171
March	35,389	6,845	42,234	37,825	7,185	45,010
April	49,451	5,662	55,113	51,997	5,349	57,346
May	57,945	4,682	62,627	61,589	5,089	66,678
June	38,126	4,133	42,259	41,625	4,603	46,228
July	28,748	3,719	32,467	29,881	3,768	33,649
August	22,507	4,312	26,819	24,390	4,754	29,144
September	16,917	6,619	23,536	18,838	7,925	26,763
October	18,912	8,953	27,865	18,961	9,445	28,406
November	17,928	8,729	26,657	18,621	9,174	27,795
December	15,428	6,395	21,823	15,273	6,834	22,107
Total	346,675	74,998	421,673	365,597	79,583	445,180

Figure 3.1: Monthly calf registrations (beef sired and dairy males) 2017-2018

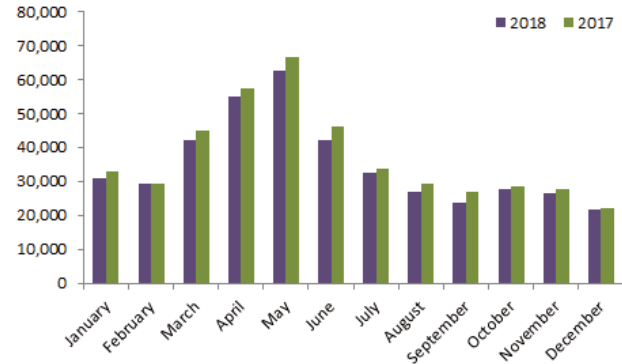


Figure 3.2: Beef sired calf registrations by breed 2018

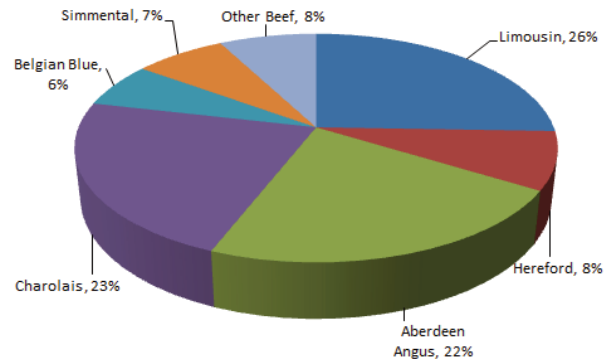


Table 4.1: Monthly number of beef cattle on the ground (aged 12-30 months) 2017-2018

	2018			2017		
	Beef Sired	Dairy Sired Male	Total	Beef Sired	Dairy Sired Male	Total
January	367,706	38,410	406,116	367,439	46,375	413,814
February	384,064	38,210	422,274	375,409	45,945	421,354
March	415,955	37,044	452,999	401,413	44,226	445,639
April	441,474	35,574	477,048	432,400	42,694	475,094
May	447,247	33,826	481,073	440,161	40,240	480,401
June	450,372	32,671	483,043	440,926	38,225	479,151
July	444,373	31,813	476,186	439,309	37,370	476,679
August	430,346	31,730	462,076	431,234	37,980	469,214
September	420,792	33,378	454,170	419,179	39,032	458,211
October	400,004	34,020	434,024	400,313	39,084	439,397
November	380,837	33,947	414,784	383,115	38,970	422,085
December	374,894	34,382	409,276	377,291	38,991	416,282

Figure 4.1: Total beef cattle on the ground (aged 12-30 months) 2017-2018

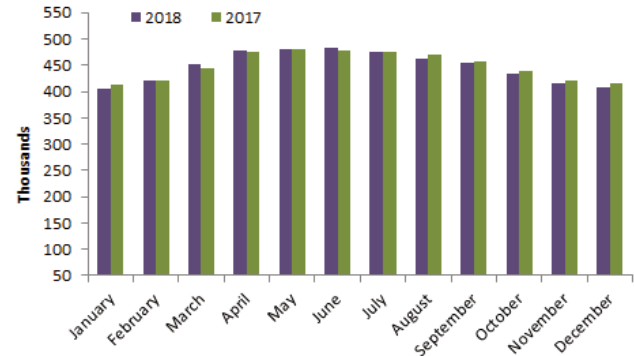


Figure 4.2: Total beef cattle on the ground (aged 18-30 months) 2017-2018

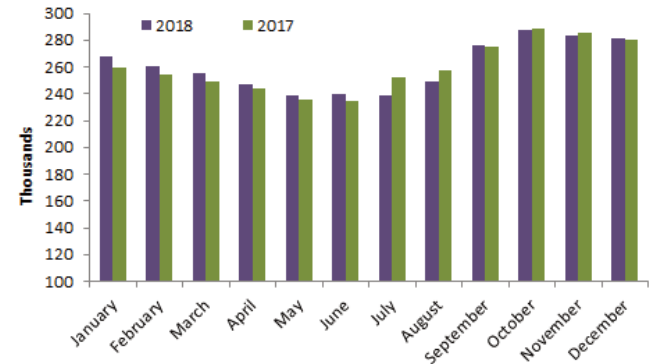


Table 5.1: Monthly imports of cattle to NI from ROI and GB for breeding and production 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	663	71	734	909	193	1,102
February	991	258	1,249	1,364	327	1,691
March	1,351	193	1,544	1,690	142	1,832
April	1,429	224	1,653	1,401	118	1,519
May	2,061	166	2,227	1,678	173	1,851
June	1,041	86	1,127	879	183	1,062
July	814	66	880	568	272	840
August	583	135	718	791	246	1,037
September	2,136	68	2,204	1,601	137	1,738
October	2,716	529	3,245	1,805	470	2,275
November	2,376	423	2,799	1,326	285	1,611
December	1,135	215	1,350	807	102	909
Total	17,296	2,434	19,730	14,819	2,648	17,467

Figure 5.1: Monthly imports of cattle to NI from GB for breeding and production 2017-2018

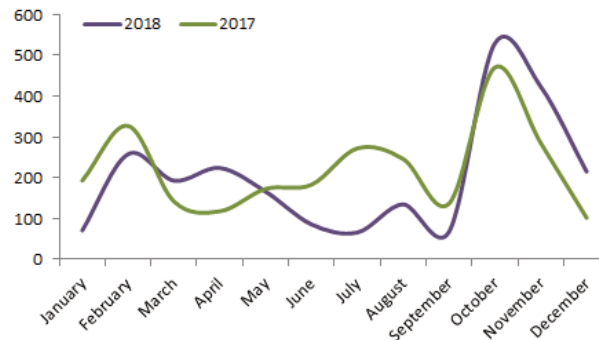


Figure 5.2: Monthly imports of cattle to NI from ROI for breeding and production 2017-2018

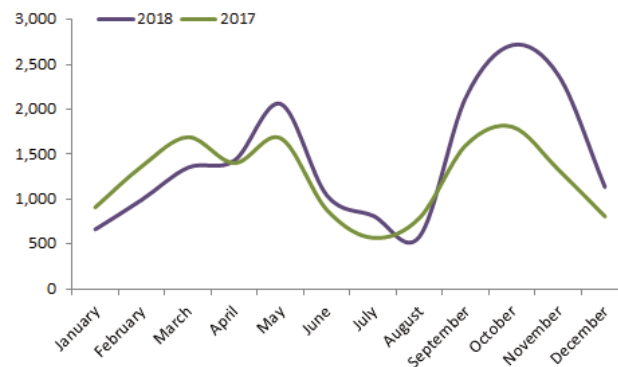


Table 6.1: Monthly exports of cattle from NI to ROI and GB for breeding and production 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	175	416	591	26	549	575
February	115	649	764	180	523	703
March	158	802	960	96	895	991
April	112	1,082	1,194	229	1,656	1,885
May	240	914	1,154	218	1,075	1,293
June	139	265	404	55	160	215
July	114	89	203	124	255	379
August	73	183	256	81	534	615
September	111	489	600	80	1,266	1,346
October	46	588	634	179	632	811
November	61	170	231	156	277	433
December	104	153	257	154	391	545
Total	1,448	5,800	7,248	1,578	8,213	9,791

Figure 6.1: Monthly exports of cattle from NI to GB for breeding and production 2017-2018

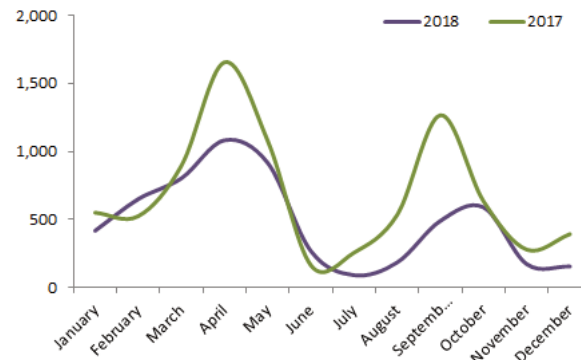


Figure 6.2: Monthly exports of cattle from NI to ROI for breeding and production 2017-2018

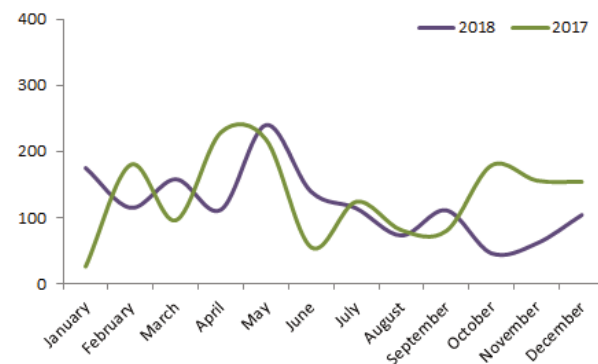


Table 7.1: Monthly imports of cattle for direct slaughter in NI plants from ROI and GB 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	308	762	1,070	858	629	1,487
February	220	656	876	1,116	620	1,736
March	306	473	779	878	457	1,335
April	312	501	813	1,484	595	2,079
May	118	322	440	1,040	555	1,595
June	220	356	576	784	648	1,432
July	223	558	781	1,172	567	1,739
August	492	421	913	1,654	412	2,066
September	1,496	357	1,853	867	424	1,291
October	1,434	430	1,864	735	728	1,463
November	1,183	178	1,361	514	713	1,227
December	1,063	307	1,370	86	253	339
Total	7,375	5,321	12,696	11,188	6,601	17,789

Figure 7.1: Monthly imports of cattle from GB for direct slaughter 2017-2018

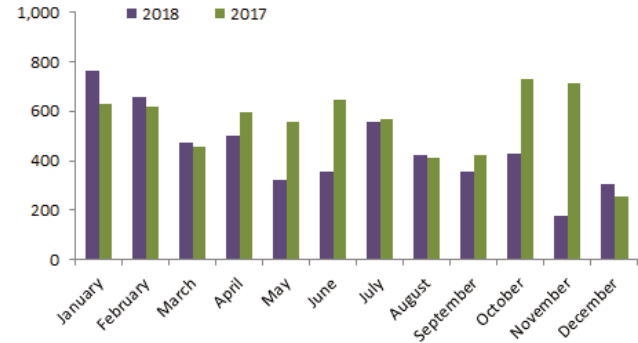


Figure 7.2: Monthly imports of cattle from ROI for direct slaughter 2017-2018

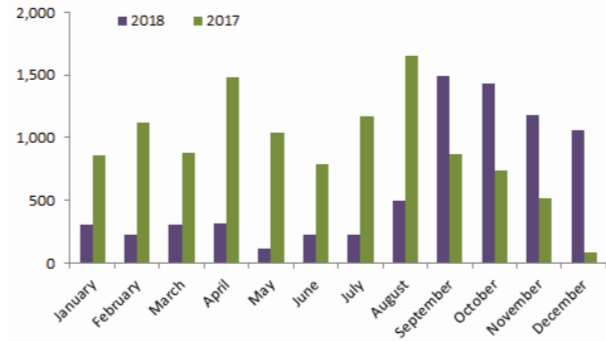


Table 8.1: Monthly exports of cattle from NI to ROI and GB for direct slaughter 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	891	319	1,210	686	247	933
February	716	225	941	468	174	642
March	609	15	624	565	92	657
April	770	69	839	821	92	913
May	700	145	845	864	77	941
June	708	108	816	375	120	495
July	685	389	1,074	539	131	670
August	800	313	1,113	634	340	974
September	411	265	676	1,167	603	1,770
October	909	344	1,253	1,152	800	1,952
November	818	123	941	944	433	1,377
December	444	154	598	700	354	1,054
Total	8,461	2,469	10,930	8,915	3,463	12,378

Figure 8.1: Monthly exports of cattle to GB for direct slaughter 2017-2018

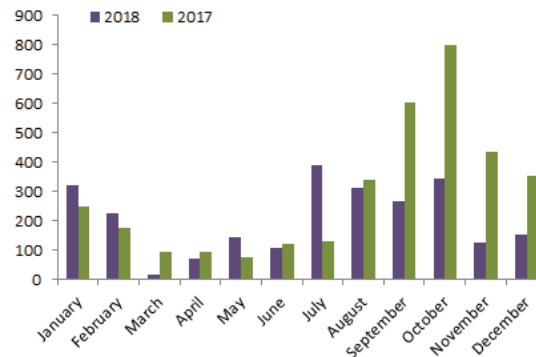


Figure 8.2: Monthly exports of cattle to ROI for direct slaughter 2017-2018

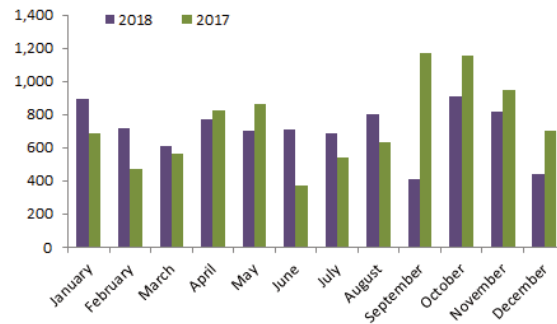


Table 9.1: Monthly UK retail beef consumer data 2017-2018

	2018			2017		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
	188,100	7.92	24,547	191,800	7.64	25,119
January	187,000	7.83	23,882	193,700	7.85	24,669
February	188,600	7.69	24,528	176,600	7.76	22,745
March	167,900	7.67	21,889	166,500	7.64	21,799
April	154,600	7.93	19,482	157,200	7.88	19,945
May	145,700	7.98	18,510	147,200	8.04	18,288
June	136,400	8.03	16,986	143,900	8.14	17,690
July	142,000	8.10	17,523	145,500	7.87	18,487
August	153,400	7.96	19,572	158,000	7.96	19,863
September	170,000	7.81	21,781	171,100	7.87	21,752
October	177,400	7.76	22,868	180,200	7.84	22,989
November	179,700	7.93	22,667	186,000	7.89	23,565
December	199,900	7.88	25,299	199,600	8.01	24,931
Total	2,190,700	7.88	279,534	2,217,300	7.88	281,842

Figure 9.2: Monthly UK volume of retail beef sales (tonnes) 2017-2018

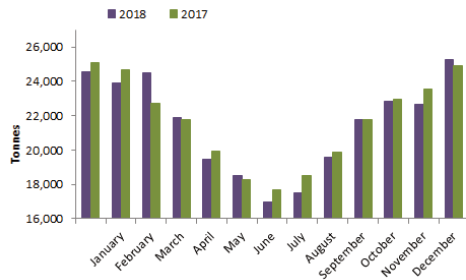


Figure 9.1: Monthly UK average retail price of beef (£/kg) 2017-2018

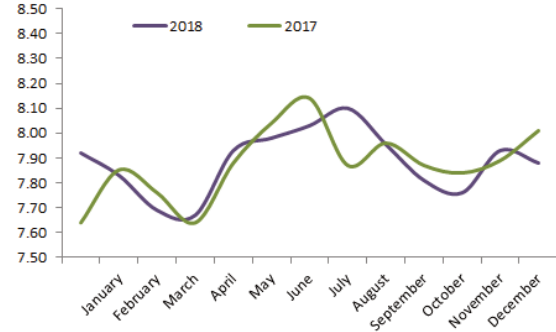


Figure 9.3: Monthly UK retail expenditure on beef (£000's) 2017-2018

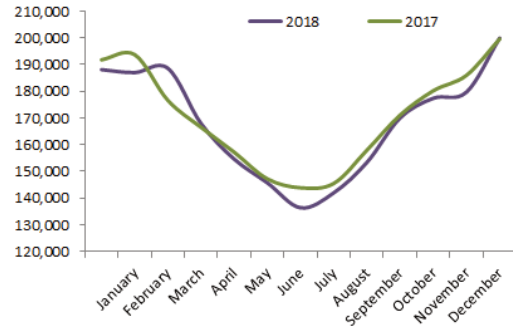


Table 10.1: Monthly NI R3 prime cattle prices (p/kg) 2017-2018

	2018			2017		
	Heifer	Steers	Young Bulls	Heifer	Steers	Young Bulls
January	359.7	361.0	347.7	353.9	355.5	344.7
February	357.6	358.4	344.2	350.5	351.6	343.1
March	358.7	358.6	345.6	350.5	351.1	338.6
April	363.5	364.2	352.0	353.0	355.3	344.2
May	367.5	367.8	357.8	360.3	361.1	353.9
June	372.6	373.8	362.7	368.7	370.2	363.8
July	362.4	364.3	352.7	370.8	371.1	363.4
August	357.8	356.4	346.4	368.4	368.2	360.9
September	361.5	360.5	350.7	359.3	359.1	350.4
October	358.3	358.3	346.6	357.9	357.6	347.4
November	357.3	356.3	342.9	358.7	358.9	345.7
December	350.0	351.5	335.6	360.5	361.2	348.3
Overall Average	360.2	360.6	349.8	358.8	359.6	352.6

Figure 10.1: NI R3 young bull prices (p/kg) 2017-2018

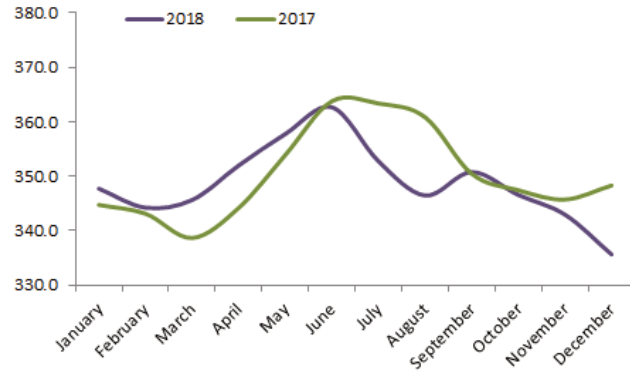


Figure 10.2: NI R3 steer prices (p/kg) 2017-2018

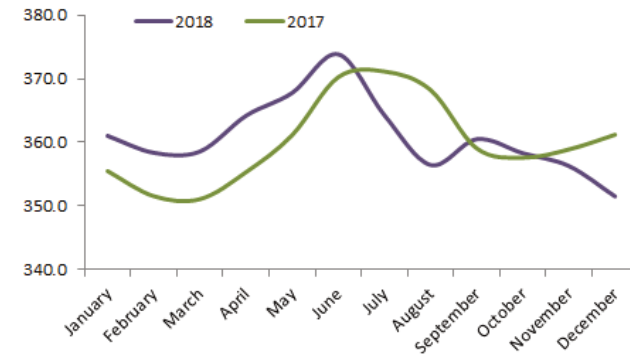


Table 11.1: Monthly NI average prime cattle prices (p/kg) 2017-2018

	2018			2017		
	Heifer	Steers	Young Bulls	Heifer	Steers	Young Bulls
January	352.4	351.9	333.5	348.7	347.1	327.5
February	350.7	350.1	330.9	343.8	342.7	323.3
March	351.7	350.5	332.4	343.2	340.6	323.2
April	356.3	355.2	338.4	346.1	345.0	329.8
May	360.2	359.5	346.0	352.8	351.4	340.1
June	366.9	366.1	352.0	360.9	360.5	352.2
July	356.8	355.1	342.3	362.4	360.5	353.4
August	351.3	347.5	337.3	360.2	359.0	351.8
September	355.3	351.3	340.1	353.2	349.6	340.4
October	352.5	349.7	336.6	349.9	347.5	336.2
November	351.4	347.3	331.1	351.4	348.8	336.4
December	344.1	341.9	324.2	353.6	352.1	335.9
Overall Average	353.8	351.8	338.1	351.7	350.0	339.5

Figure 11.1: Monthly NI average young bull prices (p/kg) 2017-2018

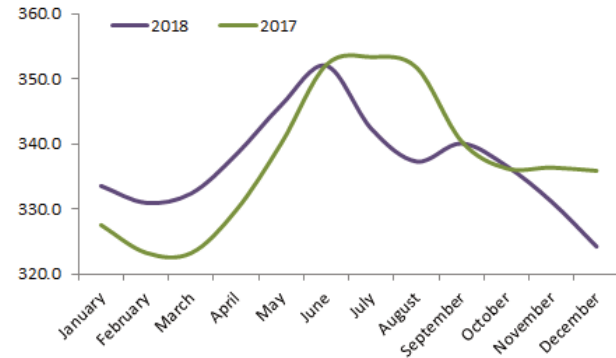


Figure 11.2: Monthly NI average steer prices (p/kg) 2017-2018

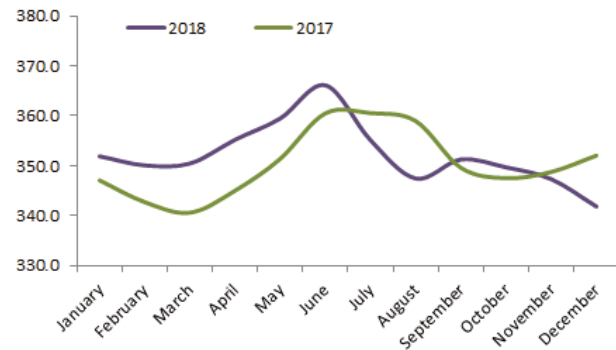


Table 12.1: Monthly average NI cow prices (p/kg) 2017-2018

	2018			2017		
	Cow P3	Cow O3	Cow Avg	Cow P3	Cow O3	Cow Avg
January	256.2	278.2	260.8	236.4	253.9	237.5
February	260.4	282.8	265.0	236.4	255.1	239.9
March	266.8	288.2	270.1	238.6	256.5	238.6
April	272.6	292.2	274.2	245.1	262.8	244.8
May	276.4	297.2	281.0	256.5	275.1	261.6
June	280.7	300.7	284.9	266.9	285.1	268.9
July	260.0	282.0	263.8	266.3	284.6	268.8
August	248.2	267.9	245.1	265.2	282.6	264.4
September	253.1	273.7	254.2	257.4	275.9	253.3
October	241.5	263.9	241.4	254.9	274.0	249.5
November	227.4	249.4	228.6	253.0	272.7	250.2
December	212.0	232.7	212.7	251.8	275.5	254.9
Overall Average	254.5	274.1	255.6	251.8	271.5	252.4

Figure 12.1: NI P3 cow prices (p/kg) 2017-2018

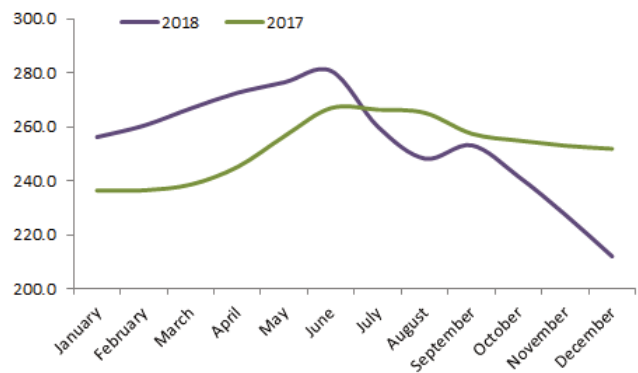


Figure 12.2: NI O3 cow prices (p/kg) 2017-2018

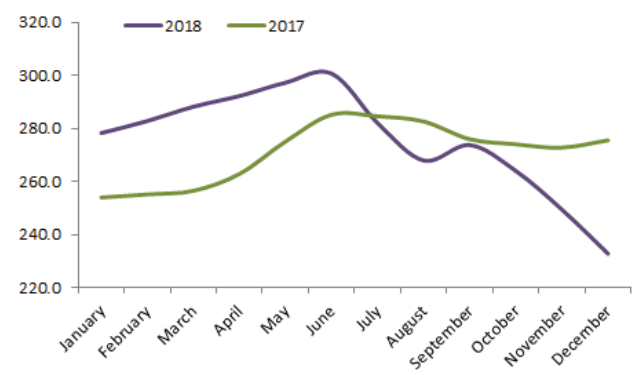


Table 13.1: Conformation analysis of the NI slaughter mix 2017-2018

Conformation Analysis cows					
	E	U	R	O	P
2018	0.0%	1.8%	15.0%	29.3%	53.9%
2017	0.0%	1.4%	14.5%	28.1%	55.9%
Conformation Analysis heifers					
	E	U	R	O	P
2018	0.1%	16.0%	44.0%	33.4%	6.5%
2017	0.1%	16.3%	45.3%	31.4%	6.9%
Conformation Analysis steers					
	E	U	R	O	P
2018	0.3%	17.7%	35.8%	36.3%	9.9%
2017	0.3%	17.8%	35.9%	34.8%	11.2%
Conformation Analysis young bulls					
	E	U	R	O	P
2018	2.0%	22.6%	31.0%	33.4%	11.0%
2017	2.2%	22.5%	27.4%	35.4%	12.5%

Figure 13.1: Conformation analysis of NI steer kill 2017-2018

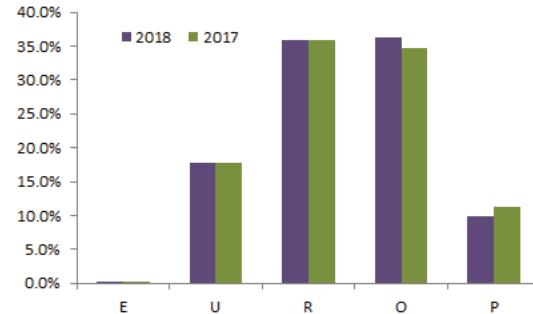


Figure 13.2: Conformation analysis of NI young bull kill 2017-2018

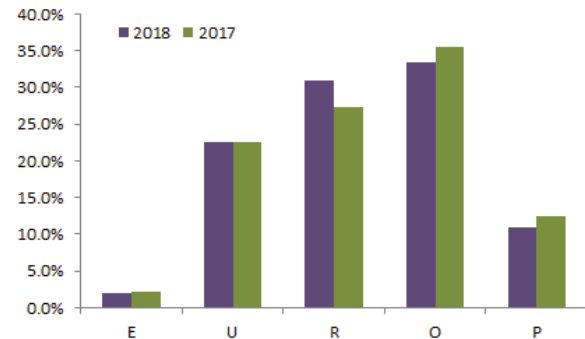


Table 14.1: Fat class analysis of the NI slaughter mix 2017-2018

Fat Class Analysis cows					
	1	2	3	4	5
2018	20.2%	23.7%	31.7%	20.6%	3.7%
2017	21.1%	24.0%	30.7%	19.7%	4.5%
Fat Class Analysis heifers					
	1	2	3	4	5
2018	1.8%	10.3%	44.6%	40.3%	3.0%
2017	1.9%	9.8%	42.9%	42.2%	3.2%
Fat Class Analysis steers					
	1	2	3	4	5
2018	1.9%	19.3%	56.9%	21.6%	0.3%
2017	1.9%	19.2%	56.6%	22.0%	0.3%
Fat Class Analysis young bulls					
	1	2	3	4	5
2018	5.7%	50.1%	41.0%	3.1%	0.0%
2017	5.6%	49.8%	41.7%	2.9%	0.0%

Figure 14.1: Fat class analysis of the NI steer kill 2017-2018

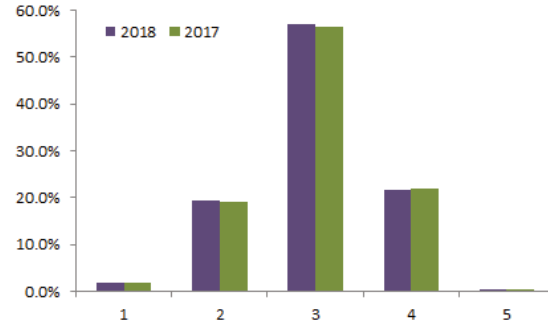


Figure 14.2: Fat class analysis of NI young bull kill 2017-2018

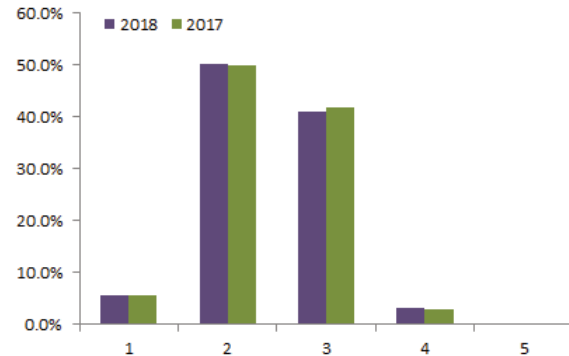


Table 15.1: Analysis of prime cattle sourced from the suckler herd 2017-2018

Suckler Dam Conformation Analysis					
	E	U	R	O	P
2018	0.8%	29.1%	51.4%	17.6%	1.1%
2017	0.8%	28.5%	51.9%	17.9%	1.1%

Suckler Dam Fat Class Analysis					
	1	2	3	4	5
2018	1.8%	18.7%	51.1%	27.2%	1.3%
2017	1.6%	17.0%	51.1%	28.9%	1.4%

Figure 15.1: Conformation analysis of prime cattle sourced from the suckler herd 2017-2018

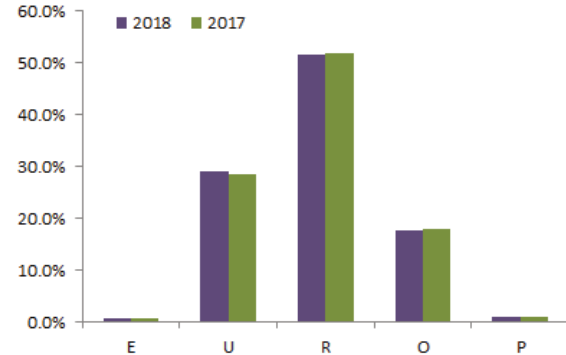


Figure 15.2: Fat class analysis of prime cattle sourced from the suckler herd 2017-2018

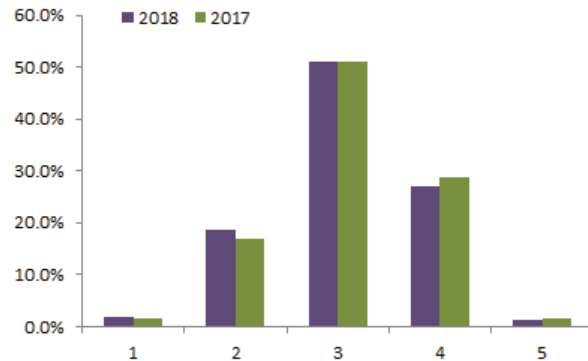


Table 16.1: Analysis of prime cattle sourced from the dairy herd 2017-2018

Dairy Dam Conformation Analysis					
	E	U	R	O	P
2018	0.0%	1.0%	17.7%	59.3%	22.0%
2017	0.0%	1.0%	16.1%	57.6%	25.3%

Dairy Dam Fat Class Analysis					
	1	2	3	4	5
2018	5.0%	23.8%	47.1%	23.0%	1.1%
2017	4.9%	24.2%	46.9%	22.9%	1.0%

Figure 16.1: Conformation analysis of prime cattle sourced from the dairy herd 2017-2018

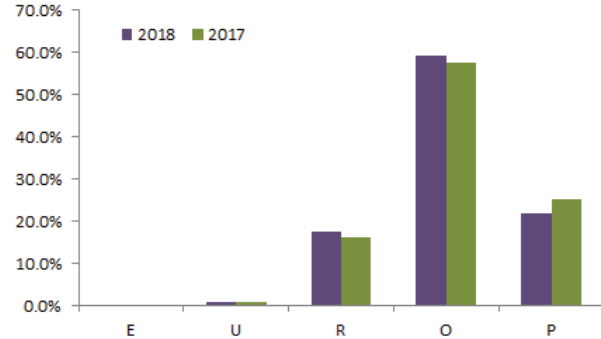
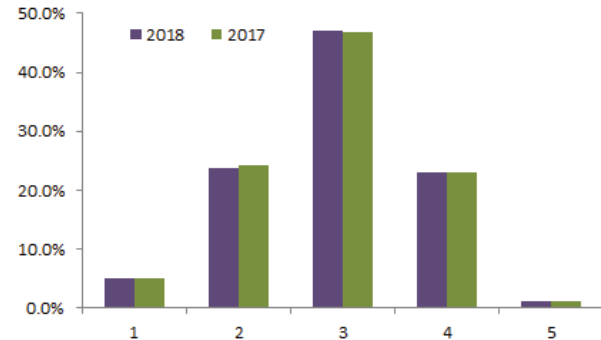


Figure 16.2: Fat class analysis of prime cattle sourced from the dairy herd 2017-2018



SHEEP STATISTICS



Table 17.1: Monthly NI sheep kill by category 2017-2018

	2018			2017		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	29,219	1,909	31,128	30,113	2,998	33,111
February	23,863	2,483	26,346	29,567	1,770	31,337
March	30,320	1,784	32,104	25,423	1,714	27,137
April	17,961	1,640	19,601	21,251	1,486	22,737
May	29,023	1,188	30,211	29,752	2,362	32,114
June	28,492	1,521	30,013	37,166	2,006	39,172
July	32,276	1,794	34,070	38,425	2,169	40,594
August	52,381	2,125	54,506	57,730	3,646	61,376
September	42,088	2,786	44,874	41,964	3,632	45,596
October	36,978	2,457	39,435	41,239	3,103	44,342
November	44,533	2,984	47,517	42,081	3,413	45,494
December	28,466	2,073	30,539	28,536	1,956	30,492
Total	395,600	24,744	420,344	423,247	30,255	453,502

Table 17.2: Proportion of annual sheep kill per month 2017-2018

	2018			2017		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	7%	8%	7%	7%	10%	7%
February	6%	10%	6%	7%	6%	7%
March	8%	7%	8%	6%	6%	6%
April	5%	7%	5%	5%	5%	5%
May	7%	5%	7%	7%	8%	7%
June	7%	6%	7%	9%	7%	9%
July	8%	7%	8%	9%	7%	9%
August	13%	9%	13%	14%	12%	14%
September	11%	11%	11%	10%	12%	10%
October	9%	10%	9%	10%	10%	10%
November	11%	12%	11%	10%	11%	10%
December	7%	8%	7%	7%	6%	7%
	100%	100%	100%	100%	100%	100%

Figure 17.1: Monthly NI lamb/hogget kill 2017-2018

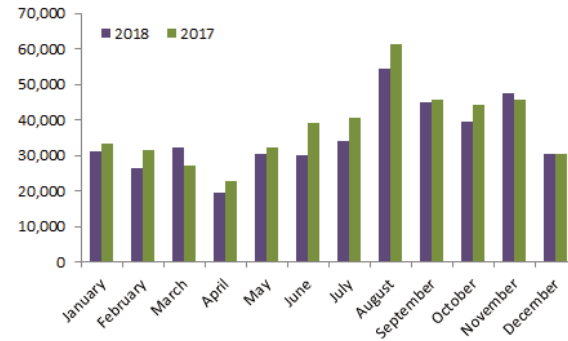


Table 18.1: Monthly NI sheep production ('000 tonnes) 2017-2018

	2018			2017		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	634	53	688	675	82	757
February	516	62	578	666	50	716
March	663	50	713	582	49	632
April	387	47	433	475	45	520
May	613	35	648	642	70	712
June	595	43	638	776	60	836
July	674	52	725	797	61	858
August	1,104	59	1,163	1,199	103	1,302
September	889	75	964	913	97	1,010
October	807	66	873	867	81	948
November	1,003	81	1,085	905	93	998
December	649	56	706	620	53	673
Total	8,533	679	9,212	9,118	844	9,961

Figure 18.1: Monthly total sheep meat production in NI 2017-2018

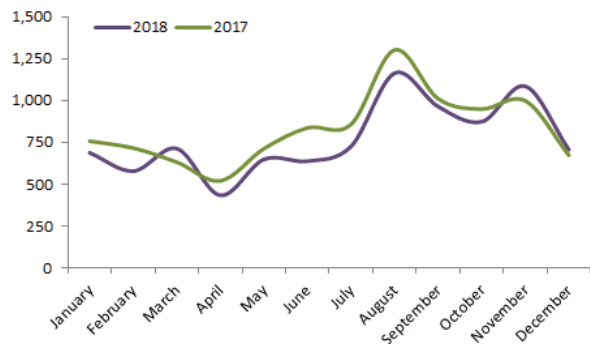


Table 18.2: Average NI carcass weight 2017-2018

	Lambs & Hoggets	Ewes & Rams
2018	21.6	27.5
2017	21.6	27.9

December 2018 Farm Survey Results

The NI agricultural survey is released annually by the Department of Agriculture, Environment and Rural Affairs (DAERA) and provides estimates of the numbers of sheep on NI farms at the beginning of December each year.

The number of breeding ewes in December 2018 decreased by four per cent from the previous year but the number of ewe lambs tugged decreased by nine per cent. The total breeding flock recorded in December stood at 886,000, back two per cent from 2017 levels. Lambs present on farms in December decreased by three per cent from 2017.

Overall, the total number of sheep recorded in December 2018 was 1.330 million a four per cent decline on 2017 levels.

Figure 19.1: Total number of breeding ewes on NI farms in December 2000-2018



Figure 19.2: Total number of ewe lambs in the NI breeding flock in December 2000-2018

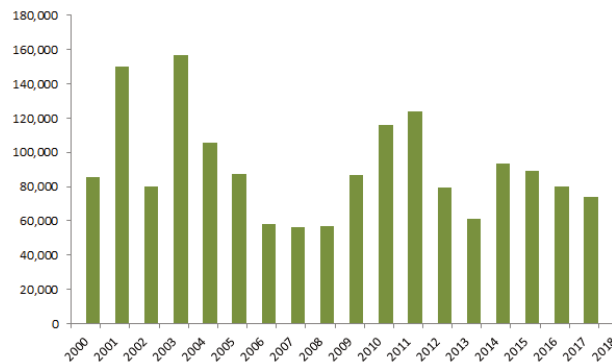


Table 20.1: Monthly NI average carcass weight by category (kg) 2017-2018

	2018			2017		
	Lambs & Hoggets	Ewes & Rams	Total Sheep	Lambs & Hoggets	Ewes & Rams	Total Sheep
January	21.7	27.9	22.1	22.4	27.3	22.9
February	21.6	25.0	21.9	22.5	28.1	22.8
March	21.9	28.0	22.2	22.9	28.7	23.3
April	21.5	28.6	22.1	22.4	30.0	22.9
May	21.1	29.5	21.5	21.6	29.8	22.2
June	20.9	28.0	21.2	20.9	30.0	21.3
July	20.9	28.7	21.3	20.7	28.0	21.1
August	21.1	27.8	21.3	21.5	28.2	21.9
September	21.1	26.9	21.5	21.8	26.8	22.2
October	21.8	26.9	22.1	21.0	26.2	21.4
November	22.2	27.3	22.5	21.5	27.3	21.9
December	22.8	27.3	23.1	21.7	27.0	22.1
Overall Average	21.6	27.5	21.9	21.6	27.9	22.1

Figure 20.1: Monthly NI average lamb & hogget carcass weights (kg) 2017-2018

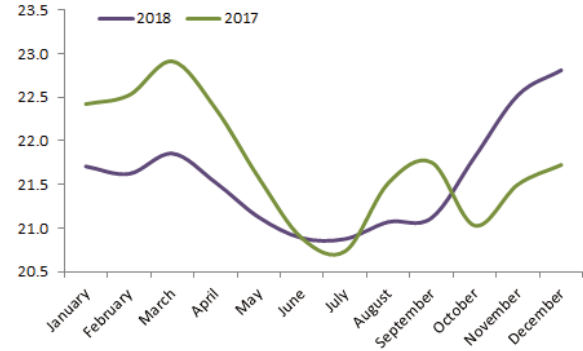


Figure 20.2: Monthly NI average ewe & ram carcass weights (kg) 2017-2018

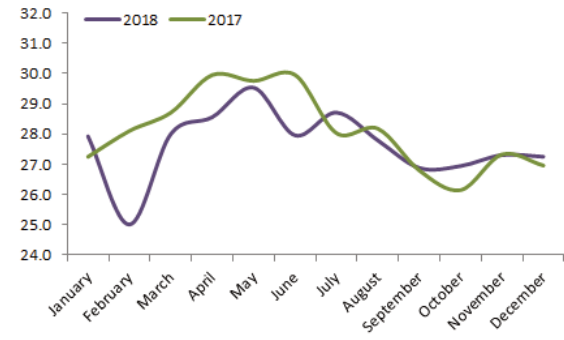


Table 21.1: Monthly imports of sheep into NI for breeding & production from ROI and GB 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	-	2,049	2,049	1	1,241	1,242
February	-	972	972	3	963	966
March	-	1,478	1,478	4	985	989
April	-	196	196	-	318	318
May	-	83	83	1	321	322
June	3	536	539	-	506	506
July	10	193	203	1	318	319
August	7	430	437	3	644	647
September	6	1,215	1,221	12	1,815	1,827
October	4	2,379	2,383	4	2,827	2,831
November	29	146	175	19	504	523
December	-	417	417	6	252	258
Total	59	10,094	10,153	54	10,694	10,748

Table 21.2: Monthly exports of sheep for breeding & production from NI to ROI and GB 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	6,839	3,228	10,067	8,863	4,168	13,031
February	3,550	2,712	6,262	5,816	4,074	9,890
March	6,197	3,338	9,535	8,030	3,926	11,956
April	6,634	5,717	12,351	7,895	5,789	13,684
May	4,149	3,697	7,846	3,457	4,538	7,995
June	3,497	4,107	7,604	1,555	4,567	6,122
July	6,717	3,881	10,598	5,993	5,822	11,815
August	4,157	4,829	8,986	3,448	6,177	9,625
September	4,951	3,700	8,651	10,652	4,995	15,647
October	6,631	3,506	10,137	8,850	5,436	14,286
November	4,609	2,122	6,731	5,975	3,286	9,261
December	5,152	1,441	6,593	7,081	2,003	9,084
Total	63,083	42,278	105,361	77,615	54,781	132,396

Table 22.1: Monthly sheep exports from NI for direct slaughter in ROI & GB 2017-2018

	2018			2017		
	ROI	GB	Total	ROI	GB	Total
January	47,846	0	47,846	41,471	-	41,471
February	36,253	0	36,253	33,396	-	33,396
March	33,410	0	33,410	27,573	-	27,573
April	29,781	62	29,843	25,120	-	25,120
May	20,460	0	20,460	19,636	-	19,636
June	25,261	0	25,261	24,261	-	24,261
July	42,718	318	43,036	36,655	-	36,655
August	36,820	1,801	38,621	35,233	-	35,233
September	36,258	611	36,869	37,573	-	37,573
October	48,475	900	49,375	43,156	-	43,156
November	41,686	0	41,686	42,899	111	43,010
December	34,002	0	34,002	35,847	-	35,847
Total	432,970	3,692	436,662	402,820	111	402,931

Figure 22.1: Monthly sheep exports from NI to ROI for direct slaughter 2017-2018

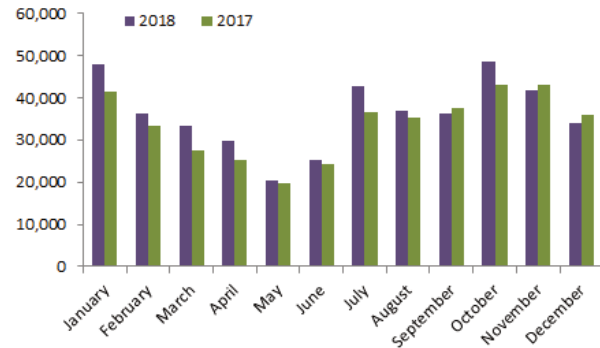


Figure 22.2: Monthly sheep exports from NI to GB for direct slaughter 2017-2018

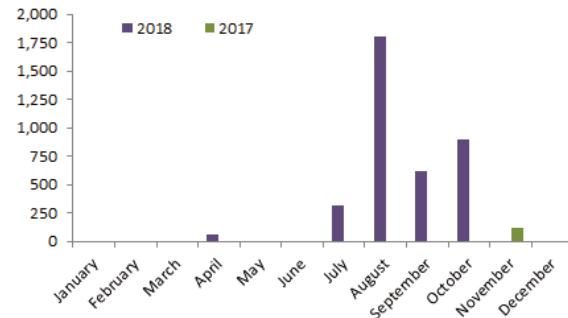


Table 23.1: Monthly UK lamb retail consumer data 2017-2018

	2018			2017		
	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)	Expenditure (£000's)	Price (£/kg)	Volume (tonnes)
January	38,600	8.84	4,168	45,000	8.72	5,166
February	44,800	9.47	4,735	46,400	8.96	5,181
March	54,100	9.15	5,910	44,000	8.89	4,954
April	66,000	8.43	7,828	72,800	7.56	9,627
May	38,200	9.40	4,067	39,000	9.32	4,179
June	34,000	9.44	3,517	37,600	9.17	4,104
July	32,800	9.45	3,470	36,700	9.11	4,030
August	33,500	9.62	3,480	39,200	9.10	4,309
September	39,500	9.67	4,095	40,400	8.97	4,510
October	44,200	9.72	4,541	43,000	9.25	4,645
November	47,400	9.55	4,963	44,000	9.36	4,701
December	46,300	10.01	4,626	48,900	9.29	5,268
Total	578,300	9.42	62,047	594,200	8.92	67,653

Figure 23.2: Monthly UK retail volume of total lamb sales (tonnes) 2017-2018

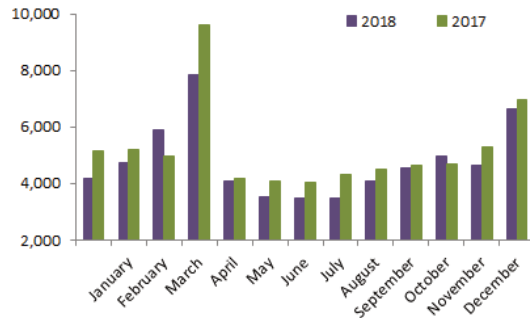


Figure 23.1: Monthly UK average retail price of lamb (£/kg) 2017-2018

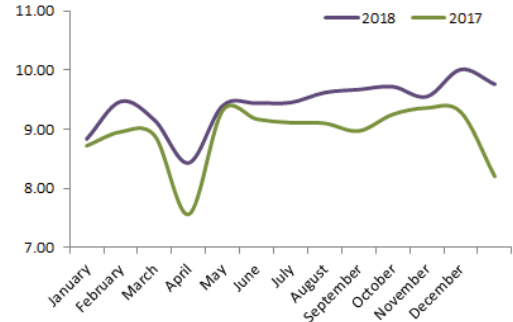


Figure 23.3: Monthly UK retail expenditure on lamb (£000's) 2017-2018

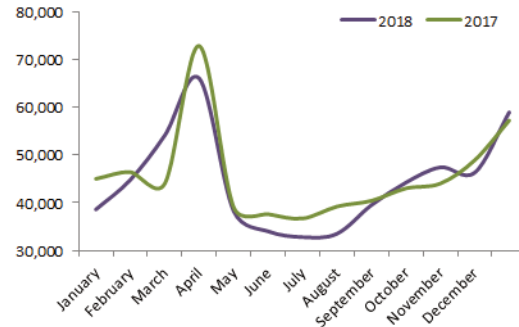


Table 24.1: Monthly NI R3 sheep prices (p/kg) 2017-2018

	2018			2017		
	Hoggets	Lambs	Lambs & Hoggets	Hoggets	Lambs	Lambs & Hoggets
January	404.1		404.1	366.6		366.6
February	443.0		443.0	371.6		371.6
March	511.4	570.5	531.1	396.0		396.0
April	540.7	574.2	557.4	402.4	444.5	423.5
May	538.2	559.0	551.2	406.8	454.2	440.7
June		481.2	481.2		458.3	458.3
July		418.1	418.1		421.7	421.7
August		402.3	402.3		399.6	399.6
September		379.6	379.6		375.2	375.2
October		371.7	371.7		359.8	359.8
November		380.1	380.1		378.4	378.4
December		404.7	404.7		384.8	384.8
Average	480.8	447.7	458.6	387.1	408.7	401.6

Figure 24.2: Average deadweight R3 lamb prices (p/kg) March - December 2017-2018

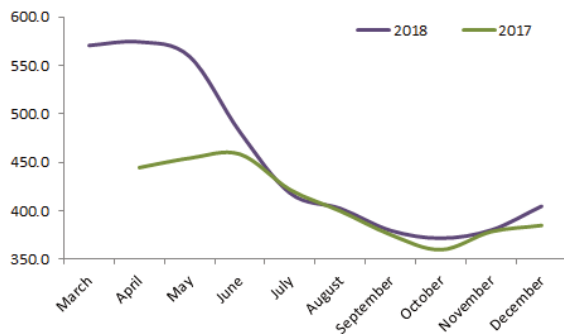


Figure 24.1: Monthly combined R3 lamb & hogget deadweight prices (p/kg) 2017-2018

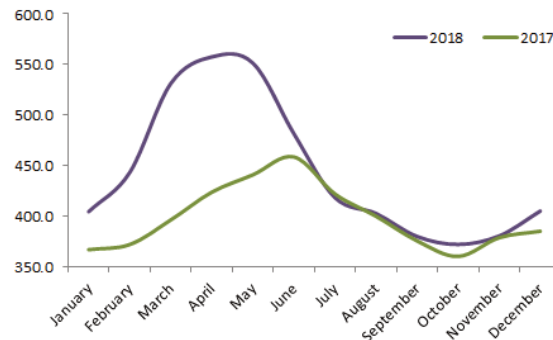


Figure 24.3: Average deadweight R3 hogget prices (p/kg) January - May 2017-2018

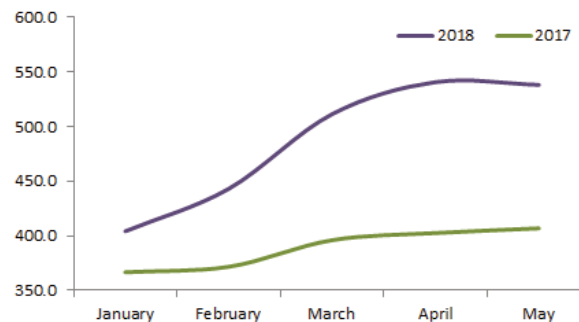


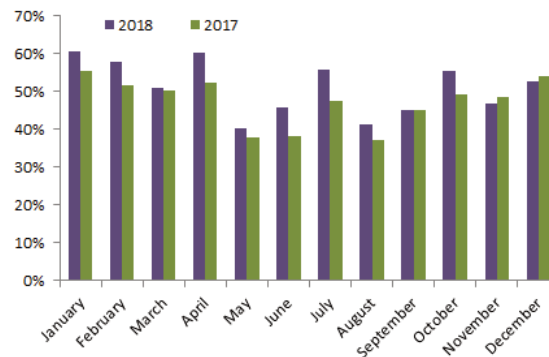
Table 25.1: Total sheep slaughterings and exports for direct slaughter by month 2017-2018

	Export for D/S		Total Slaughtered NI Plants		Total Eligible Kill NI	
	2018	2017	2018	2017	2018	2017
	ROI & GB	ROI & GB	All Sheep	All Sheep	All Sheep	All Sheep
January	47,846	41,471	31,128	33,111	78,974	74,582
February	36,253	33,396	26,346	31,337	62,599	64,733
March	33,410	27,573	32,104	27,137	65,514	54,710
April	29,843	25,120	19,601	22,737	49,444	47,857
May	20,460	19,636	30,211	32,114	50,671	51,750
June	25,261	24,261	30,013	39,172	55,274	63,433
July	43,036	36,655	34,070	40,594	77,106	77,249
August	38,621	35,233	54,506	59,376	93,127	94,609
September	36,869	37,573	44,874	45,596	81,743	83,169
October	49,375	43,156	39,435	44,342	88,810	87,498
November	41,686	43,010	47,517	45,494	89,203	88,504
December	34,002	35,847	30,539	30,492	64,541	66,339
Total	436,662	402,931	420,344	451,502	857,006	854,433

Table 25.2: Proportion of NI sheep killed in NI processors 2017-2018

	2018	2017
January	61%	56%
February	58%	52%
March	51%	50%
April	60%	52%
May	40%	38%
June	46%	38%
July	56%	47%
August	41%	37%
September	45%	45%
October	56%	49%
November	47%	49%
December	53%	54%
Total	51%	47%

Figure 25.1: Proportion of NI sheep exported for direct slaughter in GB & ROI 2017-2018











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