

IMPROVEMENT IN CARCASS CONFORMATION IN QUARTER 1

ANALYSIS of the prime cattle kill for the first quarter of 2014 has indicated a general improvement in the conformation of steers and heifers compared to the corresponding period in 2013. Table 1 and 2 outline the proportion of steers and heifers that achieved each conformation score during the first quarter of 2014 and the corresponding period in 2013.

Steers

During the 2014 period 21.6 per cent of steer carcasses were awarded a U grade, this is a 2.6 percentage point increase on the previous year. The proportion of R grading steer carcasses also increased marginally year on year to account for 38.8 per cent of steer carcasses in the 2014 period. The proportion of steer carcasses awarded O and P grades both recorded slight declines to 29.4 per cent and 9.8 per cent respectively in the 2014 period.

This general improvement in steer conformation has occurred despite a decline in average carcass weights. In the first quarter of 2014 the average steer carcass weight was 346.3kg, a 3kg reduction on the 349.3kg recorded in the same period in 2013.

This decline in carcass weights has occurred despite an improvement in production conditions and would indicate producers are moving towards

finishing cattle at lower carcass weights. During the first quarter of 2014 63 per cent of steer carcasses were between 280-380kg compared to 61 per cent in the corresponding period in 2013. Meanwhile the proportion of steer carcasses over 380kg has declined from 29.5 per cent in the first quarter of 2013 to 26.7 per cent in the same period in 2014.

Heifers

There has been a three per cent increase in the number of heifers coming forward for slaughter during the first quarter of 2014 when compared to the corresponding period in 2013. This increase in heifer throughput has coincided with an increase in average carcass weights from 308.0kg in the first quarter of 2013 to 311.8kg in the same period in 2014.

In the first quarter of 2014 heifers that met the desired 280-380kg carcass weight range accounted for 73.9 per cent of the heifer kill compared to 71.9 per cent in the first quarter of 2013. Meanwhile the proportion of heifers that had carcass weights in excess of 380kg was relatively unchanged and accounted for 5.5 per cent of heifer carcasses in the 2014 period

There has also been a general improvement recorded in the conformation of the heifers slaughtered

year on year. The proportion of heifers awarded a U grade increased from 16.3 per cent of the heifer kill during the first quarter of 2013 to 20 per cent in the corresponding period in 2014. The proportion of R grading carcasses increased by 1.2 percentage points to account for 51.8 per cent of the heifer kill during the first quarter of 2014.

The proportion of heifer carcasses achieving an O grade declined by 4 percentage points from 28.7 per cent in the 2013 period to 24.7 per cent in the 2014 period. The proportion of heifers achieving a P grade also declined, down from 4.2 per cent of the cattle kill in the 2013 period to 3.3 per cent in the 2014 period.

Young bulls

The young bull kill in NI during the first quarter of 2014 totalled 14,826 head and accounted for 18 per cent of the total prime cattle kill.

During the 2014 period 16 per cent of young bull carcasses were awarded a U grade compared to 18 per cent in the corresponding period in 2013. There was also a decline recorded in the proportion of R grading carcasses between the two periods. In the first quarter of 2014 22.1 per cent of young

bull carcasses were awarded an R grade compared to 26.8 per cent in the

Table 1: Conformation Analysis of steers during Quarter 1 in 2013 and 2014

Year	E	U	R	O	P
2013	0.2%	19.0%	38.6%	31.4%	10.8%
2014	0.4%	21.6%	38.8%	29.4%	9.8%

Table 2: Conformation Analysis of heifers during Quarter 1 in 2013 and 2014

Year	E	U	R	O	P
2013	0.1%	16.3%	50.6%	28.7%	4.2%
2014	0.2%	20.0%	51.8%	24.7%	3.3%

corresponding period in 2013.

Meanwhile the proportion of O grading carcasses increased by 4.8 percentage points to account for 36.6 per cent of young bull carcasses in the 2014 period while the number of P grading carcasses increased by 1.8 percentage points to account for 23.9 per cent of the young bull kill in the 2014 period.

During the 2014 period 52.6 per cent of the price reported young bull kill were dairy sired compared to 43.1 per cent in the corresponding period in 2013. This increase in the proportion of dairy sired young bulls in the slaughter mix is one potential explanation for the decline in average carcass weights from 340.3kg in the 2013 period to 325.9kg in the 2014 period. This decline by 14.4kg accounts for a 4.2 per cent decline in average carcass weights.

During the first quarter of 2014 40 per cent of young bull carcasses were within the desired 280-380kg weight range compared to 43 per cent during the corresponding period in 2013. There has been a marked decline in the proportion of young bull carcasses weighing over 380kg. In the 2014 period 15 per cent of carcasses were over 380kg, compared to 25 per cent in the same period in 2013.

The increase in dairy origin young bulls in the slaughter mix is one driver behind the decline in the number of carcasses over 380kg. Another key factor for this decline is the tighter application of penalties on young bull carcasses over 380kg and over 16 months of age. This has discouraged producers from finishing young bulls into higher carcass weights.

*Please note young bull analysis includes veal.

SHEEP MARKET UPDATE MARCH 2014

THE combination of the good summer of 2013 and a reduction in the lamb crop when compared to the previous year resulted in a markedly lower carryover of hoggets into 2014 compared to the previous year. The tighter availability of hoggets for slaughter combined with a firm demand for lamb has had a positive influence on the deadweight sheep markets in NI during March 2014.

The average deadweight hogget price in NI during March 2014 was 440.5p/kg, 14p/kg higher than March 2013 when the average hogget price was 426.3p/kg. Increases were also recorded in GB where average prices increased by 21p/kg on year earlier levels to 455.5p/kg in March 2014. Meanwhile in ROI average deadweight prices were down marginally in sterling terms year on year to 421.8p/kg during March 2014. It was however up by 16c/kg in euro terms.

The number of lambs/hoggets slaughtered in NI plants or exported for direct slaughter during March 2014 totalled 51,138 head. This was a 7.5 per cent reduction on the previous year when domestic slaughterings in NI and exports for direct slaughter totalled 55,306 head.

Throughput of hoggets/lambs in the NI plants during March 2014 totalled 20,175 head, an increase of

almost 6,000 head on the previous March when 14,189 head were slaughtered. This increase was driven by NI plants competing for a larger share of locally produced sheep and a marked reduction in the number of lambs heading south for direct slaughter in ROI plants as a result.

Exports to ROI for direct slaughter during March 2014 totalled 31,027 head compared to 41,117 head the previous March. This decline by 10,090 head year on year accounts for a 25 per cent decline in export levels year on year. During March 2014 exports to ROI accounted for 60.5 per cent of total sheep output from NI with the remainder slaughtered locally. This is markedly lower than the 74.2 per cent of NI produced sheep exported for slaughter in ROI plants in March 2013.

Average hogget and lamb carcass weights during March 2014 were 22.1kg, an increase of almost 1kg from March 2013 when the average carcass weight was 21.2kg. This increase can be attributed to the improvement in production conditions year on year. Average ewe and ram carcass weights have also increased year on year. During March 2014 the average ewe/ram carcass weight was 29.3kg, an increase of 0.8kg on March 2013 when the average carcass weight was 28.5kg.

NI Sheep Industry Key Performance Indicators (March Snapshot)

From Week 49 to Week 52

	Mar-13	Mar-14	% Change
Sheep Prices (p/kg)			
Average Deadweight Price	426.3	440.5	+3.3%
Average Liveweight Price	376.1	404.0	+7.4%
Average Weekly Price (GB)	434.5	455.5	+4.8%
Average Weekly Price (ROI)	424.7	421.8	-0.7%
Slaughterings			
Total Hoggets & Lambs Slaughterings (Head)	14,189	20,175	+42.2%
Total Ewes & Rams Slaughterings (Head)	2,695	3,256	+20.8%
Average Hogget & Lambs Carcass Weight (kg)	21.2	22.1	+4.3%
Average Ewe & Rams Carcass Weight (kg)	28.5	29.3	+2.8%
Trade (Head)			
Live Imports for Direct Slaughter	0	400	n/a
Live Exports for Direct Slaughter	41,117	31,027	-24.5%
All NI Figures Unless Otherwise Stated			



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CATTLE TRADE

NI FACTORY QUOTES FOR CATTLE

(P/KG DW)	This Week 14/04/14	Next Week 21/04/14
Prime		
U-3	326-328p	326-328p
R-3	320-322p	320-322p
O+3	314-316p	314-316p
* Plus 10-14p/kg in spec bonus where applicable		
Cows		
O+3 & better	230-250p	230-250p
Steakers	140-170p	140-170p
Blues	120-130p	120-130p

REPORTED NI CATTLE PRICES - P/KG

W/E 12/04/14	Steers	Heifers	Young Bulls
U-3=	338.9	352.9	326.1
U=3=	337.7	357.3	322.5
U=4=	331.7	353.4	332.0
R=3=	346.2	347.0	315.8
R=4=	345.9	341.3	322.0
O+3=	339.5	334.3	307.3
O=3=	326.9	332.1	306.7
Average	334.6	340.3	304.9

REPORTED COW PRICES NI W/E 12/04/14 (p/kg)

Grades	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
O+3=	-	240.0	-	256.2
O-3+	-	227.8	-	242.1
P+2+	190.0	224.0	213.8	221.8
P+3+	-	202.0	-	231.1
P-1-	127.2	139.8	142.3	-

COMMODITY PRICE

W/E 12/04/14	Price (£) per tonne / 1000litre	% weekly change
Barley	165.00	-0.9
Wheat	184.50	n/c
Straw	17.00	-
Red Diesel	675-690	-

Deadweight Cattle Trade

QUOTES from the plants this week for U-3 grade prime cattle have remained fairly steady with plants generally quoting 326p/kg for steers and 328p/kg for heifers. Producers should consult with individual processors regarding the criteria for the 10-14p/kg bonus available for steers and heifers that kill out in spec. Quotes for O+3 cows this week ranged from 230-250p/kg with similar quotes expected for early next week.

The plants are reporting steady supplies of cattle to meet demands with 6,734 prime cattle slaughtered in NI last week. This was a ten per cent increase on the previous week when 6,130 head were slaughtered. Cow throughput last week totalled 1,429 head, an increase of 107 head (8 per cent) from the previous week. Imports of clean cattle from ROI totalled 334 head last week and accounted for five per cent of the total NI cattle kill. There were also 17 steers and 18 cows imported from GB for direct slaughter in NI plants. Exports to ROI for direct slaughter last week consisted of 11 clean cattle and 126 cows while exports to GB for direct slaughter consisted of 127 clean cattle and 29 cows.

The average steer price in NI last week was similar to the previous week at 334.6p/kg while the R3 steer price was back by 2.7p/kg 343.9p/kg. Average heifer prices were within half a penny of the previous week at 340.3p/kg while the R3 heifer price was unchanged at 346.9p/kg. U3 heifer prices in NI last week increased by 2.6p/kg from the previous week to 353.9p/kg.

The trade in GB has continued to come under pressure with the average steer price back by 1.2p/kg to 359.2p/kg. Average steer prices were back in all the GB regions with the exception of Northern England where average prices increased by 3p/kg to 367.2p/kg. R3 steer prices were back in all the GB regions with the average R3 price back by 2.1p/kg to 361.5p/kg. Average heifer prices in GB last week were back by 1.8p/kg to 357.9p/kg while the R3 heifer price was back by 2.5p/kg to 359.7p/kg. The trade for cows in GB has shown signs of firming with the average cow price increasing by 1.4p/kg to 234.1p/kg last week. The only GB region where the cow prices came back was the Midlands where the average cow price was back by 4.8p/kg to 249.9p/kg. Meanwhile in NI the average cow price increased by 6.4p/kg to 228.9p/kg. This is the lowest average cow price in the UK with the exception of Southern England where the average cow price was 221.8p/kg.

Strong throughputs of cattle have been recorded in ROI for 2014 to date with the total cattle kill running 56,000 head above the levels recorded in the corresponding period last year. The R3 steer price in ROI last week was back the equivalent of 2.4p/kg to 311.5p/kg while the R3 heifer price was unchanged at 322.6p/kg. The differential between ROI and NI last week was 32.4p/kg for R3 grade steers and 24.3p/kg for heifers.

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

W/E 12/04/2014	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	338.4	318.2	383.4	371.5	367.5	368.8	373.7
	R3	343.9	311.5	374.1	360.8	356.1	349.7	361.5
	R4	342.6	311.4	375.6	372.7	357.8	351.8	367.5
	O3	328.3	298.7	355.1	349.0	329.5	325.5	339.6
	AVG	334.6	-	374.5	367.2	347.2	338.2	359.2
Heifers	U3	353.9	336.9	383.7	370.8	368.5	367.2	373.6
	R3	346.9	322.6	371.0	358.7	356.4	347.4	359.7
	R4	341.8	321.7	373.1	364.3	356.2	349.7	362.5
	O3	331.1	305.0	345.6	342.4	332.2	328.8	337.9
	AVG	340.3	-	373.0	361.7	350.0	337.9	357.9
Young Bulls	U3	325.7	298.2	371.4	346.5	349.9	360.1	353.5
	R3	318.1	288.0	356.9	336.7	339.2	342.9	340.8
	O3	297.3	259.9	317.8	295.0	311.6	324.3	308.8
	AVG	304.9	-	334.0	317.4	321.8	328.9	323.7
Prime Cattle Price Reported	5751	-	6207	5585	5184	3801	20777	
Cows	O3	243.3	234.4	253.1	251.2	260.1	246.2	251.0
	O4	248.2	236.4	259.9	254.2	261.0	249.4	255.1
	P2	202.7	194.8	186.3	200.4	212.4	191.7	193.9
	P3	225.5	222.9	216.8	226.8	226.5	220.7	221.5
	AVG	228.9	-	244.5	231.5	249.9	221.8	234.1

- Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=82.62p 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 12/04/14	1st QUALITY			2nd QUALITY		
	From	To	Average	From	To	Average
Finished Cattle (p/kg)						
Steers	200	218	205	175	199	188
Friesians	146	161	153	121	144	132
Heifers	201	219	208	170	200	185
Beef Cows	150	193	168	120	149	134
Dairy Cows	104	129	109	68	103	88
Store Cattle (p/kg)						
Bullocks up to 400kg	214	236	224	175	213	188
Bullocks 400kg - 500kg	202	221	210	170	201	185
Bullocks over 500kg	204	228	212	175	203	180
Heifers up to 450kg	210	236	223	162	209	185
Heifers over 450kg	202	232	216	159	201	180
Dropped Calves (£/head)						
Continental Bulls	260	400	300	160	258	200
Continental Heifers	220	350	260	100	218	150
Friesian Bulls	85	150	125	20	80	50
Holstein Bulls	70	140	100	1	68	30

SHEEP TRADE

HOGGET QUOTES

(P/Kg DW)		This Week 14/04/14	Next Week 21/04/14
NI Factories	Hoggets	450>22kg	450>22kg
	Spring lambs	500>21kg	500>21kg

REPORTED HOGGET PRICES - P/KG

(P/KG DW)	W/E 29/03/14	W/E 05/04/14	W/E 12/04/14
NI Liveweight	433.6	422.1	388.5
NI Deadweight	468.4	488.8	475.5
ROI Deadweight	458.4	467.0	459.9
GB Deadweight	477.0	480.9	489.8

Deadweight Sheep Trade

The plants are quoting 450p/kg for R3 grading hoggets up to 22kg this week and 500p/kg for R3 grading spring lambs up to 21kg. Spring lambs continue to come forward for slaughter in small numbers in NI and accounted for 12 per cent of the price reported sheep kill last week. Lamb and hogget slaughterings in NI plants last week totalled 5,460 head, an increase of 820 head from the previous week when 4,640 head were slaughtered. Exports to ROI for direct slaughter totalled 7,010 head last week, an increase of 1,519 head on the previous week when 5,491 head were exported. Deadweight hogget prices in NI came back by 13.3p/kg to 475.5p/kg last week while deadweight hogget prices in GB increased by 9p/kg to 489.8p/kg.

This week's marts

THE number of hoggets passing through the marts has declined this week with reports of the number of hoggets on the ground tightening. The prices available have also come back on previous weeks across the majority of marts. In Massereene on Monday 866 hoggets sold from 380-440p/kg compared to 1,303 hoggets last week selling from 400-460p/kg. In Saintfield on Tuesday 304 hoggets sold from 380-430p/kg compared to 445 hoggets last week selling from 400-481p/kg. In Enniskillen 327 hoggets sold from 402-427p/kg compared to 782 hoggets the previous week selling from 408-437p/kg. Small numbers of spring lambs have continued to come forward with prices ranging from 430-530p/kg across the marts. Top prices for good quality cull ewes generally ranged from £90-100.

LATEST SHEEP MARTS

From: 12/04/14		Hoggets (P/KG LW)			
To: 18/04/14		No	From	To	Avg
Saturday	Omagh	314	358	414	-
	Donemana	300	420	454	-
	Swatragh	1050	415	474	-
Monday	Massereene	866	380	440	-
	Kilrea	180	400	425	-
Tuesday	Saintfield	304	380	430	-
	Rathfriland	430	380	424	400
Wednesday	Ballymena	609	350	440	370
	Enniskillen	327	402	427	-
	Markethill	440	360	418	-

LATEST SHEEP MARTS

From: 12/04/14		Spring Lambs (P/KG LW)			
To: 18/04/14		No	From	To	Avg
Monday	Massereene	126	485	520	-
Tuesday	Rathfriland	120	450	500	482
	Ballymena	89	430	530	470
Wednesday	Enniskillen	93	465	495	-
	Markethill	160	450	491	-

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