

PRIME KILL FAT CLASS UPDATE QUARTER 4

An analysis of the price reported prime cattle kill for the final quarter of 2016 (October-December) has indicated a general downward movement in terms of the fat cover scores being achieved by prime cattle when compared to previous years. Figure 1 displays the fat scores awarded for all price reported steers for the period October-December 2016 compared to the corresponding period in 2015.

The proportion of price reported steer carcasses awarded a 4 for fat cover has declined from 19.9 per cent in the period October-December 2015 to 17.7 per cent in the same period in 2016 accounting for a decrease of 2.2 percentage points year on year. The proportion of steer carcasses awarded a 3 for fat cover decreased from 57.4 per cent during October-December 2015 to 56.5 per cent during October-December 2016. Meanwhile the proportion of steer carcasses awarded a 2 for fat cover increased from 20.8 per cent in the 2015 period to 22.9 per cent in the corresponding period in 2016.

When considering fat cover scores for the heifer kill these have also generally declined as outlined in Table 1. Heifer carcasses awarded a 4 for fat cover accounted for 37.1 per cent of the total heifer kill in the period October-December 2016 and during the same

period in 2015 accounted for 41.3 per cent of the kill. This was a decline of 4.2 percentage points year on year. The proportion of heifer carcasses awarded a 3 for fat cover increased by 1.7 percentage points between the two periods to account for 45.4 per cent of the total heifer kill in October-December 2016. The proportion of heifer carcasses awarded a 2 for fat cover increased from 10.4 per cent in the 2015 period to 12.5 per cent in the 2016 period.

A similar trend can be observed when considering the young bull kill as outlined in Table 2. The proportion of young bull carcasses awarded a 3 for fat cover decreased from 31.5 per cent during the 2015 period to 30.2 per cent during the 2016 period. Meanwhile the proportion of young bull carcasses awarded a 2 for fat cover increased from 53.2 per cent in the 2015 period to 55.6 per cent in the corresponding period in 2016.

The general downward movement in fat cover scores achieved by the NI prime cattle kill may be due to a combination of factors. The unsettled and changeable weather last summer made managing cattle at grass more challenging and this will have potentially impacted on animal performance and fat cover. This reduced performance of prime cattle has also been reflected by lower carcass weights with an average

steer carcass weight of 350kg during the last quarter of 2016, a decline of 9kg from the same period in 2015.

Increased input costs due to relatively high store cattle prices during much of 2016 may also have encouraged producers to try and reduce other input costs to their beef enterprises and as a result reduced the level of concentrates being fed to finishing cattle. The mild autumn and prolonged grazing season will have kept cattle out at grass longer and performance may not have been as good as expected without adequate concentrate supplementation.

Price reported steers were also killed earlier during October-December 2016 with an average age at slaughter of 768 days, which is back 29 days from October-December 2015 when the average age at slaughter was 797 days. A firm demand from the processors for NI origin cattle in the absence of imports for direct slaughter from ROI and a relatively steady beef price during the last quarter of 2016 may have encouraged producers to slaughter cattle earlier and younger.

A slight increase in the dairy influence on the NI prime cattle kill during October-December 2016 may also have been a contributing factor to lower fat cover scores being achieved.

Figure 1: Fat class scores for price reported NI steer kill October-December 2015/2016

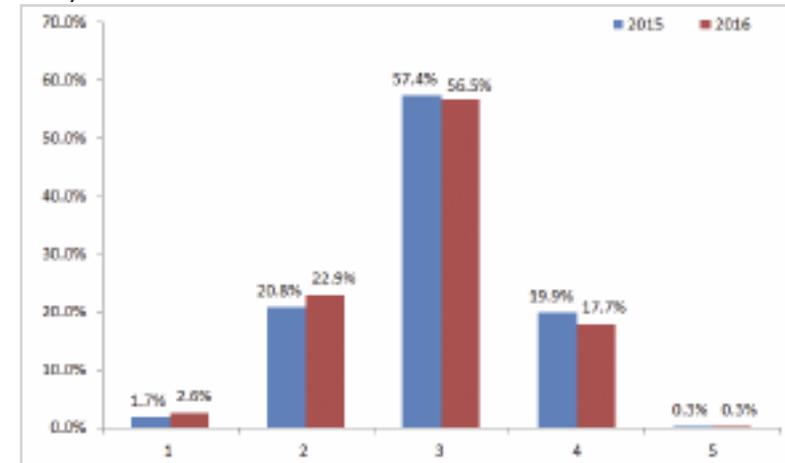


Table 1: Fat class scores for price reported NI heifer kill October-December 2015/2016

Year	1	2	3	4	5
2015	1.4%	10.4%	43.7%	41.3%	3.2%
2016	2.4%	12.5%	45.4%	37.1%	2.5%

Table 2: Fat class scores for price reported NI young bull kill October-December 2015/2016

Year	1	2	3	4	5
2015	13.4%	53.2%	31.5%	1.9%	0.0%
2016	12.6%	55.6%	30.2%	1.7%	0.0%

DECREASE IN THE VALUE OF NI RED MEAT SALES

ACCORDING to the latest data from Kantar Worldpanel the total value of retail red meat sales in NI during the twelve week period ending 01 January 2017 was £33 million, a two per cent decline from the 12 week period ending 03 January 2016 when the total value of retail red meat sales was £33.5 million. Red meat sales accounted for 43 per cent of total meat sales by value in NI during the 2016/2017 period under analysis, marginally higher than 42 per cent during the corresponding period in 2015/2016.

Beef

The latest Kantar figures have indicated that the value of beef sales in NI during the twelve week period ending 1 January 2017 totalled £28.5 million and accounted for 86 per cent of total red meat sales in terms of value. This was a decline of three per cent from the 2015/2016 period when NI beef sales were valued at £29.2 million, accounting for 87 per cent of total red meat sales in terms of value.

The volume of beef sales in NI during the 12 weeks ending 01 January 2017 totalled 3,776 tonnes, a six per cent

decrease on year earlier levels when beef sales totalled 4,015 tonnes. Beef sales accounted for 85 per cent of total red meat sales in terms of volume during the 12 weeks ending 01 January 2017, a three percentage points decline from the corresponding period in 2015/2016.

The number of households purchasing beef has also decreased with 84.7 per cent of shoppers buying beef during the 12 weeks ending 01 January 2017. This was a 4.3 percentage point decrease from the corresponding period the previous year when 89 per cent of shoppers purchased beef. The average retail price of beef in NI during the 12 weeks ending 01 January 2017 recorded an increase at £7.54/kg, compared to the £7.29/kg during the 12 week period ending 03 January 2016. However the average spend per buyer on beef has increased only marginally from £45.20 in the 2015/2016 period to £45.80 in the 2016/2017 period.

Lamb

The latest retail data from Kantar has indicated that lamb sales in NI during the twelve weeks ending 01 January

2017 were valued at £4.5 million and accounted for 14 per cent of total red meat sales in terms of value. In the corresponding period in 2015/2016 the total value of lamb sales in NI was £4.2 million, accounting for 13 per cent of total red meat sales in terms of value. This represented a six per cent increase in the value of lamb sales year on year.

The total volume of lamb sold in NI during the twelve weeks ending 01 January 2017 was 684 tonnes, a notable 23 per cent increase from the previous year. The volume of lamb sales accounted for 15 per cent of total red meat sales during the 2016/2017 period, three percentage points above the 2015/2016 period when lamb sales accounted for 12 per cent of total red meat sales in terms of volume.

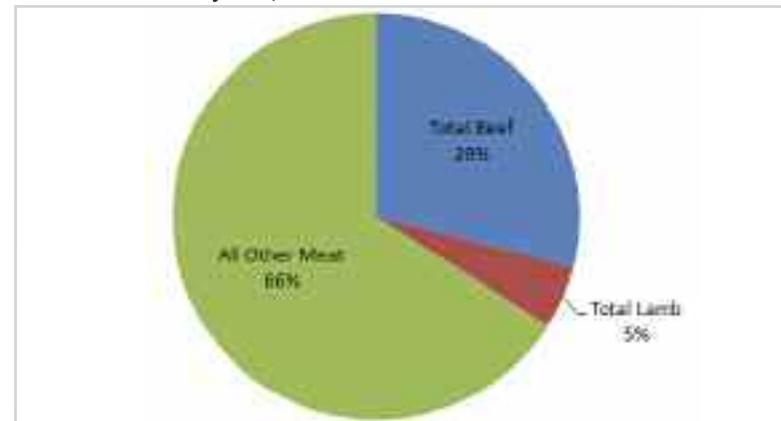
The average retail price of lamb in NI during the 12 weeks ending 01 January 2017 decreased markedly to £6.55/kg from £7.60/kg in the same period in 2015/2016. As a result there has been an increase in the proportion of households buying lamb, up from 27.9 per cent in the 2015/2016 period to 29.2 per cent in the 2016/17 period.

Market Share

As outlined in Figure 2, the overall volume of beef and lamb sales in NI during the 12 weeks ending 1 January 2017 accounted for 29 per cent and 5 per cent respectively with all other meat accounting for 66 per cent of sales. Beef's share of total meat sales decreased from 30 per cent in the 2015/2016 period while lamb sales increased from 4 per cent during the same period. The market share of all other meat remained unchanged between the two periods.

LMC is committed to promoting beef and sheep meat in home and export markets in order to increase the share of red meat within total meat sales therefore it is encouraging to note that red meat is maintaining its market share of total meat sales year on year. As part of its services to industry LMC educates consumers about the true nutritional value of red meat and cooking beef and lamb with confidence through retail sampling and education services programmes across NI.

Figure 2: Volume of meat sales in NI during the 12 weeks ending 01 January 2017 broken down by beef, lamb and all other meats



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WEEKLY BEEF & LAMB MARKETS



CATTLE TRADE

NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 30/01/17	Next Week 06/02/17
Prime		
U-3	340 - 346p	340 - 346p
R-3	334 - 340p	334 - 340p
O+3	328 - 334p	328 - 334p
P+3	274 - 294p	274 - 294p
Including bonus where applicable		
Cows		
O+3 & better	235 - 250p	240 - 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 28/01/17	Steers	Heifers	Young Bulls
U3	354.3	358.3	346.0
R3	350.6	349.8	342.8
O+3	341.2	340.7	335.6

*Prices exclude AA, HER and Organic cattle

REPORTED COW PRICES NI - P/KG

W/E 28/01/17	Wgt <220kg	Wgt 220-250kg	Wgt 250-280kg	Wgt >280kg
P1	154.2	170.7	180.1	203.5
P2	173.5	197.5	219.3	231.6
P3	200.0	216.8	235.4	239.2
O3	209.0	230.0	244.0	256.2
O4	-	230.2	238.7	260.3
R3	-	-	250.0	273.8

Deadweight Cattle Trade

BASE quotes from the major NI processors this week for in spec U-3 grade prime cattle ranged from 340-346p/kg with the majority of plants quoting 344-346p/kg. The trade for good quality O+3 grade cows remained steady ranging from 240-250p/kg across the majority of plants. Similar quotes are expected for all types of cattle early next week.

Reports from the local processors have indicated good numbers of prime cattle coming forward for slaughter with throughput in NI last week remaining relatively steady at 7,059 head. This was higher than the 6,251 head of prime cattle slaughtered in NI plants in the corresponding week in 2016, accounting for a 13 per cent increase year on year. Meanwhile a total of 2,097 cows were slaughtered in NI last week, a slight increase compared to the previous week and also higher than the 1,935 cows killed locally in the same week last year.

Prime cattle imports from ROI for direct slaughter in NI plants totalled 151 head last week, almost unchanged from the previous week and accounting for two per cent of the total NI prime cattle kill. In the corresponding week in 2016 474 prime cattle were imported from ROI for slaughter in NI plants which accounted for eight per cent of the total NI prime cattle kill. Meanwhile 152 cows were exported from NI for direct slaughter in ROI last week, a decrease from the 188 cows exported in the same week last year. Exports from NI for direct slaughter in GB last week consisted of 46 prime cattle and 9 cows, a decline from year earlier levels when 136 prime cattle and 39 cows were exported to GB.

Deadweight prices for prime cattle in NI came under some pressure last week with the average steer price back by 1.8p/kg to 345p/kg while the R3 steer price decreased by 1.2p/kg to 353.5p/kg. The average heifer price in NI last week was back by 2.4p/kg to 345.7p/kg while the R3 heifer price decreased by a penny to 351.9p/kg. The average cow price in NI last week recorded a decrease of half a penny to 239p/kg while the O3 cow price was up by 0.8p/kg to 254.8p/kg.

The average steer price in GB last week was steady at 351p/kg while the average R3 steer price was back by 1.5p/kg to 360.7p/kg. The differential in R3 steer prices last week between NI and GB was 7.2p/kg or £25 on a 350kg carcass. The average heifer price in GB last week was back by 1.3p/kg to 354.5p/kg while the average R3 heifer price decreased by the same amount to 361.8p/kg. The differential in R3 heifer prices last week between NI and the GB average was 9.9p/kg or £32 on a 320kg carcass.

The deadweight trade in ROI last week held relatively steady in euro terms however a weakening in euro against sterling meant deadweight prices were back in sterling terms. The R3 steer price in ROI was the equivalent of 319.1p/kg, a decrease of 5.7p/kg from the previous week while the R3 heifer price was the equivalent of 331.2p/kg, back by 4.5p/kg from the previous week. The O3 cow price in ROI last week recorded a decrease of 3.3p/kg to the equivalent of 259.1p/kg, putting it 4.3p/kg above the equivalent price in NI.

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

W/E 28/01/2017	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB	
Steers	U3	355.1	328.5	367.1	361.7	366.3	367.1	365.4
	R3	353.5	319.1	367.9	357.0	356.3	362.2	360.7
	R4	352.6	319.8	367.2	366.5	355.8	360.8	363.4
	O3	342.6	306.1	340.4	331.4	323.7	330.6	331.4
	AVG	345.0	-	362.6	351.7	343.4	344.9	351.0
Heifers	U3	358.7	342.4	374.8	366.2	370.3	373.5	371.3
	R3	351.9	331.2	367.1	361.4	357.8	362.8	361.8
	R4	351.1	330.5	365.7	360.0	359.2	360.5	361.4
	O3	344.4	317.6	344.2	331.6	337.0	334.2	337.1
	AVG	345.7	-	364.7	352.9	349.4	349.7	354.5
Young Bulls	U3	346.0	320.8	358.8	342.7	347.9	362.3	348.9
	R3	342.7	311.1	351.2	332.9	336.9	343.5	339.4
	O3	323.2	299.4	310.8	305.0	313.4	312.8	310.5
	AVG	323.9	-	335.7	314.3	317.0	321.2	320.3
Prime Cattle Price Reported	6325	-	6813	6895	6757	4500	24965	
Cows	O3	254.8	259.1	248.8	246.0	246.6	235.1	244.2
	O4	259.5	260.4	250.5	247.0	249.2	237.8	246.5
	P2	220.6	235.6	193.5	201.2	198.5	189.5	195.9
	P3	237.4	249.9	213.2	219.9	215.1	212.3	215.1
	AVG	239.0	-	239.6	223.7	216.8	203.5	218.1

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=85.63p 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 28/01/17	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
Finished Cattle (p/kg)						
Steers	197	210	204	170	196	183
Friesians	146	155	151	130	144	139
Heifers	195	213	203	165	194	182
Beef Cows	132	204	153	105	131	120
Dairy Cows	103	125	109	65	102	85
Store Cattle (p/kg)						
Bullocks up to 400kg	210	258	225	175	208	195
Bullocks 400kg - 500kg	200	223	210	175	198	186
Bullocks over 500kg	195	211	203	160	194	175
Heifers up to 450kg	200	236	218	170	199	185
Heifers over 450kg	200	223	210	160	199	180
Dropped Calves (£/head)						
Continental Bulls	280	350	320	165	275	235
Continental Heifers	235	340	275	125	230	165
Friesian Bulls	110	190	140	40	108	75
Holstein Bulls	80	180	115	20	78	50

SHEEP TRADE

SHEEP BASE QUOTES

(P/Kg DW)	This Week 30/01/17	Next Week 06/02/17
Hoggets	370 > 22kg	370-375 > 22kg

REPORTED SHEEP PRICES

(P/KG)	W/E 14/01/17	W/E 21/01/17	W/E 28/01/17
NI Hoggets L/W	345.9	343.0	345.3
NI Hoggets D/W	363.8	364.1	367.4
GB Hoggets D/W	382.3	378.9	378.2
ROI D/W	382.0	380.3	375.9

Deadweight Sheep Trade

THE deadweight sheep trade remained steady in NI this week with quotes for R3 grade hoggets at 370p/kg with plants paying up to 22kg. Similar quotes are expected for early next week. Reports from the processors have indicated an increase in the number of hoggets coming forward for slaughter with throughput last week totalling 7,508 head, compared to 6,996 hoggets killed in NI plants the previous week. This was also an increase compared to the corresponding week in 2016 when a total of 5,797 hoggets were killed locally. Exports of sheep to ROI for direct slaughter last week recorded an increase to 8,551 head however this was lower than the same week last year when 10,016 sheep were exported to ROI. The average deadweight hogget price in NI last week increased by 3.3p/kg to 367.4p/kg while the average deadweight hogget price in ROI last week decreased by 4.4p/kg to 375.9p/kg.

This week's marts

REPORTS from the marts this week indicated a generally steady trade with similar numbers of hoggets passing through the sale rings compared to last week. In Massereene on Monday 1,206 hoggets sold from 330-365p/kg compared to 926 hoggets the previous week selling from 350-375p/kg. In Rathfriland on Tuesday 570 hoggets sold to an average of 335p/kg compared to 500 hoggets the previous week selling to an average of 344p/kg. In Ballymena on Wednesday 1,005 hoggets sold to an average of 336p/kg compared to 1,675 hoggets the previous week selling to an average of 328p/kg. The trade for first quality fat ewes firmed slightly this week with top prices generally ranging from £80-95 and a top reported price of £101 in Ballymena on Wednesday.

LATEST SHEEP MARTS

From: 27/01/17		Hoggets (P/KG LW)			
To: 02/02/17		No	From	To	Avg
Friday	Newtownstewart	220	323	353	-
Saturday	Omagh	1054	343	399	-
	Swatragh	825	329	348	-
Monday	Kilrea	400	336	349	-
	Massereene	1206	330	365	-
Tuesday	Saintfield	355	330	375	-
	Rathfriland	570	326	368	335
Wednesday	Ballymena	1005	320	365	336
	Enniskillen	275	333	363	-
	Markethill	880	340	380	-
	Armoey	436	330	368	-

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HEALTH AND SAFETY MUST BE MADE A PRIORITY BY FQAS MEMBERS

IMPROPERLY fenced-off slurry lagoons represent the biggest cause of Farm Quality Assurance Scheme (FQAS) non-conformances relating to health and safety, according to LMC's Farm Quality Assurance Manager Daryl McLaughlin.

He made this comment against the backdrop of this week's start to the 2017 slurry spreading season. "Obviously, this issue has both quality assurance and farm safety implications," he said. "The risk of a child drowning in a slurry lagoon is magnified by an almost infinite amount if the store is not fenced off to the required standard."

"And the same principle holds if the entrance gates to the lagoon are not padlocked shut. This is another high ranking health and safety issue, where the FQAS scheme is concerned. "In a similar vein, machinery should not be parked adjacent to or close to a fence surrounding a lagoon. Children climbing on the equipment could easily slip and fall into the slurry."

McLaughlin confirmed that issues relating to the various forms of slurry stores found in Northern Ireland account for the largest number of safety-related non-conformance queries raised in the context of FQAS farm inspections.

"The specific figures that relate to each of the store specifications are quite small. But when they are all totalled up, the overall figure comes in at around 10%. And this is significant!" McLaughlin said that safety issues pertaining to above ground slurry tanks ranks second in the pecking order of slurry store related non-conformance issues.

"The ladder must always be removed and stored safely away when not in use," he added. "Again children, can climb up the ladder if it is left in position. It's all too easy for young people to fall into the slurry if they stretch up to look over the top of the store. Keeping the trap door padlocked, when not in use, is another FQAS requirement."

Where below ground stores are concerned, McLaughlin listed a number of FQAS priorities. "Mixing points must always be properly closed off. Covering them with a piece of old gate or a pallet is not fit for purpose," he added. "In some cases single slats must be lifted to allow the mixing of the slurry below. It goes without saying that these slats must be put back in position, once the mixing and pumping processes have been completed. If this is not done a child or animal could fall into the tank below. The same risks are also associated with broken slats. These should be replaced as a matter of routine."

McLaughlin also highlighted the danger associated with the toxic gases, given off from slurry during mixing. "All livestock should be removed from buildings in which mixing is about to take place," he said. "Every door should be opened prior to the mixing operation getting underway and all people should remain outside until such times as the gases given off have dissipated. It is also recommended for mixing to be carried out on a windy day."

Given the significance of the non-conformance problems that are accounted for by slurry stores, LMC is currently developing a specific information leaflet on the matter. "This will be launched over the coming weeks in association with the Health and Safety Executive.

LMC, as an affiliate member of the Farm Safety Partnership, will continue to play its part in making farms here a safer place to work on," said McLaughlin. "Copies will be distributed to all farmers seeking to secure or retain their FQAS status,"

Image 1: FQAS Manager Daryl McLaughlin highlighted the importance of safe slurry storage for compliance with both FQAS standards and Farm Safety



REDMEAT INDUSTRY TO SPEAK WITH ONE VOICE ON BREXIT



getting the proper carcass balance, in terms of what the commercial markets deliver back to processors and farmers.” Smith said that securing access to new markets through well negotiated trade agreements will be a key driver for NI’s redmeat industry moving forward. “And this is already happening. Obviously, China remains a key target market for the future and new markets in countries, such as the Philippines, are now coming on stream. But this momentum must be increased once Brexit becomes a reality.”

The LMC representative stressed the need for existing export markets to be maintained, once the UK leaves the Union. “I am not sure if a seamless transition can be guaranteed in this regard but every effort must be made by trade negotiators in London to ensure that securing timely access to both new and existing markets for food produced in NI is made a key priority.” Where the EU single market is concerned, Smith said that the UK negotiators must secure the best trading deal possible.

Turning to imports, Smith said that the UK government must act to ensure equivalence of standards. “The Mercosur grouping of countries in South America, for example, has the

potential to export large quantities of redmeat onto the UK market. But it is unlikely that this food will be produced to the same quality, traceability and environmental standards as is the case in the UK. It is vital that all future free trade deals entered into by the UK are closely scrutinised from an agri food perspective and must recognise the sensitive product status of UK beef and sheepmeat. It is up to our political leaders to ensure this is the case.”

Colin highlighted the valuable role played by the Farm Quality Assurance Scheme (FQAS) in defining the true value of beef and lamb produced in Northern Ireland. “There is full equivalence between FQAS and Red Tractor: it is vitally important for this to remain the case, when it comes to local processors trading with the rest of the UK. Maintaining these important standards will provide an opportunity to displace imports.” he explained.

It is the consensus of redmeat industry leaders that effective support levels must be made available to local beef and sheep producers post Brexit. “The draft Total Income for Farming figures for 2016 bear this point out,” said Colin Smith. “The total income figure for agriculture as a whole amounted to £244m. However, the same period saw

CAP Pillar 1 support payments come in at £276m. Primary beef and lamb production must be supported in NI and that requires a budget from UK treasury commensurate with the support provided to local farmers through the CAP. Redmeat industry leaders all believe that this support must be directed in ways that encourage improved efficiencies at farm level.”

“A concerted drive to implement well established technologies such as soil and silage sampling, nutrient balances, measuring grass growth and the production of in-spec animals represents an obvious starting point. But other significant advances can be achieved by the more widespread use of improved genetics and other technologies that have a proven track record in making a real difference when it comes to improving the performance of beef and lamb production here in NI”.

A particular concern for redmeat processors in a post-Brexit scenario will be that of securing continued access to migrant labour. “Foreign nationals already make an invaluable contribution, when it comes to the efficient operating of our beef and lamb factories. And, obviously, processors will want access to this labour pool into the future.”

The overarching sentiment expressed by all the redmeat industry representatives attending the recent LMC-Hosted Brexit meeting concerned the need for all policy makers, negotiators and opinion formers to ensure that agri food is made a priority in the upcoming negotiations. “And this is particularly the case, where Northern Ireland is concerned,” said Smith.

“Agriculture represents 0.6% of gross value added on a UK basis and 1.4% of total employment. However, the equivalent figures for Northern Ireland are 1.4% and 5.7%. “So agriculture must not be left as an afterthought when it comes to sorting out the final Brexit deal. The good news for local beef and sheep farmers is that the redmeat stakeholders have already reached a consensus on all of the big issues that will impact post-Brexit.

“The challenge now is to ensure that our public representatives are made fully aware of what these issues are and why they are so important to farmers, processors and consumers. With the right trade deals and agriculture policies Northern Ireland can supply a safe, secure supply of affordable food for UK consumers”

THE redmeat industry will speak with one voice in the upcoming Brexit negotiations, according to LMC Industry Development Manager Colin Smith. “The Commission has already hosted a meeting involving all relevant stakeholder groups on this matter.”

“The groupings represented comprised the Ulster Farmers’ Union, the Northern Ireland Meat Exporters’ Association, the Northern Ireland Agricultural Producers’ Association, the Agri-Food Strategy Board and, of course, our own Board and staff. This will be followed up by future meetings but already a clear set of Brexit principles have been established for the beef and lamb sectors.”

“The UK market will remain fundamentally important but it is about

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