

Seamus Mc Menamin



Slaughter Trends 2018/19

NI Slaughterings December 2018

NI CATTLE AND SHEEP SLAUGHTERINGS						
	Dec			Year to Date		
	(4 weeks ended 29/12/18)			(52 weeks ended 29/12/18)		
	Dec-17	Dec-18	% Change	2017	2018	Change
CATTLE - FOODCHAIN						
Steers	12,831	12,332	-4%	170,480	160,732	-6%
Heifers	10,227	10,358	1%	126,135	131,414	4%
Young Bulls	2,328	2,706	16%	36,100	44,845	24%
Total Prime Cattle	25,386	25,396	0%	332,715	336,991	1%
Calves	517	440	-15%	6,287	6,107	-3%
Cows	7,982	6,804	-15%	103,440	103,533	0%
Mature Bulls	205	386	88%	3,670	4,708	28%
Total Cattle	34,090	33,026	-3%	446,112	451,339	1%
SHEEP						
Lambs & Hoggets	28,536	27,335	-4%	423,247	392,867	-7%
Ewes & Rams	1,956	2,073	6%	30,255	24,744	-18%
Total Sheep	30,492	29,408	-4%	453,502	417,611	-8%

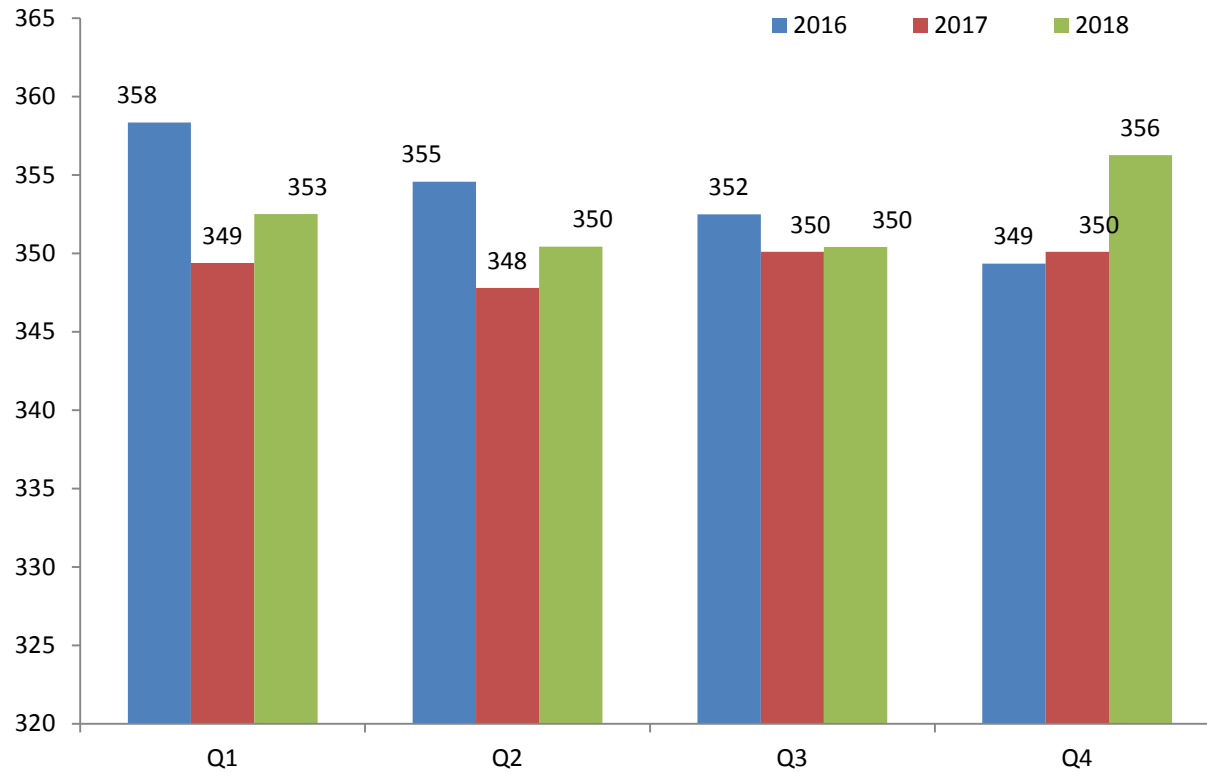
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

NI Beef+ Lamb Production Dec 2018

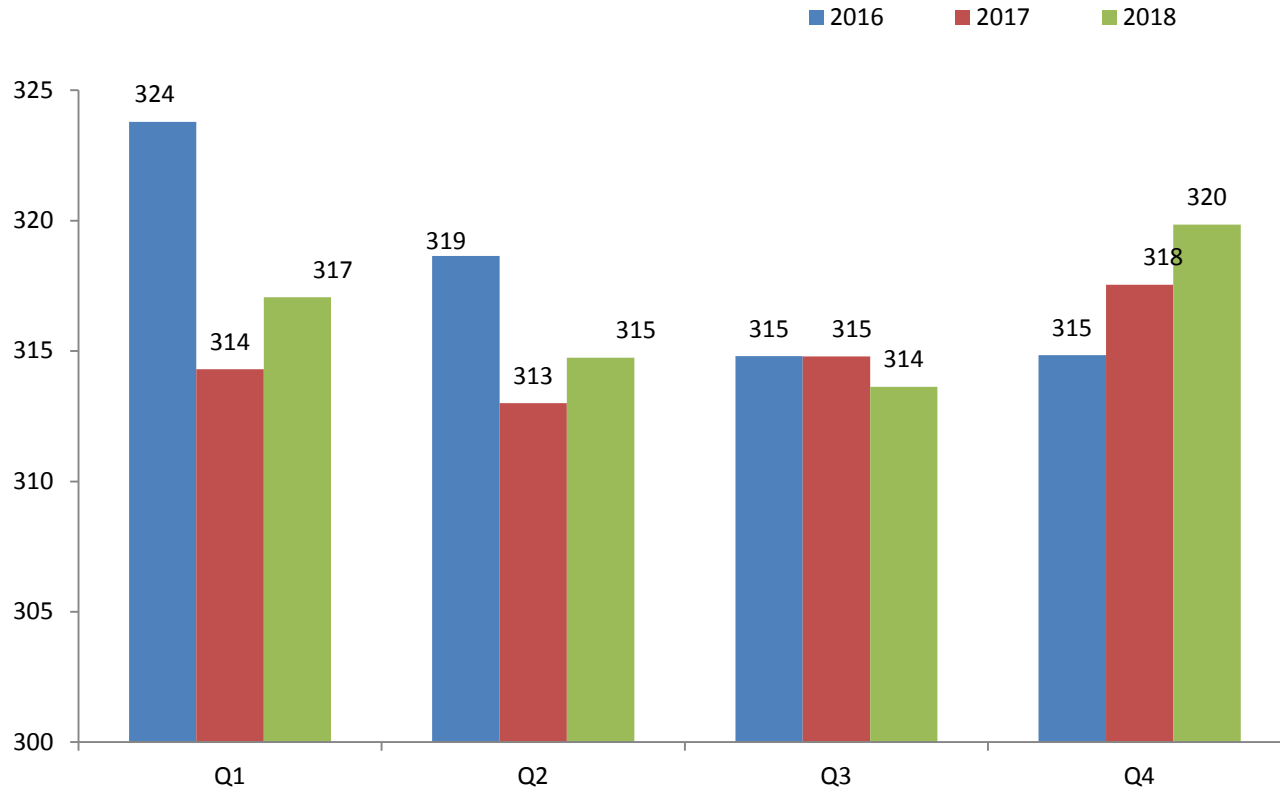
NI BEEF AND SHEEPMEAT PRODUCTION						
	Dec			Year to Date		
	(4 weeks ended 29/12/18)			(52 weeks ended 29/12/18)		
	Dec-17	Dec-18	% Change	2017	2018	Change
BEEF						
Steers	4,503	4,379	-3%	59,479	56,683	-5%
Heifers	3,250	3,335	3%	39,712	41,596	5%
Young Bulls	767	893	16%	11,956	15,100	26%
Total Prime Cattle	8,520	8,606	1%	111,147	113,379	2%
Calves	98	85	-13%	1,198	1,175	-2%
Cows	2,387	2,045	-14%	30,676	31,055	1%
Mature Bulls	95	157	65%	1,666	1,996	20%
Total Beef	11,100	10,893	-2%	144,688	147,606	2%
SHEEP						
Lambs & Hoggets	620	623	0%	9,117	8,454	-7%
Ewes & Rams	53	56	7%	844	679	-19%
Total Sheepmeat	673	679	1%	9,961	9,134	-8%

The above figures are provisional and are measured in '000 tonnes; any amendments will be incorporated in the cumulative data (source DAERA).

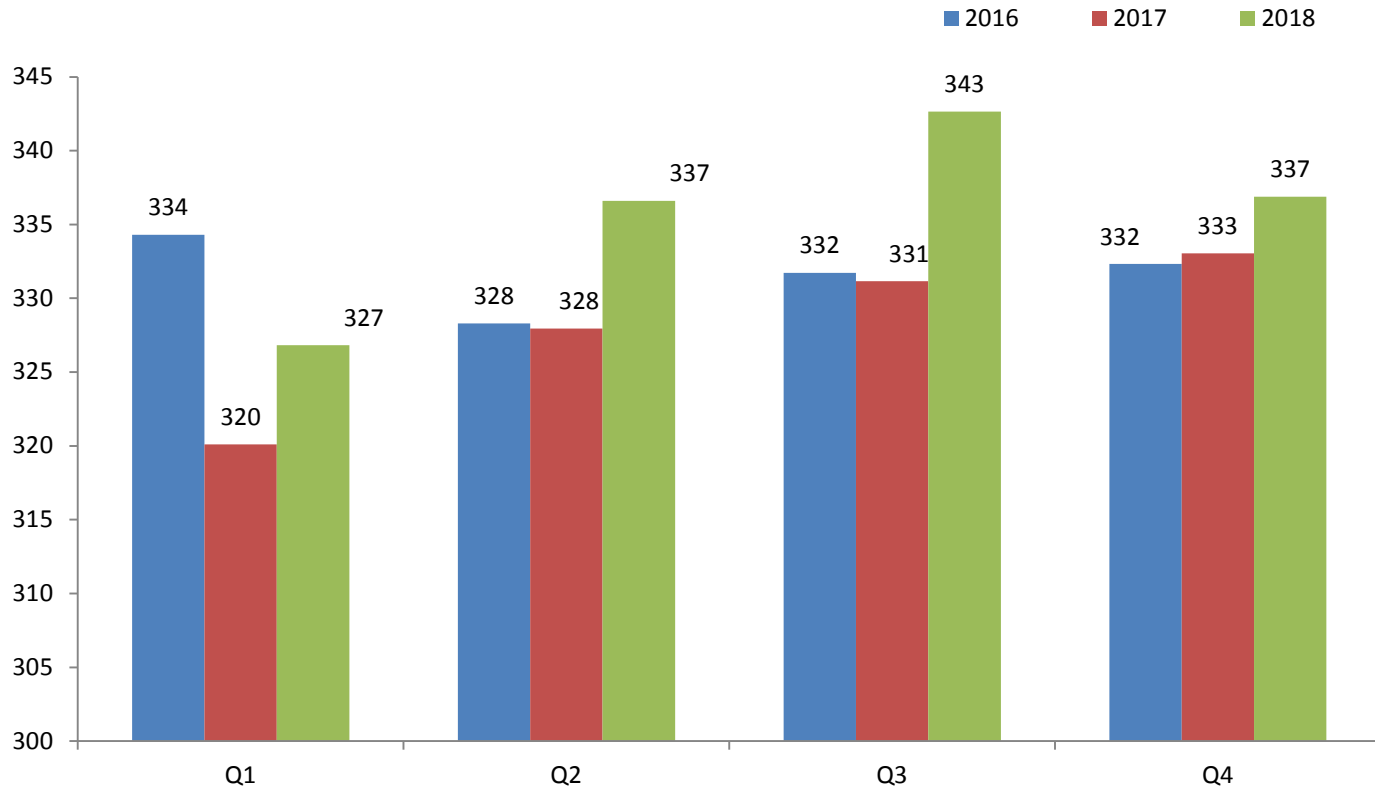
Carcase weights (Steers)



Carcase weights (Heifers)

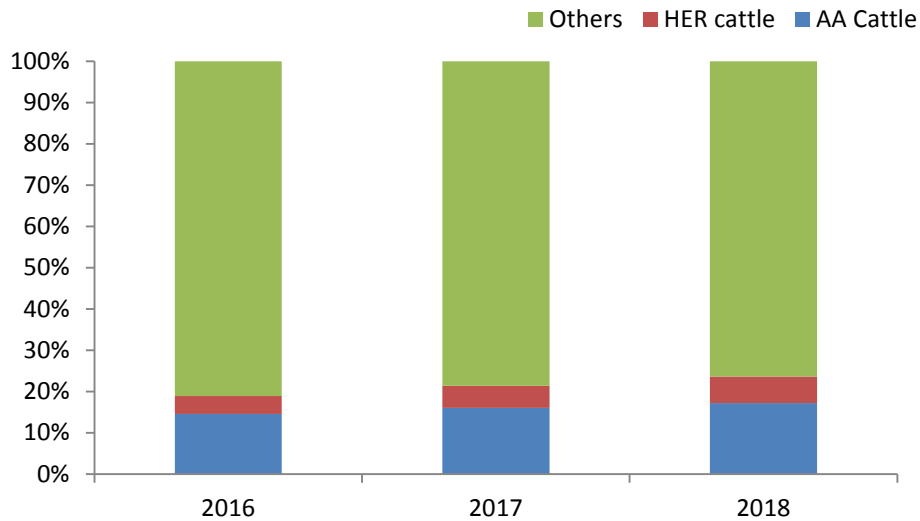


Carcase weights (Young Bulls)



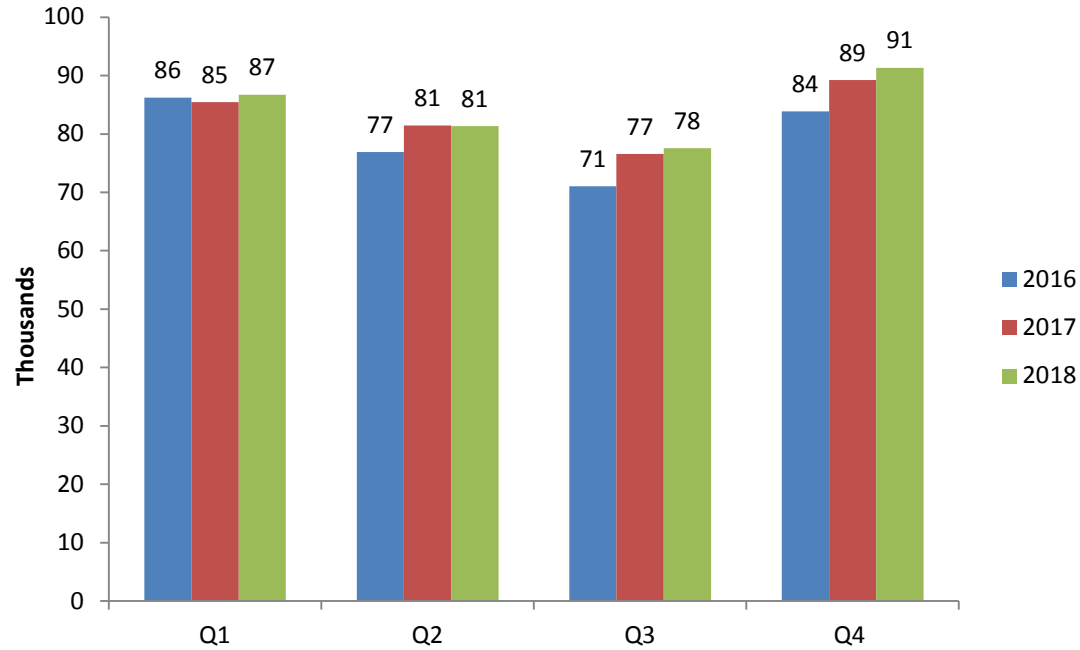
Overview of prime kill

	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
2016	319.3	25.5	353.2	25.4	322.7	15.3
2017	316.8	25.5	350.6	25.1	329.7	15.7
2018	317.6	25.8	353.7	25.6	335.0	16.0



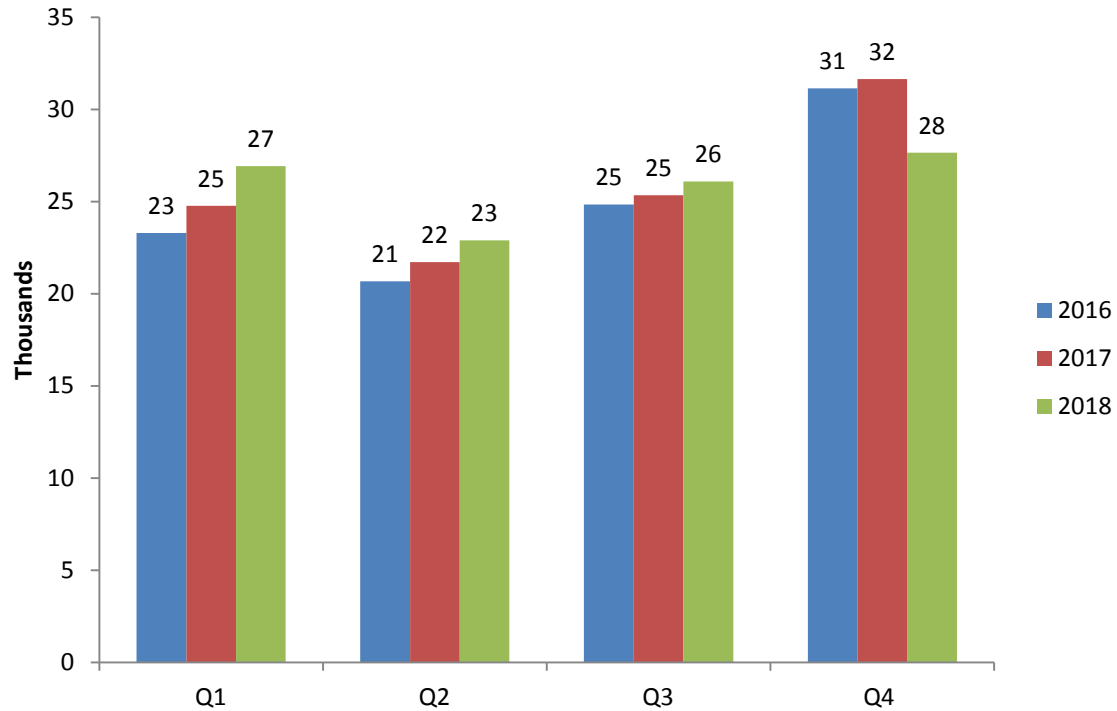
	AA Cattle	HER cattle	Others
2016	14%	4%	81%
2017	16%	5%	78%
2018	17%	7%	76%

Quarterly Prime Cattle Kill



Prime Cattle kill	2016	2017	2018
Q1	86,202	85,430	86,738
Q2	76,882	81,474	81,359
Q3	71,014	76,560	77,583
Q4	83,861	89,251	91,311

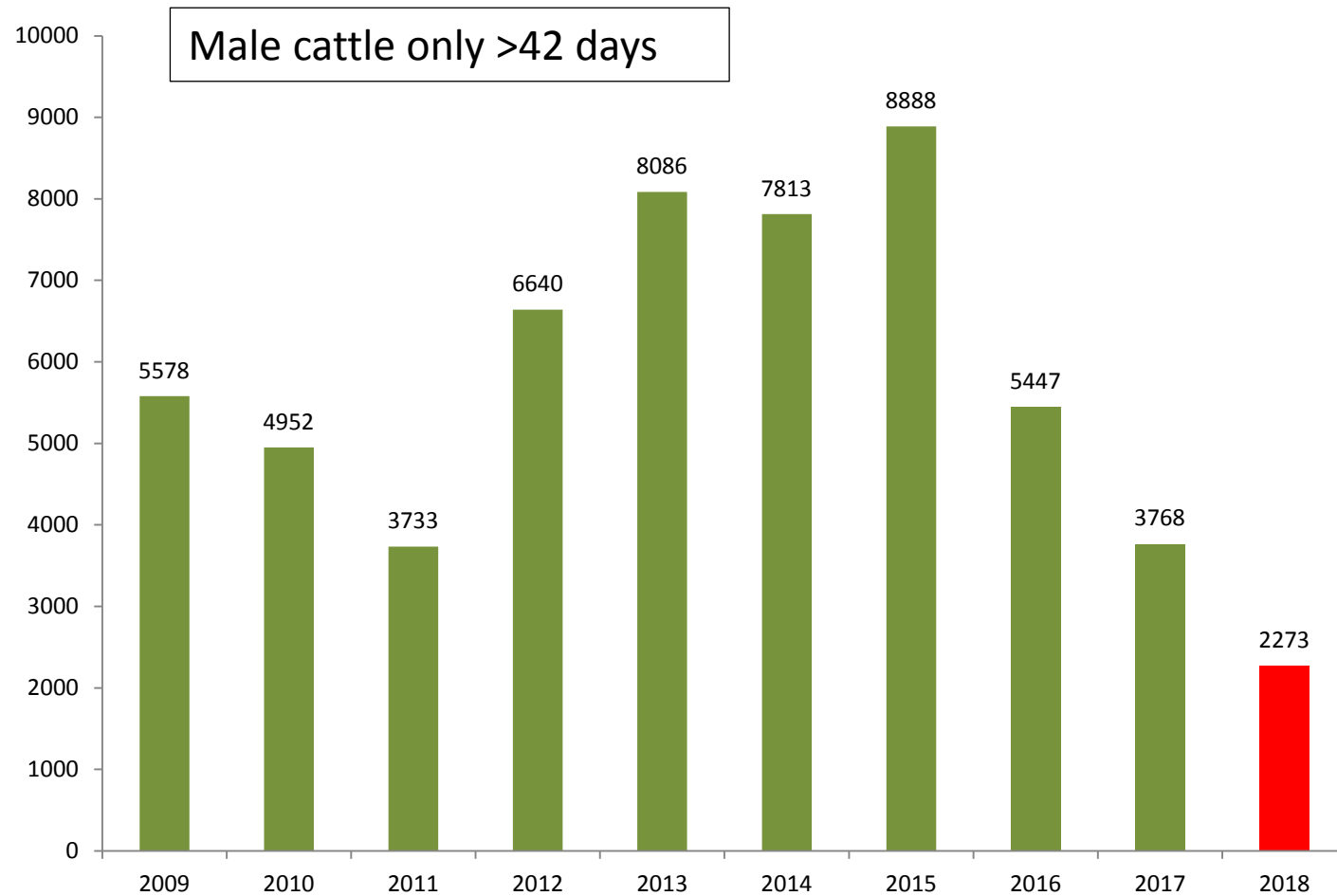
Quarterly Cow Kill



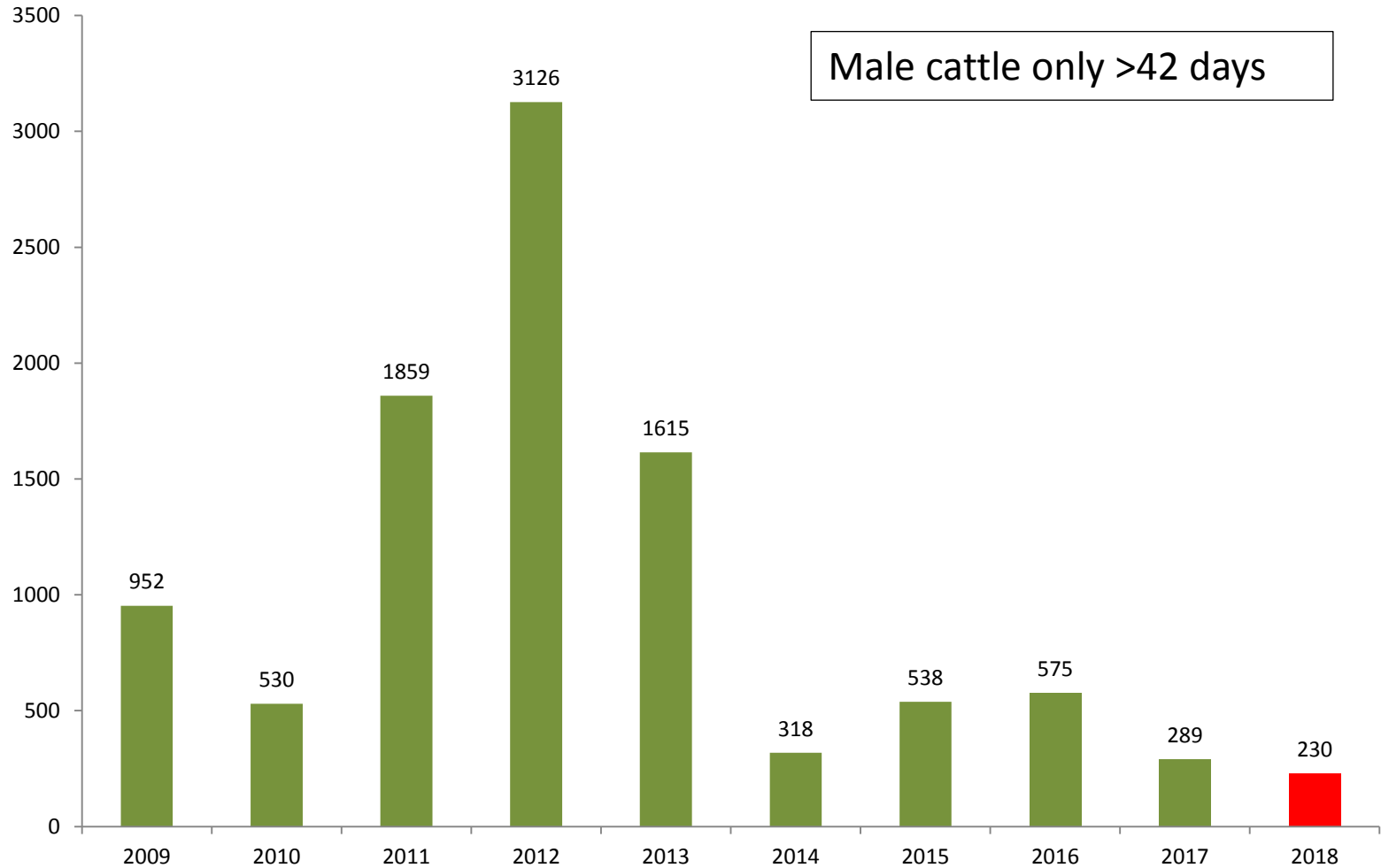
Cow Slaughtering	2016	2017	2018
Q1	23,290	24,760	26,924
Q2	20,677	21,706	22,890
Q3	24,841	25,339	26,079
Q4	31,135	31,635	27,640

Live Exports

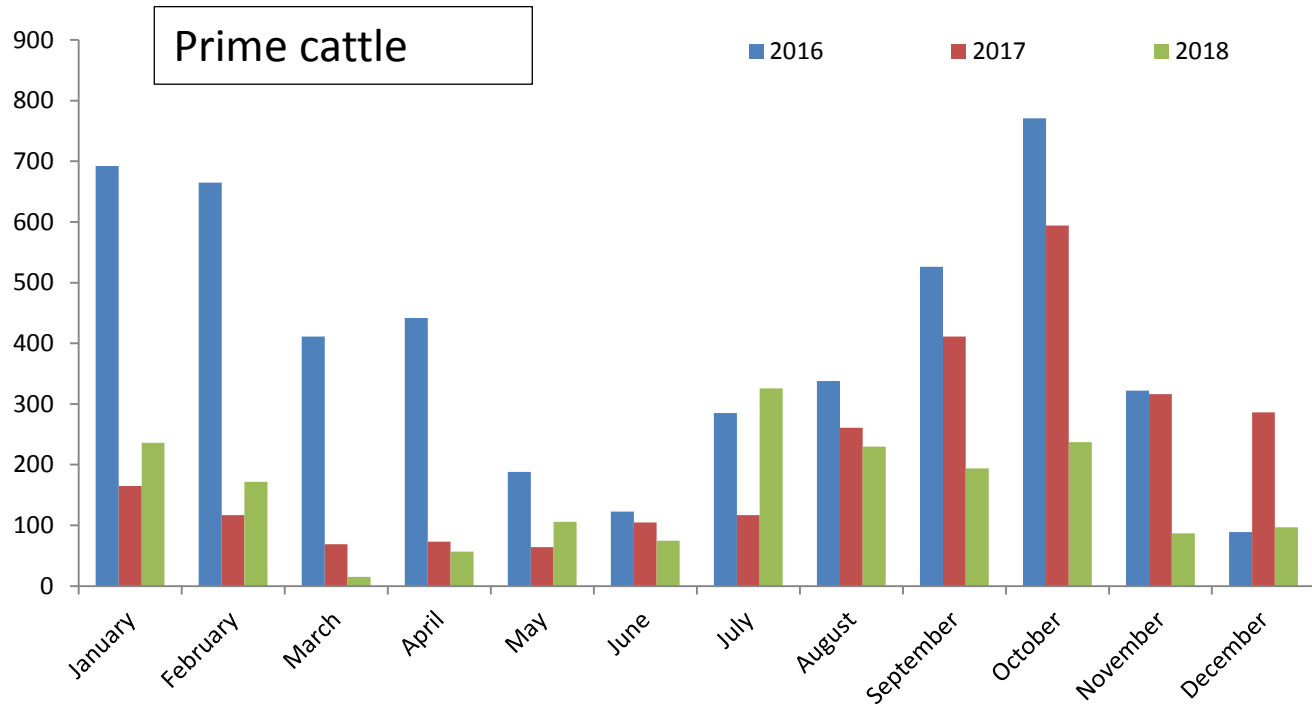
Exports to GB for further production



Exports to ROI for Further Production

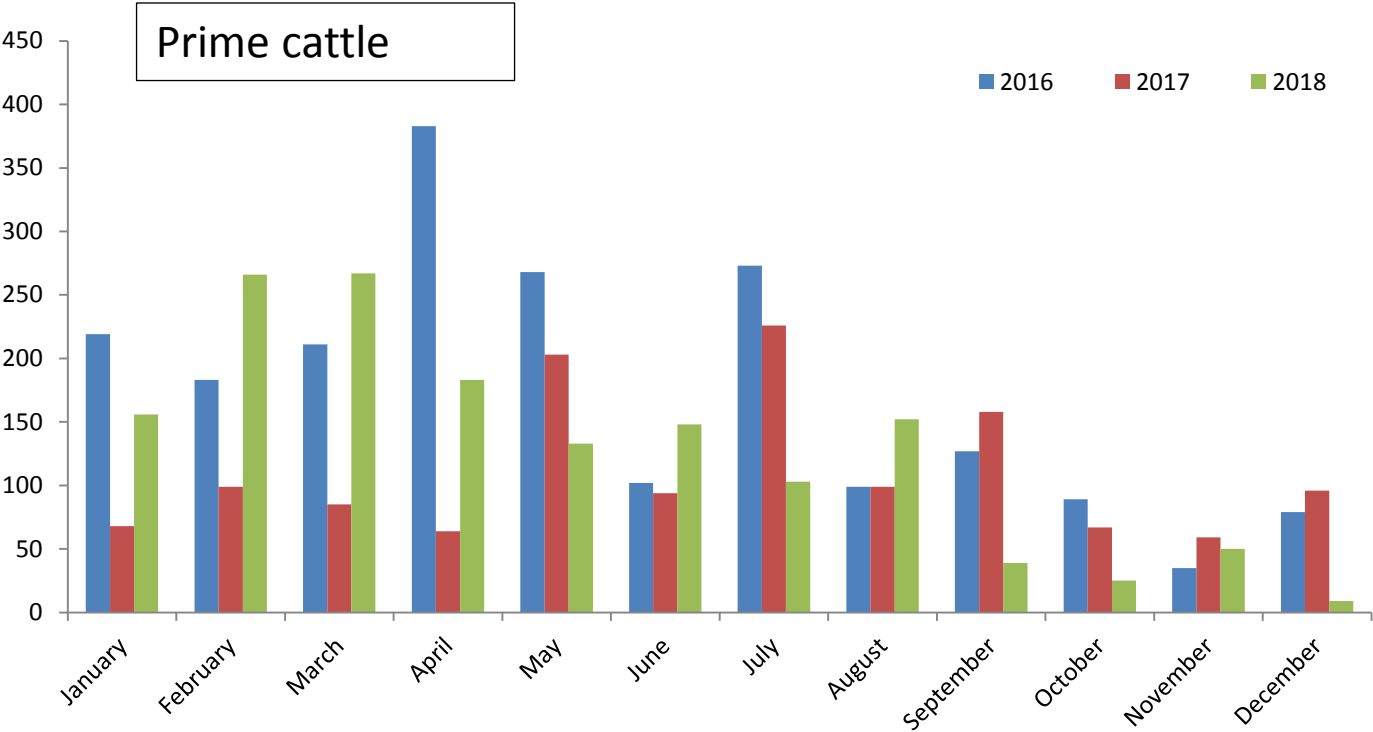


Exports to GB for Direct Slaughter



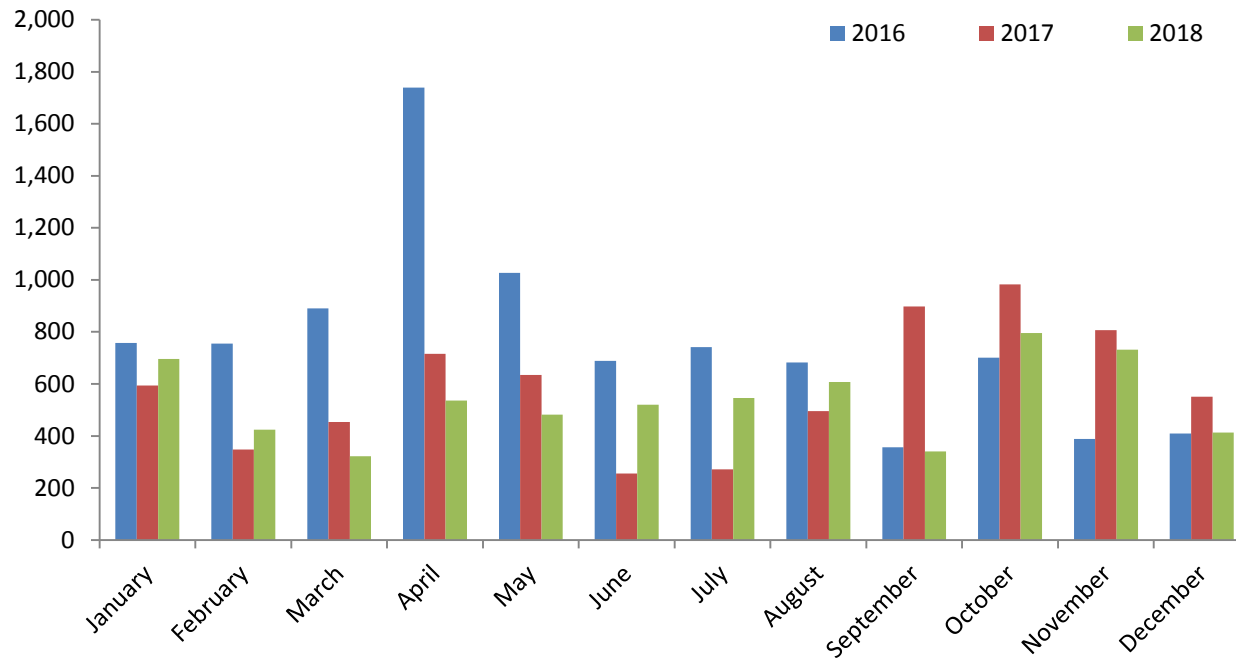
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	692	665	411	442	188	123	285	338	526	771	322	89
2017	165	117	69	73	64	105	117	261	411	594	316	286
2018	236	172	15	57	106	75	326	230	194	237	87	97

Exports to ROI for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	220	183	211	383	268	102	273	99	127	89	35	79
2017	68	99	85	64	203	94	226	99	158	67	59	96
2018	156	266	267	183	133	148	103	152	39	25	50	9

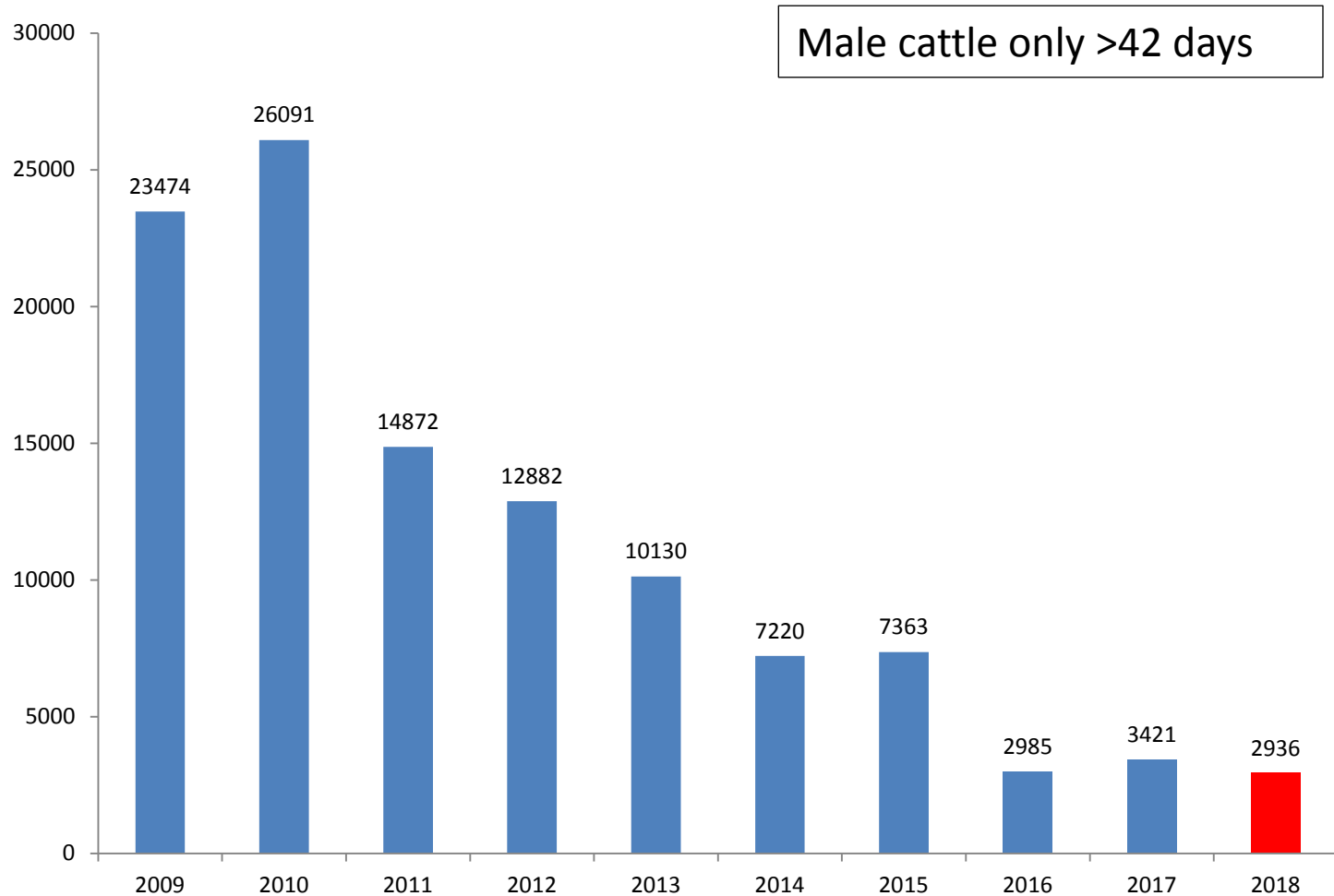
Cow exports to ROI for Direct Slaughter



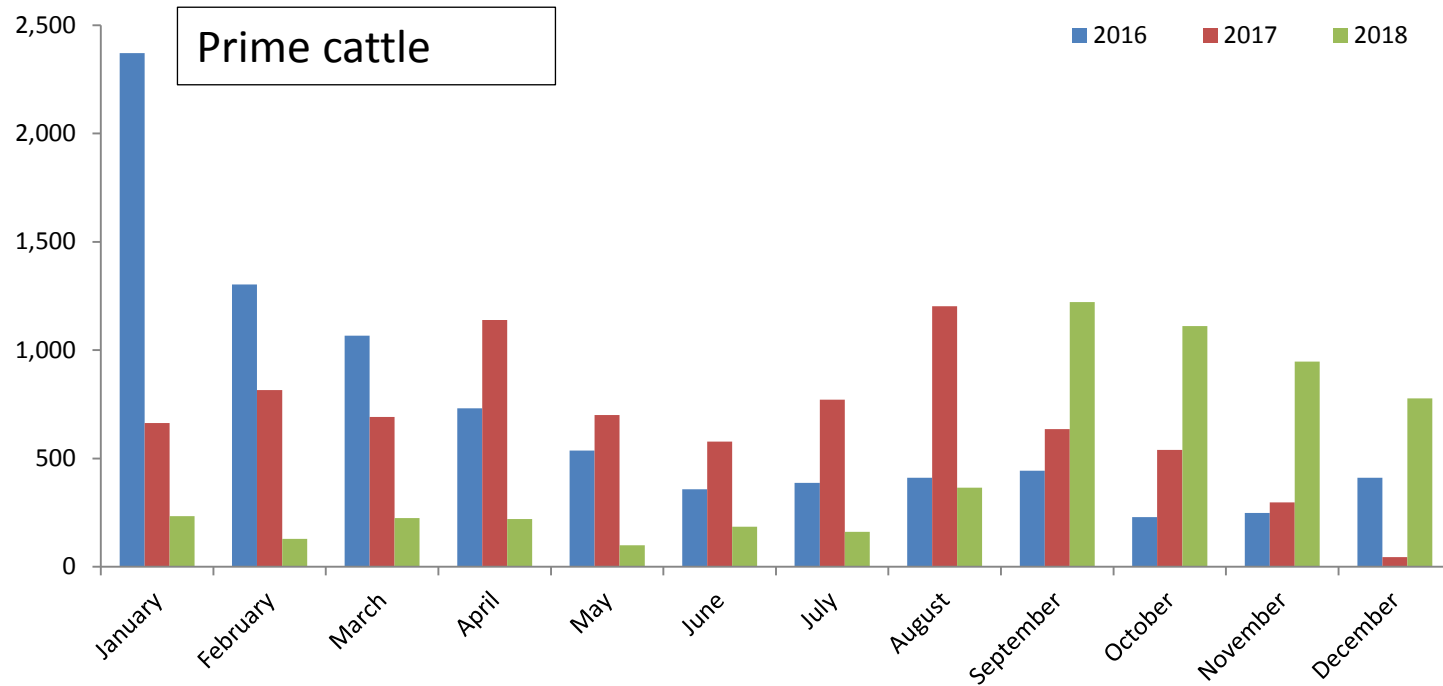
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	758	755	890	1739	1027	688	742	682	357	701	389	409
2017	594	348	453	716	635	256	272	496	898	982	807	551
2018	696	424	322	536	482	520	546	607	341	796	732	413

Live Imports

Imports from ROI for Further Production

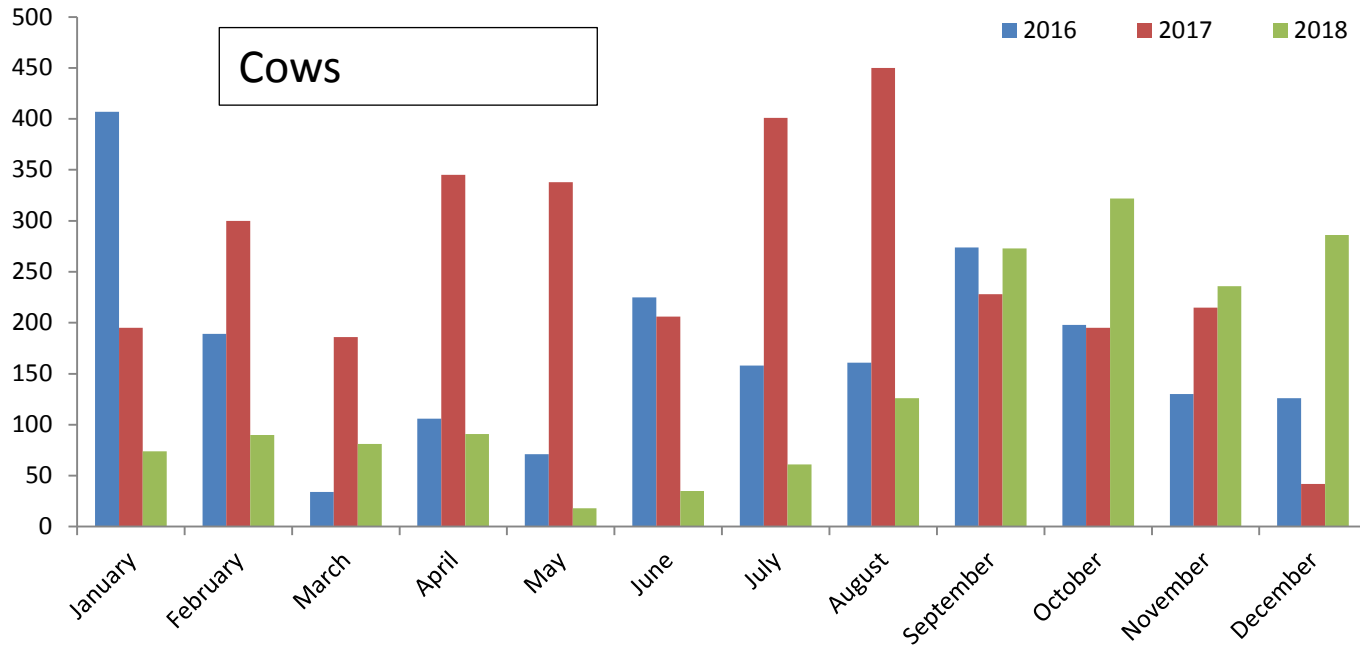


Imports from ROI for Direct Slaughter



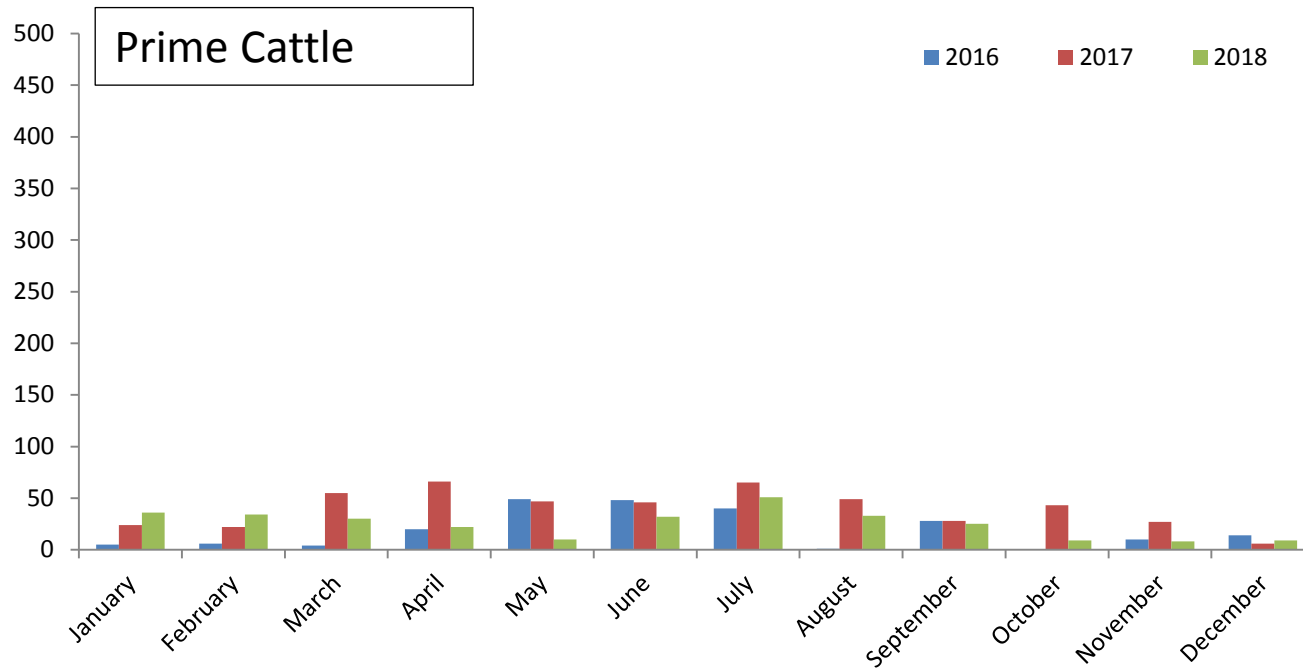
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	2372	1302	1067	731	536	358	388	411	443	230	248	411
2017	663	816	692	1139	700	578	771	1203	635	539	297	44
2018	234	129	225	221	100	185	162	366	1222	1111	947	777

Imports from ROI for Direct Slaughter



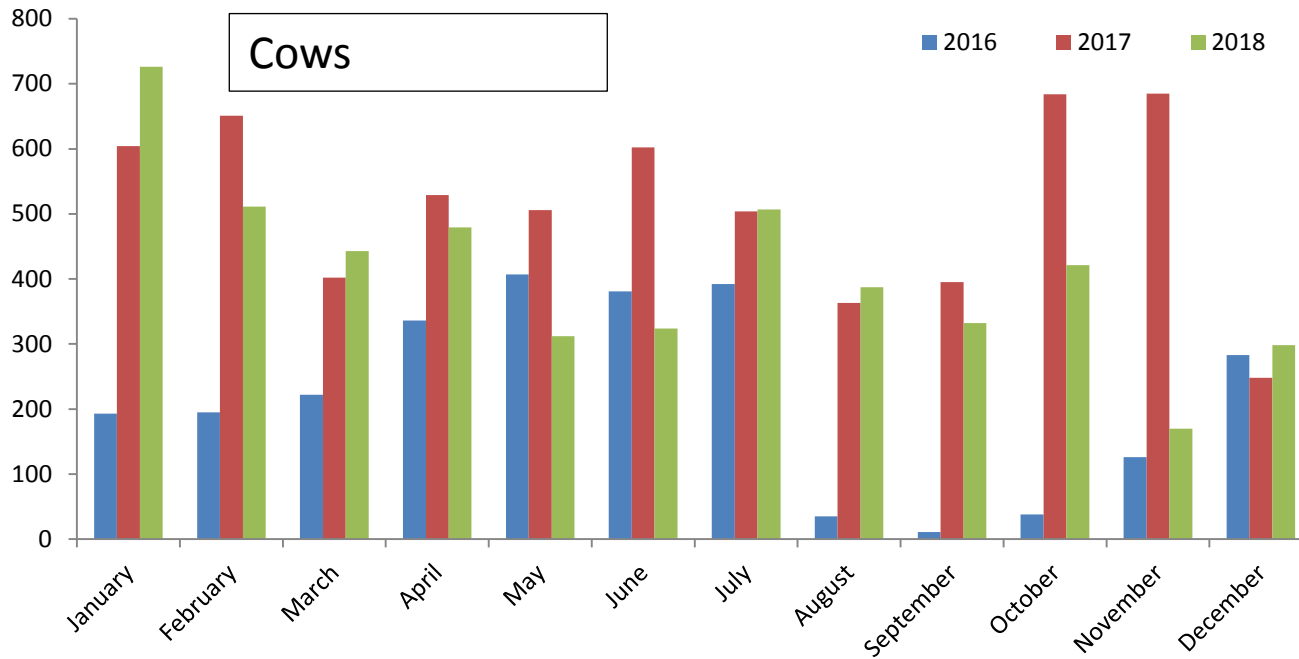
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	407	189	34	106	71	225	158	161	273	198	130	126
2017	195	300	186	345	338	206	401	450	228	195	215	42
2018	74	90	81	91	18	35	61	126	273	322	236	286

Imports from GB for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	5	6	4	20	49	48	40	1	28	0	10	14
2017	24	22	55	66	47	46	65	49	28	43	27	6
2018	36	34	30	22	10	32	51	33	25	9	8	9

Imports from GB for Direct Slaughter

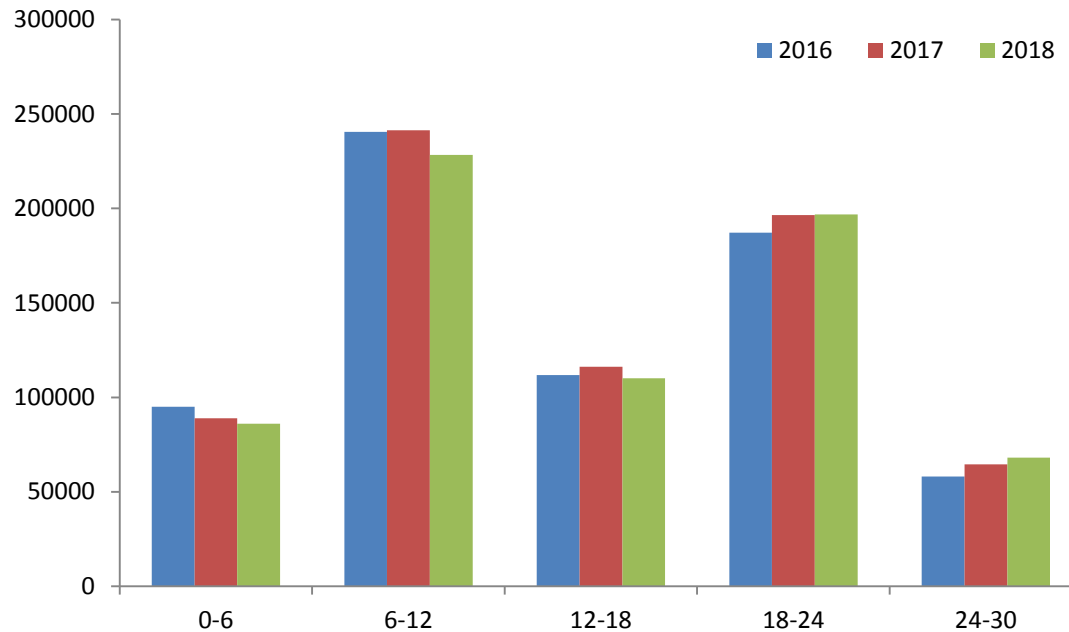


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	193	195	222	336	407	381	392	35	11	38	126	283
2017	604	651	402	529	506	602	504	363	395	684	685	248
2018	726	511	443	479	312	324	507	387	332	421	170	298

Cattle Supplies

Beef sired cattle on NI farms

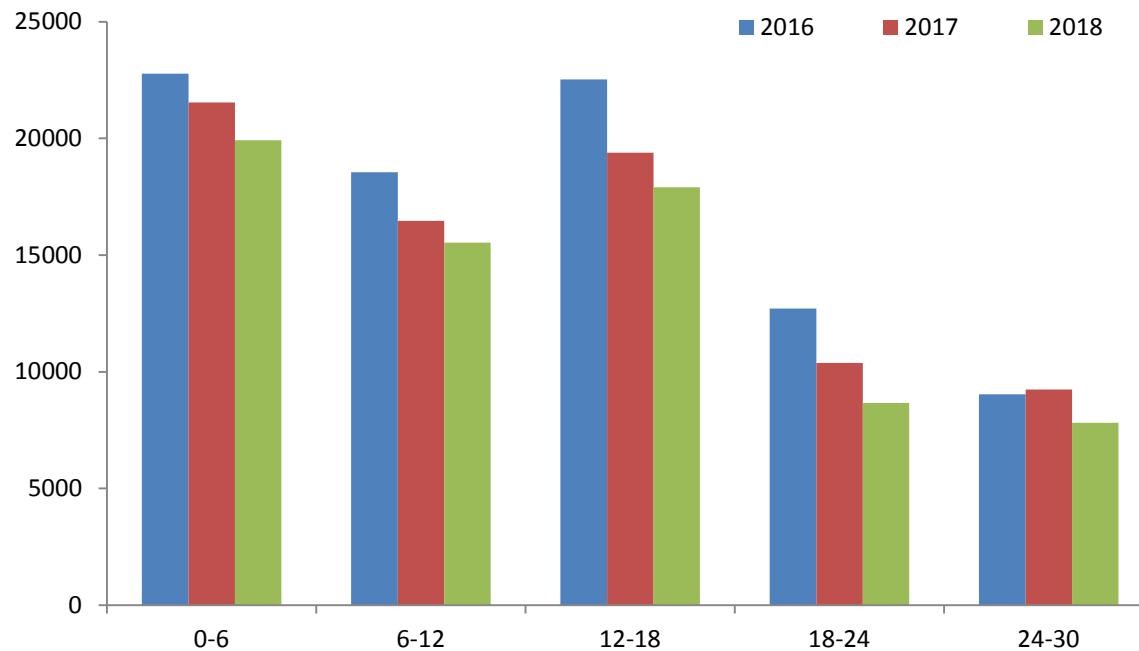
December 2018



Age (Months)	2016	2017	2018	2017/2018	2016/2018
0-6	94971	88859	86036	-3.2%	-9.4%
6-12	240550	241447	228334	-5.4%	-5.1%
12-18	111836	116166	110040	-5.3%	-1.6%
18-24	187130	196547	196869	0.2%	5.2%
24-30	58074	64578	67985	5.3%	17.1%

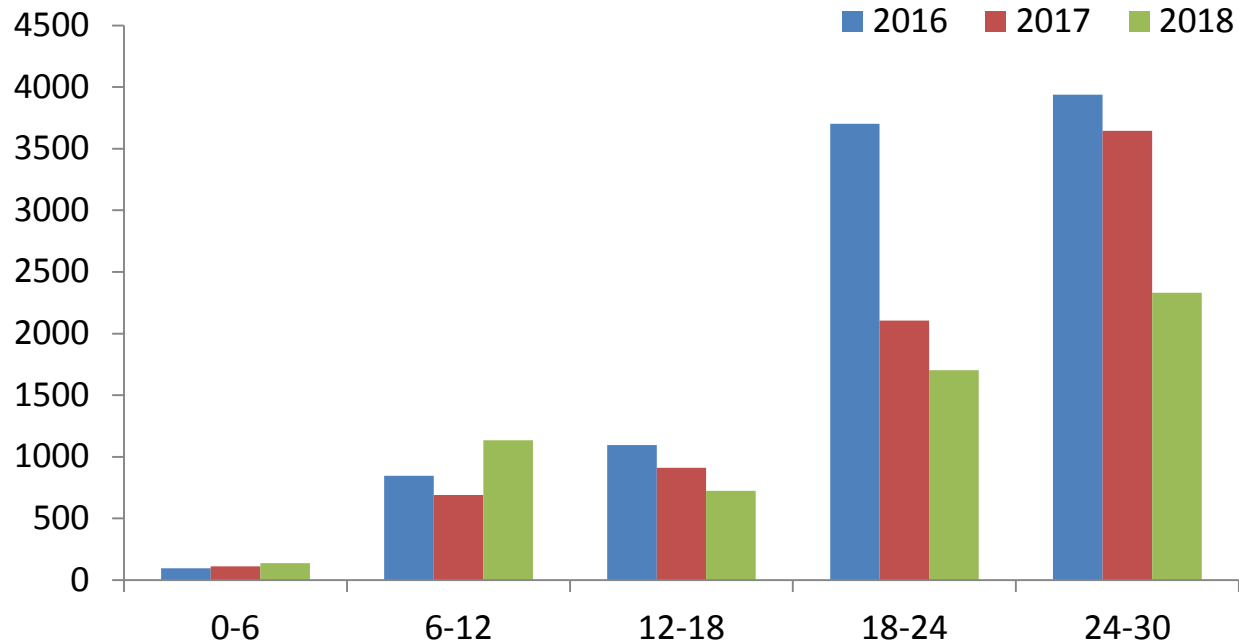
Dairy sired male cattle on NI farms

December 2018



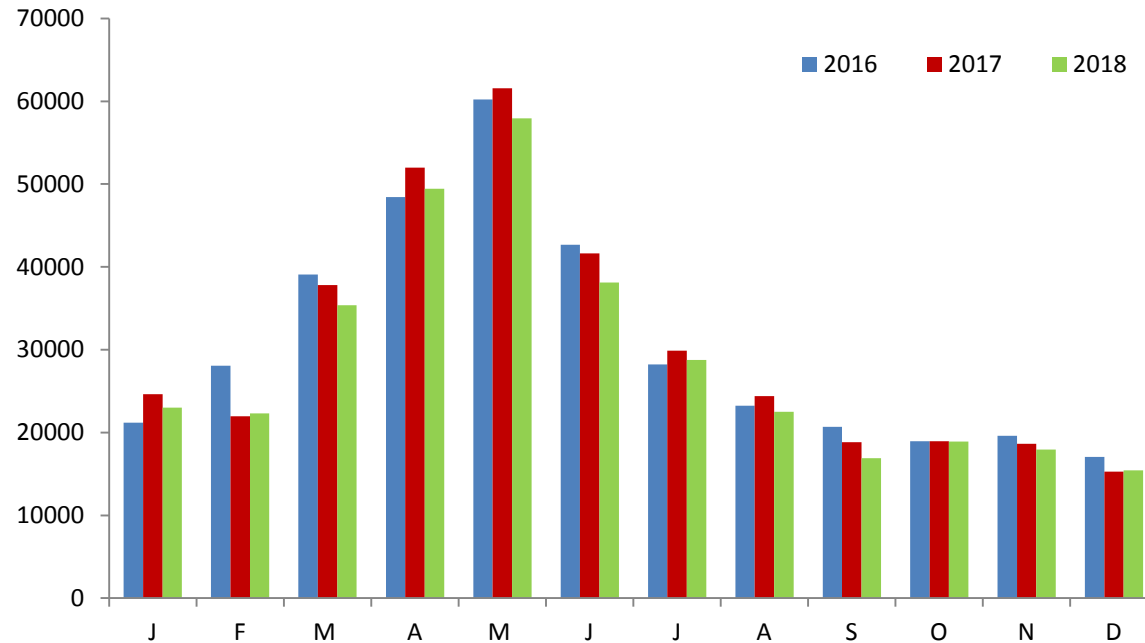
Dairy sired males	2016	2017	2018	2017/2018	2016/2018
0-6	22774	21532	19915	-7.5%	-12.6%
6-12	18553	16462	15528	-5.7%	-16.3%
12-18	22528	19380	17903	-7.6%	-20.5%
18-24	12703	10373	8664	-16.5%	-31.8%
24-30	9036	9238	7815	-15.4%	-13.5%

Nomad cattle on NI farms Dec 2018



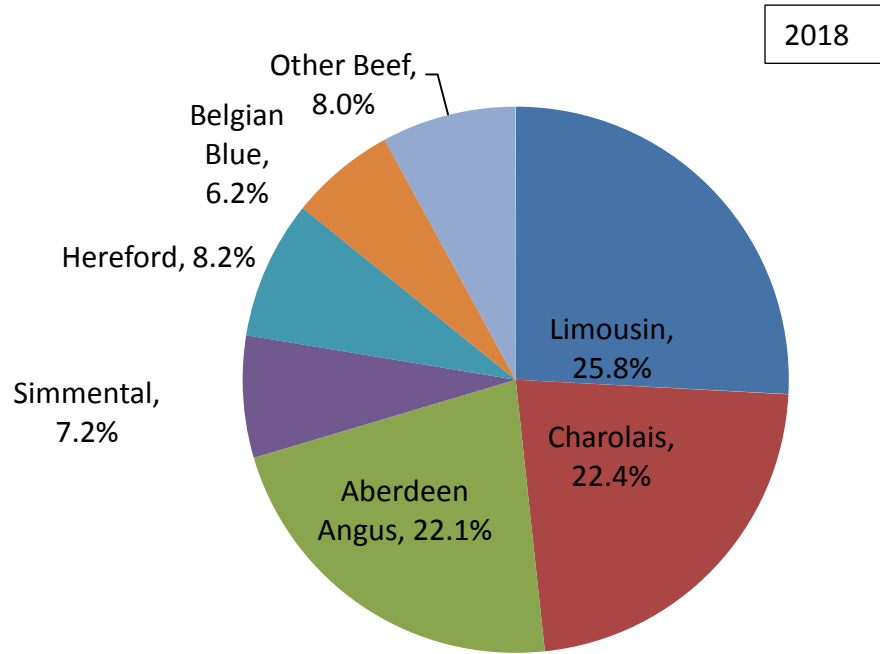
ROI Nomads (beef sired +dairy male)	2016	2017	2018	2017/2018	2016/2018
0-6	147	46	61	33%	-58.5%
6-12	1134	1182	1984	68%	75.0%
12-18	746	617	805	30%	7.9%
18-24	4701	2983	2881	-3%	-38.7%
24-30	2005	1829	1389	-24%	-30.7%

NI Beef Sired Calf Registrations 2018



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	24641	21956	37825	51997	61589	41625	29881	24390	18838	18961	18621	15273
2018	23001	22323	35389	49451	57945	38126	28748	22507	16917	18912	17928	15428
% Change	-6.7%	1.7%	-6.4%	-4.9%	-5.9%	-8.4%	-3.8%	-7.7%	-10.2%	-0.3%	-3.7%	1.0%

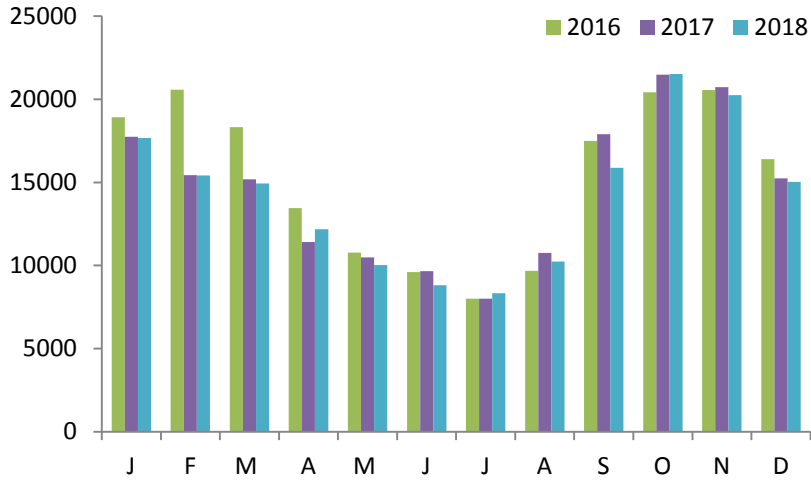
Beef Calf Registrations by Breed



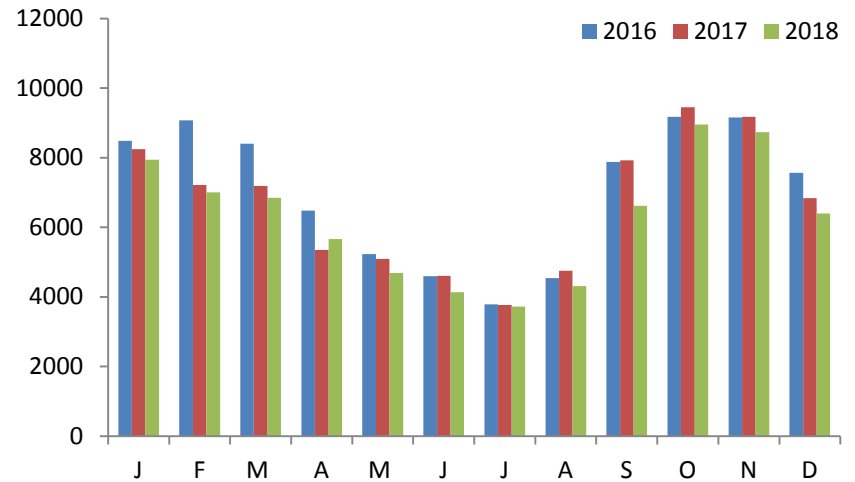
Proportion Dairy Dam	2016	2017	2018
Jan	46%	49%	51%
Feb	43%	51%	51%
Mar	34%	39%	40%
Apr	24%	26%	26%
May	18%	20%	19%
Jun	23%	24%	24%
Jul	26%	27%	28%
Aug	29%	30%	31%
Sep	39%	40%	40%
Oct	47%	47%	49%
Nov	52%	51%	54%
Dec	55%	56%	60%
Grand Total	32%	34%	31%

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2017	27.3%	23.0%	20.3%	7.3%	8.0%	6.1%	8.0%
2018	25.8%	22.4%	22.1%	7.2%	8.2%	6.2%	8.0%

NI Dairy Sired Calf Registrations 2018



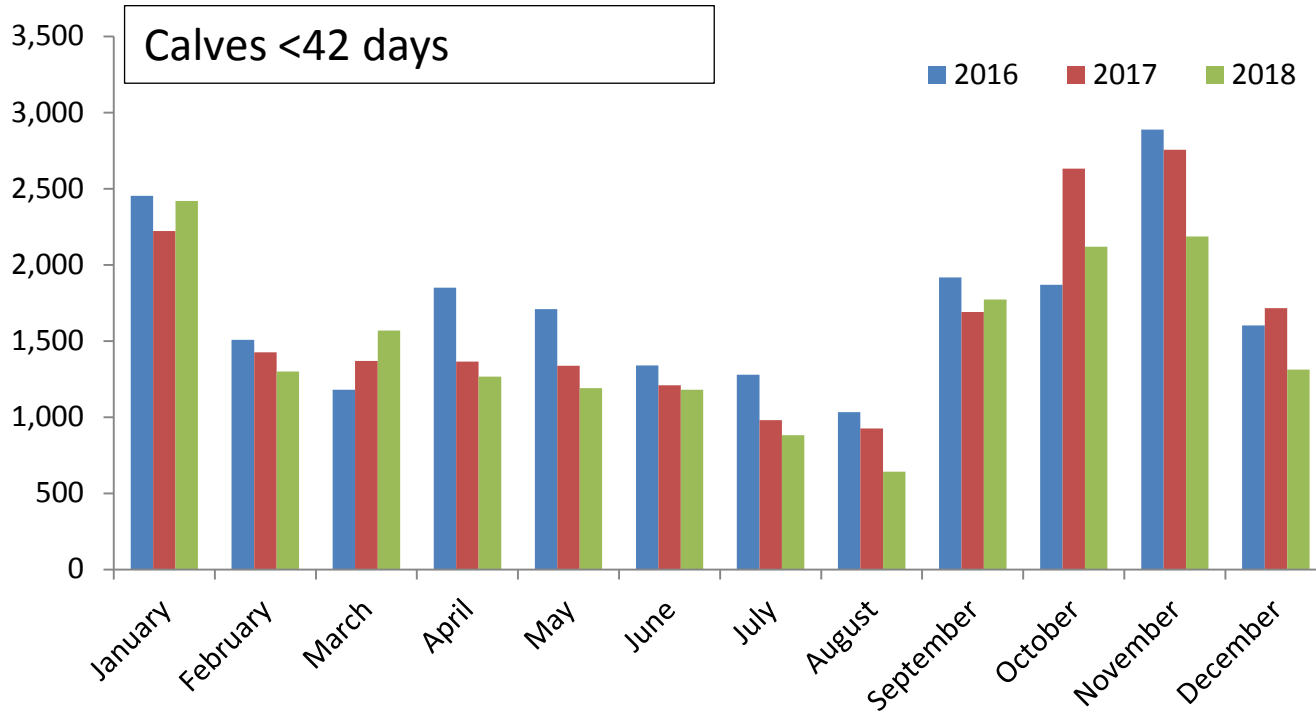
Total dairy calf registrations



Male dairy calf registrations

Males	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	8242	7216	7186	5349	5089	4604	3768	4754	7925	9445	9174	6834
2018	7942	7007	6845	5663	4682	4133	3721	4312	6619	8953	8729	6395
% Change	-3.6%	-2.9%	-4.7%	5.9%	-8.0%	-10.2%	-1.2%	-9.3%	-16.5%	-5.2%	-4.9%	-6.4%

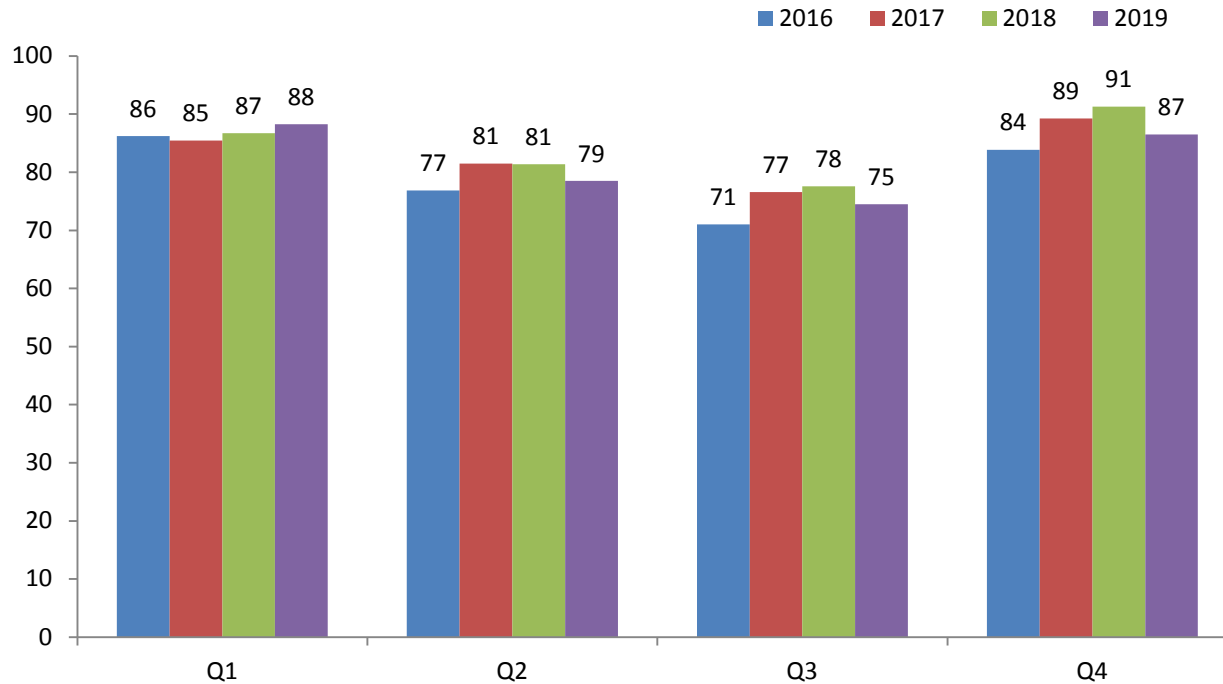
Dairy Bull Calf Exports



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	2453	1508	1179	1849	1709	1339	1279	1032	1918	1868	2888	1602
2017	2222	1426	1369	1365	1338	1210	981	926	1690	2632	2756	1716
2018	2419	1300	1568	1265	1191	1180	881	642	1772	2119	2186	1313

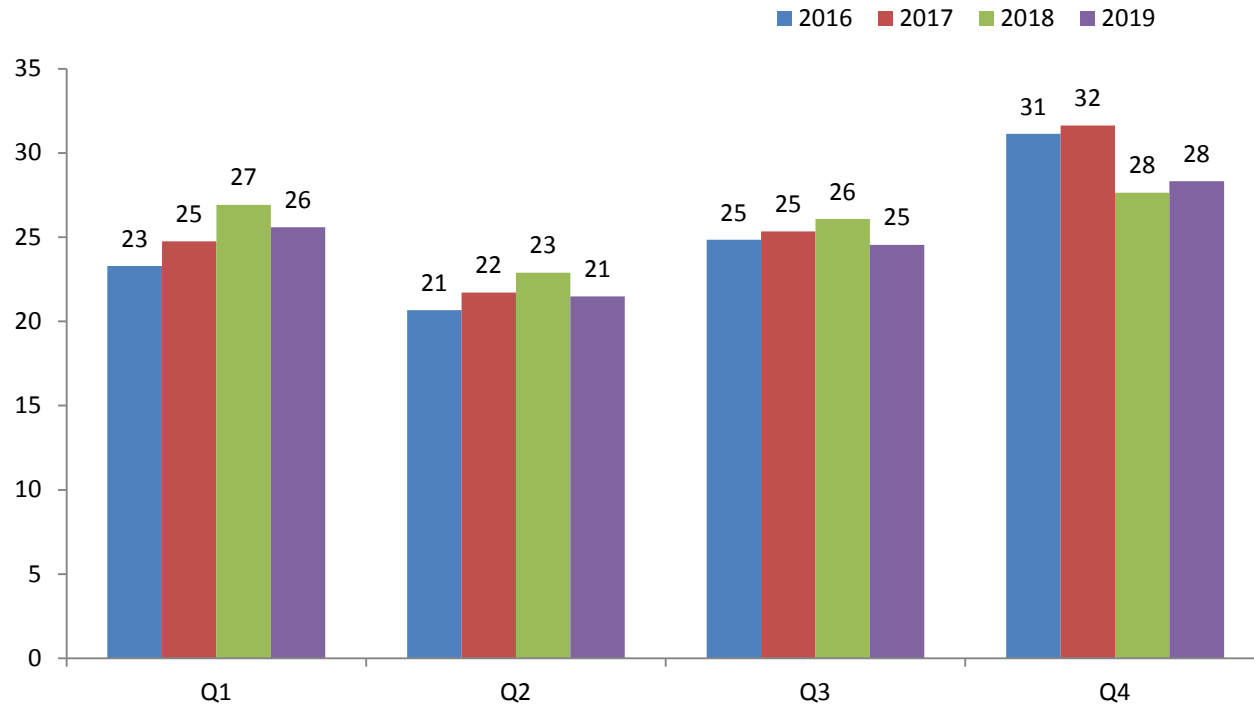
Forecast

Forecast NI Prime Cattle Kill 2019



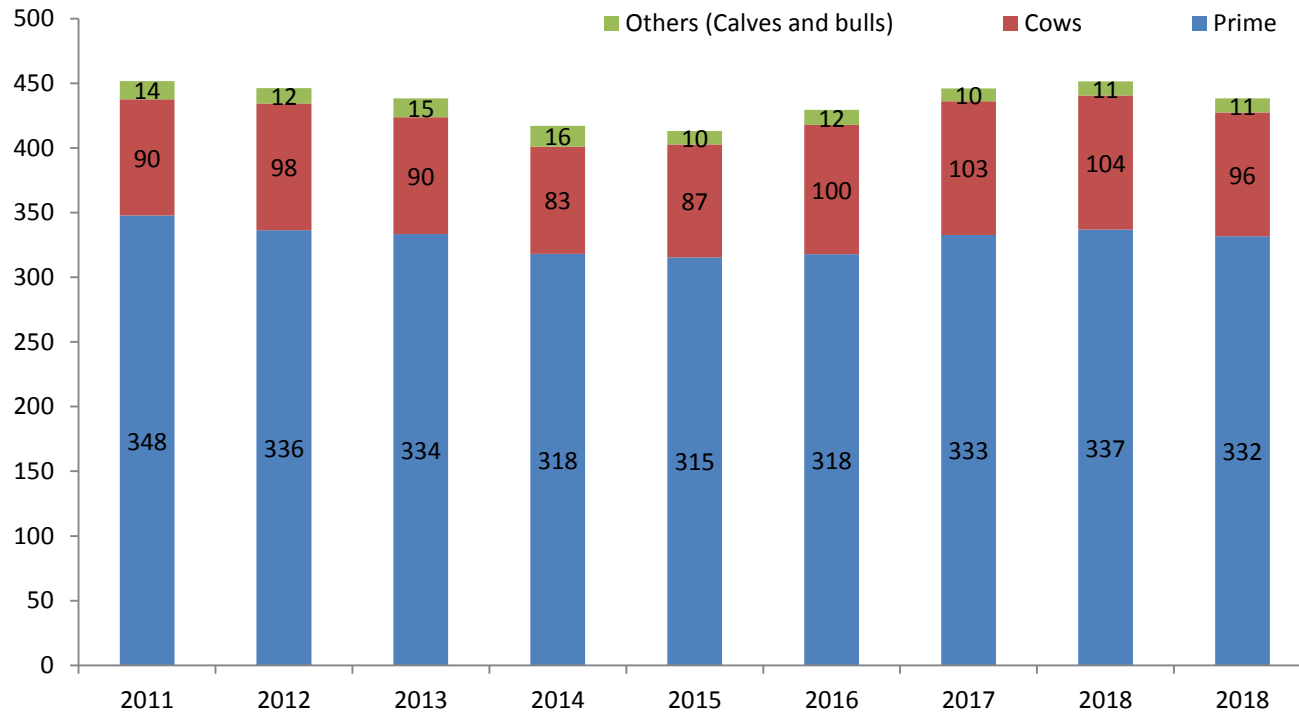
	2016	2017	2018	2019(e)
Q1	86,202	85,430	86,738	89554
Q2	76,882	81,474	81,359	78502
Q3	71,014	76,560	77,583	72634
Q4	83,861	89,251	91,311	91007
Total	317959	332715	336991	331697

Forecast NI Cow Kill 2019



	2016	2017	2018	2019 (e)
Q1	21968	24760	26924	22859
Q2	20110	21706	22890	19759
Q3	24521	25339	26079	24361
Q4	33344	31635	27640	28712
Total	99943	103440	103533	95690

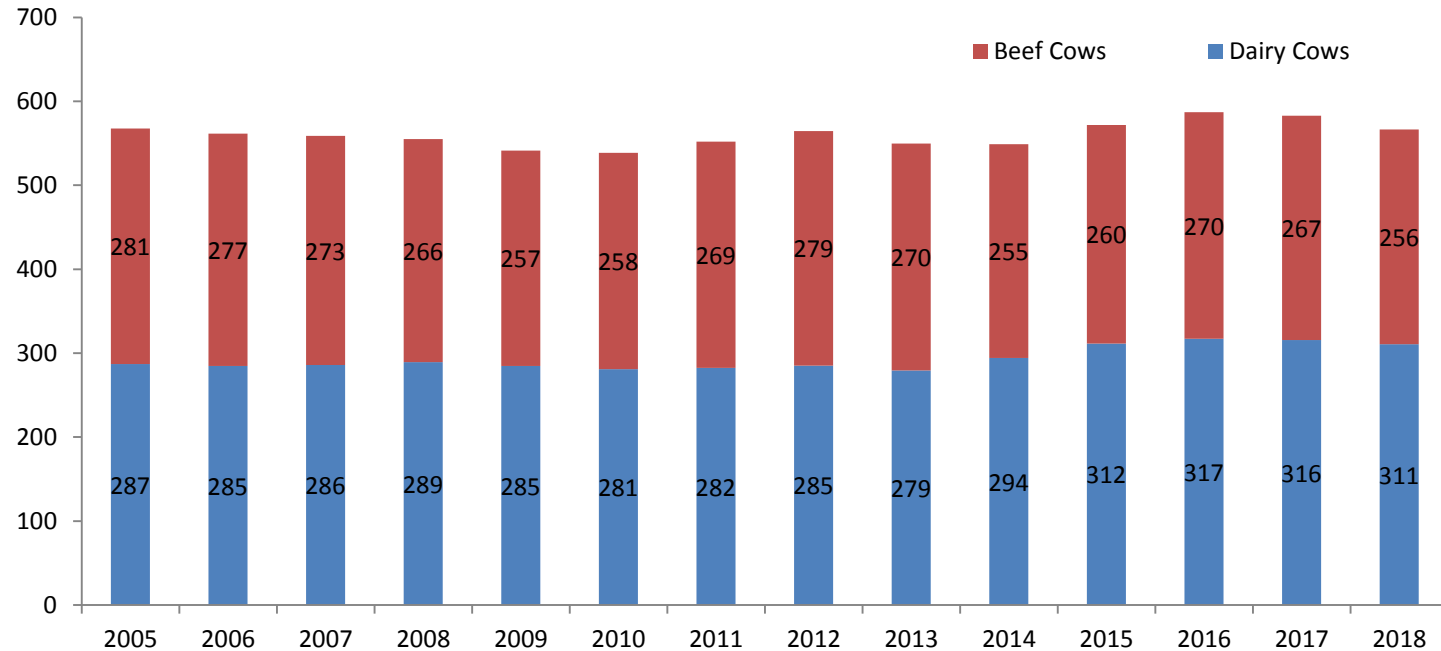
Forecast Total Cattle Kill 2019 (Inc bulls and calves)



Year	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total cattle throughput	451,716	446,356	438,335	416,989	413,062	429,418	446,112	451,357	438,216

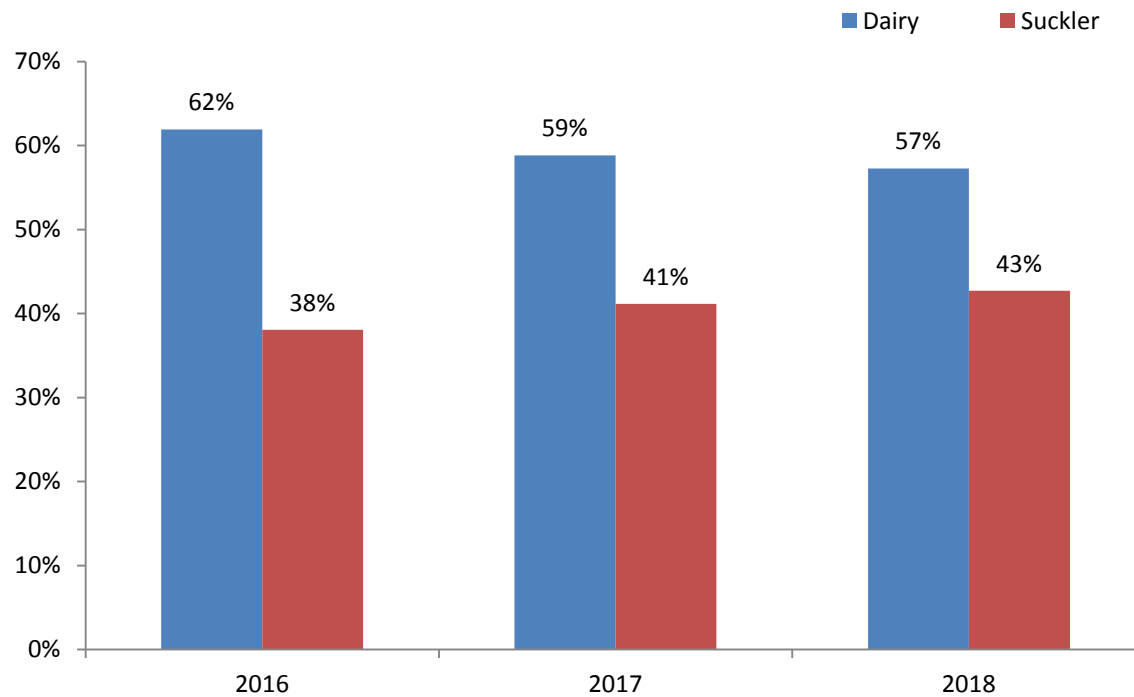
Longer term outlook

Breeding females December Survey



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Dairy Cows	287,094	284,718	286,073	289,247	284,698	281,043	282,487	285,369	279,481	294,192	311,520	317,146	315,800	310,700
Beef Cows	280,582	276,734	272,616	265,663	256,776	257,648	269,488	279,195	270,105	254,870	260,325	269,746	267,100	255,900

Origin cows in NI slaughter mix



Key Assumptions for Forecast

- Live imports for DS from ROI remain depressed
- Exports to ROI and GB combined unchanged
- Unchanged calf exports to continent
- Current level of beef sires used on dairy herd continues
- No change in relative price trends across British Isles
- No substantial movement in exchange rates
- No substantial disease outbreak
- No substantial changes in disease controls
- Breeding herd to remain steady
- No change in age at slaughter
- Stability in dairy market
- Brexit?????