

Seamus Mc Menamin



Slaughter Trends 2019

NI Slaughterings March 2019

NI CATTLE AND SHEEP SLAUGHTERINGS						
	March			Year to Date		
	(4 weeks ended 30/03/19)			(13 weeks ended 30/03/19)		
	Mar-18	Mar-19	% Change	2018	2019	Change
CATTLE - FOODCHAIN						
Steers	12,033	12,956	8%	42,350	41,763	-1%
Heifers	10,196	11,144	9%	35,609	37,374	5%
Young Bulls	2,857	2,910	2%	8,779	9,829	12%
Total Prime Cattle	25,086	27,010	8%	86,738	88,966	3%
Calves	449	497	11%	1,570	1,571	0%
Cows	7,943	6,984	-12%	26,924	22,920	-15%
Mature Bulls	259	289	12%	875	979	12%
Total Cattle	33,737	34,780	3%	116,107	114,436	-1%
SHEEP						
Lambs & Hoggets	24,424	18,924	-23%	83,402	66,040	-21%
Ewes & Rams	1,436	2,096	46%	6,176	7,290	18%
Total Sheep	25,860	21,020	-19%	89,578	73,330	-18%

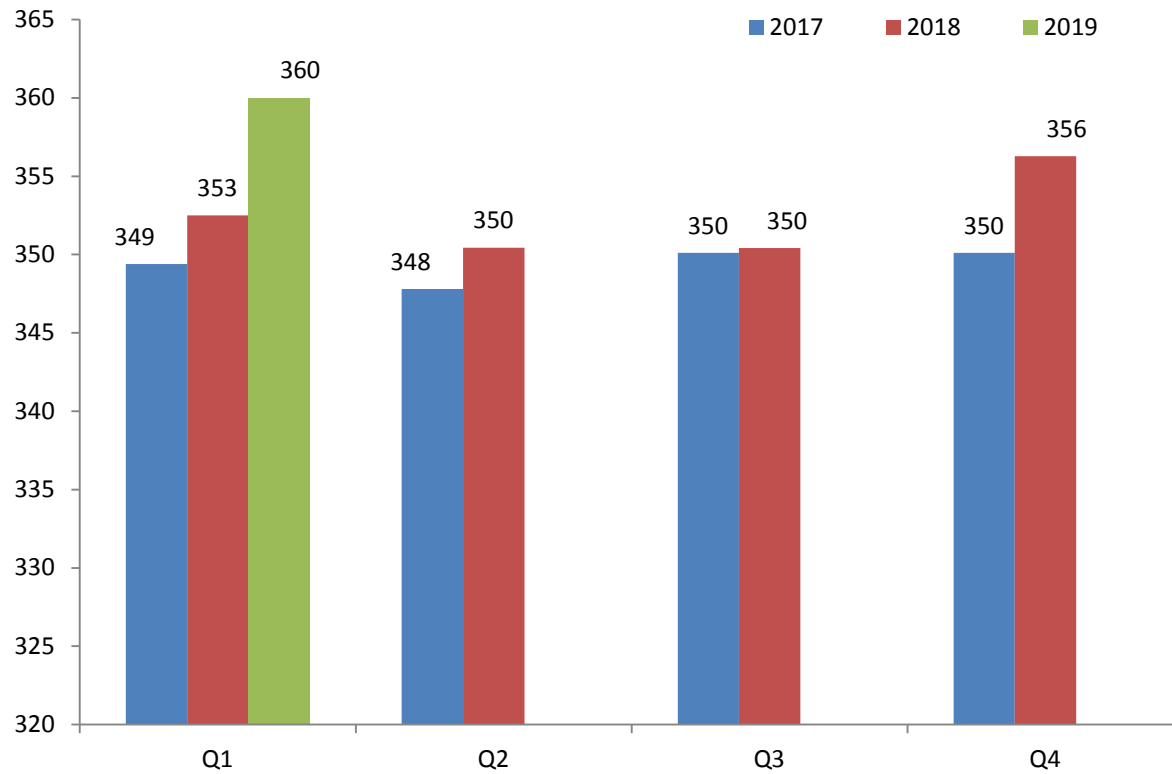
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

NI Beef+ Lamb Production March 2019

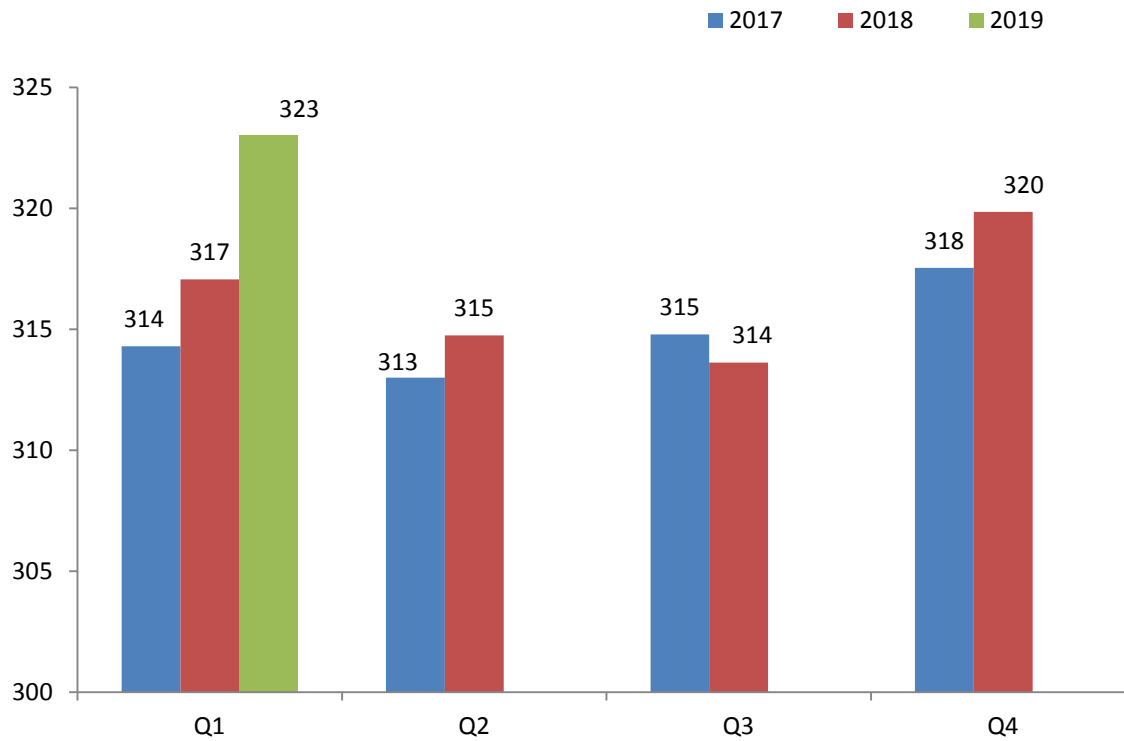
NI BEEF AND SHEEPMEAT PRODUCTION						
	March			Year to Date		
	(4 weeks ended 30/03/19)			(13 weeks ended 30/03/19)		
	Mar-18	Mar-19	% Change	2018	2019	Change
BEEF						
Steers	4,212	4,668	11%	14,929	15,035	1%
Heifers	3,205	3,597	12%	11,290	12,082	7%
Young Bulls	934	978	5%	2,869	3,314	15%
Total Prime Cattle	8,351	9,243	11%	29,088	30,430	5%
Calves	90	100	12%	301	316	5%
Cows	2,374	2,134	-10%	8,072	7,056	-13%
Mature Bulls	109	123	12%	378	416	10%
Total Beef	10,924	11,600	6%	37,839	38,219	1%
SHEEP						
Lambs & Hoggets	534	440	-18%	1,813	1,520	-16%
Ewes & Rams	40	61	51%	165	213	29%
Total Sheepmeat	574	501	-13%	1,978	1,733	-12%

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

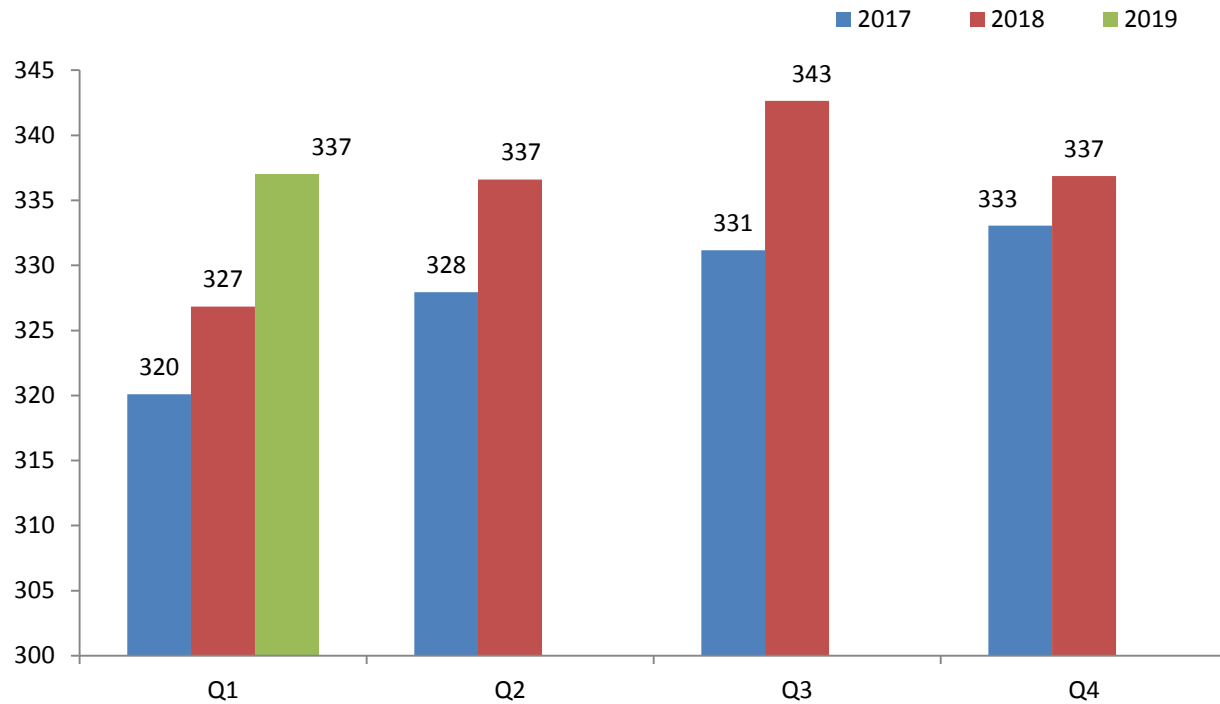
Carcase weights (Steers)



Carcase weights (Heifers)



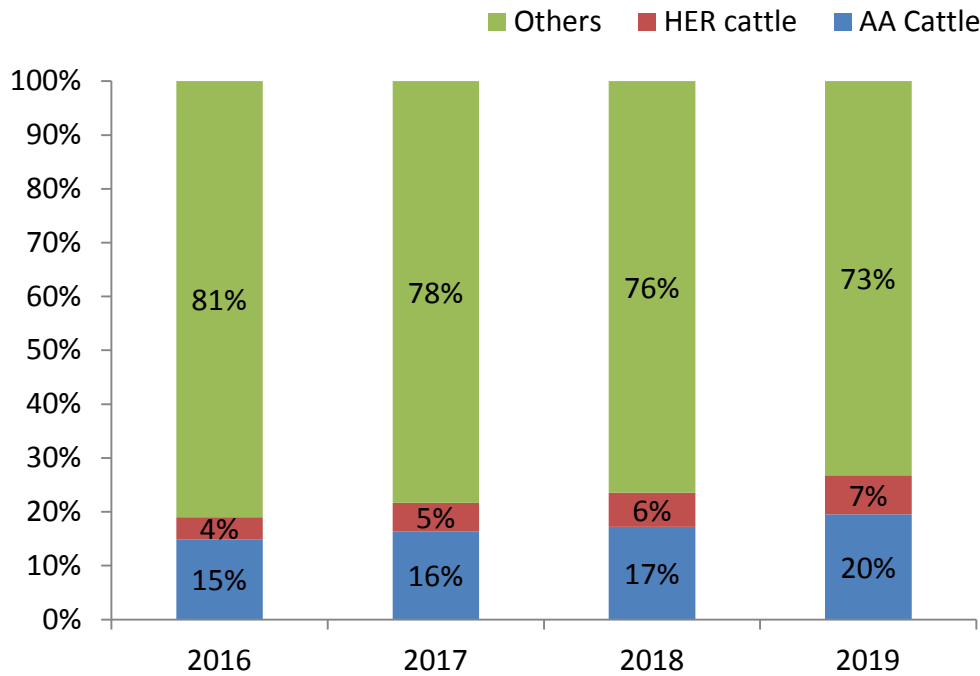
Carcase weights (Young Bulls)



Overview of prime kill

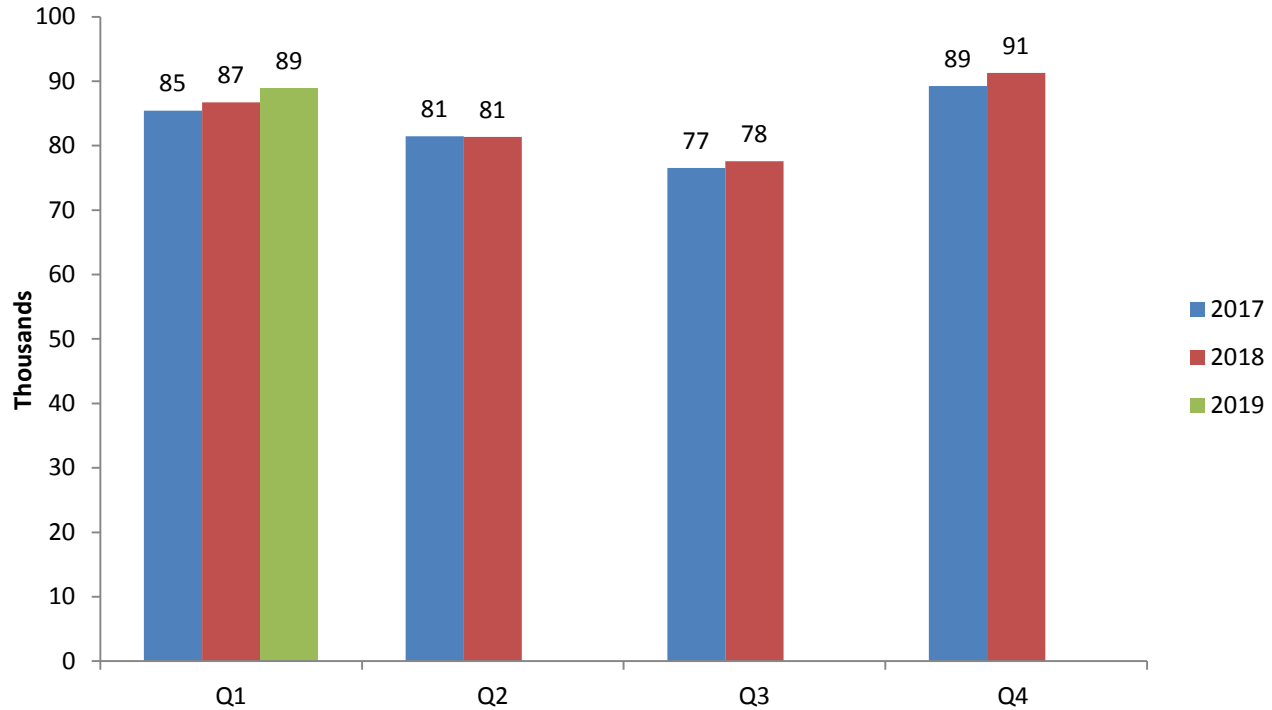
	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
2017	316.5	24.7	350.5	24.5	316.6	15.7
2018	317.8	25.1	353.9	24.9	322.3	16.2
2019	322.8	25.5	359.8	25.6	332.9	16.6

Premium cattle



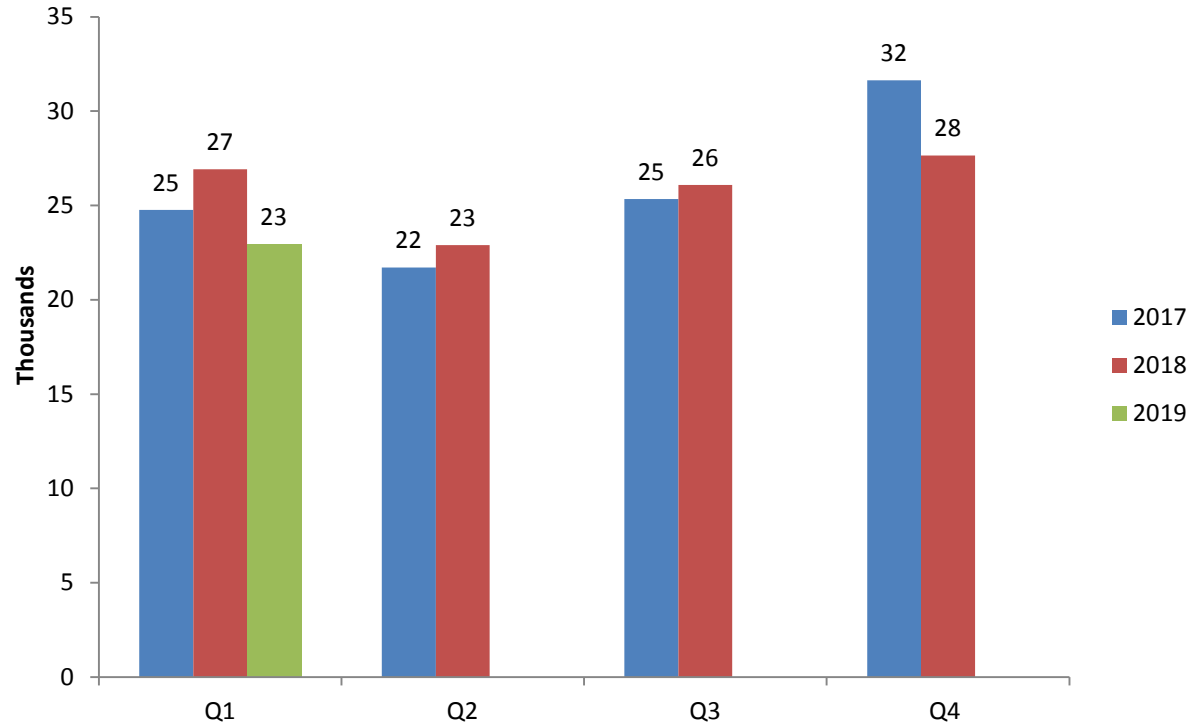
	AA Cattle	HER cattle	Others
2016	15%	4%	81%
2017	16%	5%	78%
2018	17%	6%	76%
2019	20%	7%	73%

Quarterly Prime Cattle Kill



Prime Cattle kill	2017	2018	2019
Q1	85,430	86,738	88,966
Q2	81,474	81,359	
Q3	76,560	77,583	
Q4	89,251	91,311	

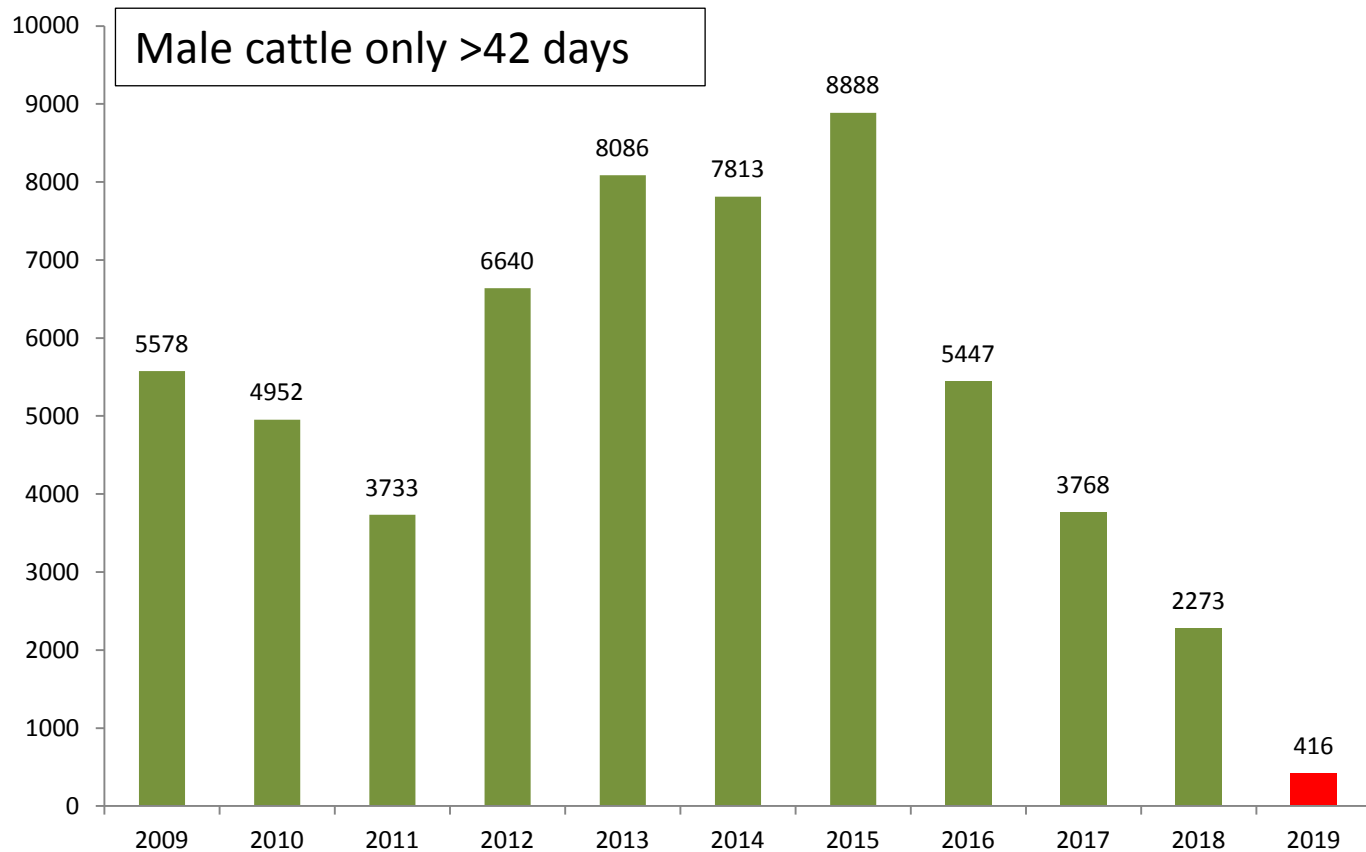
Quarterly Cow Kill



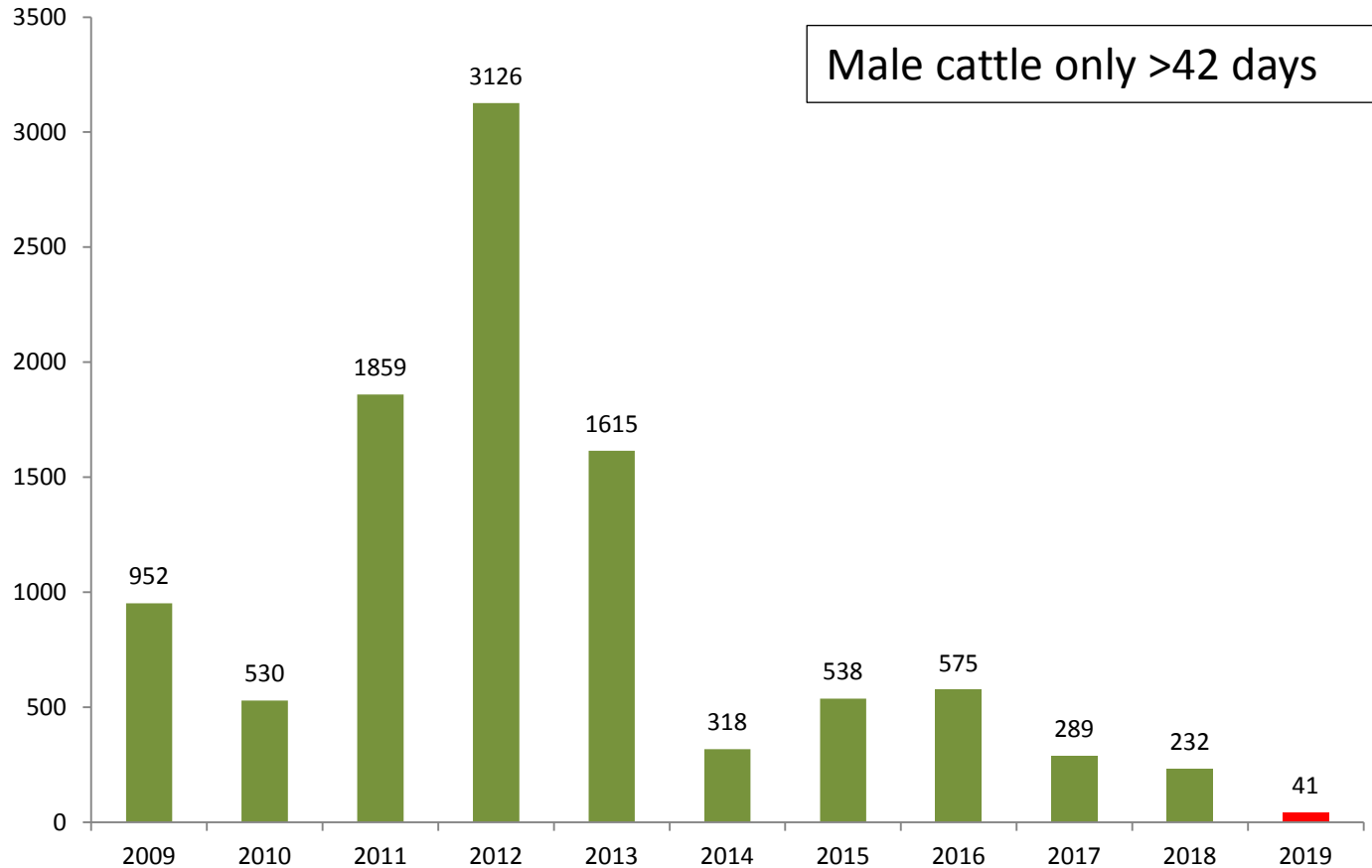
Cow Slaughtering	2017	2018	2019
Q1	24,760	26,924	22,920
Q2	21,706	22,890	
Q3	25,339	26,079	
Q4	31,635	27,640	

Live Exports

Exports to GB for further production

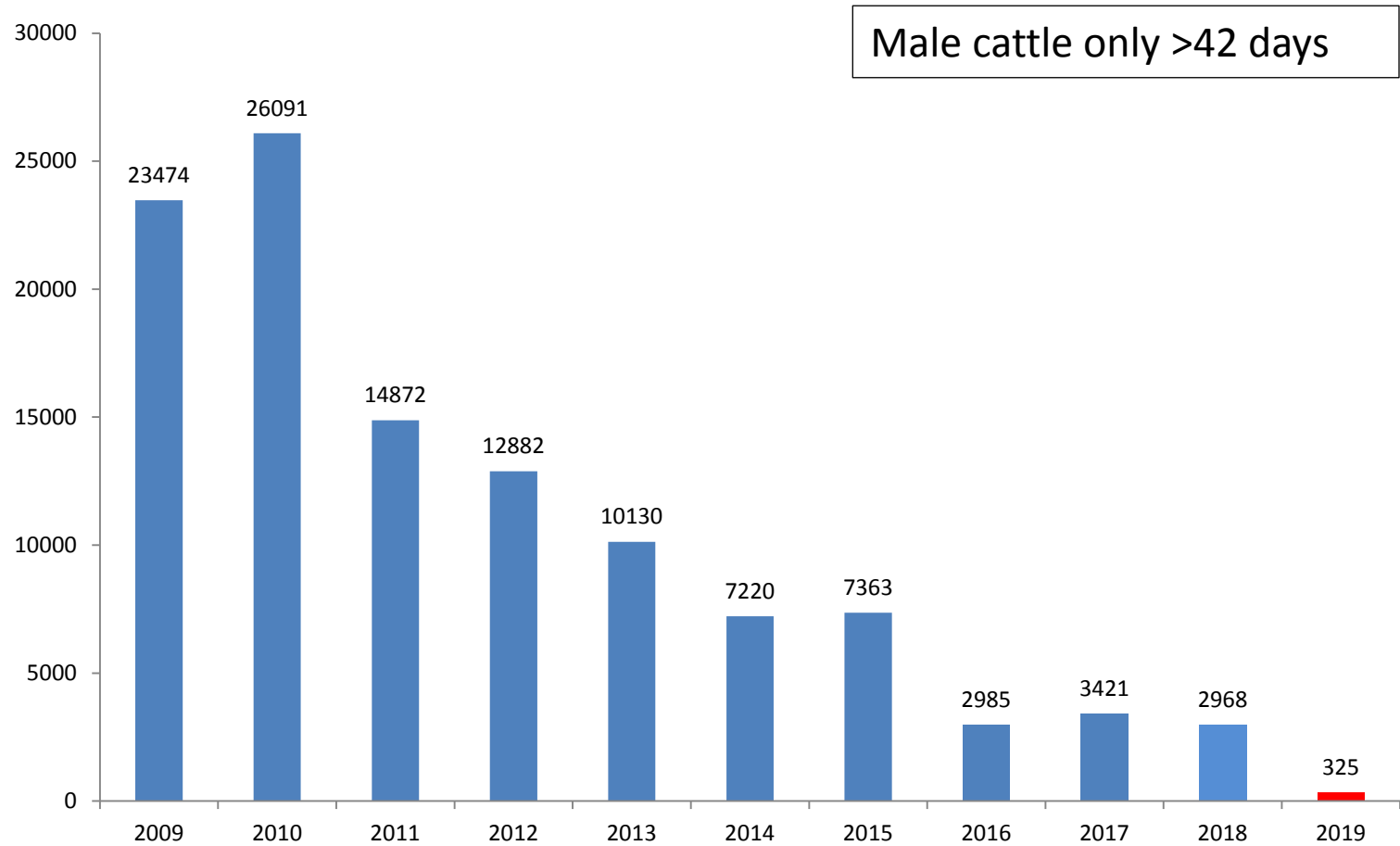


Exports to ROI for Further Production



Live Imports

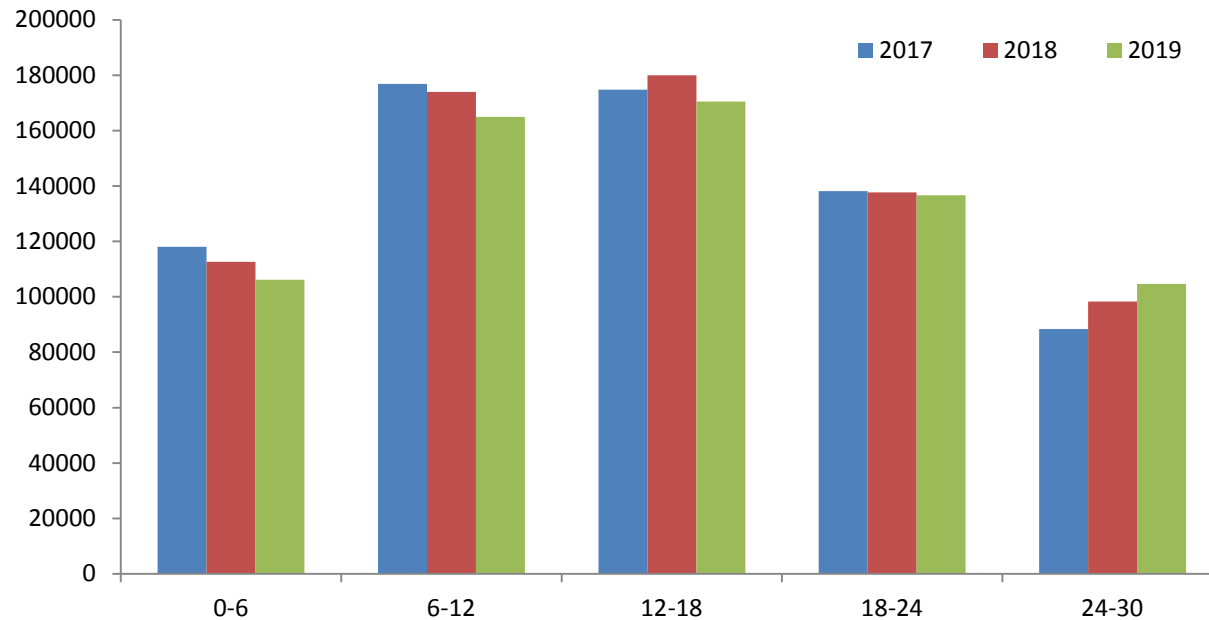
Imports from ROI for Further Production



Cattle Supplies

Beef sired cattle on NI farms

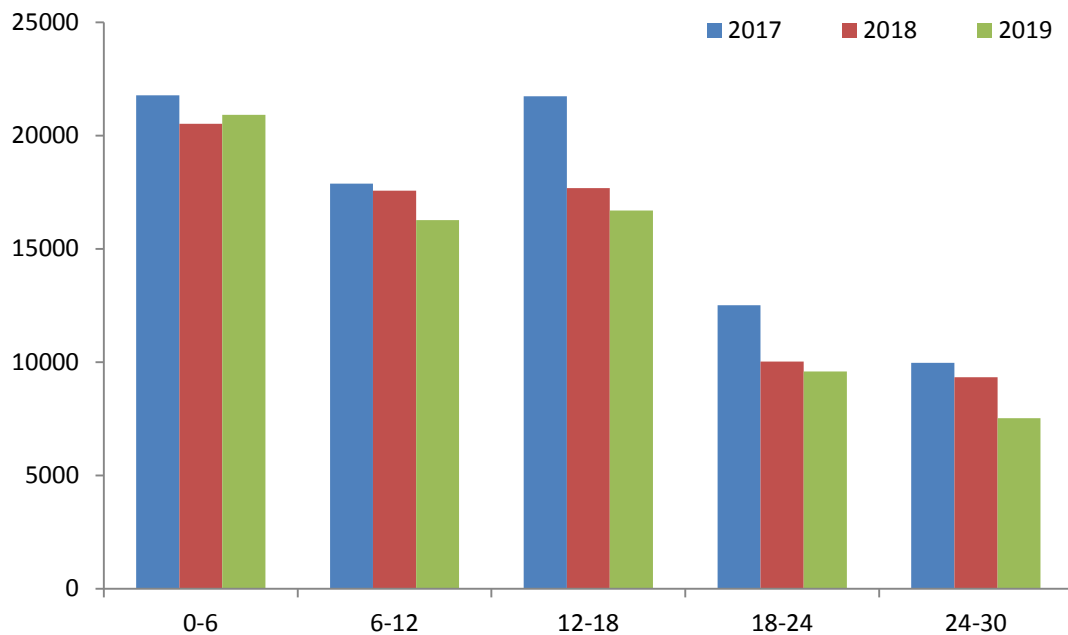
March 2019



Age (Months)	2017	2018	2019	2018/2019	2017/2019
0-6	118013	112638	106212	-5.7%	-10.0%
6-12	176838	173983	165012	-5.2%	-6.7%
12-18	174825	179989	170563	-5.2%	-2.4%
18-24	138210	137700	136724	-0.7%	-1.1%
24-30	88378	98266	104610	6.5%	+18.4%

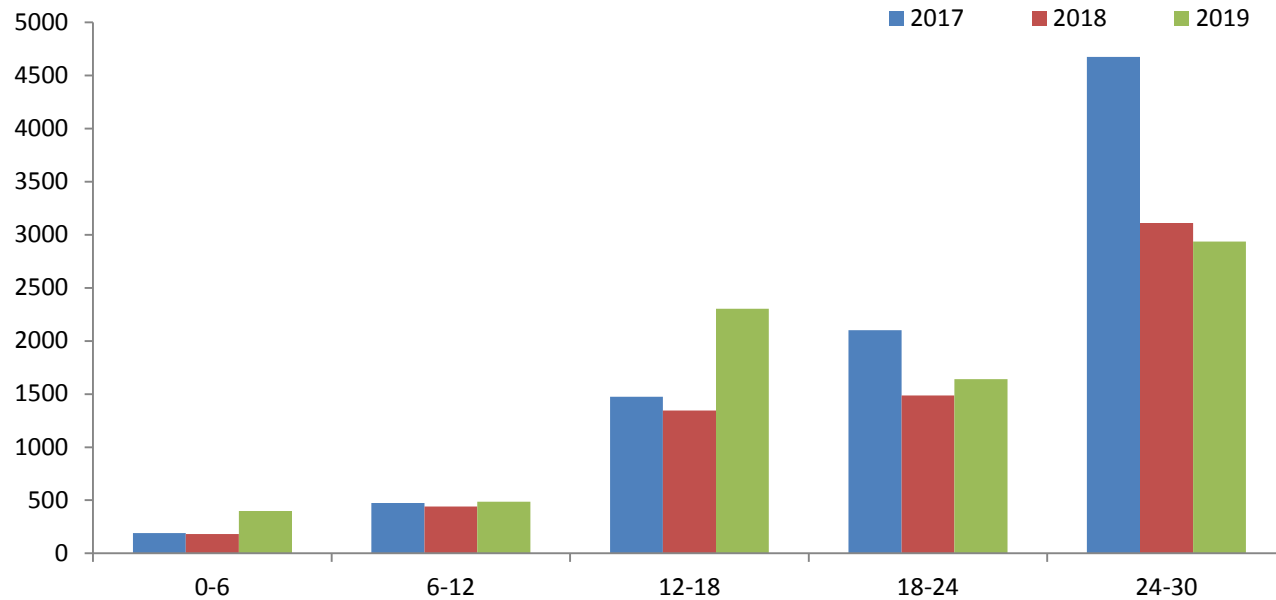
Dairy sired male cattle on NI farms

March 2019



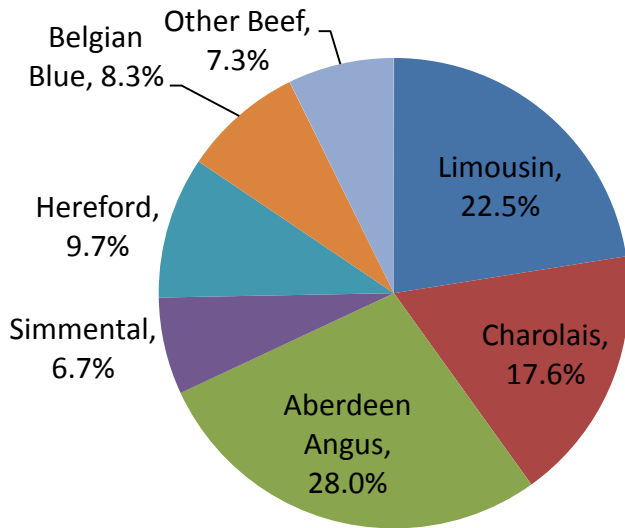
Dairy sired males	2017	2018	2019	2018/2019	2017/2019
0-6	21781	20516	20912	1.9%	-4.0%
6-12	17888	17566	16272	-7.4%	-9.0%
12-18	21737	17681	16692	-5.6%	-23.2%
18-24	12522	10024	9586	-4.4%	-23.4%
24-30	9967	9339	7534	-19.3%	-24.4%

Nomad cattle on NI farms March 2019



ROI Nomads (beef sired +dairy male)	2017	2018	2019	2018/2019	2017/2019
0-6	192	183	399	118.0%	107.8%
6-12	473	440	486	10.5%	2.7%
12-18	1474	1345	2304	71.3%	56.3%
18-24	2102	1486	1640	10.4%	-22.0%
24-30	4675	3112	2938	-5.6%	-37.2%

Beef Calf Registrations by Breed



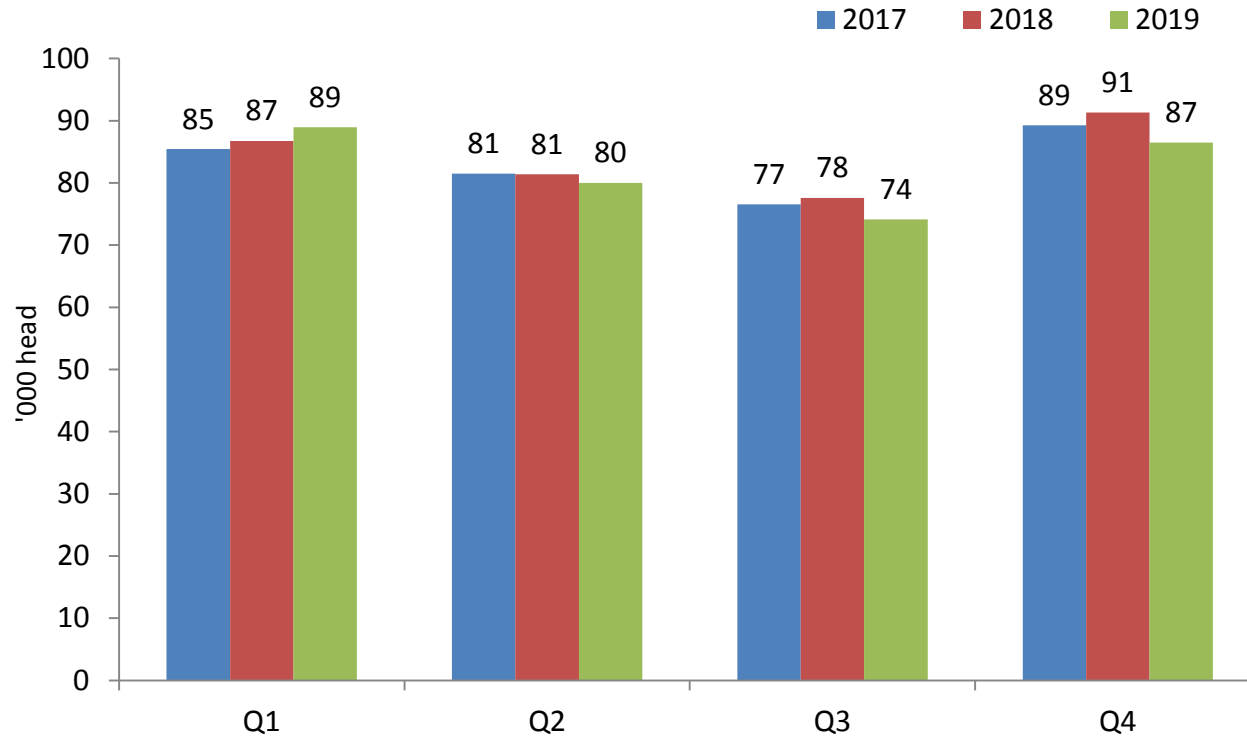
2019

Proportion Dairy Dam	2017	2018	2019
Jan	49%	51%	53%
Feb	51%	51%	51%
Mar	39%	40%	43%
Apr	26%	26%	
May	20%	19%	
Jun	24%	24%	
Jul	27%	28%	
Aug	30%	31%	
Sep	40%	40%	
Oct	47%	49%	
Nov	51%	54%	
Dec	56%	60%	
Grand Total	34%	31%	

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2018	22.9%	18.3%	26.1%	7.1%	9.8%	7.6%	8.2%
2019	22.5%	17.6%	28.0%	6.7%	9.7%	8.3%	7.3%

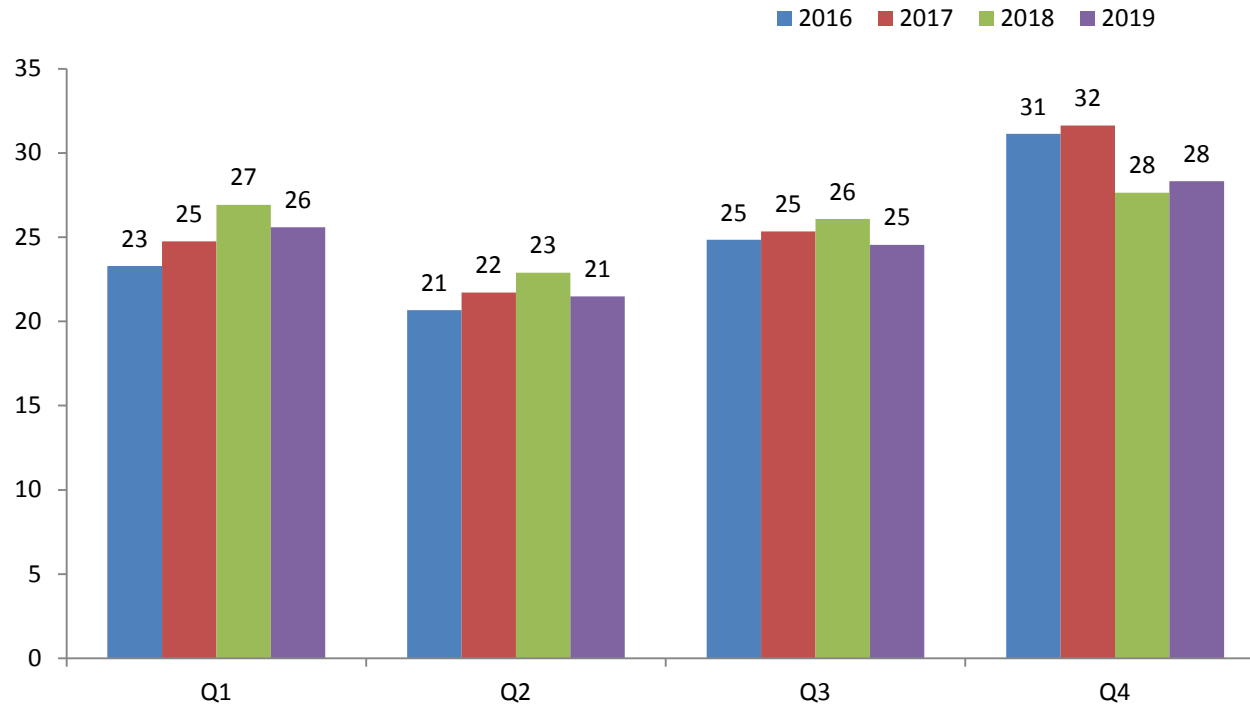
Forecast

Forecast NI Prime Cattle Kill 2019



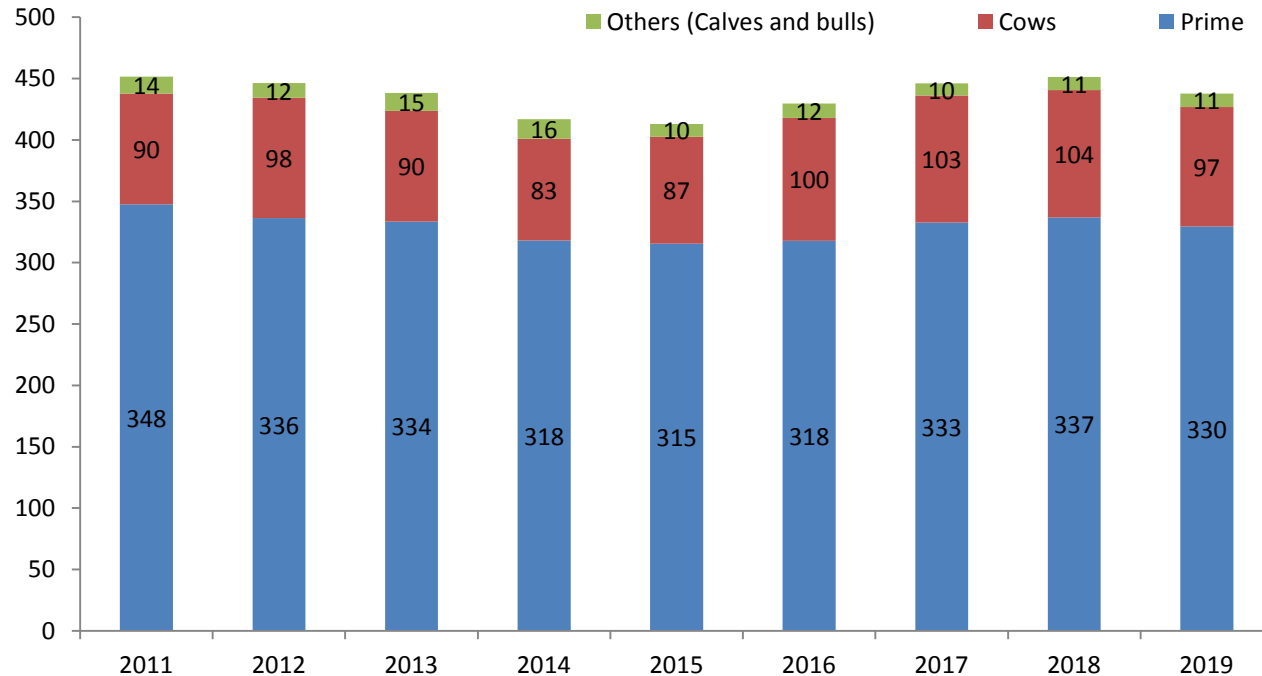
	2017	2018	2019(e)	2018/19 % Change
Q1	85430	86738	88966	2.6%
Q2	81474	81359	80000	-1.7%
Q3	76560	77583	74153	-4.4%
Q4	89251	91311	86500	-5.3%
Total	332715	336991	329619	-2.2%

Forecast NI Cow Kill 2019



	2017	2018	2019 (e)	2018/19 % Change
Q1	24760	26924	22920	-14.9%
Q2	21706	22890	21491	-6.1%
Q3	25339	26079	24551	-5.9%
Q4	31635	27640	28333	+2.5%
Total	103440	103533	97295	-6.0%

Forecast Total Cattle Kill 2019 (Inc bulls and calves)

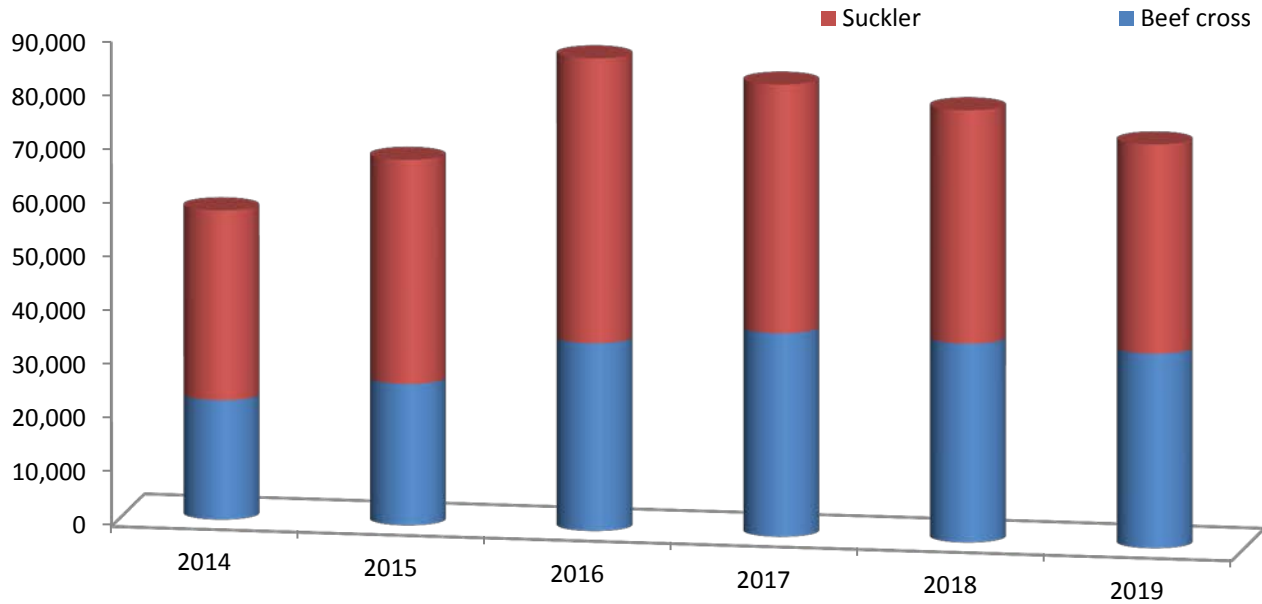


Year	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total cattle throughput	451,716	446,356	438,335	416,989	413,062	429,618	446,112	451,359	437,743

Longer term outlook

Growing Dairy Influence

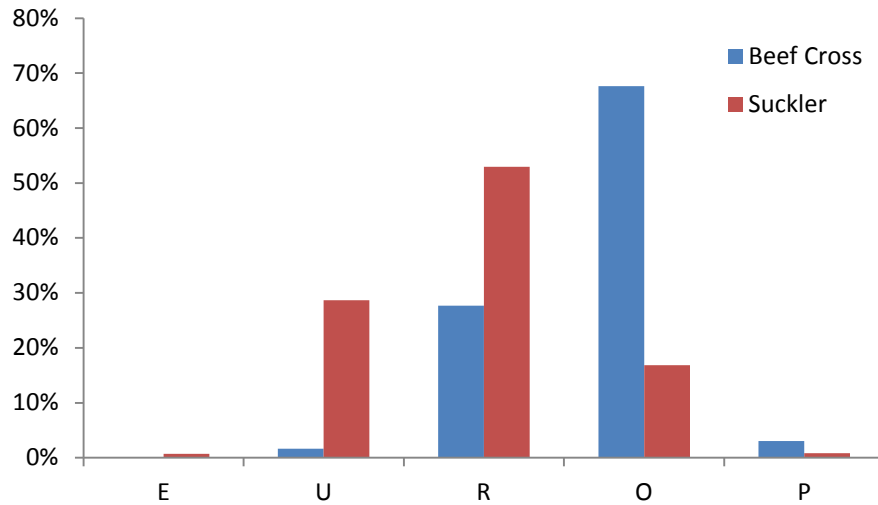
Calf Registrations Q1 2019



	2014	2015	2016	2017	2018	2019
Suckler	35,272	41,612	52,928	46,173	43,324	38,832
Beef cross	22,253	26,385	35,003	37,935	37,074	36,273

Growing Dairy influence cont'd

Grading- Quarter 1 2019



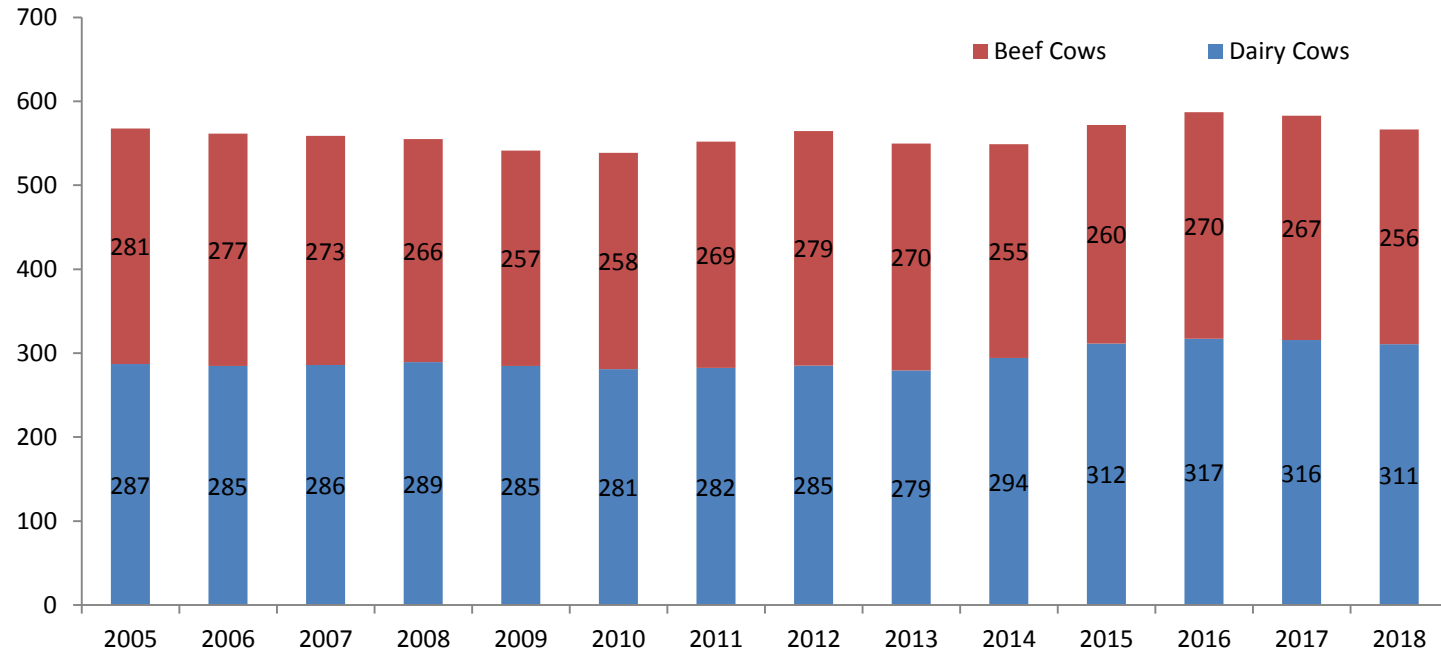
Carcase weight Quarter 1 2019

Q1 2019	Steer	Heifer
Suckler Origin	376	334
Beef Cross	347	308

Q1 2019	2018	2019
Suckler Origin	69%	66%
Beef Cross	31%	34%

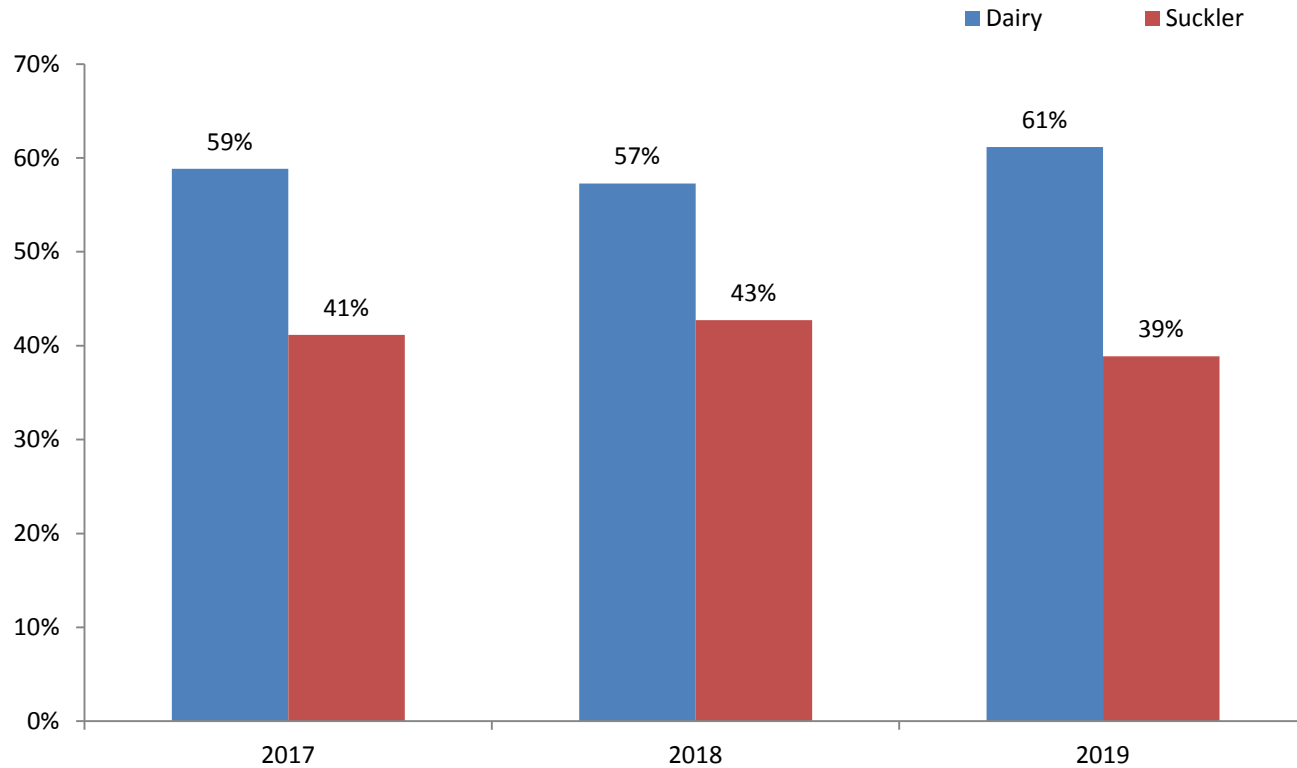
Source of steer kill Quarter 1 2018/2019

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?????