

Seamus Mc Menamin



Slaughter Trends 2019

NI Slaughterings June 2019

NI CATTLE AND SHEEP SLAUGHTERINGS						
	June			Year to Date		
	(4 weeks ended 30/06/19)			(26 weeks ended 30/06/19)		
CATTLE - FOODCHAIN	Jun-18	Jun-19	% Change	2018	2019	Change
Steers	9,857	11,030	12%	79,438	80,373	1%
Heifers	8,606	9,411	9%	67,698	71,328	5%
Young Bulls	4,459	4,901	10%	20,961	22,827	9%
Total Prime Cattle	31,616	33,994	8%	168,097	174,528	4%
Calves	441	429	-3%	3,022	2,858	-5%
Cows	6,560	7,088	8%	49,814	43,126	-13%
Mature Bulls	292	500	71%	1,828	2,567	40%
Total Cattle	38,909	42,011	8%	222,761	223,079	0%
SHEEP						
Lambs & Hoggets	28,492	35,963	26%	158,878	152,859	-4%
Ewes & Rams	1,521	1,912	26%	10,525	13,662	30%
Total Sheep	30,013	37,875	26%	169,403	166,521	-2%

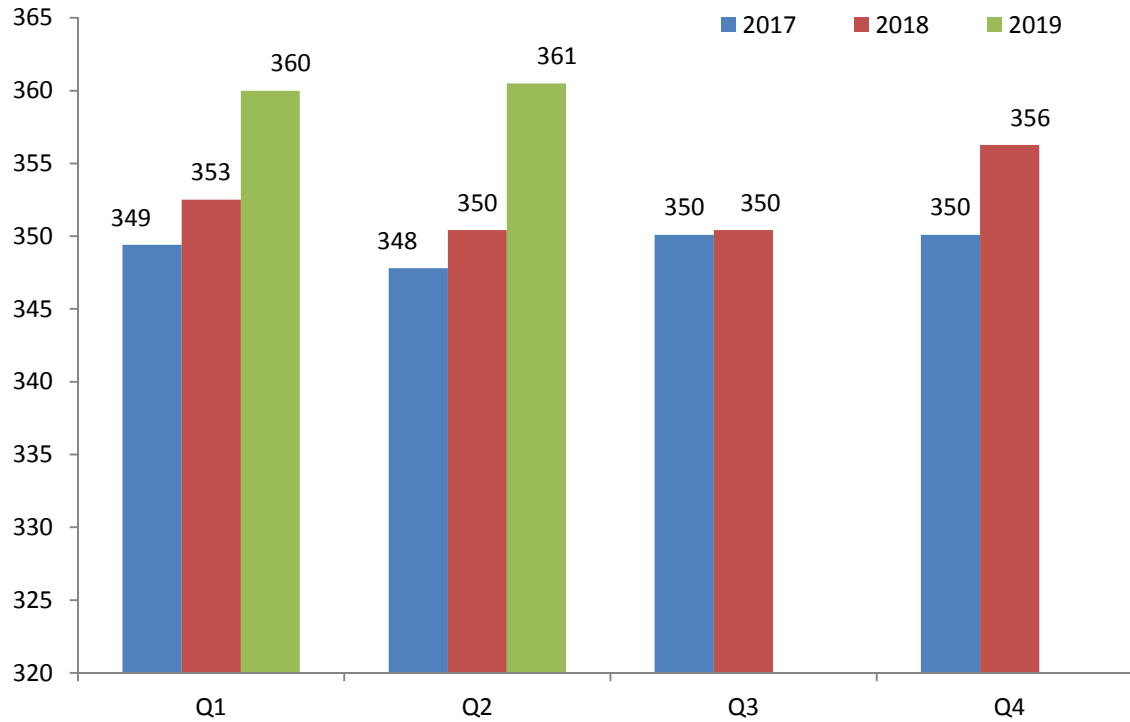
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

NI Beef+ Lamb Production June 2019

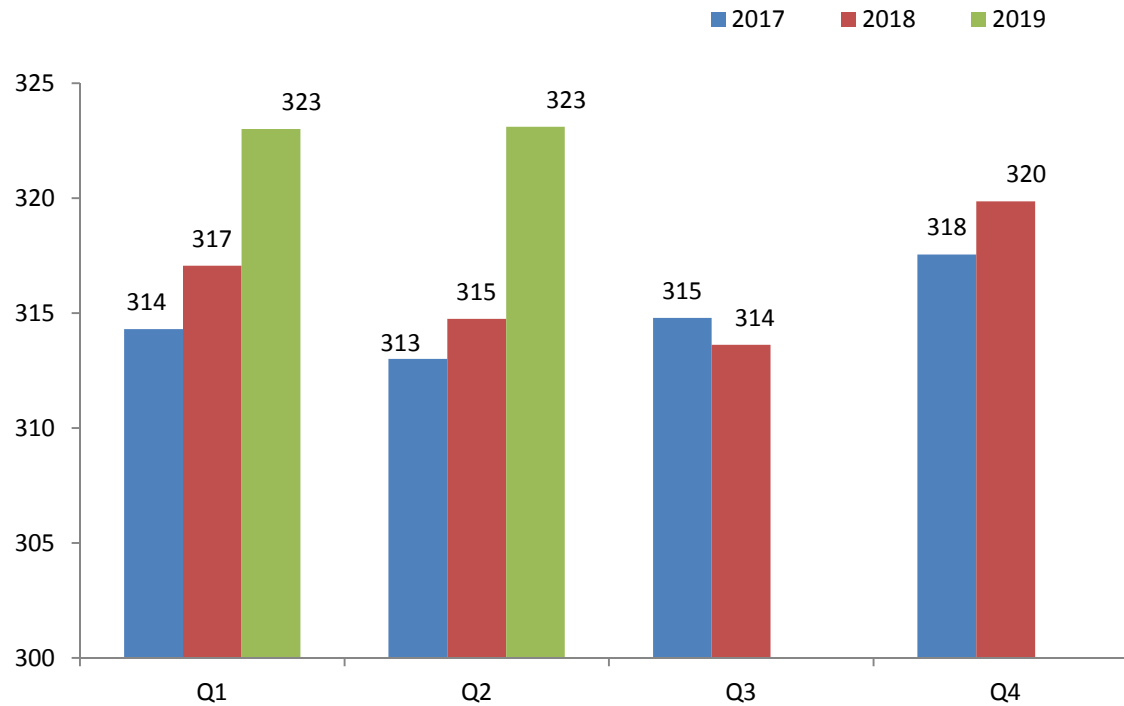
NI BEEF AND SHEEPMEAT PRODUCTION						
	June			Year to Date		
	(4 weeks ended 30/06/19)			(26 weeks ended 30/06/19)		
	Jun-18	Jun-19	% Change	2018	2019	Change
BEEF						
Steers	3,462	3,998	15%	27,925	28,952	4%
Heifers	2,715	3,043	12%	21,390	23,055	8%
Young Bulls	1,517	1,717	13%	6,970	7,806	12%
Total Prime Cattle	10,581	11,691	10%	56,285	59,813	6%
Calves	82	93	14%	575	600	4%
Cows	2,045	2,203	8%	15,003	13,292	-11%
Mature Bulls	129	220	70%	797	1,091	37%
Total Beef	13,351	14,454	8%	72,660	74,796	3%
SHEEP						
Lambs & Hoggets	595	759	28%	3,408	3,463	2%
Ewes & Rams	43	60	41%	290	412	42%
Total Sheepmeat	638	819	28%	3,697	3,876	5%

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

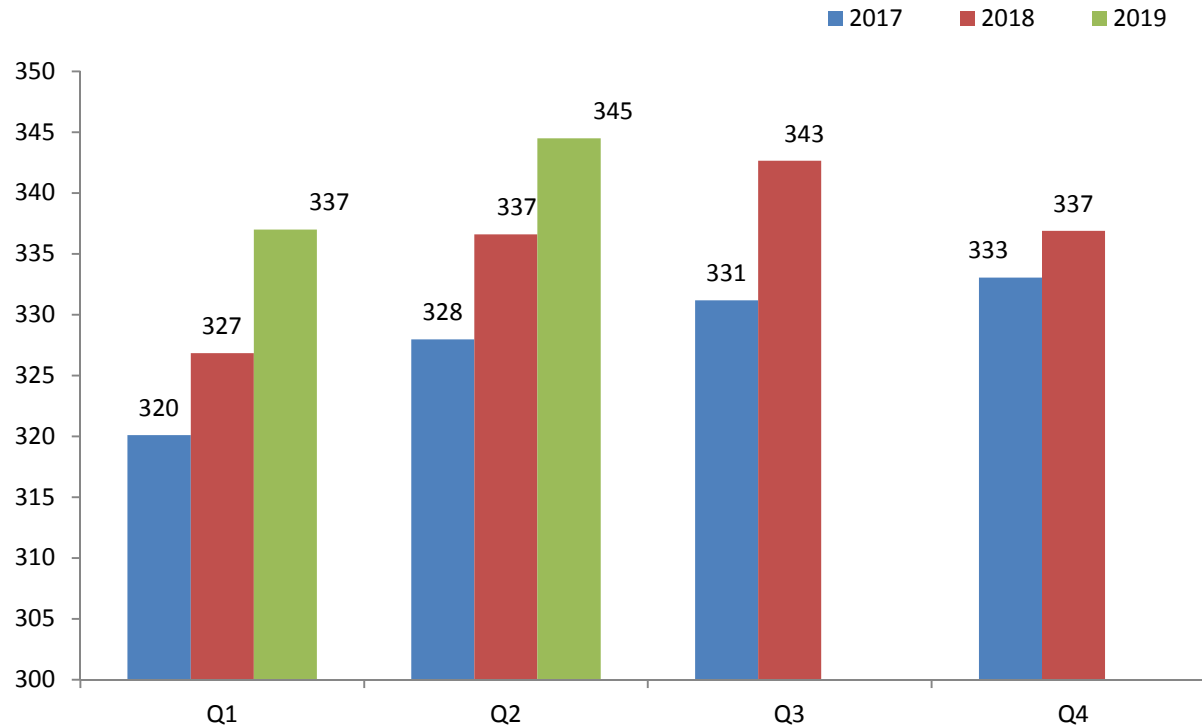
Carcase weights (Steers)



Carcase weights (Heifers)



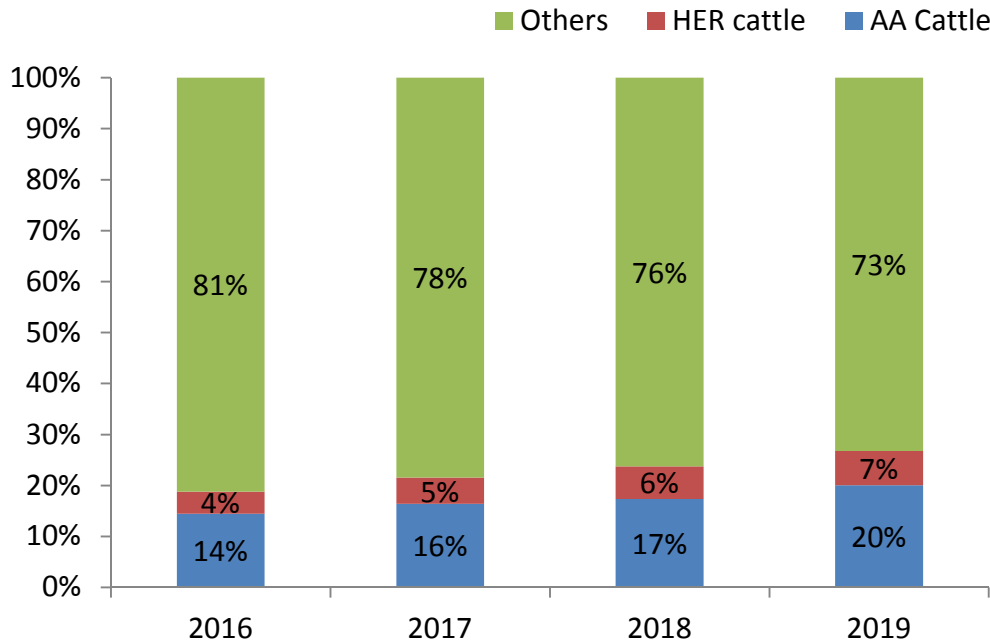
Carcase weights (Young Bulls)



Overview of prime kill Q2

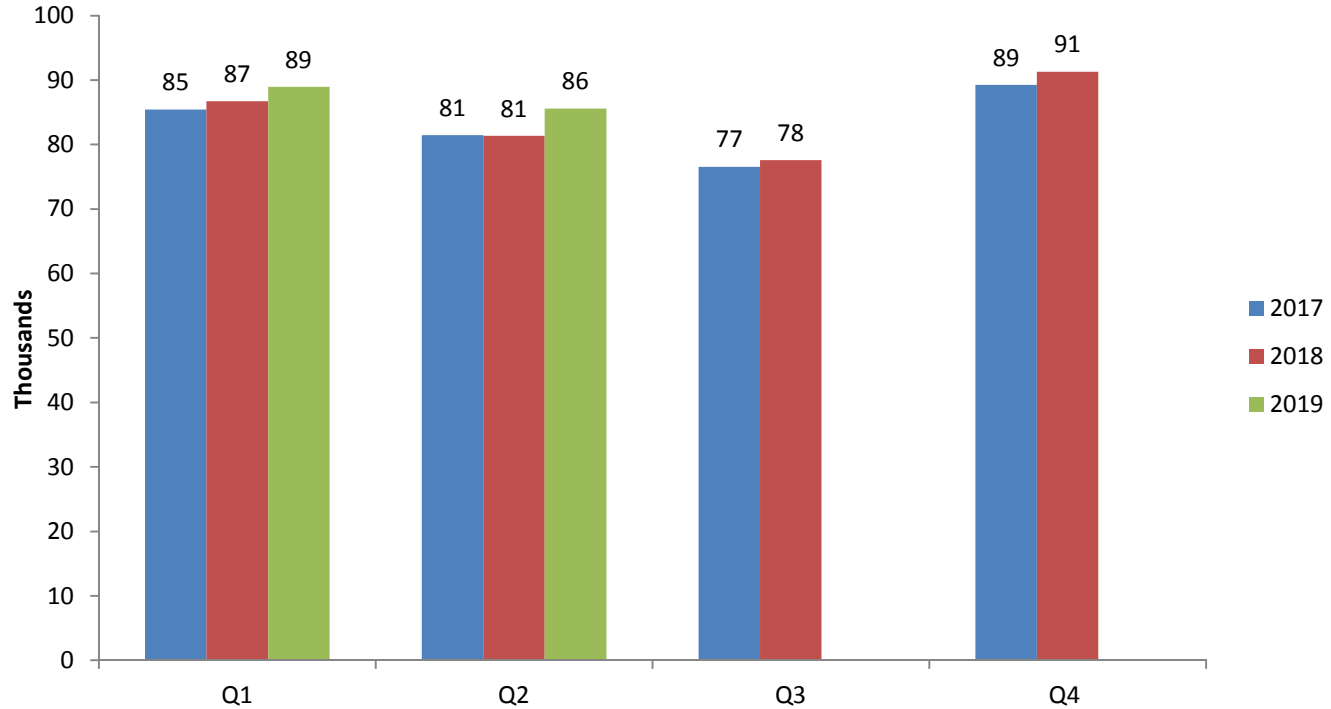
	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
2017	315.4	25.2	349.5	24.8	328.9	15.5
2018	316.6	25.5	351.6	25.2	335.4	15.9
2019	323.7	25.8	360.7	25.7	344.3	15.9

Premium cattle kill Q2



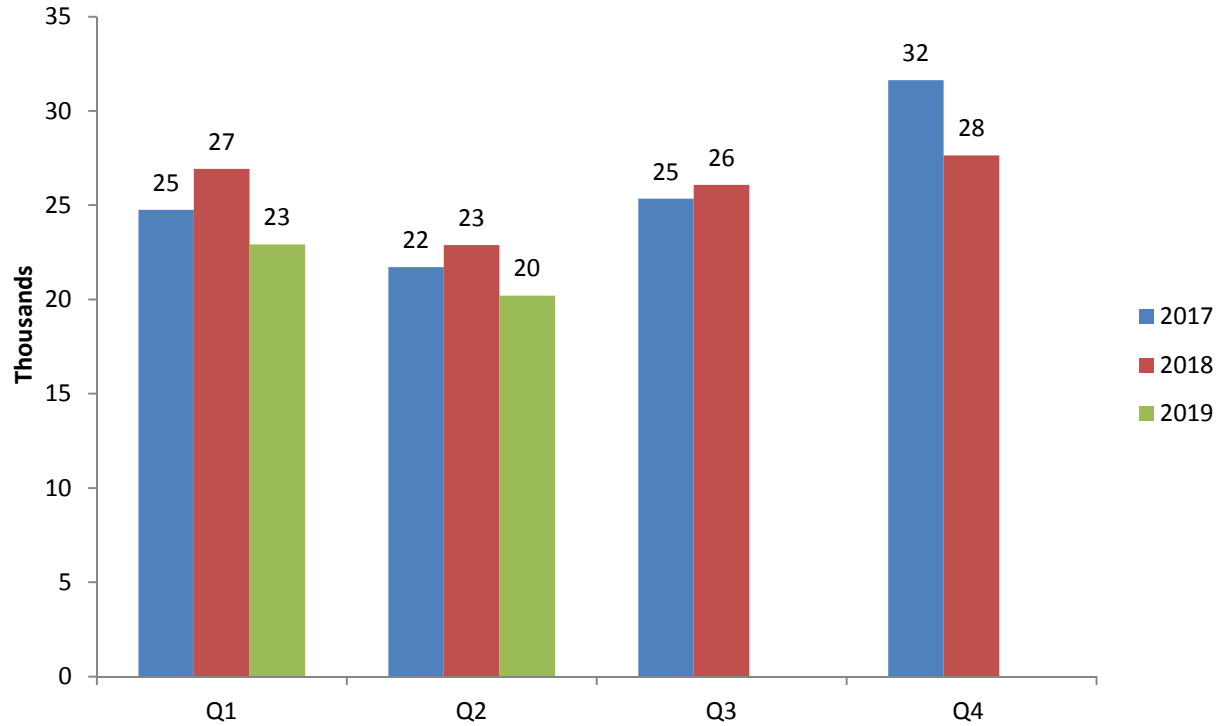
	AA Cattle	HER cattle	Others
2016	14%	4%	81%
2017	16%	5%	78%
2018	17%	6%	76%
2019	20%	7%	73%

Quarterly Prime Cattle Kill



Prime Cattle kill	2017	2018	2019
Q1	85,430	86,738	88,966
Q2	81,474	81,359	85,562
Q3	76,560	77,583	
Q4	89,251	91,311	

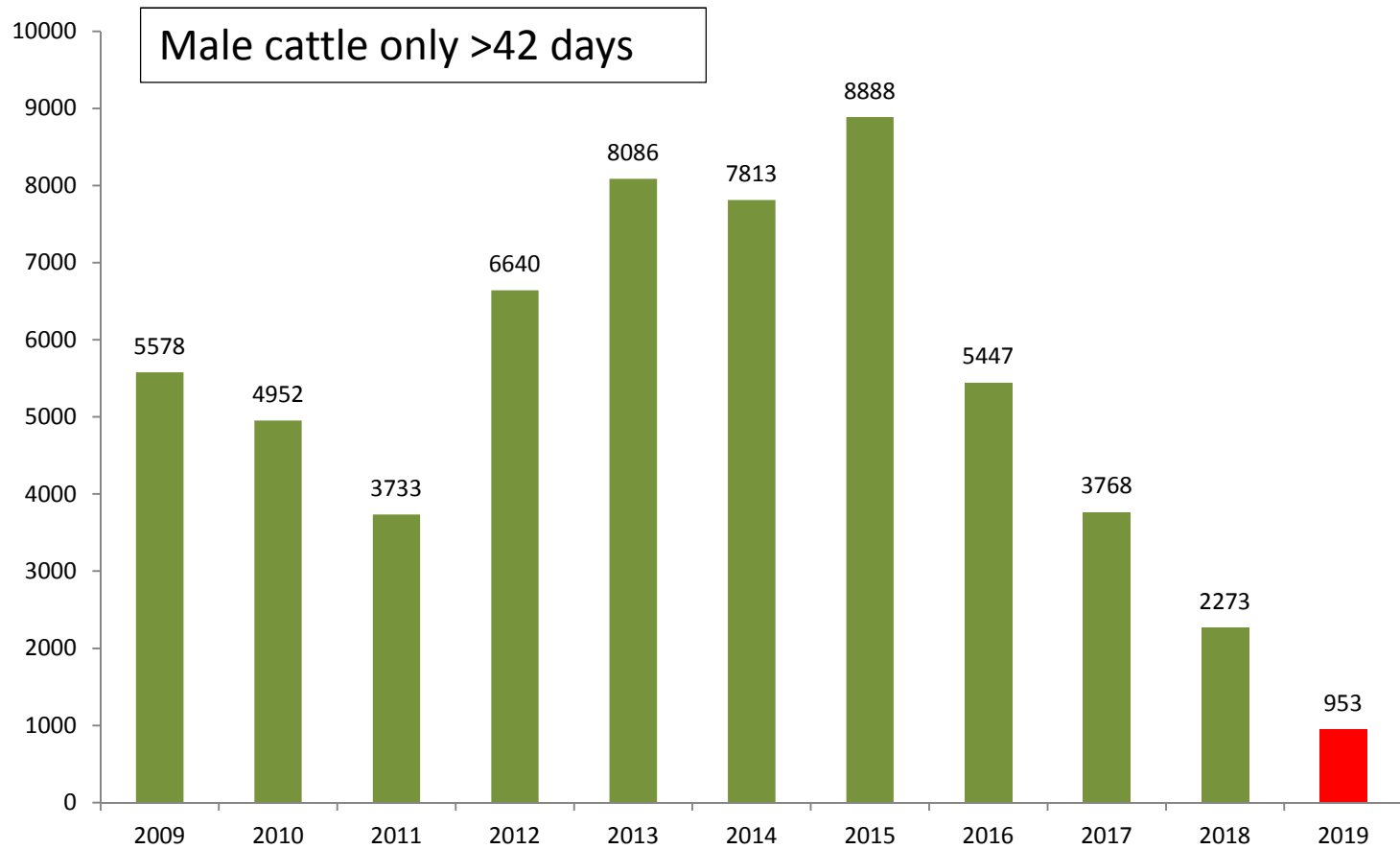
Quarterly Cow Kill



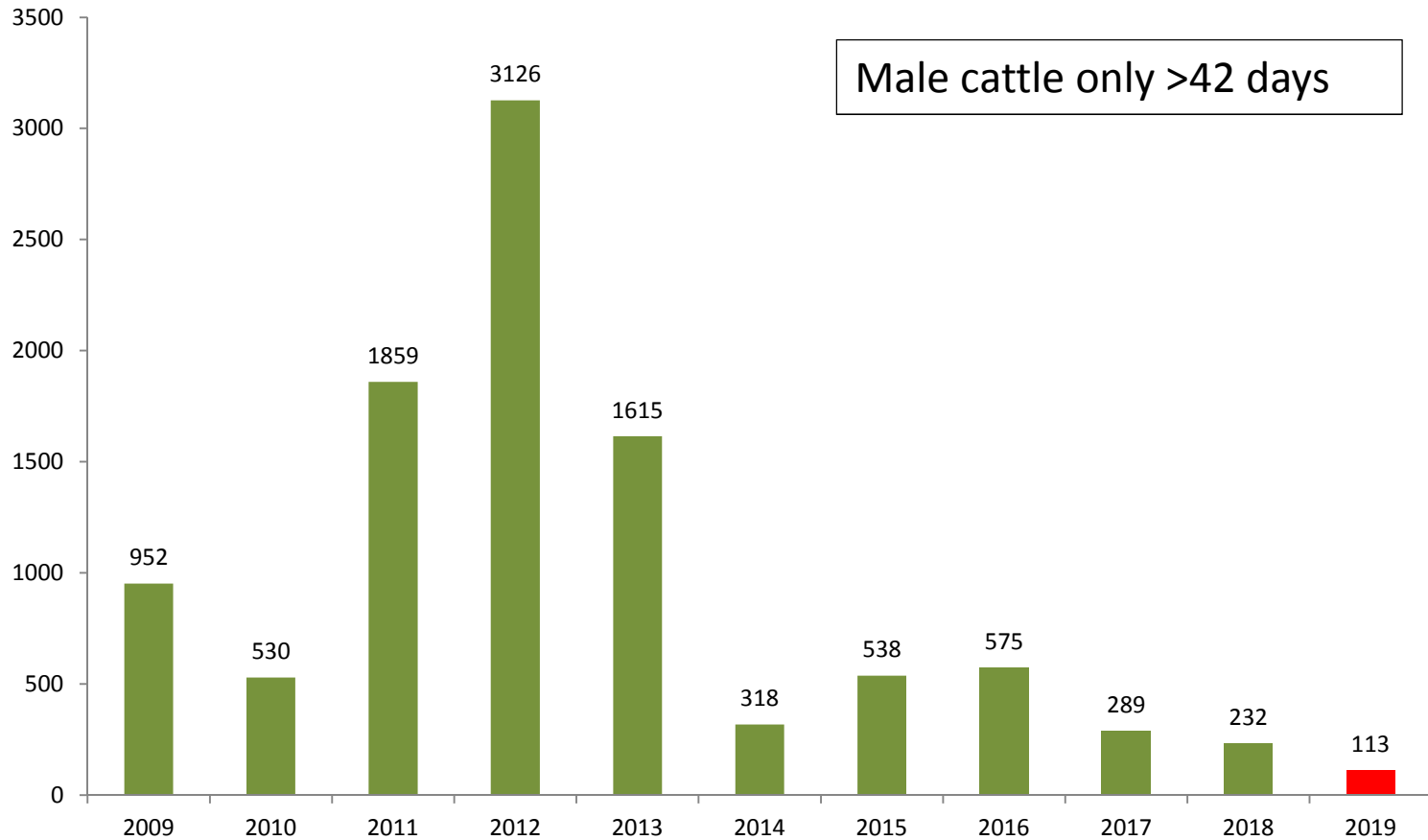
Cow Slaughtering	2017	2018	2019
Q1	24,760	26,924	22,920
Q2	21,706	22,890	20,206
Q3	25,339	26,079	
Q4	31,635	27,640	

Live Exports

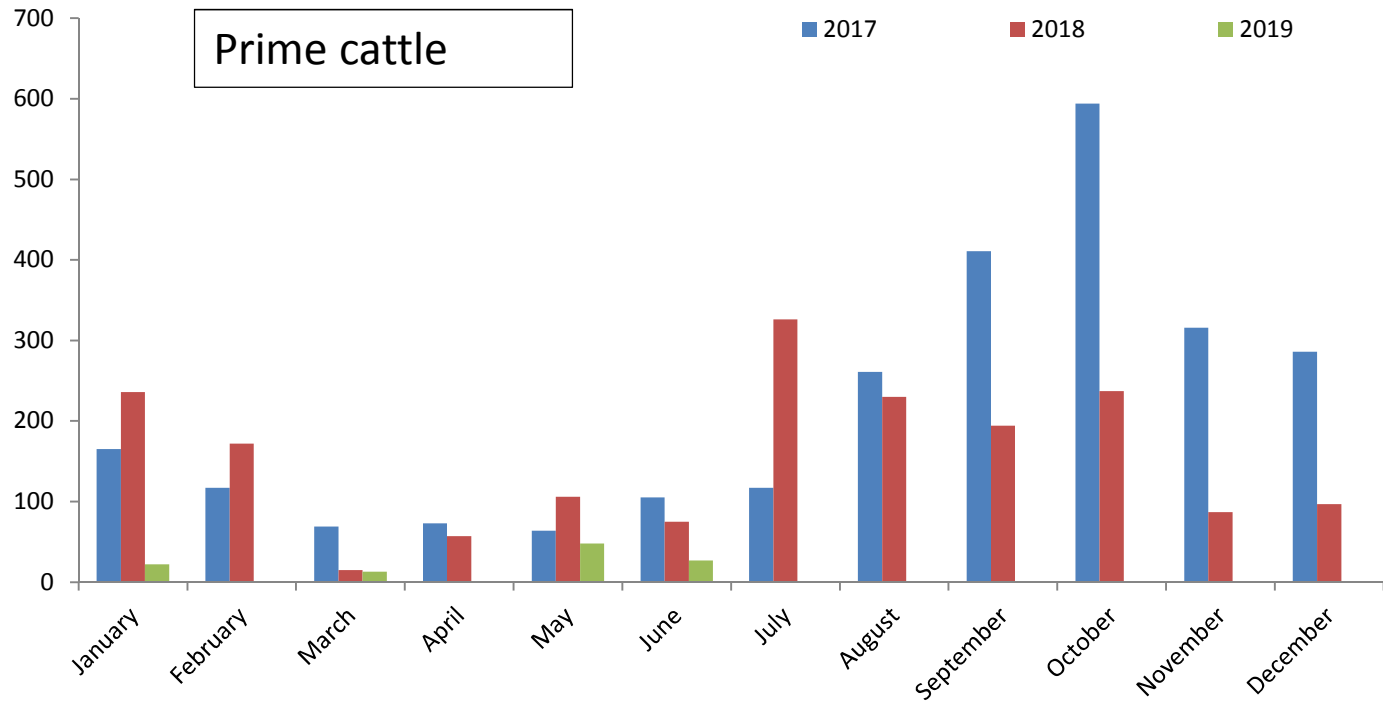
Exports to GB for further production



Exports to ROI for Further Production

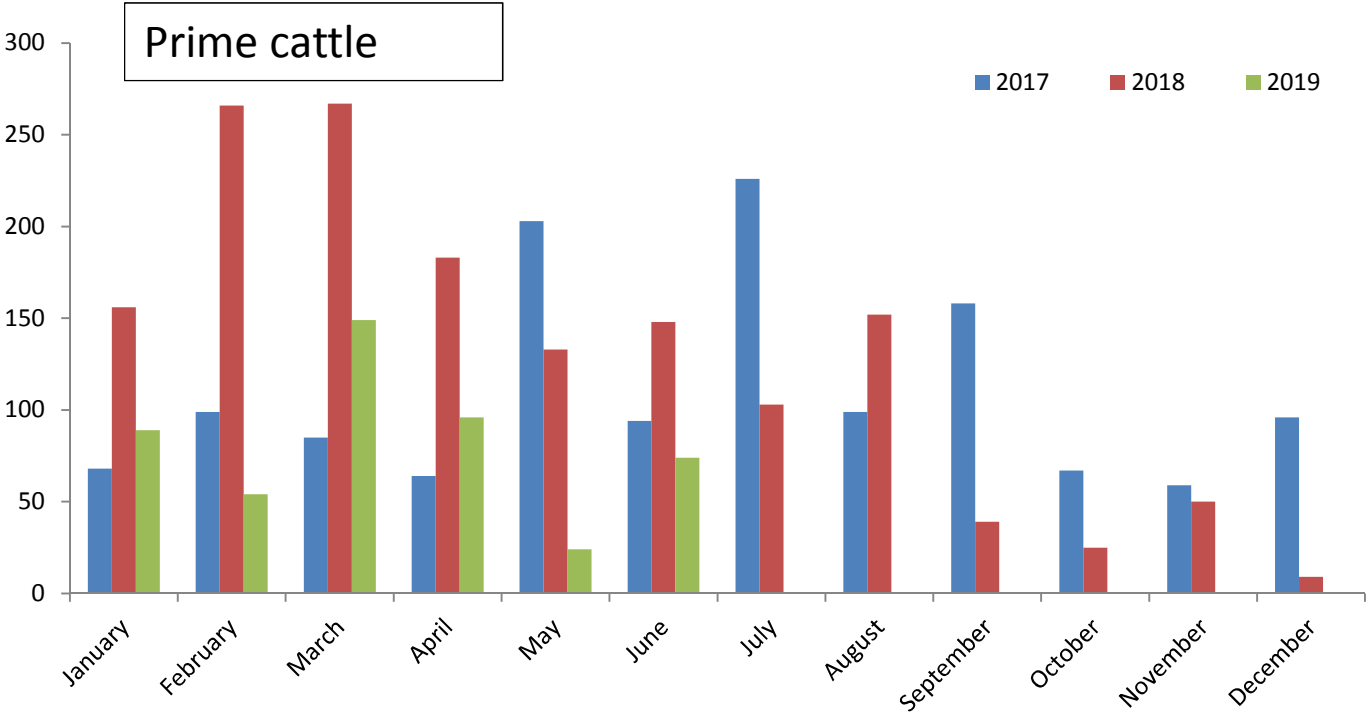


Exports to GB for Direct Slaughter



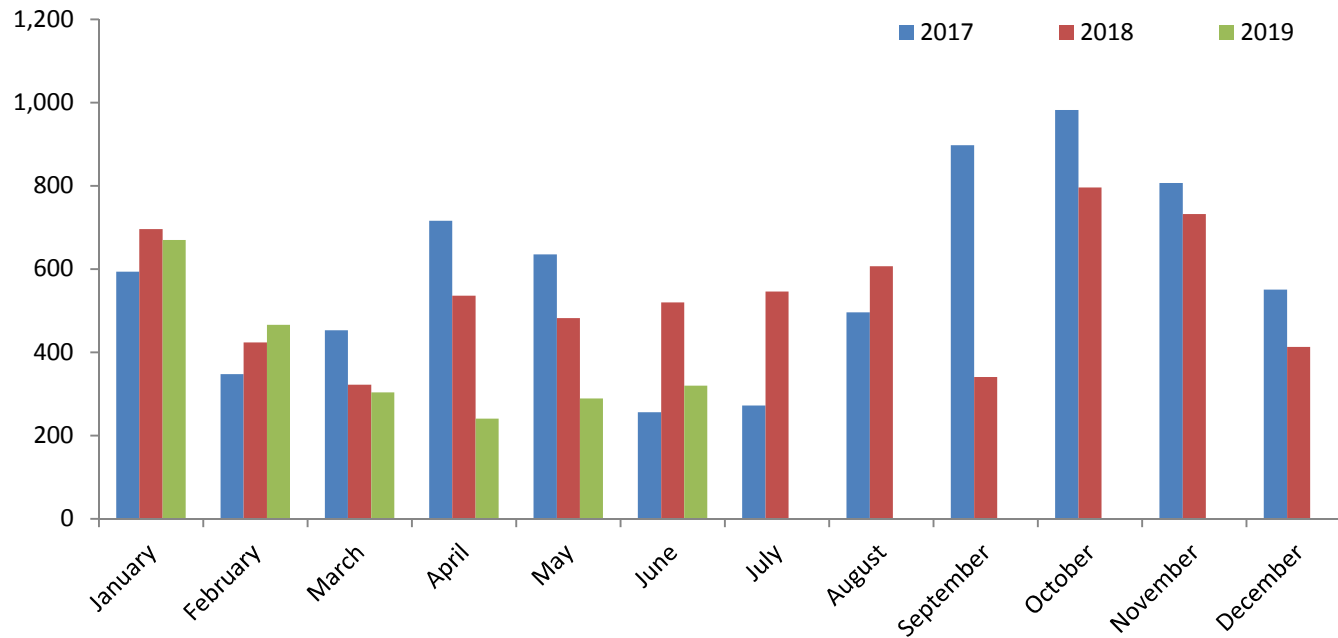
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	165	117	69	73	64	105	117	261	411	594	316	286
2018	236	172	15	57	106	75	326	230	194	237	87	97
2019	22	0	13	0	48	27						

Exports to ROI for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
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
2019	89	54	149	96	24	74						

Cow exports to ROI for Direct Slaughter

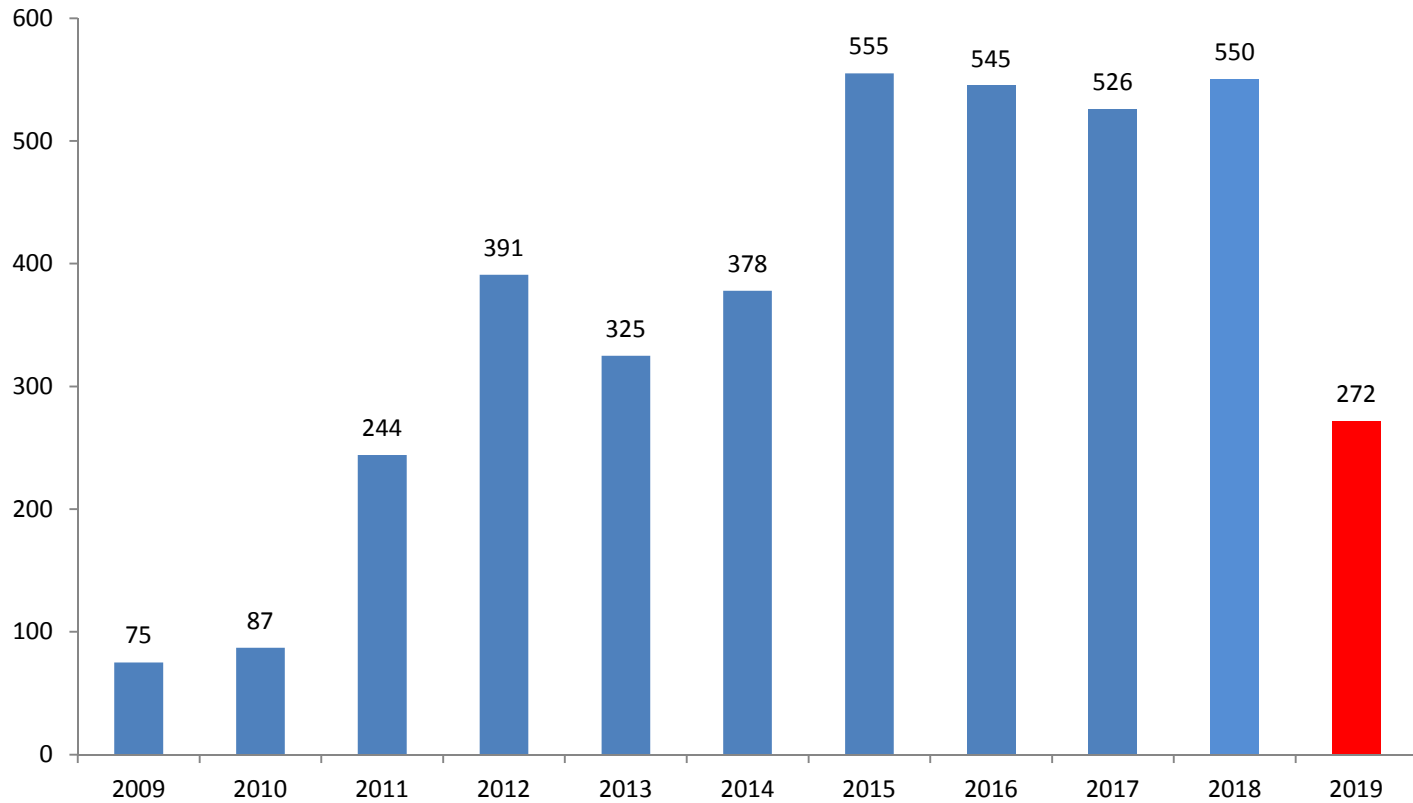


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	594	348	453	716	635	256	272	496	898	982	807	551
2018	696	424	322	536	482	520	546	607	341	796	732	413
2019	670	466	304	241	289	320						

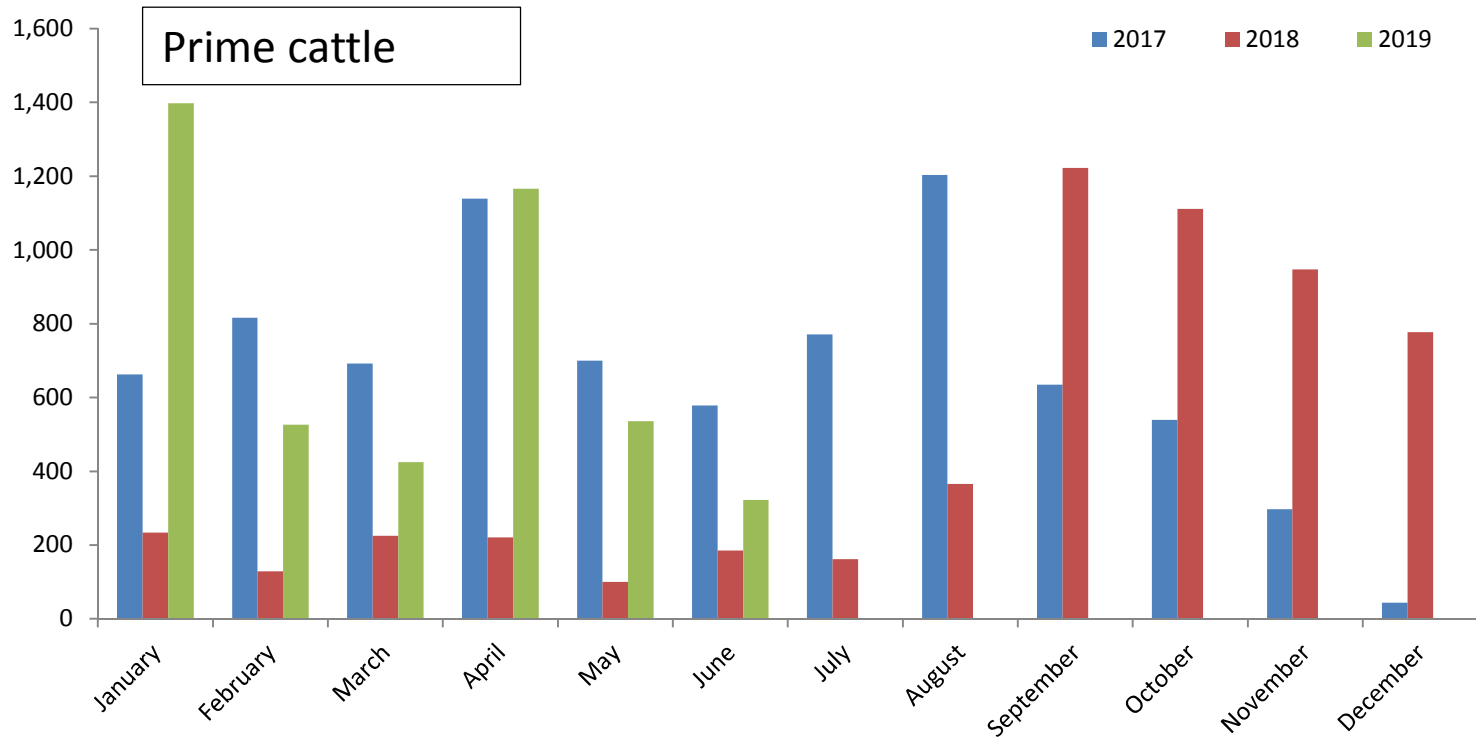
Live Imports

Imports from ROI for Further Production

Male cattle only >42 days

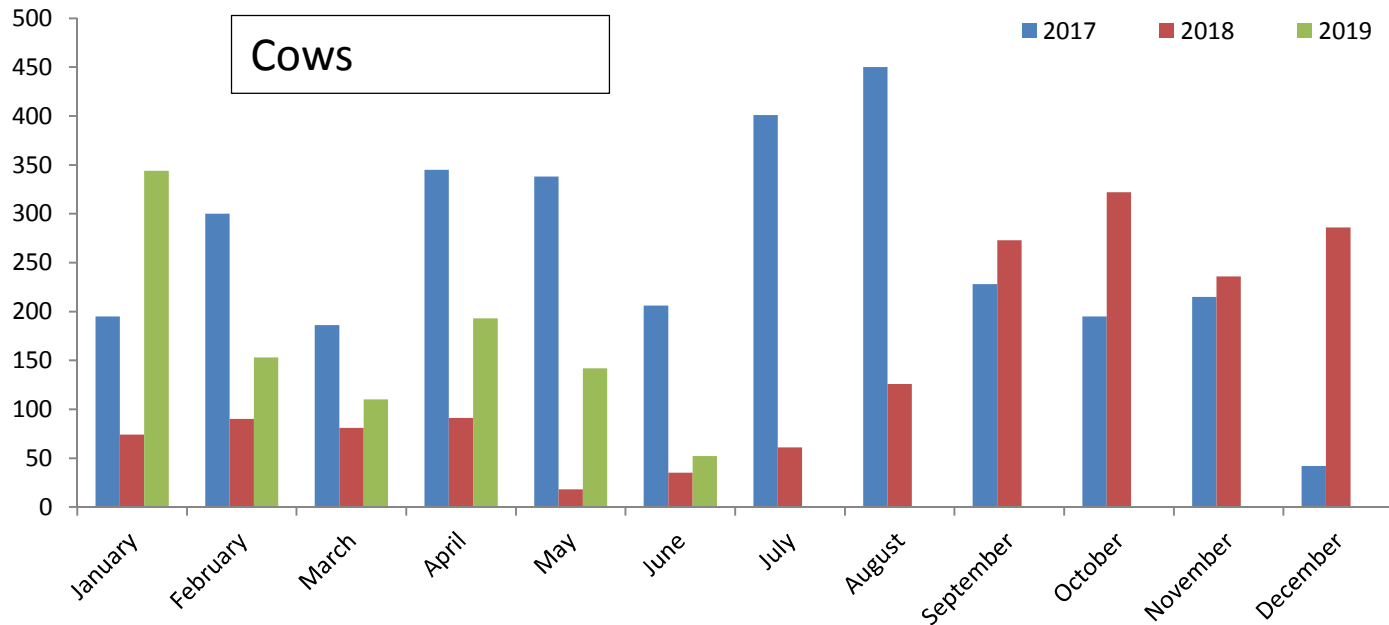


Imports from ROI for Direct Slaughter



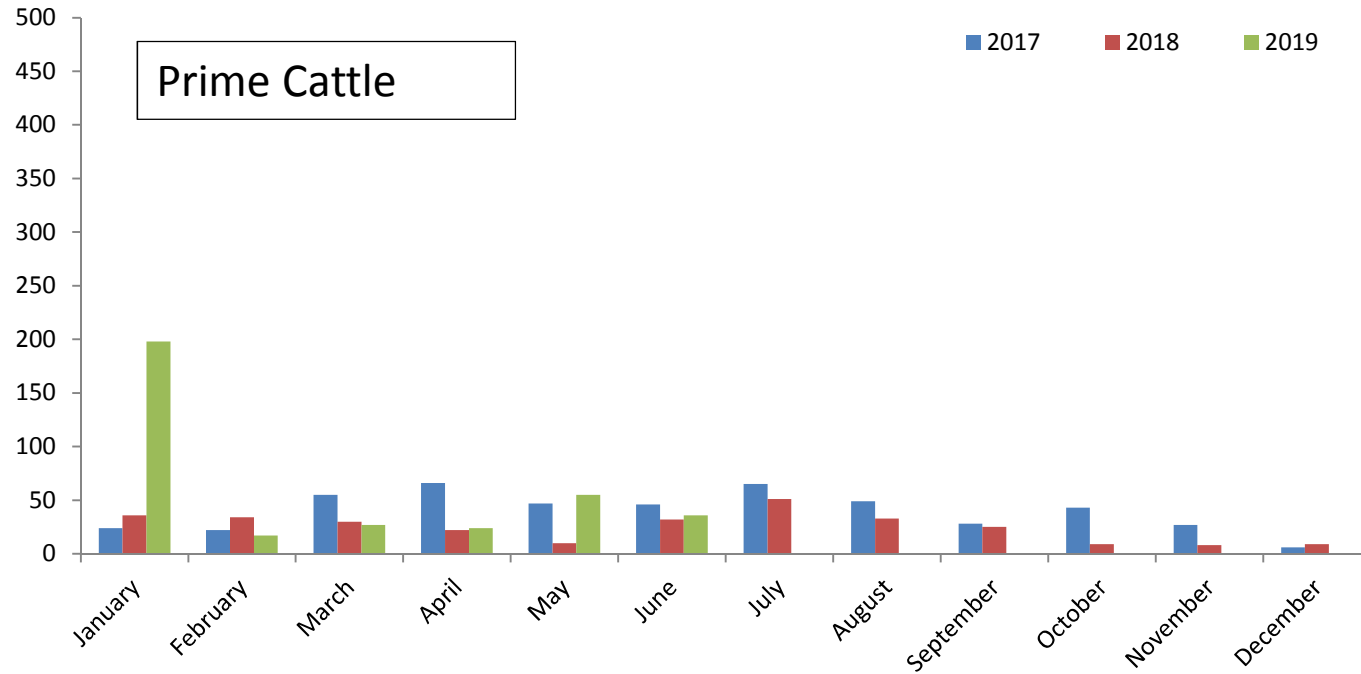
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	663	816	692	1139	700	578	771	1203	635	539	297	44
2018	234	129	225	221	100	185	162	366	1222	1111	947	777
2019	1398	526	425	1166	536	322						

Imports from ROI for Direct Slaughter



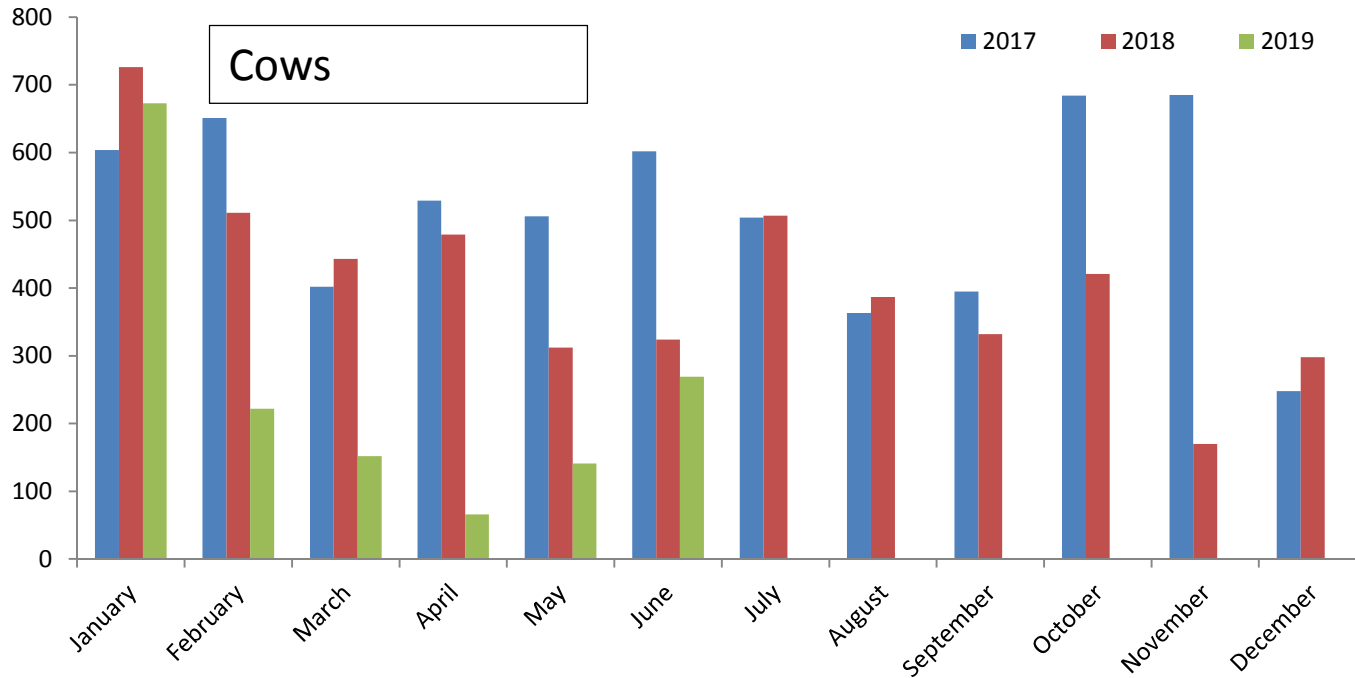
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	195	300	186	345	338	206	401	450	228	195	215	42
2018	74	90	81	91	18	35	61	126	273	322	236	286
2019	344	153	110	193	142	52						

Imports from GB for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
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
2019	198	17	27	24	55	36						

Imports from GB for Direct Slaughter

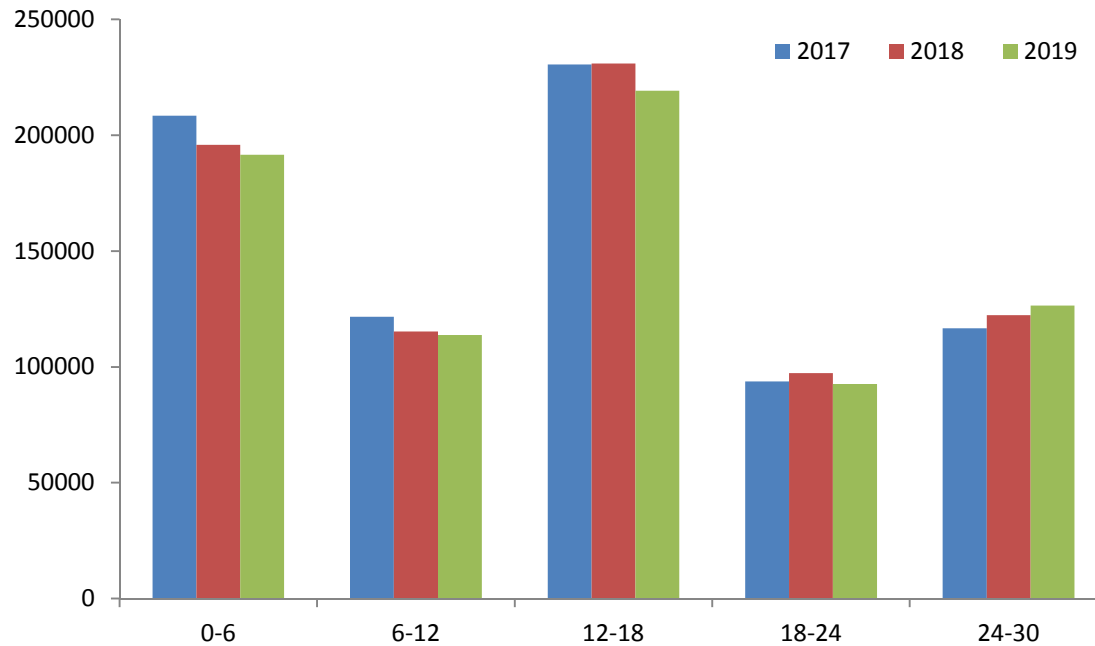


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2017	604	651	402	529	506	602	504	363	395	684	685	248
2018	726	511	443	479	312	324	507	387	332	421	170	298
2019	673	222	152	66	141	269						

Cattle Supplies

Beef sired cattle on NI farms

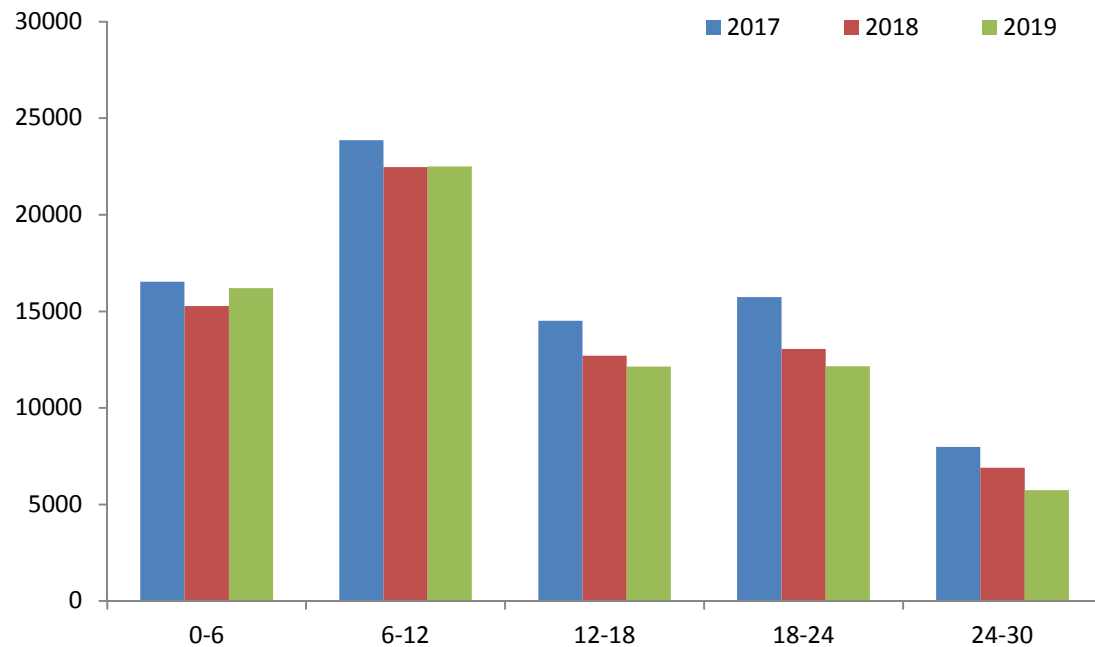
June 2019



Age (Months)	2017	2018	2019	2018/2019	2017/2019
0-6	208384	195826	191570	-2.2%	-8.1%
6-12	121636	115260	113789	-1.3%	-6.5%
12-18	230522	230879	219115	-5.1%	-4.9%
18-24	93705	97243	92660	-4.7%	-1.1%
24-30	116699	122250	126404	3.4%	8.3%

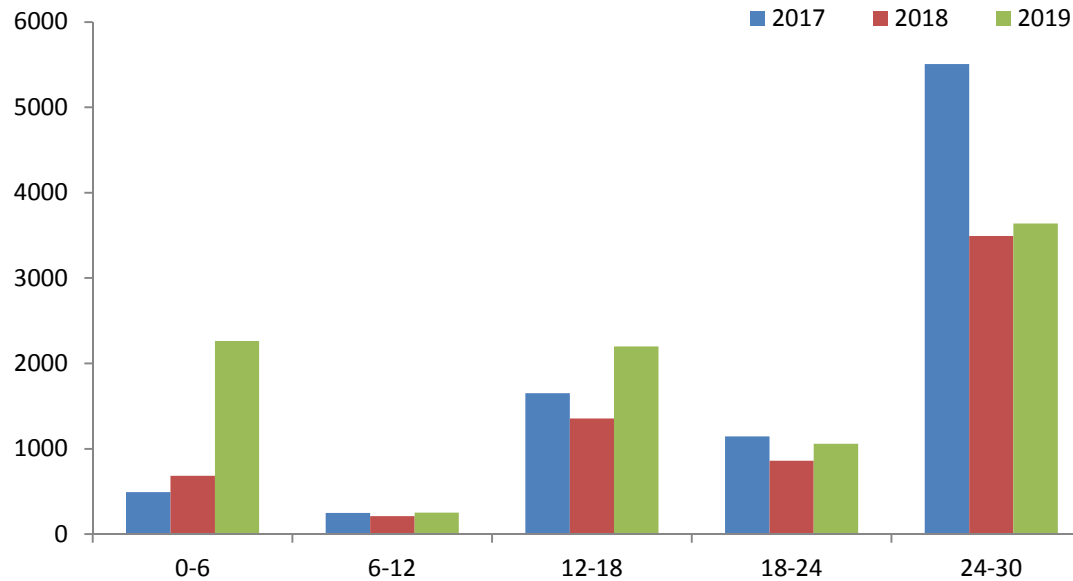
Dairy sired male cattle on NI farms

June 2019



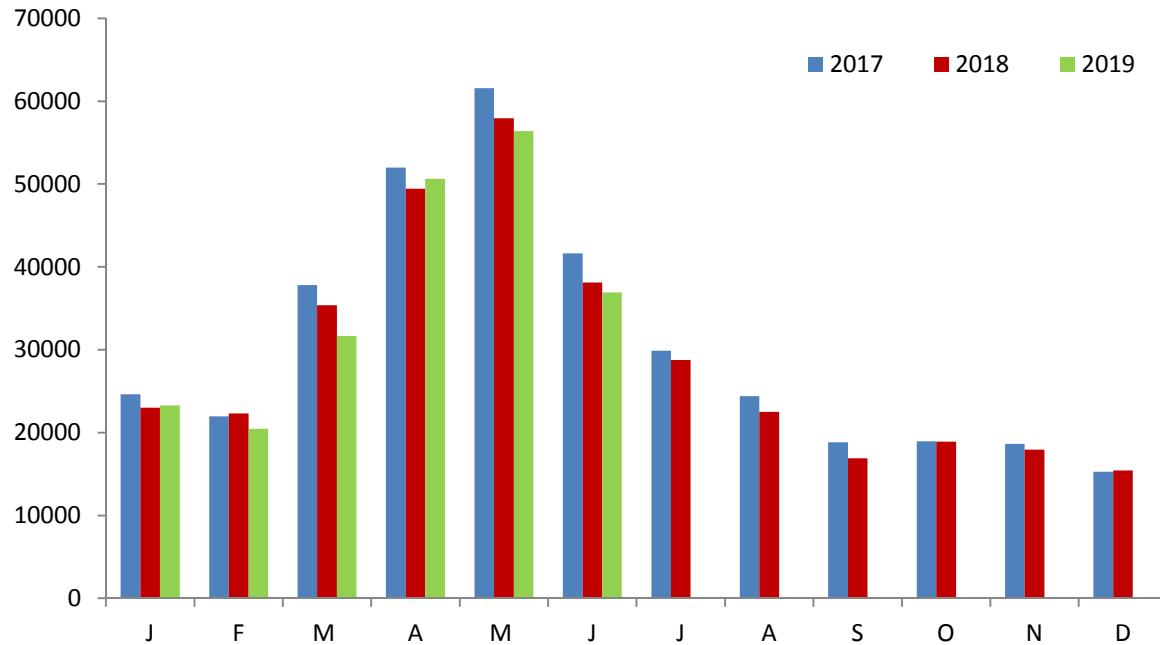
Dairy sired males	2017	2018	2019	2018/2019	2017/2019
0-6	16531	15270	16198	6.1%	-2.0%
6-12	23857	22467	22494	0.1%	-5.7%
12-18	14510	12706	12133	-4.5%	-16.4%
18-24	15737	13054	12157	-6.9%	-22.7%
24-30	7978	6911	5740	-16.9%	-28.1%

Nomad cattle on NI farms June 2019



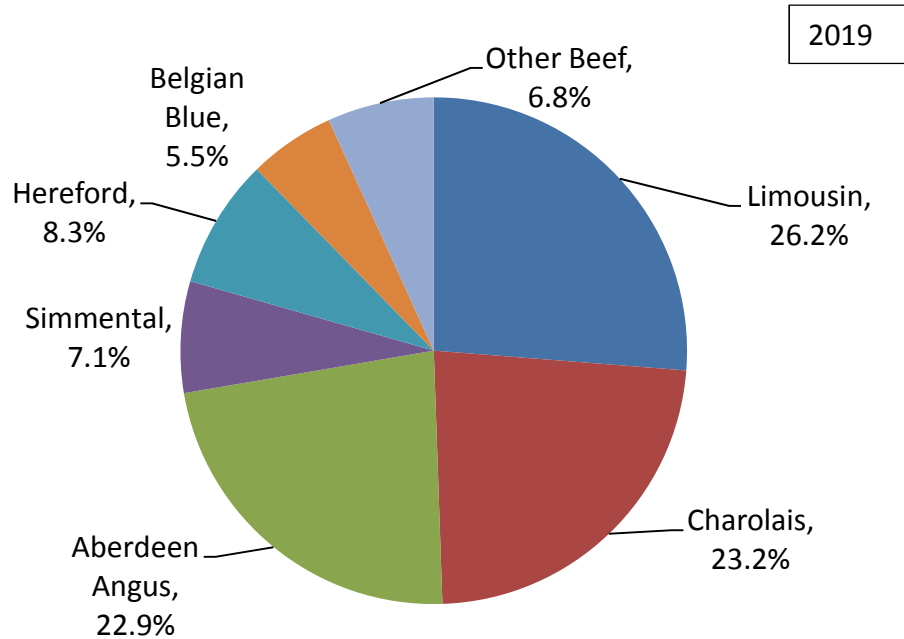
ROI Nomads (beef sired +dairy male)	2017	2018	2019	2018/2019	2017/2019
0-6	491	682	2261	231.5%	360.5%
6-12	247	212	253	19.3%	2.4%
12-18	1653	1354	2200	62.5%	33.1%
18-24	1146	860	1057	22.9%	-7.8%
24-30	5508	3491	3641	4.3%	-33.9%

NI Beef Sired Calf Registrations 2019



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2018	23001	22323	35389	49451	57945	38126	28748	22507	16917	18912	17928	15428
2019	23262	20461	31658	50617	56386	36912						
% Change	1.1%	-8.3%	-10.5%	2.4%	-2.7%	-3.2%						

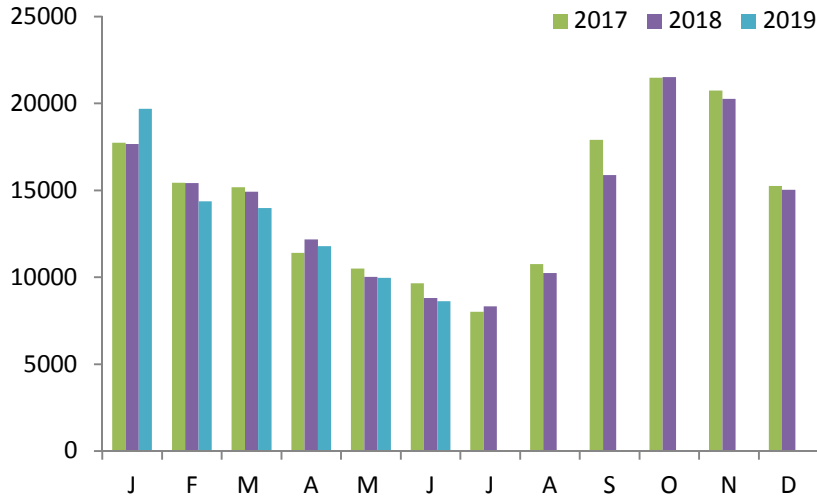
Beef Calf Registrations by Breed



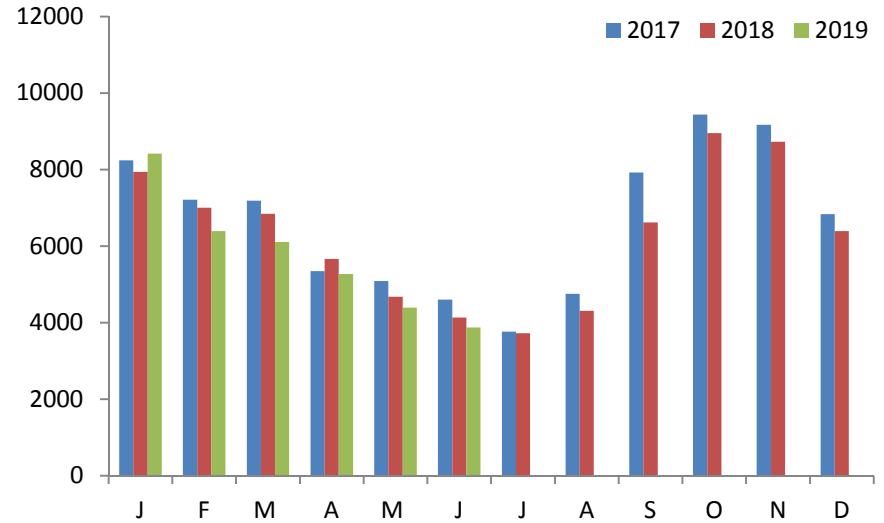
Proportion Dairy Dam	2017	2018	2019
Jan	49%	51%	53%
Feb	51%	51%	51%
Mar	39%	40%	43%
Apr	26%	26%	27%
May	20%	19%	20%
Jun	24%	24%	25%
Jul	27%	28%	
Aug	30%	31%	
Sep	40%	40%	
Oct	47%	49%	
Nov	51%	54%	
Dec	56%	60%	
Grand Total	34%	35%	

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2018	26.5%	23.5%	21.1%	7.4%	8.1%	5.2%	8.3%
2019	26.2%	23.2%	22.9%	7.1%	8.3%	5.5%	6.8%

NI Dairy Sired Calf Registrations 2019



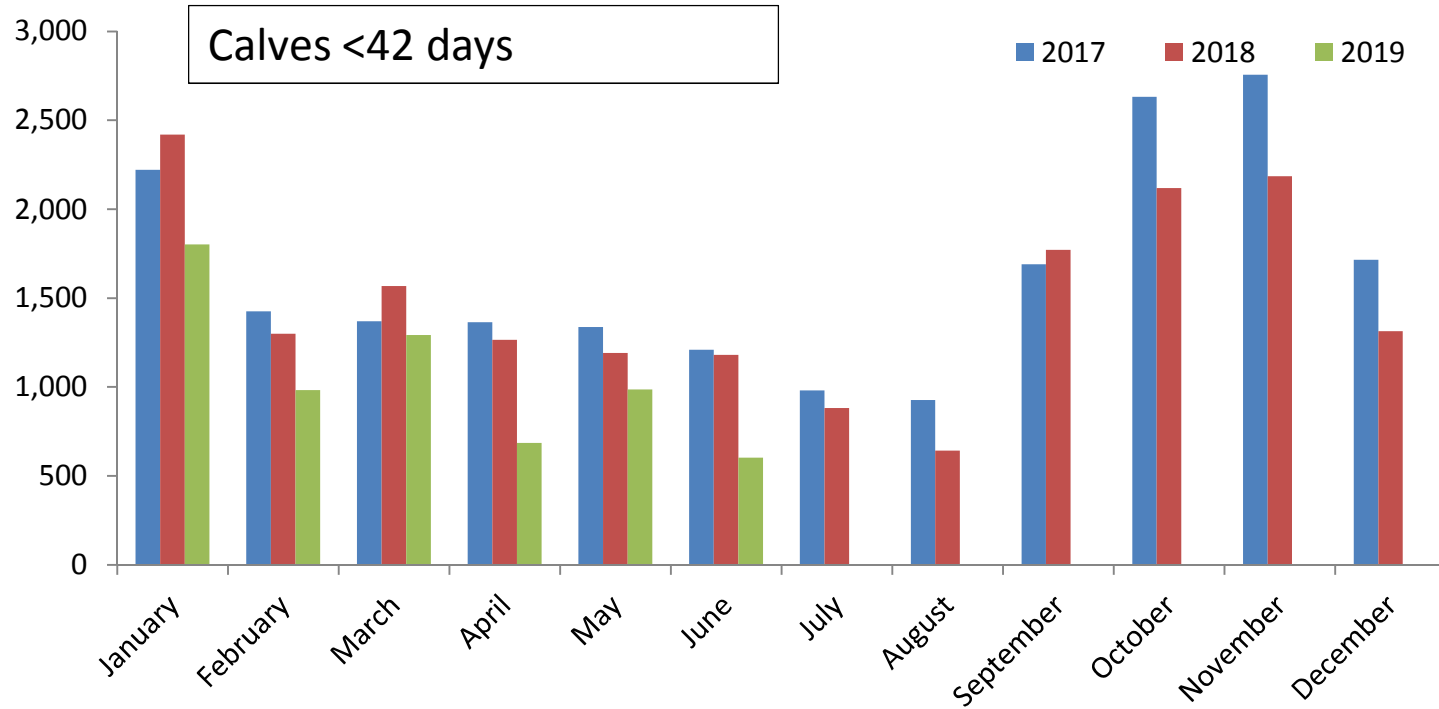
Total dairy calf registrations



Male dairy calf registrations

Males	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2018	7942	7007	6845	5663	4682	4133	3721	4312	6619	8953	8729	6395
2019	8423	6392	6110	5270	4394	3877						
% Change	6.1%	-8.8%	-10.7%	-6.9%	-6.2%	-6.2%						

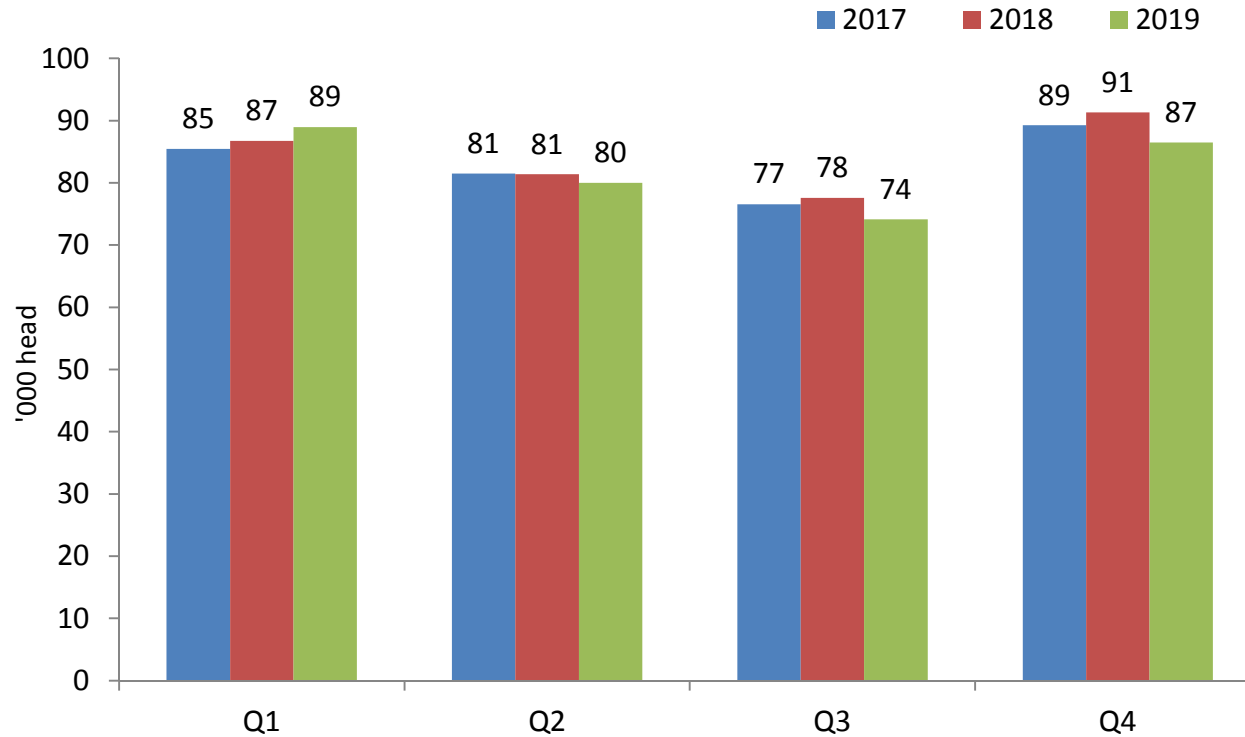
Dairy Bull Calf Exports



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
2017	2222	1426	1369	1365	1338	1210	981	926	1690	2632	2756	1716	19631
2018	2419	1300	1568	1265	1191	1180	881	642	1772	2119	2186	1313	17836
2019	1802	983	1293	685	986	602							

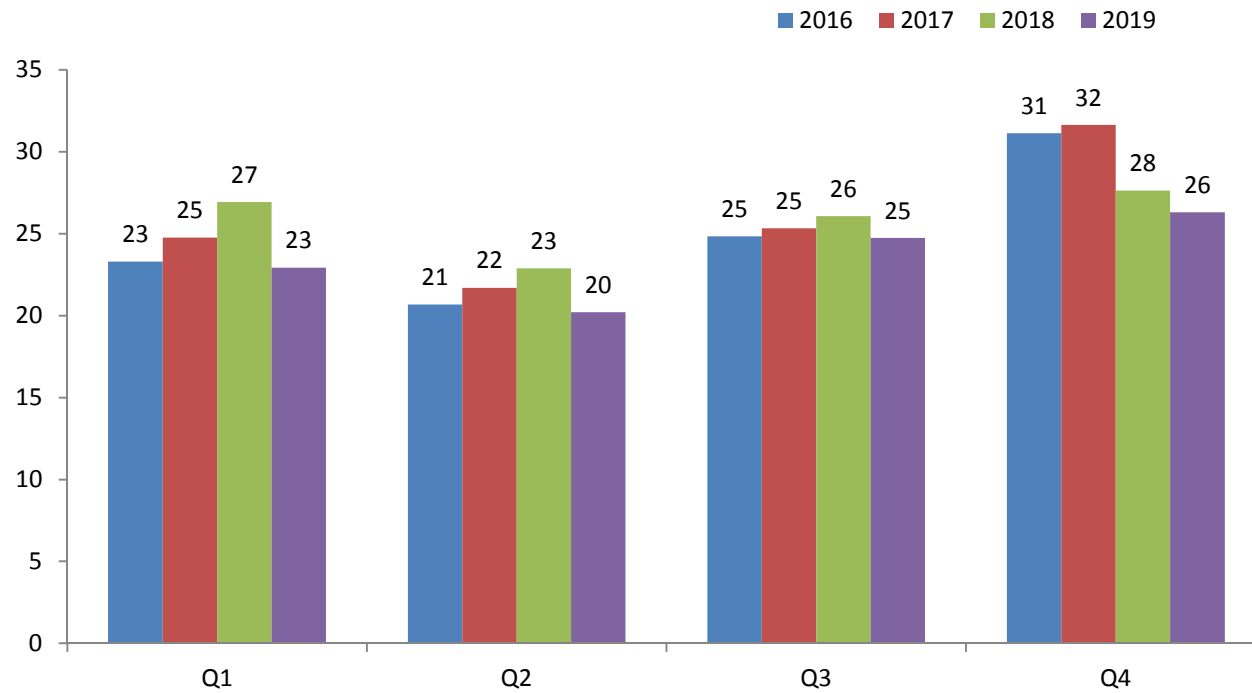
Forecast

Forecast NI Prime Cattle Kill 2019



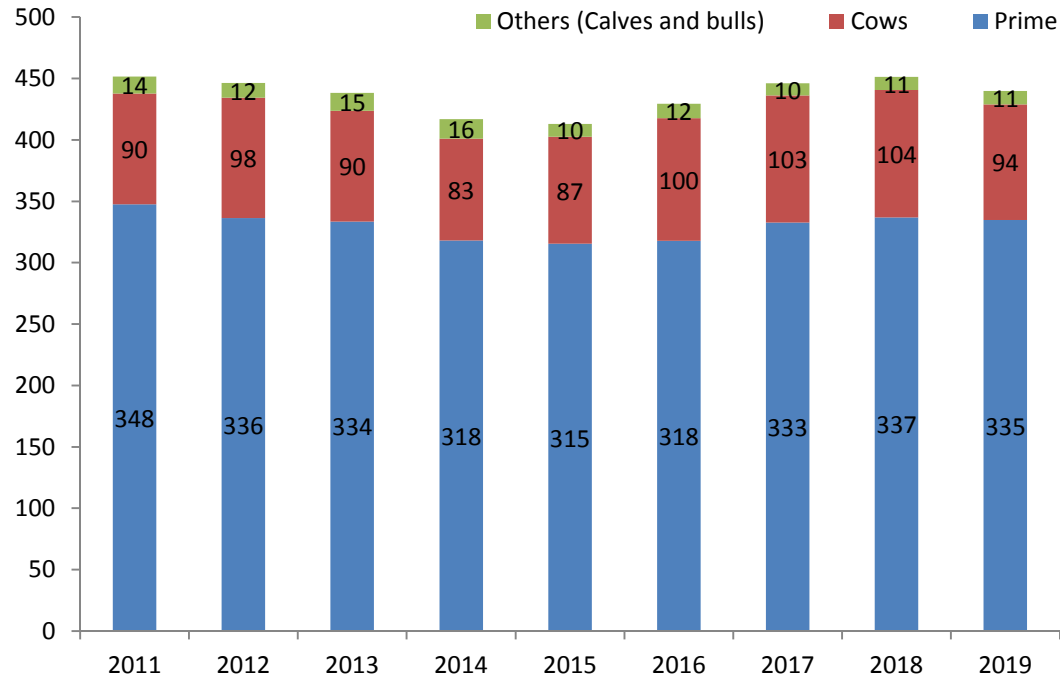
	2017	2018	2019(e)	2018/19 % Change
Q1	85430	86738	88966	2.6%
Q2	81474	81359	85562	5.2%
Q3	76560	77583	73251	-5.6%
Q4	89251	91311	87000	-4.7%
Total	332715	336991	334779	-0.7%

Forecast NI Cow Kill 2019



	2017	2018	2019 (e)	2018/19 % Change
Q1	24760	26924	22920	-16.2%
Q2	21706	22890	20206	-12.4%
Q3	25339	26079	24742	-5.3%
Q4	31635	27640	26301	-4.2%
Total	103440	103533	94169	-9.1%

Forecast Total Cattle Kill 2019 (Inc bulls and calves)

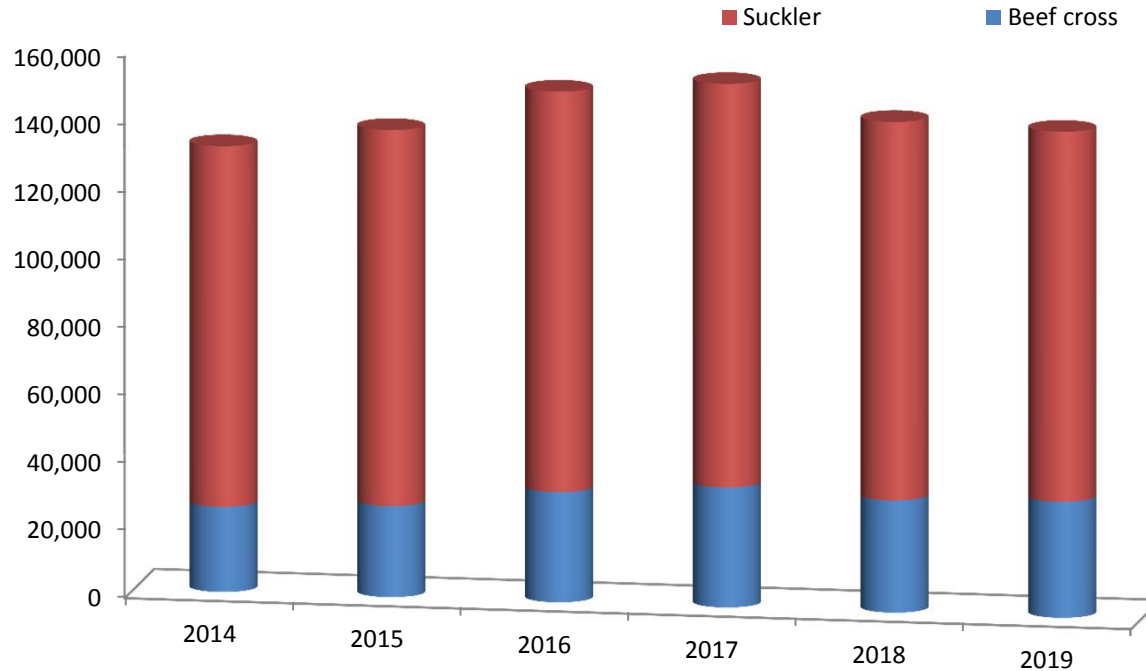


Year	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total cattle throughput	451,716	446,356	438,335	416,989	413,062	429,618	446,112	451,359	439,777

Longer term outlook

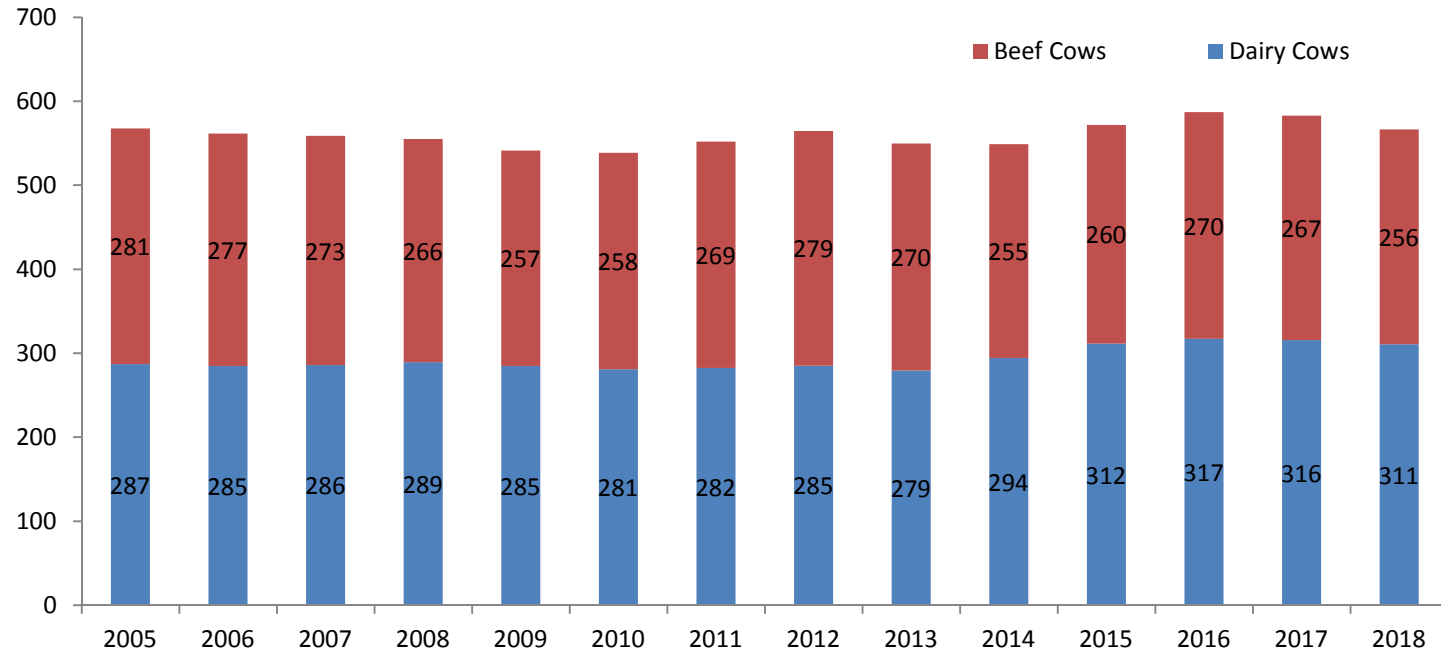
Growing Dairy Influence

Calf Registrations Q2 2019



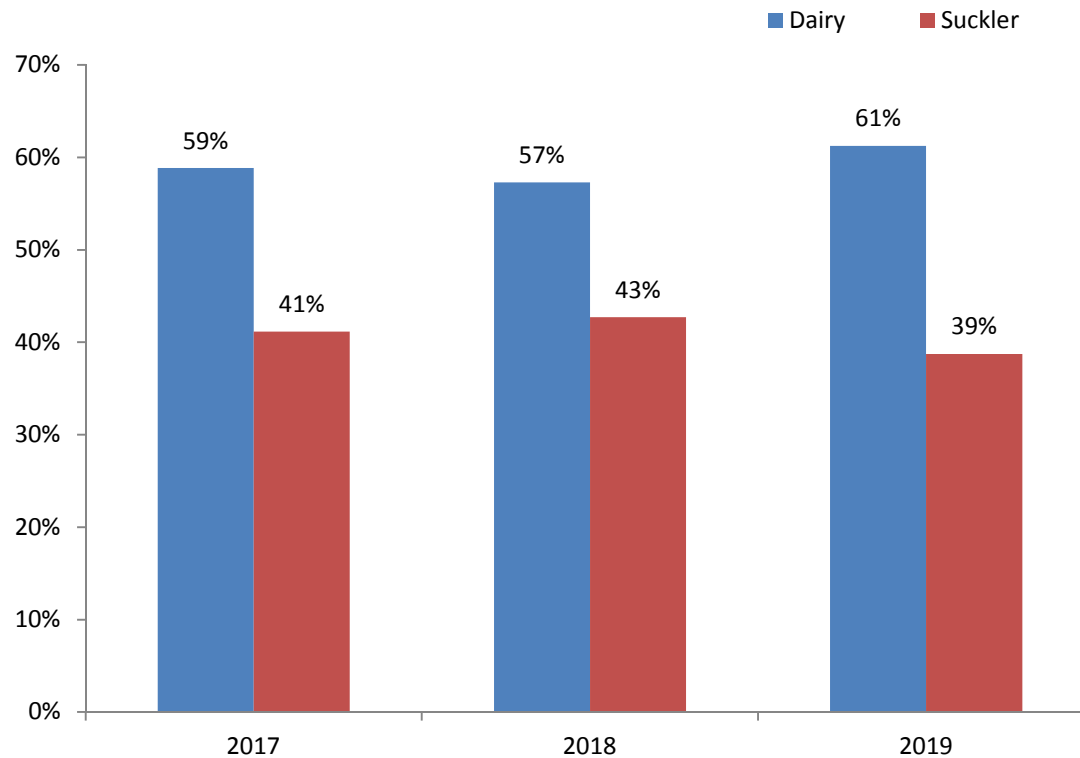
	2014	2015	2016	2017	2018	2019
Suckler	106,563	111,159	118,342	119,190	111,831	109,311
Beef cross	25,235	26,948	32,604	35,511	33,204	34,322

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?????