

# Seamus Mc Menamin



## Slaughter Trends 2020

# NI Slaughterings December 2019

NI CATTLE AND SHEEP SLAUGHTERINGS						
	December			Year to Date		
	(4 weeks ended 28/12/19)			(52 weeks ended 28/12/19)		
	Dec-18	Dec-19	% Change	2018	2019	Change
<b>CATTLE - FOODCHAIN</b>						
Steers	12,332	11,783	-4%	160,732	163,918	2%
Heifers	10,358	9,800	-5%	131,414	136,004	3%
Young Bulls	2,706	2,128	-21%	44,845	44,749	0%
Total Prime Cattle	25,396	23,711	-7%	336,991	344,671	2%
Calves	440	441	0%	6,107	5,970	-2%
Cows	6,804	7,652	12%	103,533	99,321	-4%
Mature Bulls	386	319	-17%	4,708	5,258	12%
Total Cattle	33,026	32,123	-3%	451,339	455,220	1%
<b>SHEEP</b>						
Lambs & Hoggets	28,466	27,494	-3%	395,600	385,694	-3%
Ewes & Rams	2,073	2,106	2%	24,744	29,600	20%
	30,539	29,600	-3%	420,344	415,294	-1%

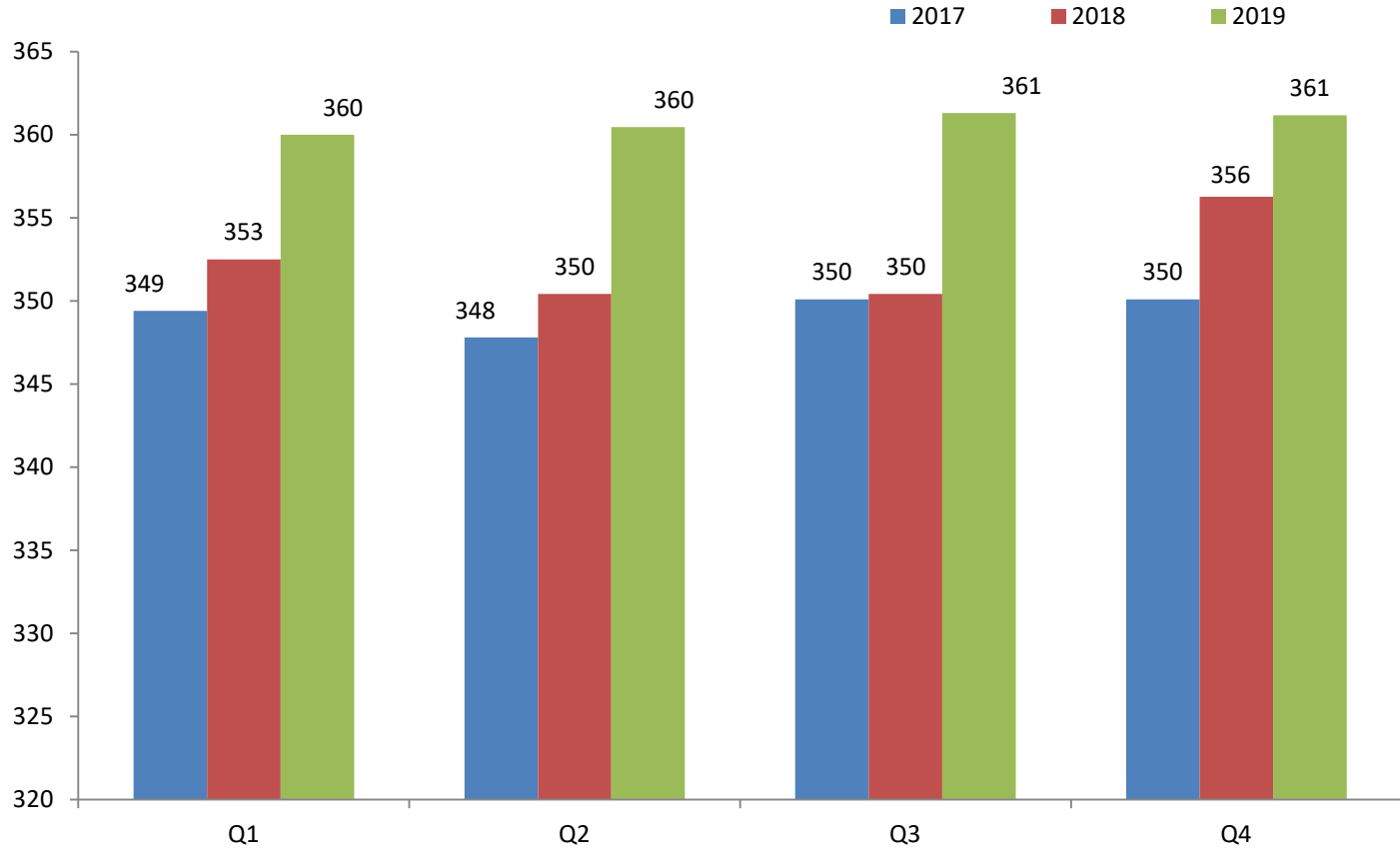
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

# NI Beef+ Lamb Production Dec 2019

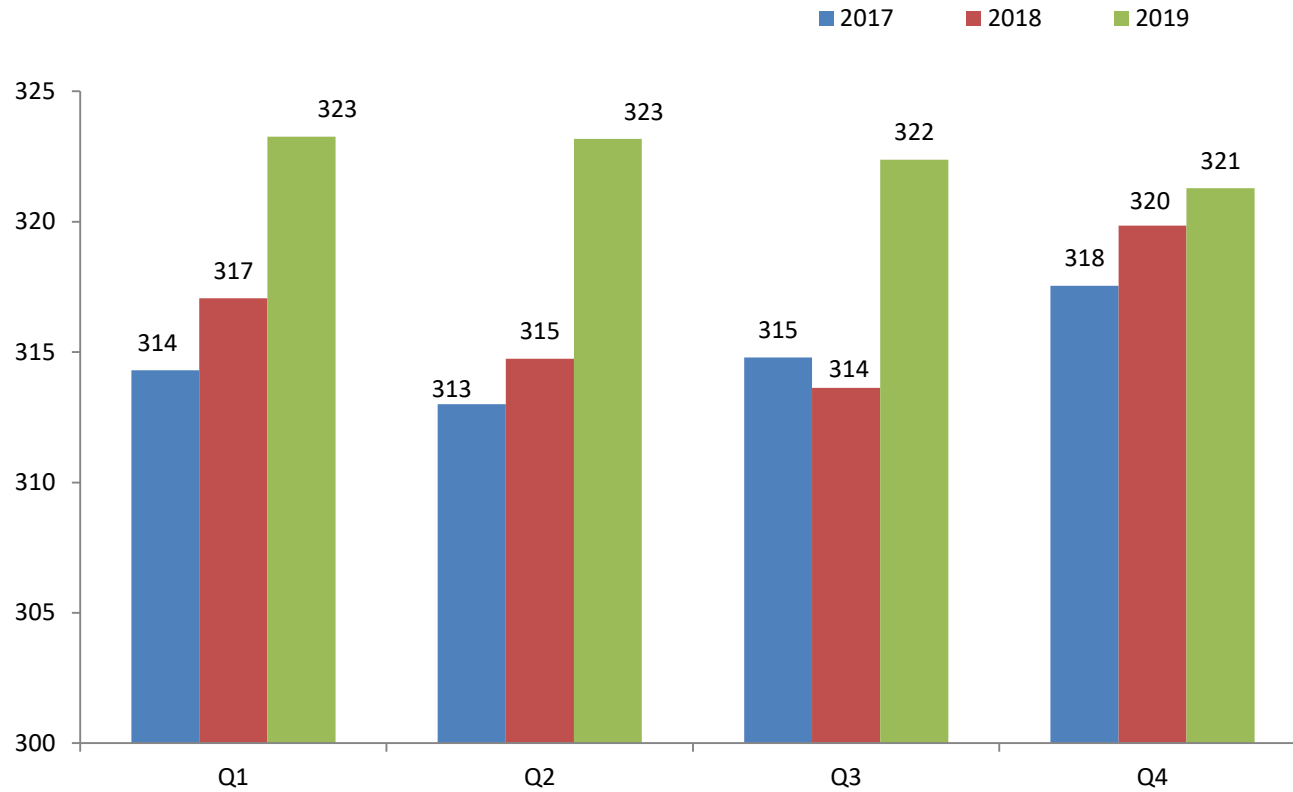
NI BEEF AND SHEEPMET PRODUCTION						
	December			Year to Date		
	(4 weeks ended 28/12/19)			(52 weeks ended 28/12/19)		
	Dec-18	Dec-19	% Change	2018	2019	Change
<b>BEEF</b>						
Steers	4,379	4,274	-2%	56,683	59,131	4%
Heifers	3,335	3,096	-7%	41,596	43,866	5%
Young Bulls	893	723	-19%	15,100	15,426	2%
Total Prime Cattle	8,606	8,092	-6%	113,379	118,423	4%
Calves	85	87	2%	1,175	1,249	6%
Cows	2,045	2,355	15%	31,055	30,526	-2%
Mature Bulls	157	149	-4%	1,996	2,338	17%
Total Beef	10,893	10,684	-2%	147,606	152,538	3%
<b>SHEEP</b>						
Lambs & Hoggets	649	622	-4%	8,533	8,538	0%
Ewes & Rams	56	57	1%	679	856	26%
	706	679	-4%	9,212	9,394	2%

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

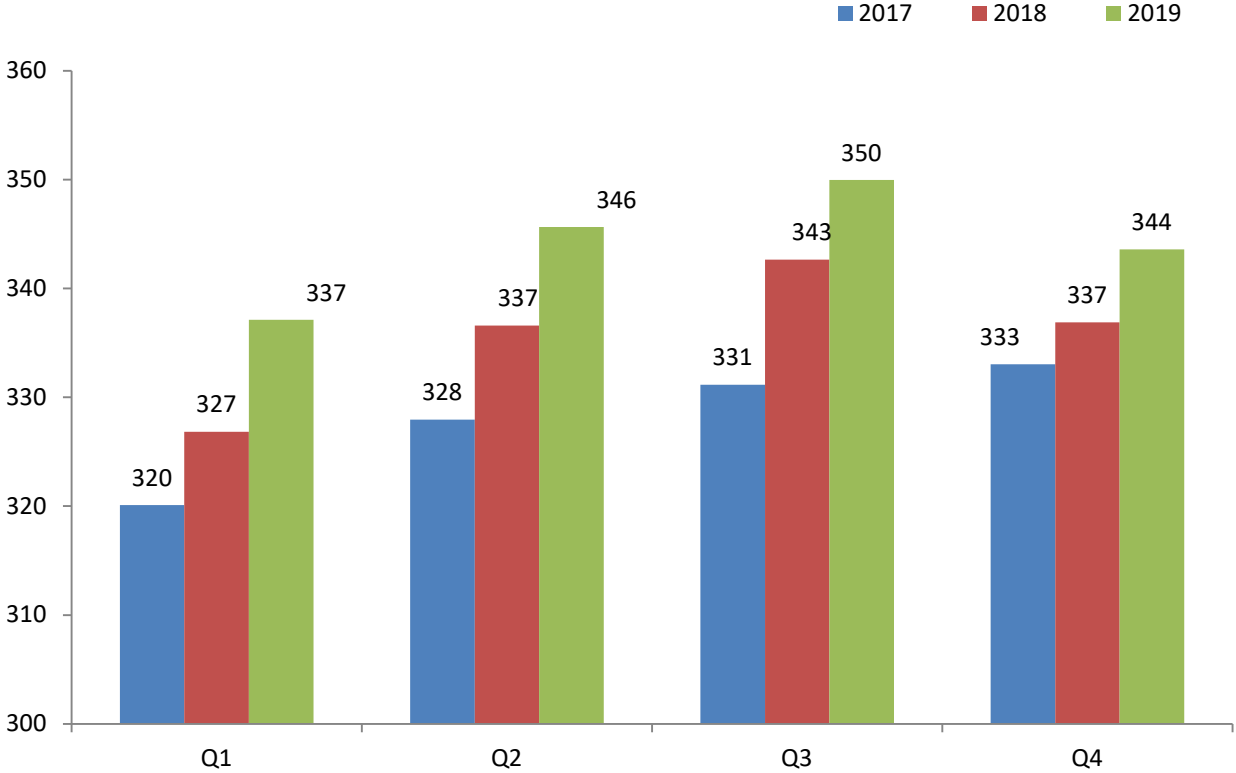
# Carcase weights (Steers)



# Carcase weights (Heifers)



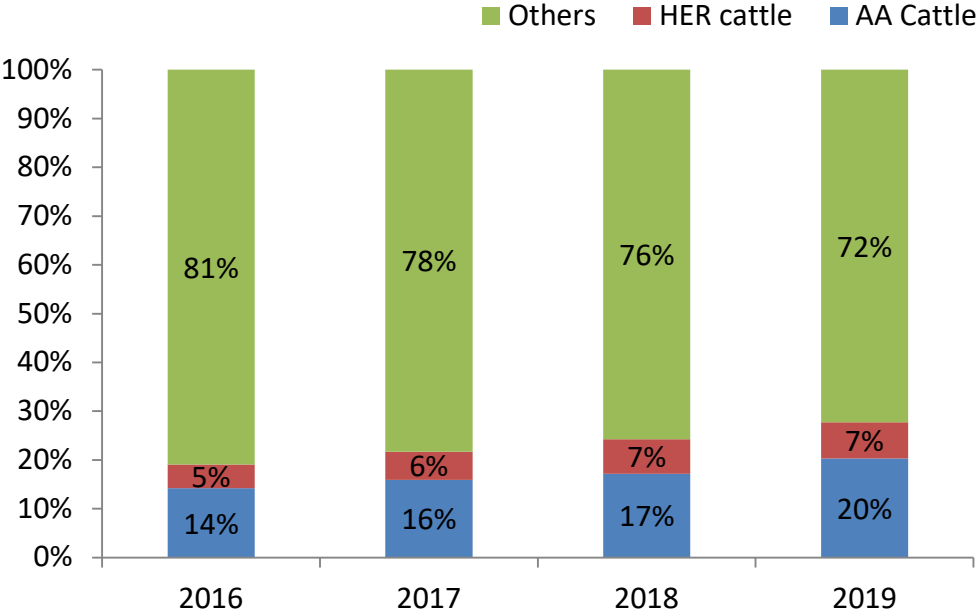
# Carcase weights (Young Bulls)



# Overview of prime kill Oct-Dec 2019

	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
2017	319.0	25.8	351.5	25.5	332.0	16.0
2018	320.6	26.1	357.0	26.3	334.4	16.3
2019	325.3	26.2	360.4	26.0	341.9	16.3

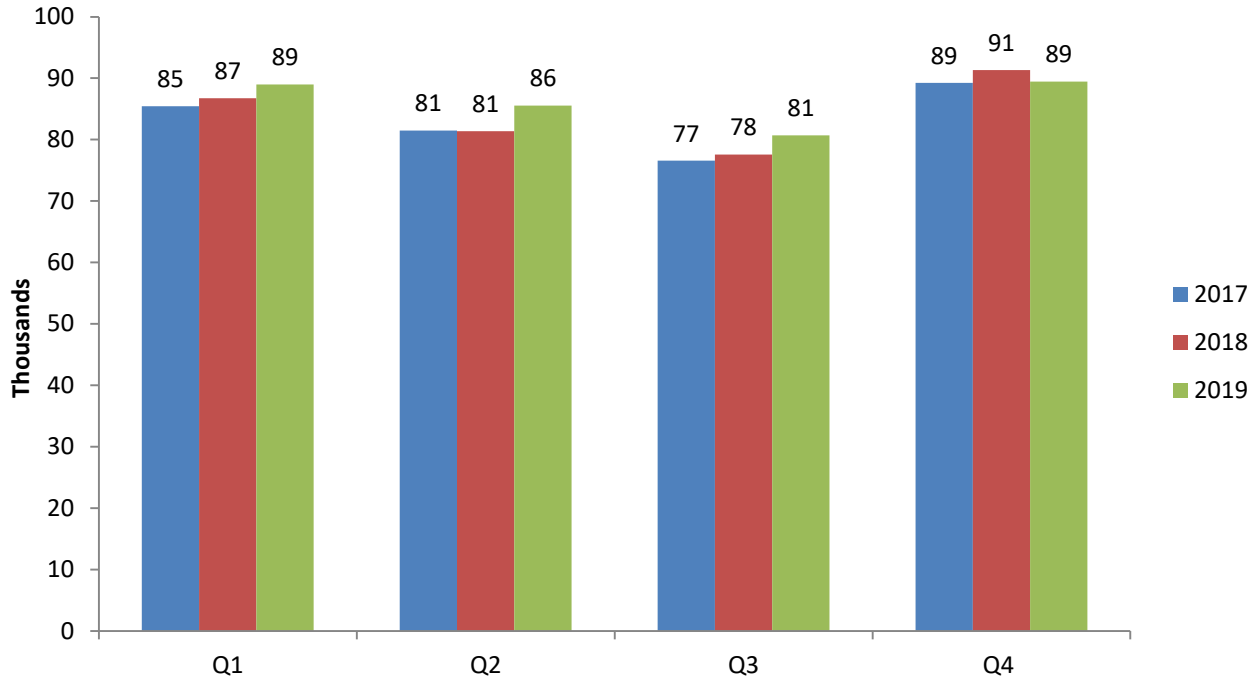
# Premium cattle kill Oct-Dec 2019



	AA Cattle	HER cattle	Others
<b>2016</b>	14%	5%	81%
<b>2017</b>	16%	6%	78%
<b>2018</b>	17%	7%	76%
<b>2019</b>	20%	7%	72%

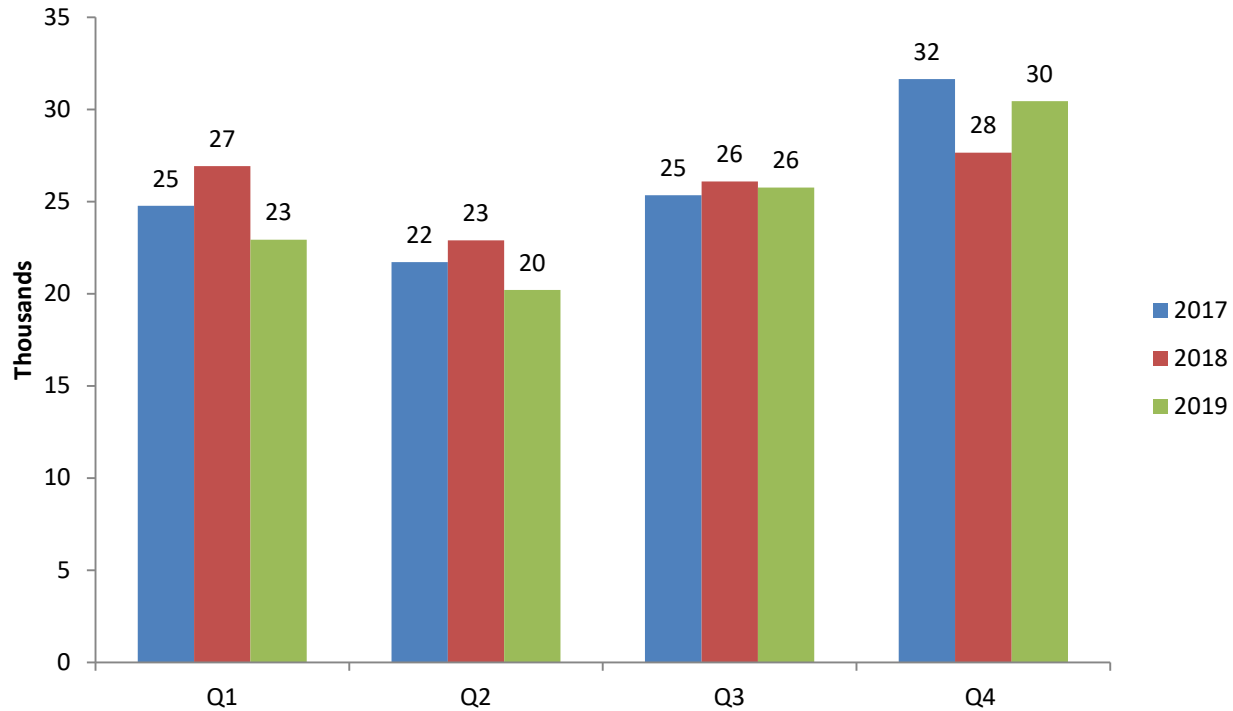


# Quarterly Prime Cattle Kill



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	80,692
Q4	89,251	91,311	89,451

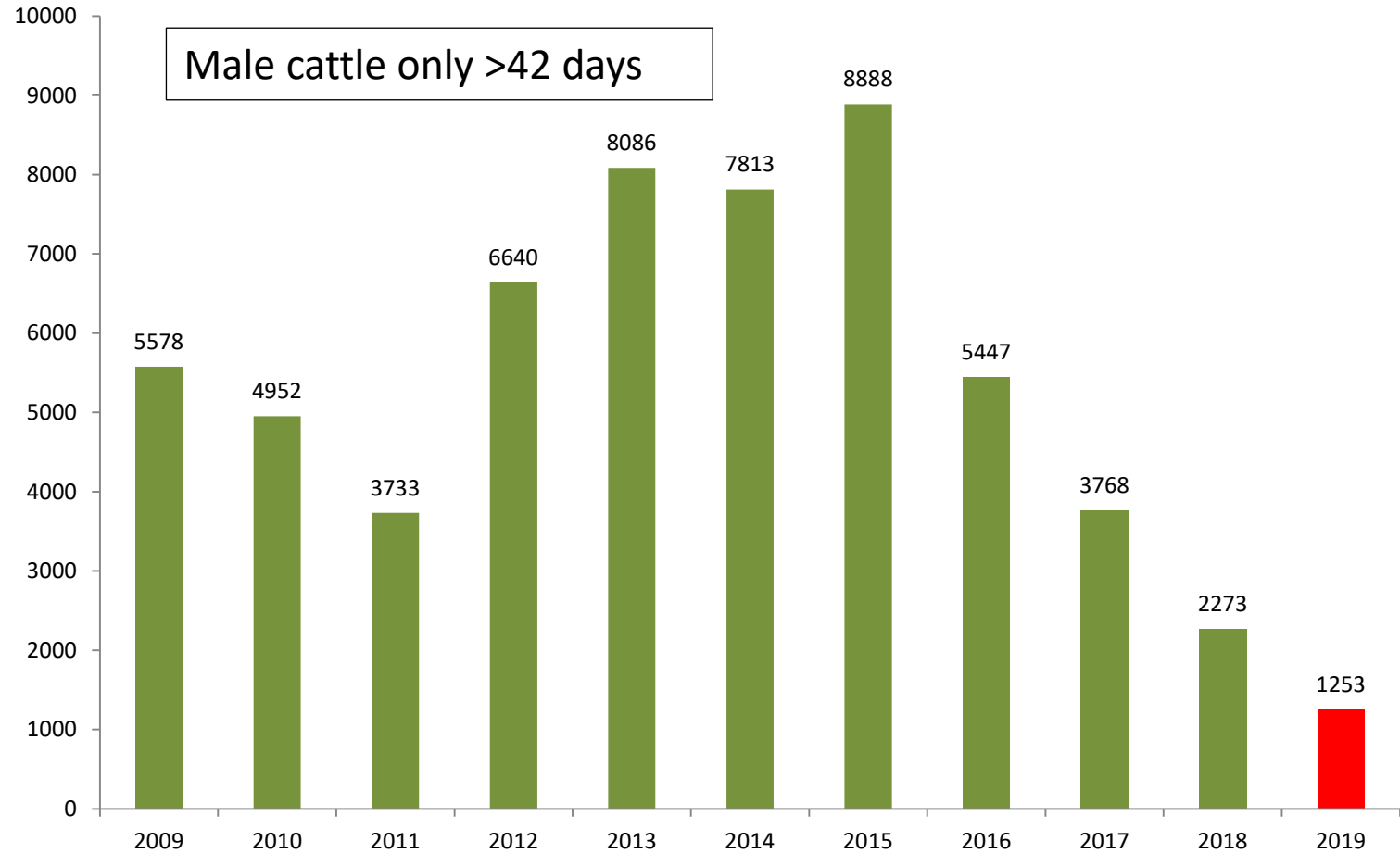
# Quarterly Cow Kill



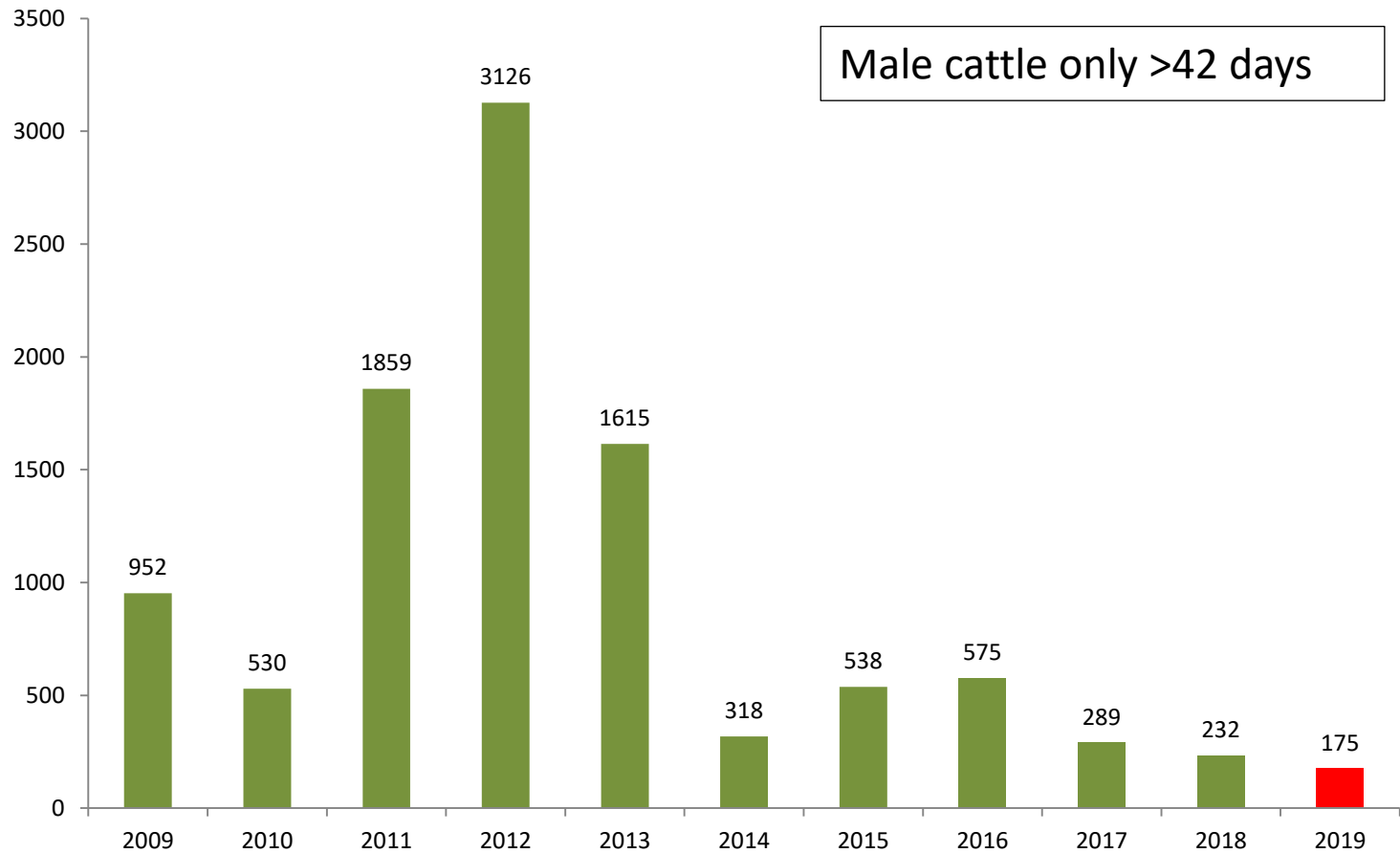
Cow Slaughtering	2017	2018	2019
Q1	24,760	26,924	22,920
Q2	21,706	22,890	20,206
Q3	25,339	26,079	25,753
Q4	31,635	27,640	30,442

# Live Exports

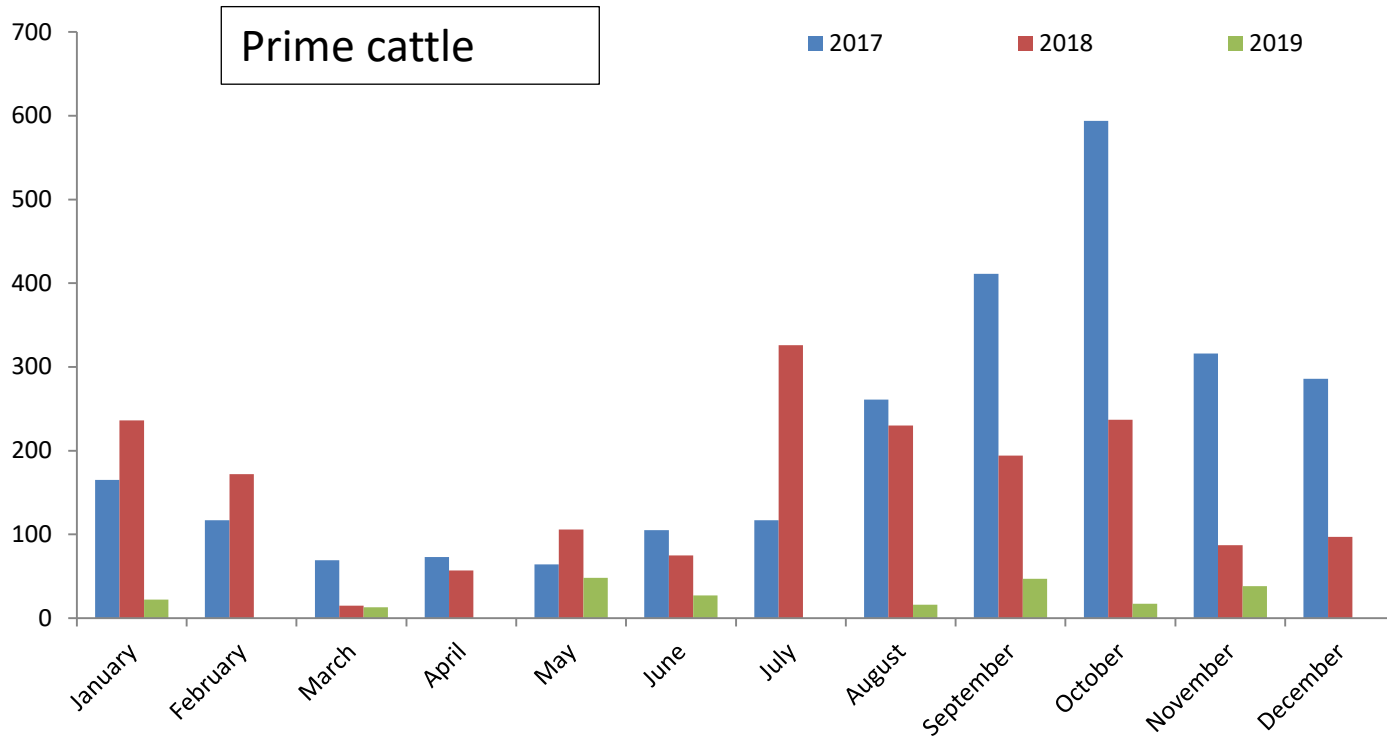
# Exports to GB for further production



# Exports to ROI for Further Production

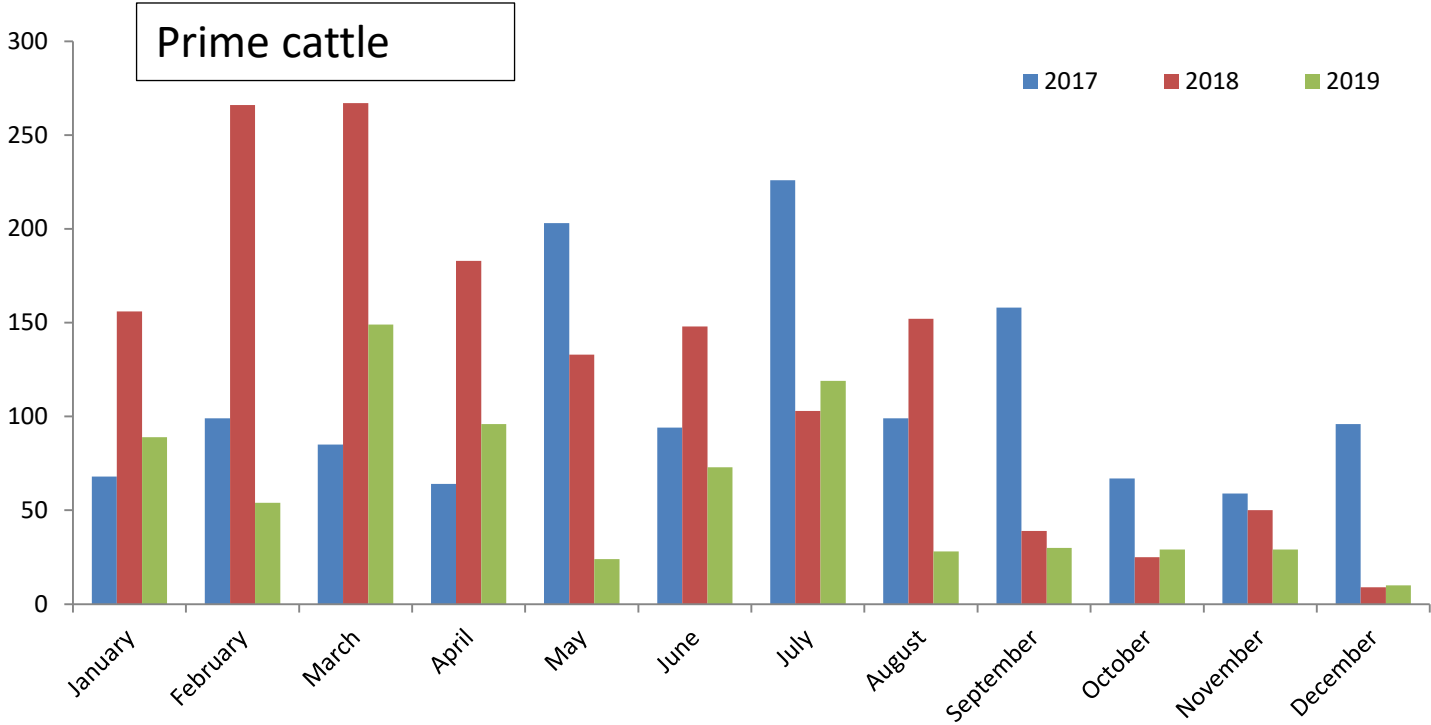


# Exports to GB for Direct Slaughter



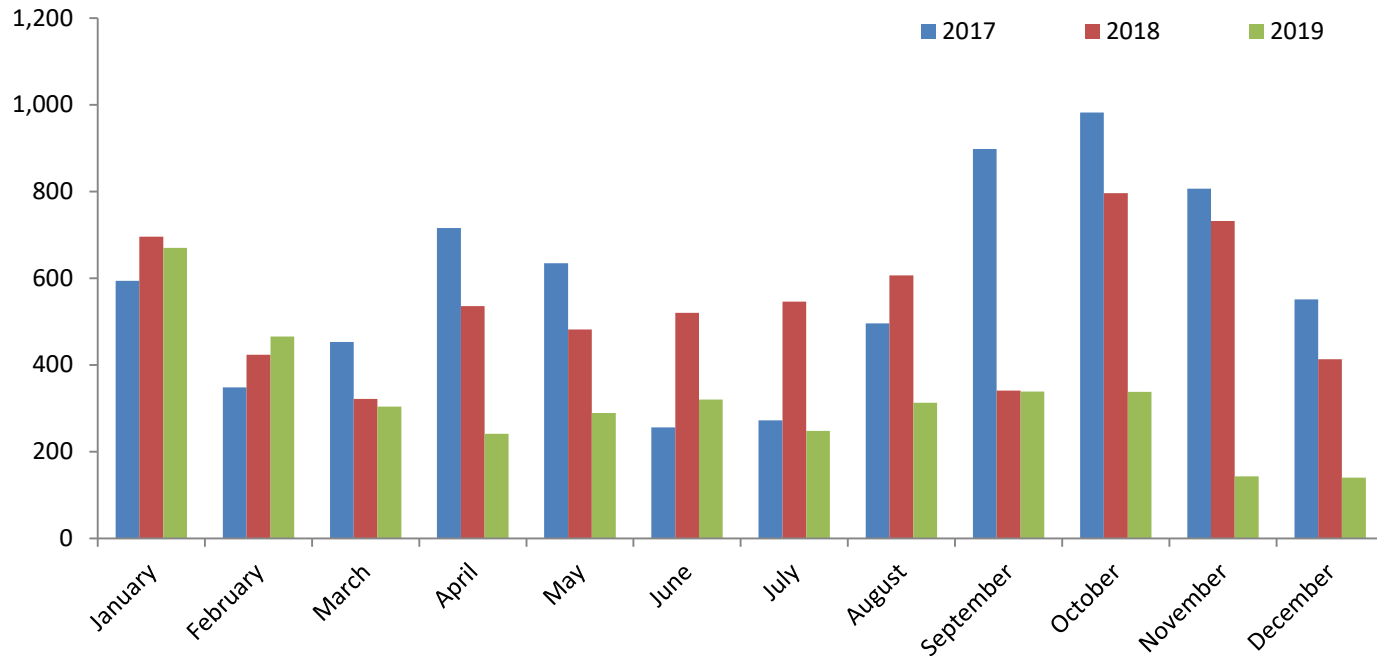
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	165	117	69	73	64	105	117	261	411	594	316	286	<b>2,578</b>
<b>2018</b>	236	172	15	57	106	75	326	230	194	237	87	97	<b>1,832</b>
<b>2019</b>	22	0	13	0	48	27	0	16	47	17	38	0	<b>228</b>

# Exports to ROI for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	68	99	85	64	203	94	226	99	158	67	59	96	<b>1318</b>
<b>2018</b>	156	266	267	183	133	148	103	152	39	25	50	9	<b>1531</b>
<b>2019</b>	89	54	149	96	24	73	119	28	30	29	29	10	<b>730</b>

# Cow exports to ROI for Direct Slaughter

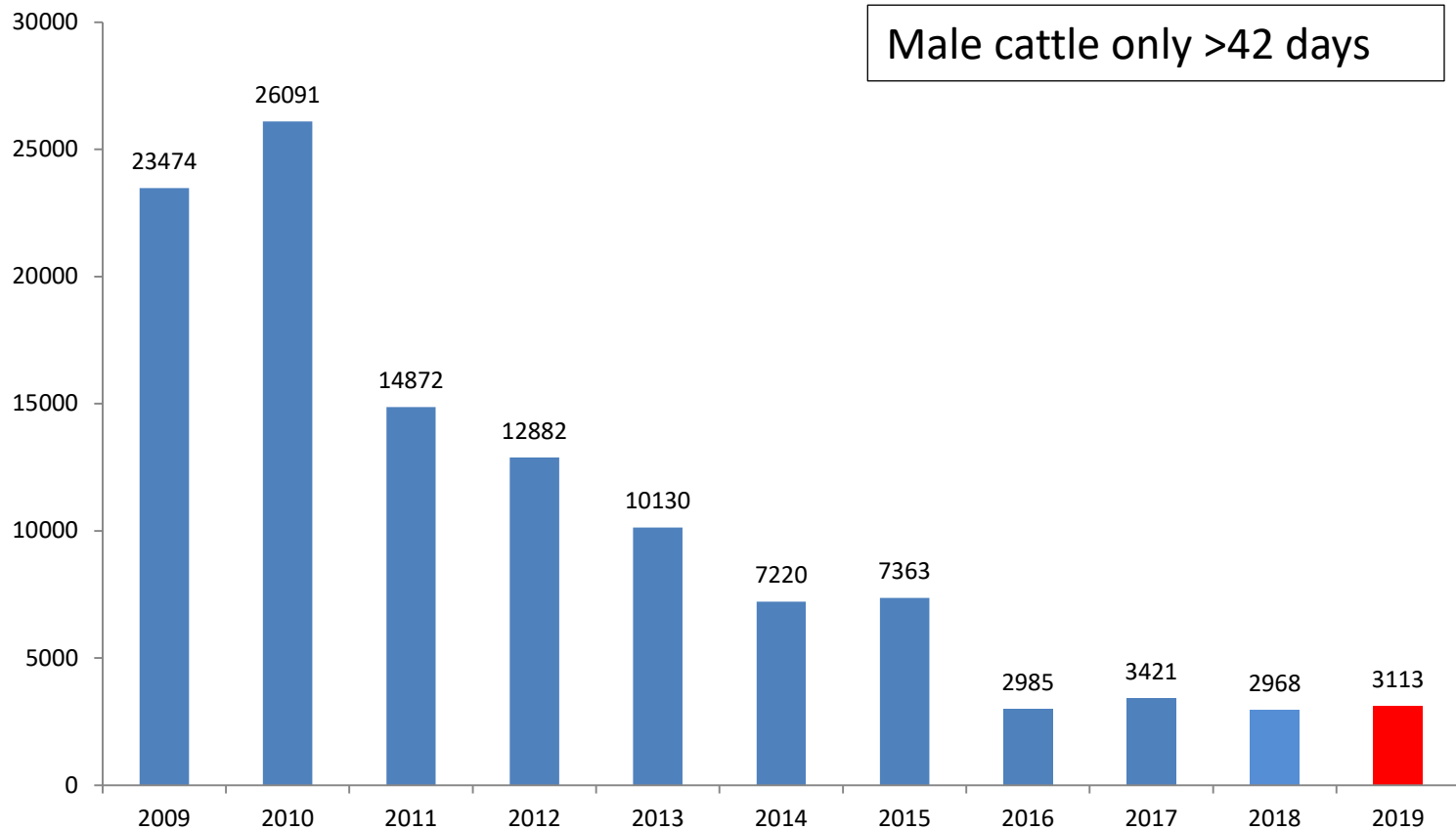


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	594	348	453	716	635	256	272	496	898	982	807	551	<b>7008</b>
<b>2018</b>	696	424	322	536	482	520	546	607	341	796	732	413	<b>6415</b>
<b>2019</b>	670	466	304	241	289	320	248	313	339	338	143	140	<b>3811</b>

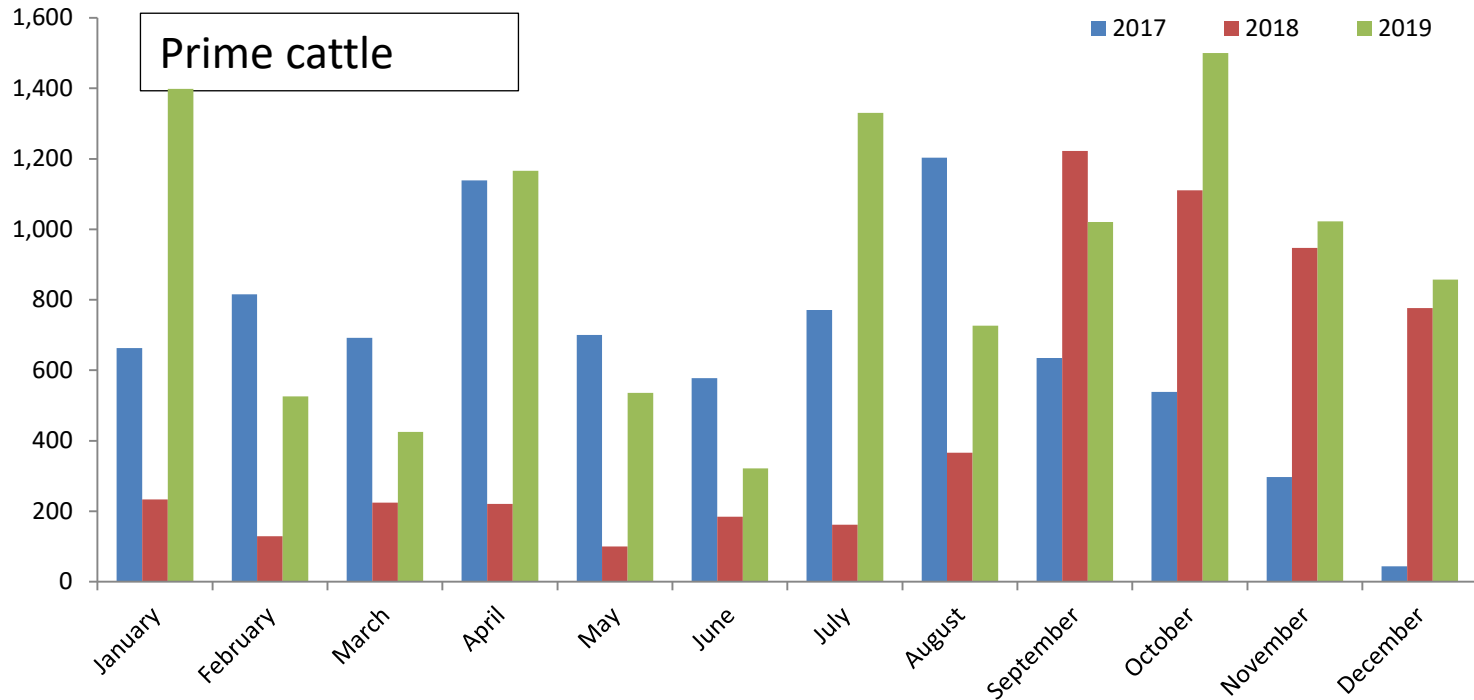


Live Imports

# Imports from ROI for Further Production

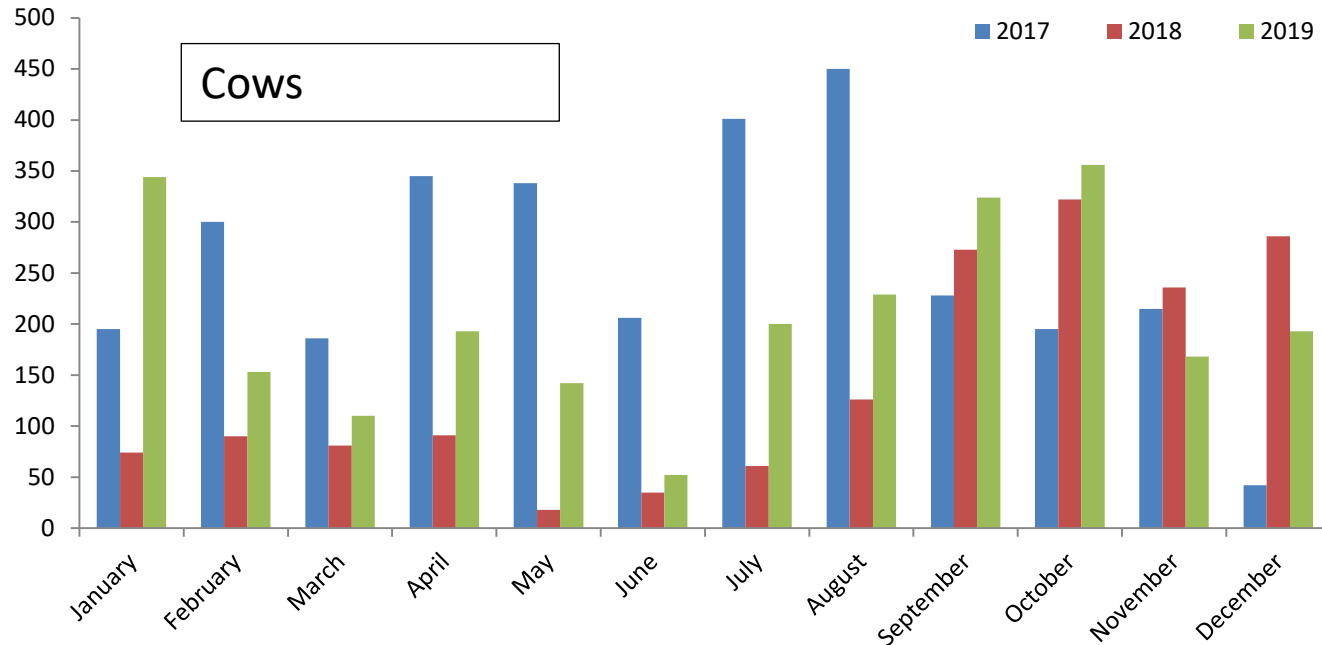


# Imports from ROI for Direct Slaughter



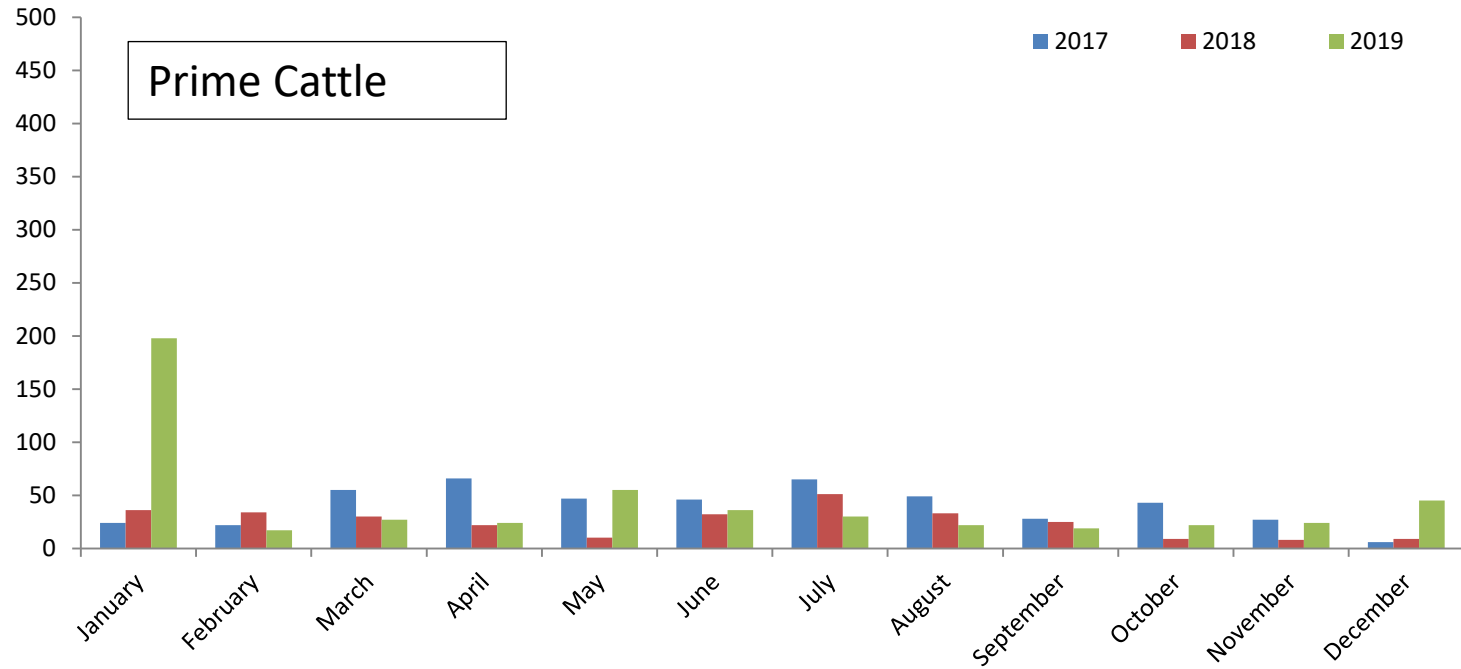
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	663	816	692	1139	700	578	771	1203	635	539	297	44	<b>8077</b>
<b>2018</b>	234	129	225	221	100	185	162	366	1222	1111	947	777	<b>5679</b>
<b>2019</b>	1398	526	425	1166	536	322	1330	727	1021	1500	1023	857	<b>10831</b>

# Imports from ROI for Direct Slaughter



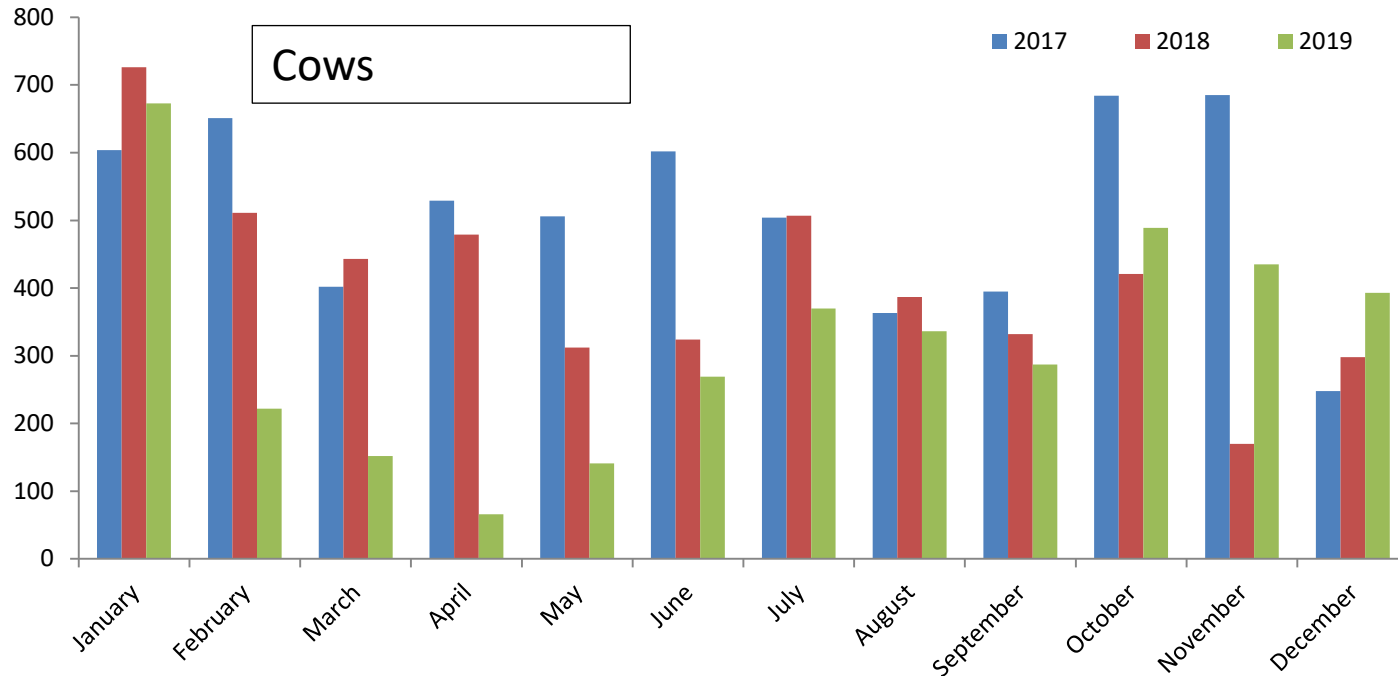
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	195	300	186	345	338	206	401	450	228	195	215	42	<b>3101</b>
<b>2018</b>	74	90	81	91	18	35	61	126	273	322	236	286	<b>1693</b>
<b>2019</b>	344	153	110	193	142	52	200	229	324	356	168	193	<b>2464</b>

# Imports from GB for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	24	22	55	66	47	46	65	49	28	43	27	6	<b>478</b>
<b>2018</b>	36	34	30	22	10	32	51	33	25	9	8	9	<b>299</b>
<b>2019</b>	198	17	27	24	55	36	30	22	19	22	24	45	<b>519</b>

# Imports from GB for Direct Slaughter

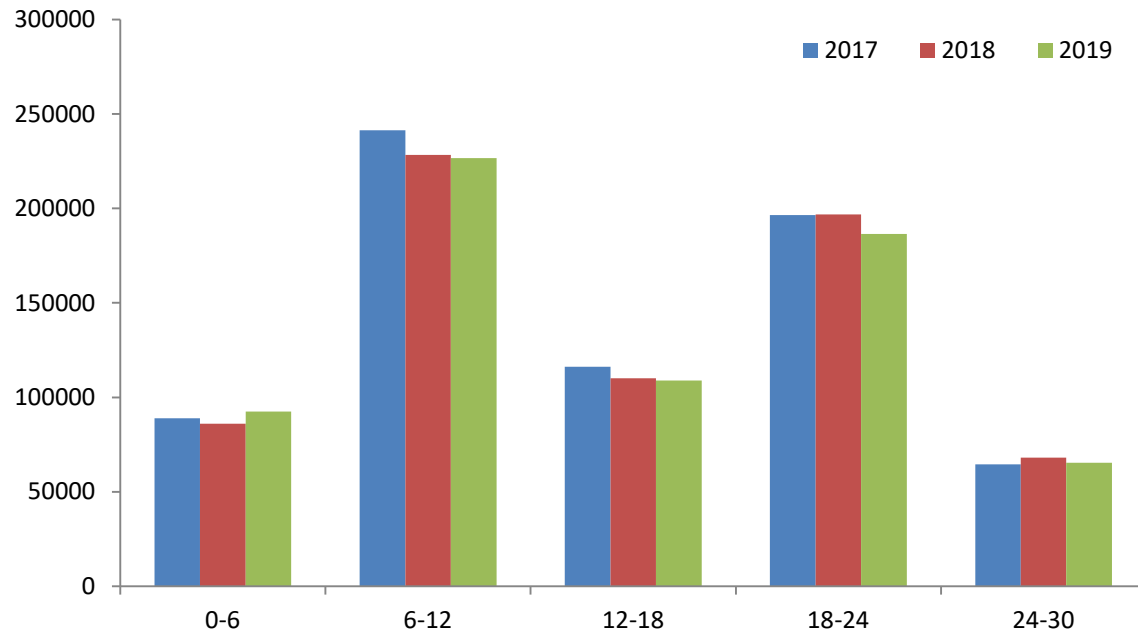


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	604	651	402	529	506	602	504	363	395	684	685	248	<b>6173</b>
<b>2018</b>	726	511	443	479	312	324	507	387	332	421	170	298	<b>4910</b>
<b>2019</b>	673	222	152	66	141	269	370	336	287	489	435	393	<b>3833</b>

# Cattle Supplies

# Beef sired cattle on NI farms

## December 2019

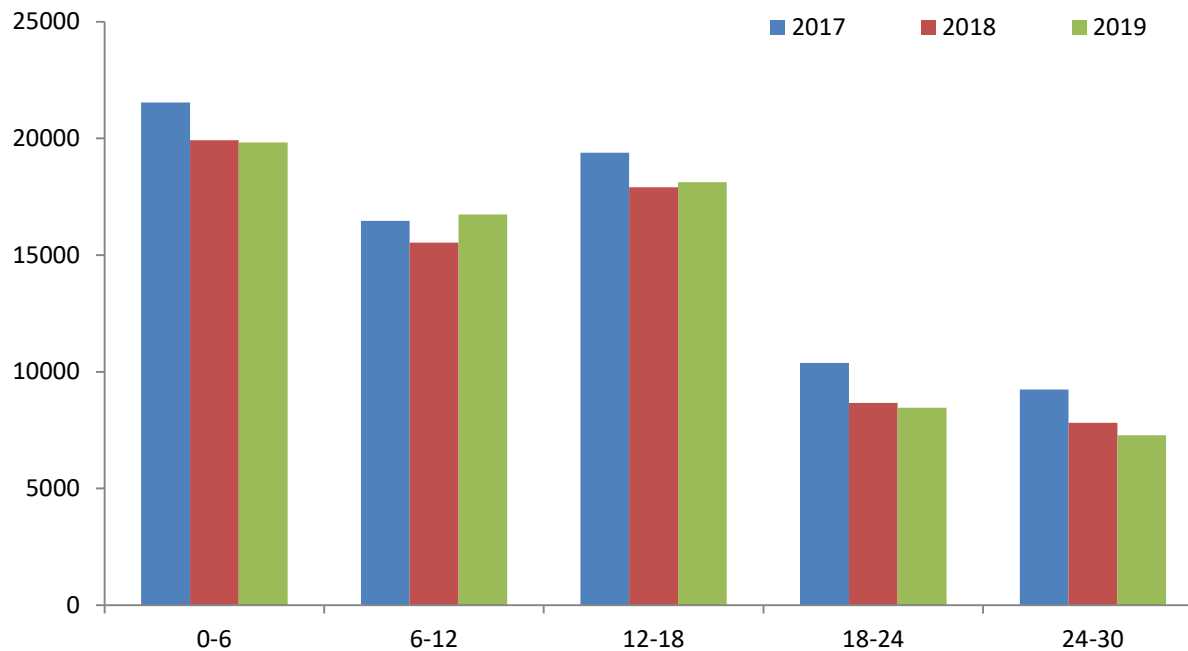


Age (Months)	2017	2018	2019	2018/2019	2017/2019
0-6	88859	86036	92544	7.6%	4.1%
6-12	241447	228334	226750	-0.7%	-6.1%
12-18	116166	110040	108903	-1.0%	-6.3%
18-24	196547	196869	186436	-5.3%	-5.1%
24-30	64578	67985	65313	-3.9%	1.1%



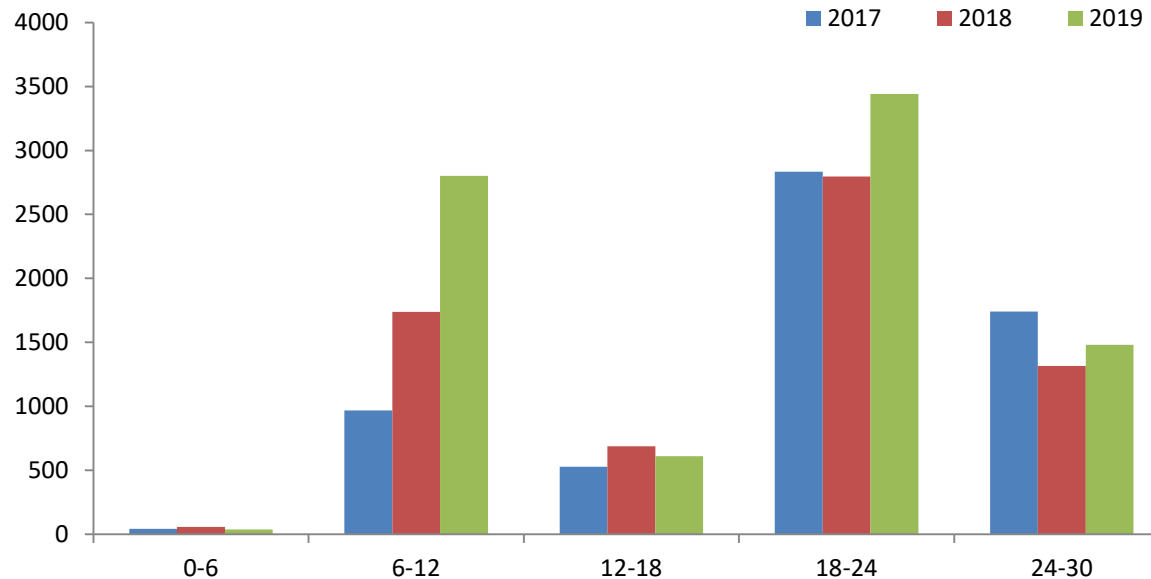
# Dairy sired male cattle on NI farms

## December 2019



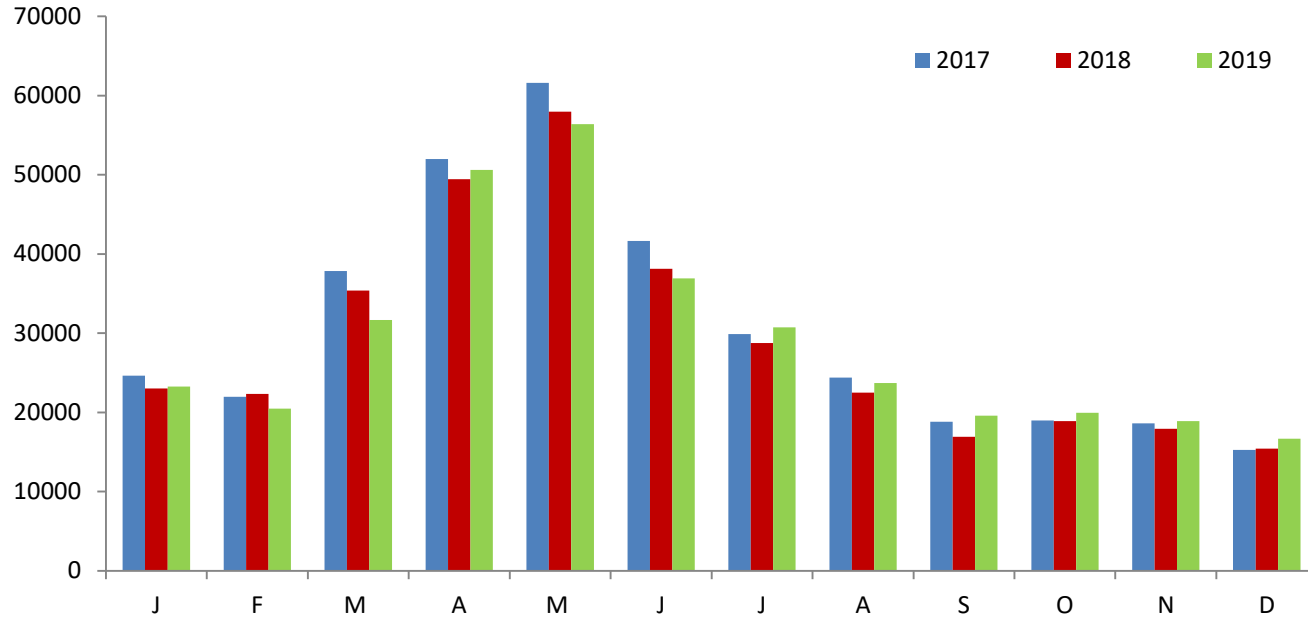
Dairy sired males	2017	2018	2019	2018/2019	2017/2019
<b>0-6</b>	21532	19915	19827	-0.4%	-7.9%
<b>6-12</b>	16462	15528	16740	7.8%	1.7%
<b>12-18</b>	19380	17903	18120	1.2%	-6.5%
<b>18-24</b>	10373	8664	8463	-2.3%	-18.4%
<b>24-30</b>	9238	7815	7276	-6.9%	-21.2%

# Nomad cattle on NI farms Dec 2019



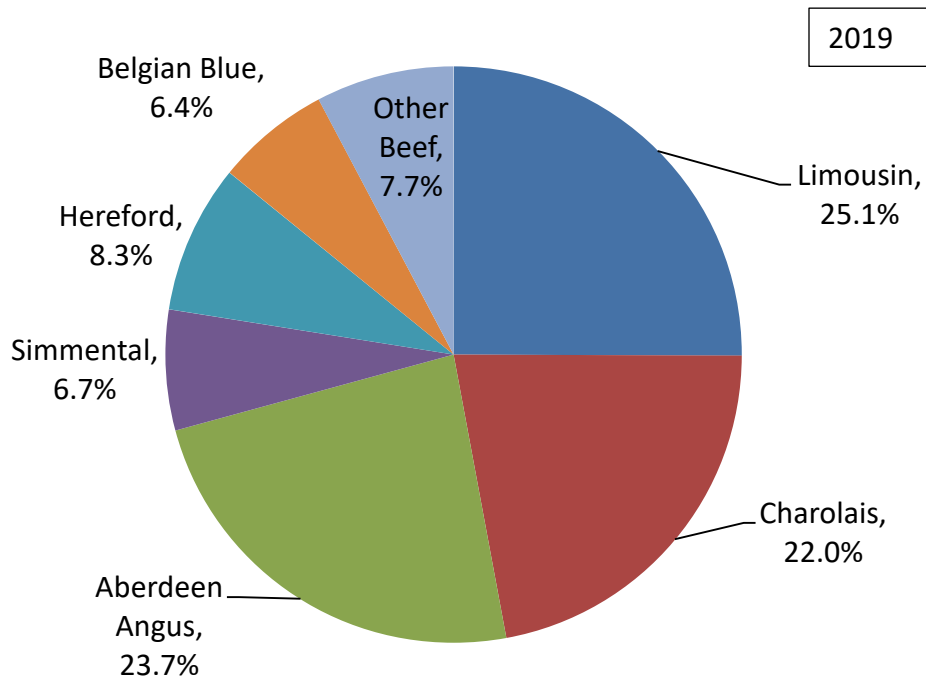
ROI Nomads (beef sired +dairy male)	2017	2018	2019	2018/2019	2017/2019
<b>0-6</b>	42	57	37	-35.1%	-11.9%
<b>6-12</b>	967	1738	2802	61.2%	189.8%
<b>12-18</b>	529	687	610	-11.2%	15.3%
<b>18-24</b>	2833	2797	3442	23.1%	21.5%
<b>24-30</b>	1741	1316	1482	12.6%	-14.9%

# NI Beef Sired Calf Registrations 2019



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2018</b>	23001	22323	35389	49451	57945	38126	28748	22507	16917	18912	17928	15428	<b>346675</b>
<b>2019</b>	23262	20461	31658	50617	56386	36912	30720	23702	19603	19943	18886	16697	<b>348847</b>
<b>% Change</b>	1.1%	-8.3%	-10.5%	2.4%	-2.7%	-3.2%	6.9%	5.3%	15.9%	5.5%	5.3%	8.2%	<b>0.6%</b>

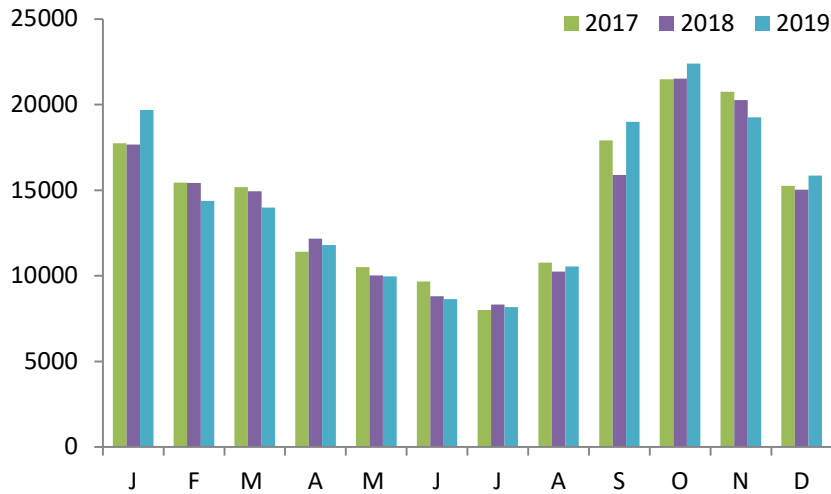
# Beef Calf Registrations by Breed



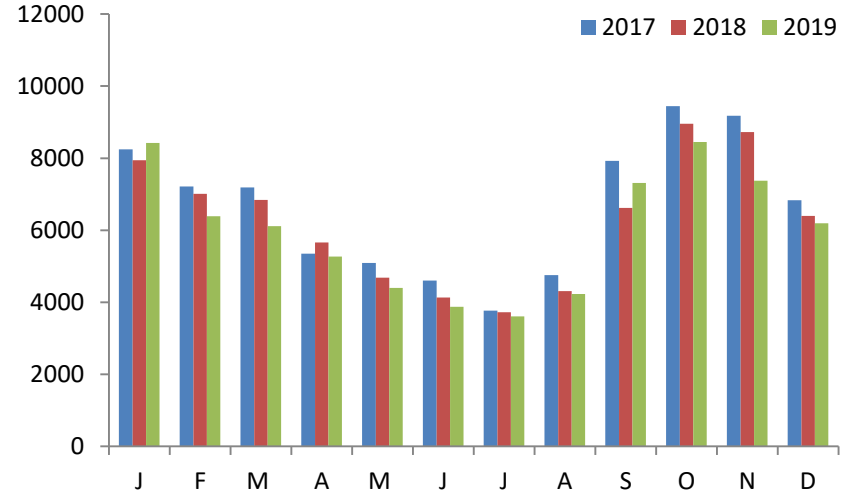
Proportion Dairy Dam	2017	2018	2019
Jan	49%	51%	53%
Feb	51%	51%	51%
Mar	39%	40%	43%
Apr	26%	26%	27%
May	20%	19%	20%
Jun	24%	24%	25%
Jul	27%	28%	28%
Aug	30%	31%	32%
Sep	40%	40%	41%
Oct	47%	49%	49%
Nov	51%	54%	55%
Dec	56%	60%	58%
<b>Grand Total</b>	<b>34%</b>	<b>35%</b>	<b>36%</b>

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
<b>2018</b>	25.8%	22.4%	22.1%	7.2%	8.2%	6.2%	8.0%
<b>2019</b>	25.1%	22.0%	23.7%	6.7%	8.3%	6.4%	7.7%

# NI Dairy Sired Calf Registrations 2019



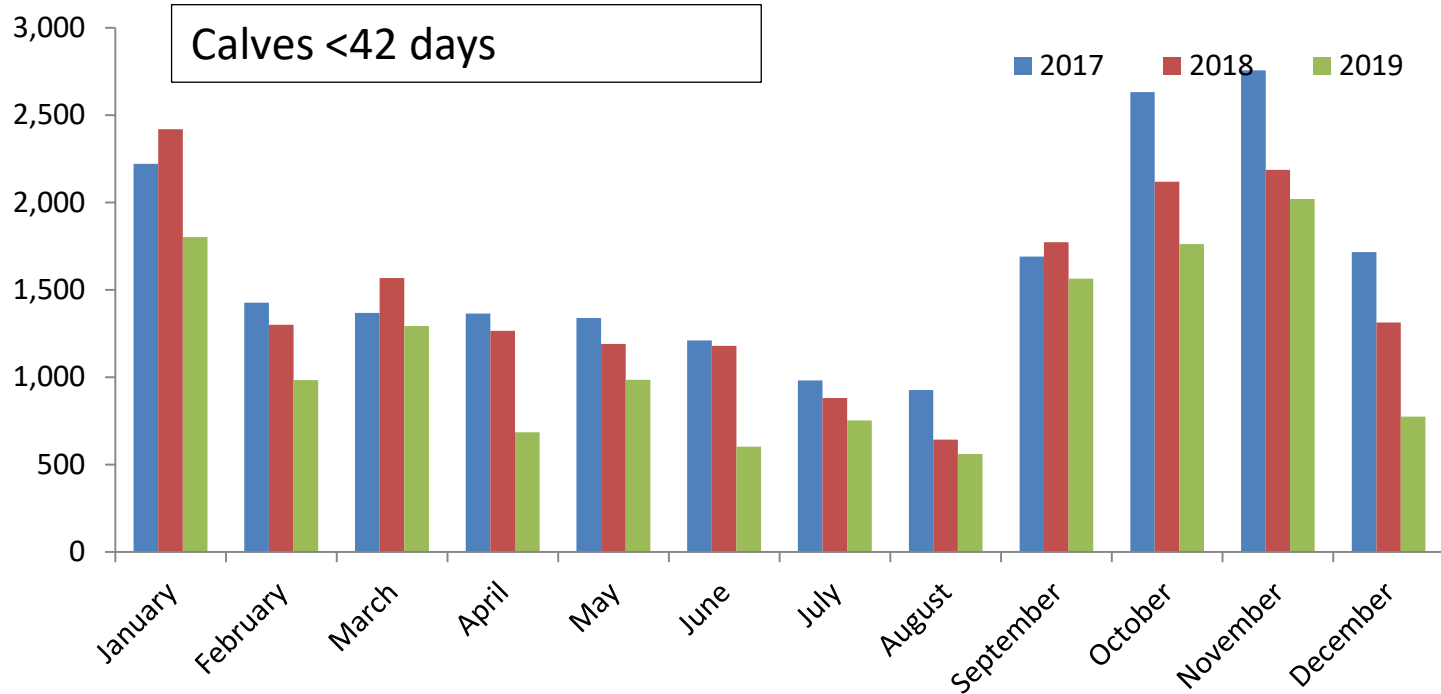
Total dairy calf registrations



Male dairy calf registrations

Males	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2018</b>	7942	7007	6845	5663	4682	4133	3721	4312	6619	8953	8729	6395	<b>75001</b>
<b>2019</b>	8423	6392	6110	5270	4394	3877	3607	4234	7312	8447	7371	6193	<b>71630</b>
<b>% Change</b>	6.1%	-8.8%	-10.7%	-6.9%	-6.2%	-6.2%	-3.1%	-1.8%	10.5%	-5.7%	-15.6%	-3.2%	<b>-4.5%</b>

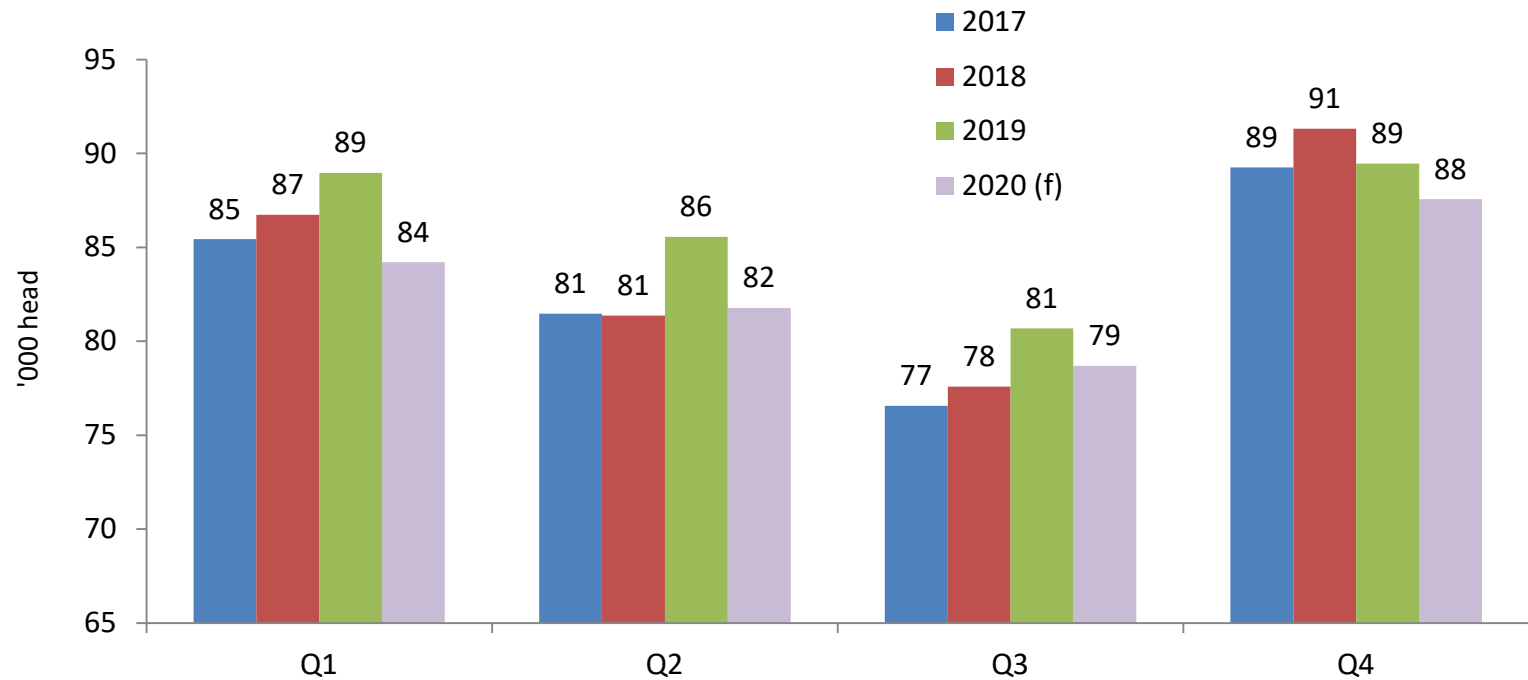
# Dairy Bull Calf Exports



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>2017</b>	2222	1426	1369	1365	1338	1210	981	926	1690	2632	2756	1716	<b>19631</b>
<b>2018</b>	2419	1300	1568	1265	1191	1180	881	642	1772	2119	2186	1313	<b>17836</b>
<b>2019</b>	1802	983	1293	685	986	602	752	561	1564	1761	2020	775	<b>13784</b>

Forecast

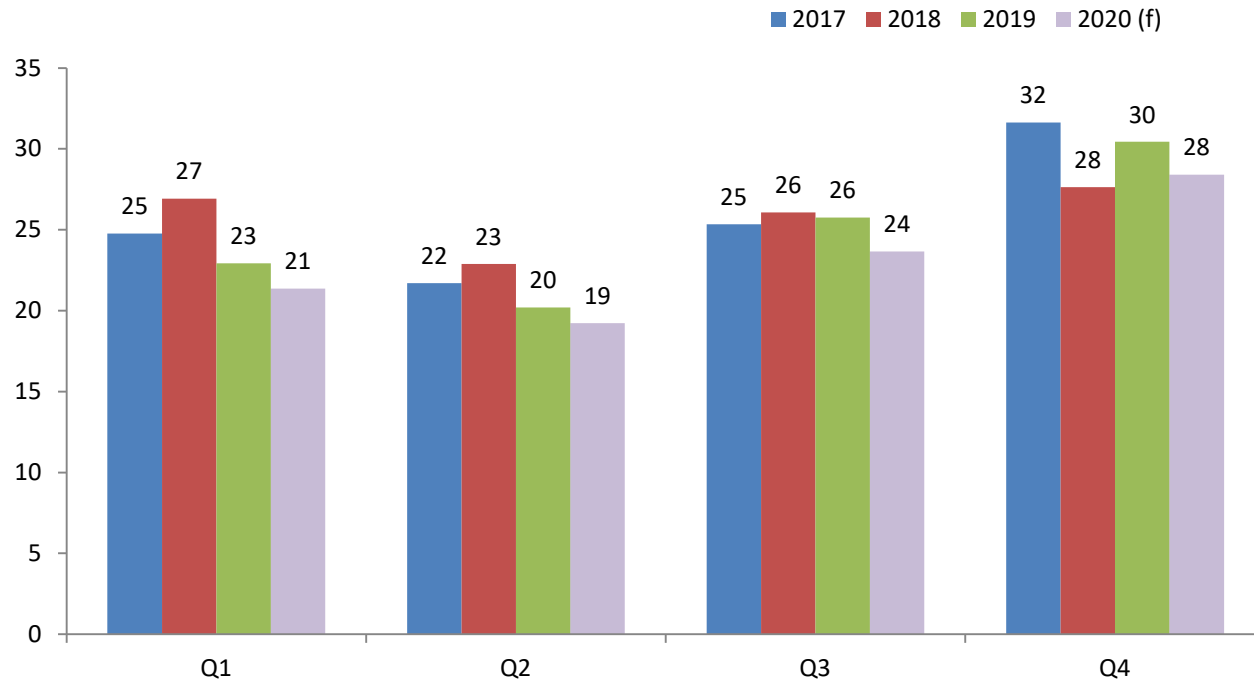
# Forecast NI Prime Cattle Kill 2020



	2017	2018	2019	2020 (f)	2019/20 % Change
<b>Q1</b>	85430	86738	88966	84203	-5.5%
<b>Q2</b>	81474	81359	85562	81780	-4.6%
<b>Q3</b>	76560	77583	80692	78694	-2.6%
<b>Q4</b>	89251	91311	89451	87562	-2.1%
<b>Total</b>	332715	336991	344671	332239	-3.7%

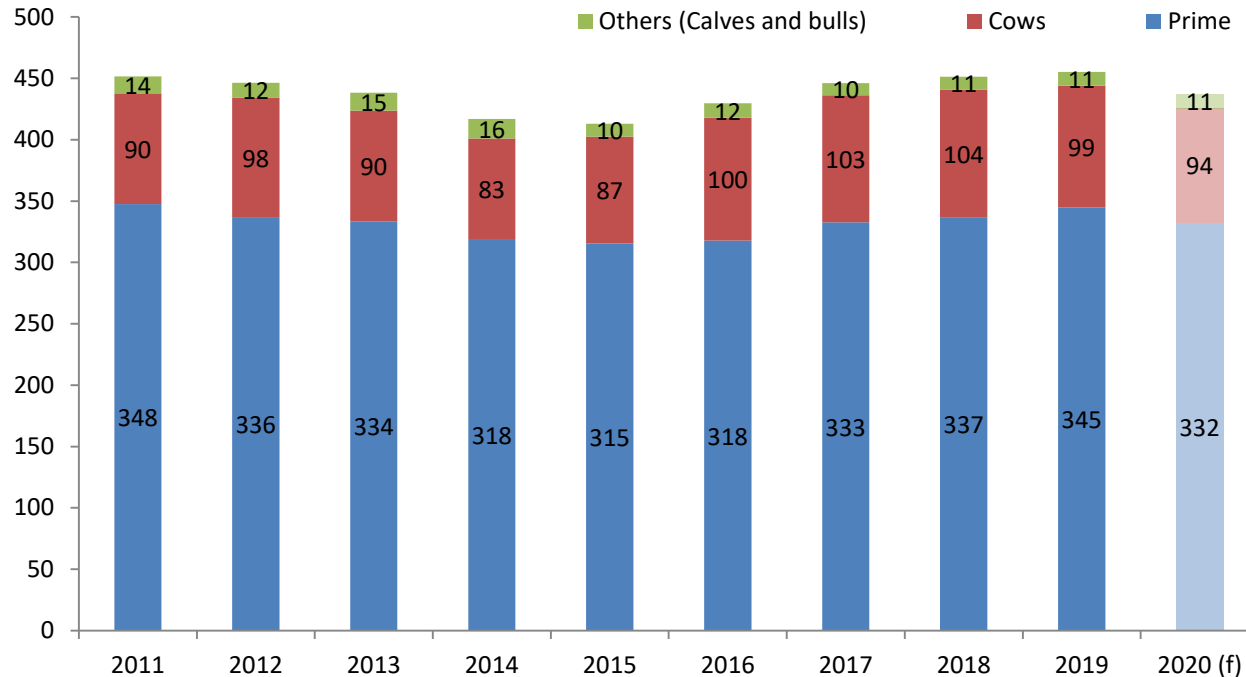


# Forecast NI Cow Kill 2020



	2017	2018	2019	2020 (f)	2019/20 % Change
<b>Q1</b>	24760	26924	22920	21366	-5.8%
<b>Q2</b>	21706	22890	20206	19232	-4.3%
<b>Q3</b>	25339	26079	25753	23651	-8.1%
<b>Q4</b>	31635	27640	30442	28409	-7.4%
<b>Total</b>	103440	103533	99321	92657	-6.4%

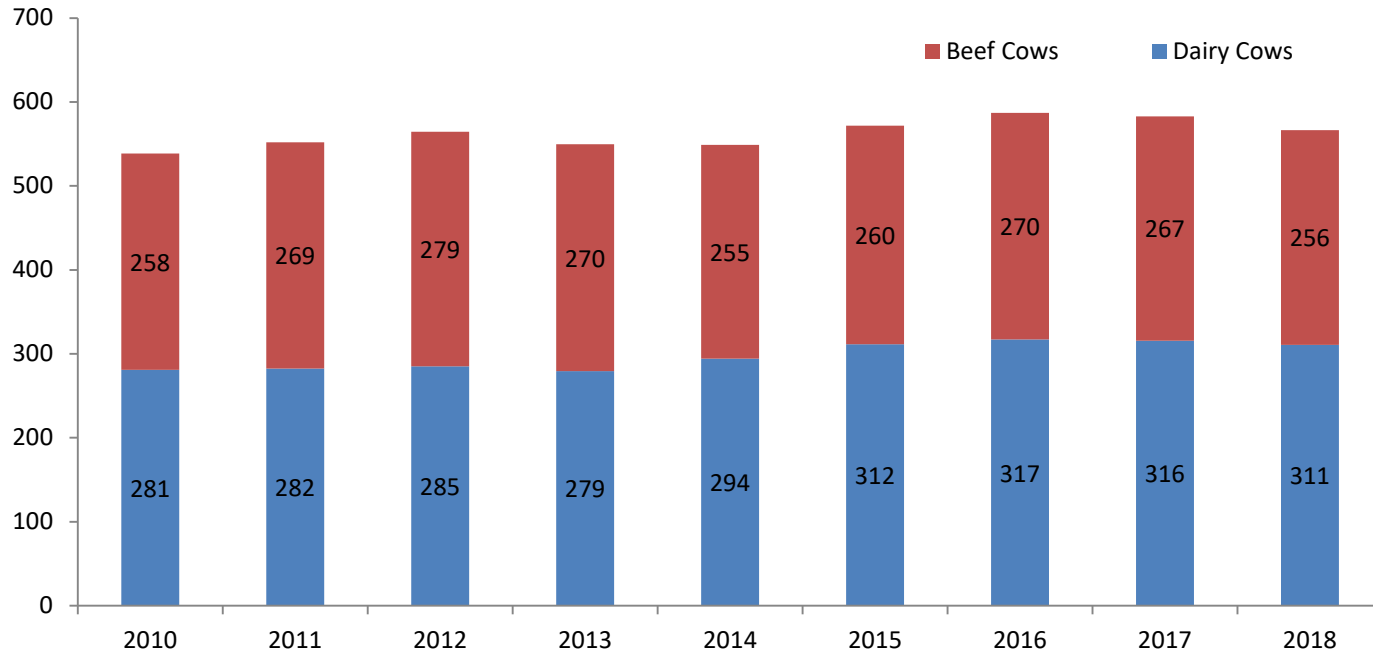
# Forecast Total Cattle Kill 2020 (Inc bulls and calves)



Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020 (f)
<b>Total cattle throughput</b>	451,716	446,356	438,335	416,895	413,062	429,618	446,112	451,339	455,280	437,184

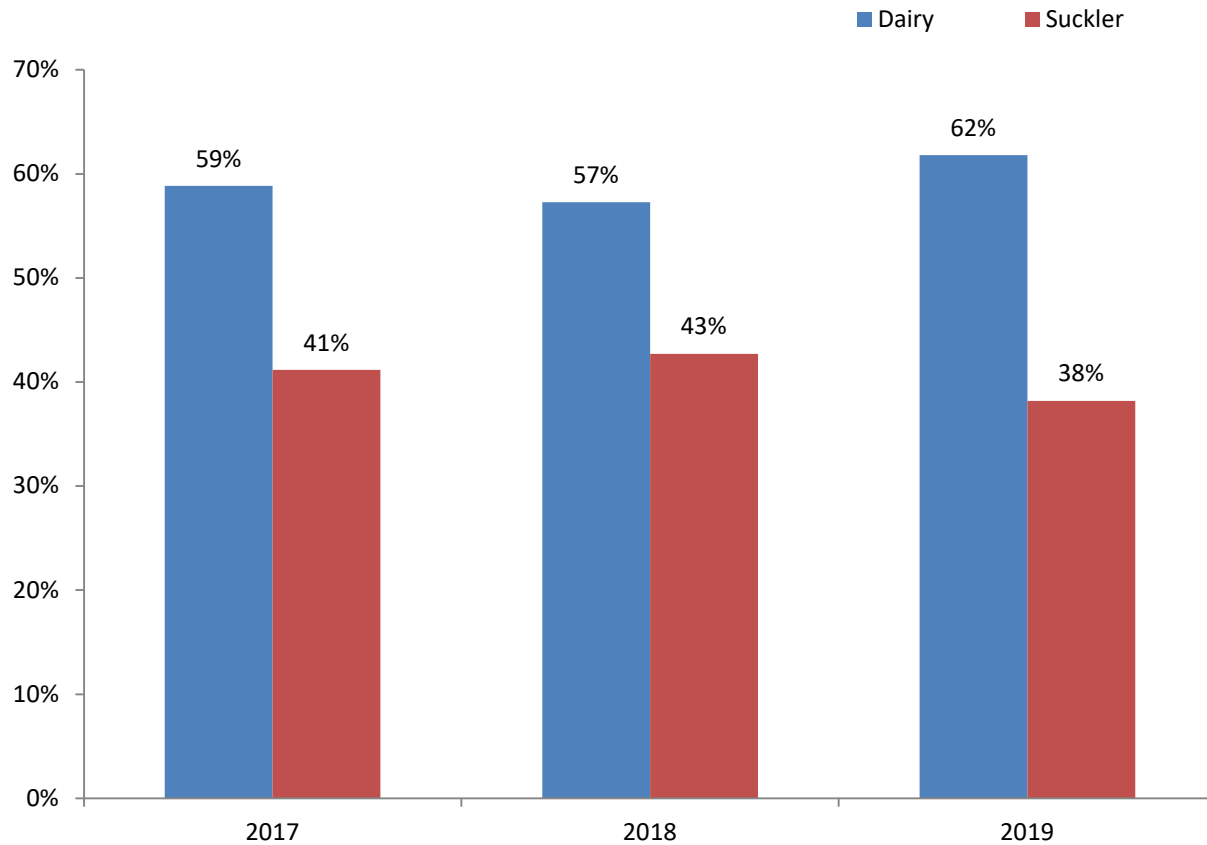
Longer term outlook

# Breeding females December Survey



	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Dairy Cows</b>	281,043	282,487	285,369	279,481	294,192	311,520	317,146	315,800	310,700
<b>Beef Cows</b>	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 continue at current levels
- Exports to ROI and GB for direct slaughter continue at similar levels
- Unchanged calf exports to continent
- Current level of beef sires used on dairy herd continues
- No change in relative price differential across British Isles
- No substantial movement in exchange rates
- No substantial disease outbreak
- No substantial changes in disease controls
- Breeding herd to remain steady
- Stability in dairy market
- Brexit- 31 January 2020