

Seamus Mc Menamin



Slaughter Trends 2020

NI Slaughterings June 2020

NI CATTLE AND SHEEP SLAUGHTERINGS						
	June			Year to Date		
	(4 weeks ended 27/06/20)			(26 weeks ended 27/06/20)		
	Jun-19	Jun-20	% Change	2019	2020	Change
CATTLE – FOODCHAIN						
Steers	11,030	12,540	14%	80,373	82,001	2%
Heifers	9,411	10,083	7%	71,328	69,059	-3%
Young Bulls	4,901	3,679	-25%	22,827	17,730	-22%
Total Prime Cattle	25,342	26,302	4%	174,528	168,790	-3%
Calves	429	331	-23%	2,858	2,890	1%
Cows	7,088	8,548	21%	43,126	45,869	6%
Mature Bulls	500	493	-1%	2,567	2,350	-8%
Total Cattle	33,359	35,674	7%	223,079	219,899	-1%
SHEEP						
Lambs & Hoggets	35,963	40,206	12%	152,859	174,330	14%
Ewes & Rams	1,912	1,877	-2%	13,662	11,402	-17%
	37,875	42,083	11%	166,521	185,732	12%

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

NI Beef & Lamb Production June 2020

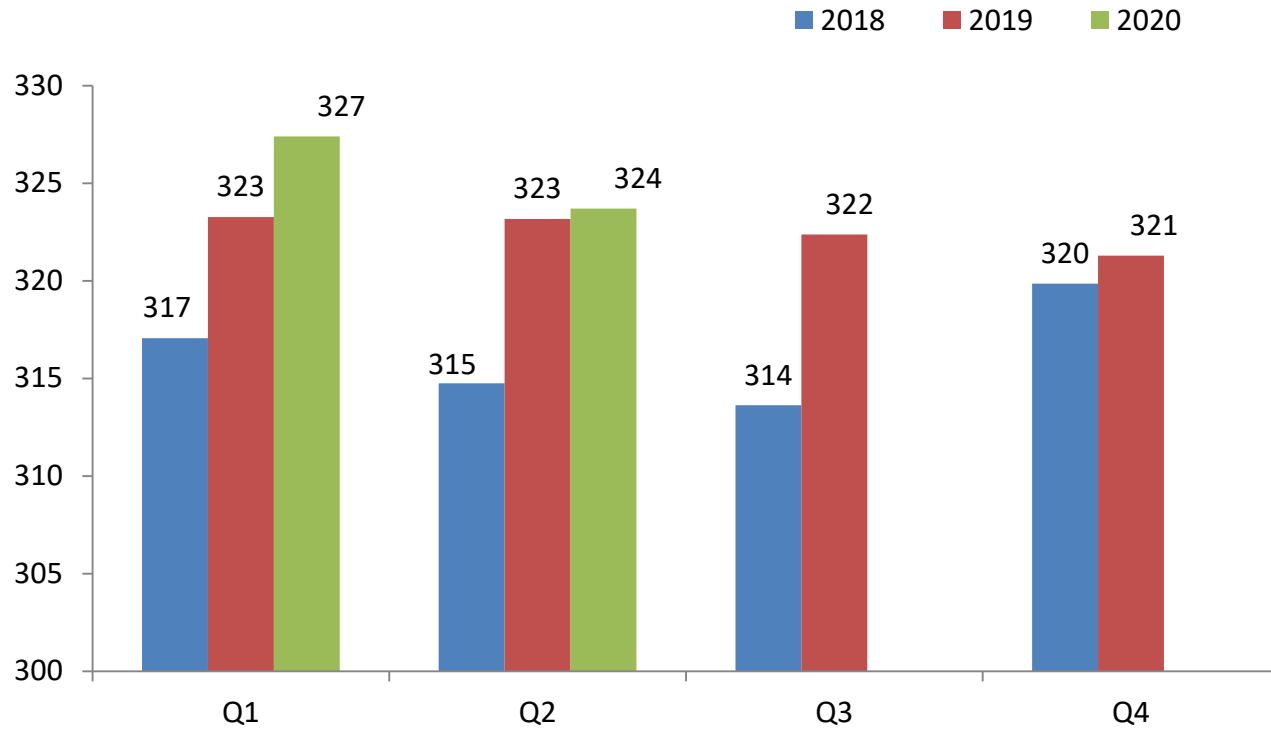
NI BEEF AND SHEEPMEAT PRODUCTION						
	June			Year to Date		
	(4 weeks ended 27/06/20)			(26 weeks ended 27/06/20)		
	Jun-19	Jun-20	% Change	2019	2020	Change
CATTLE - FOODCHAIN						
Steers	3,998	4,520	13%	28,952	29,599	2%
Heifers	3,043	3,260	7%	23,055	22,491	-2%
Young Bulls	1,717	1,260	-27%	7,806	5,991	-23%
Total Prime Cattle	8,757	9,040	3%	59,813	58,082	-3%
Calves	93	73	-22%	600	586	-2%
Cows	2,203	2,735	24%	13,292	14,384	8%
Mature Bulls	220	227	3%	1,091	1,045	-4%
Total Cattle	11,274	12,075	7%	74,796	74,098	-1%
SHEEP						
Lambs & Hoggets	759	847	12%	3,463	3,834	11%
Ewes & Rams	60	56	-7%	412	328	-21%
	819	903	10%	3,876	4,161	7%

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

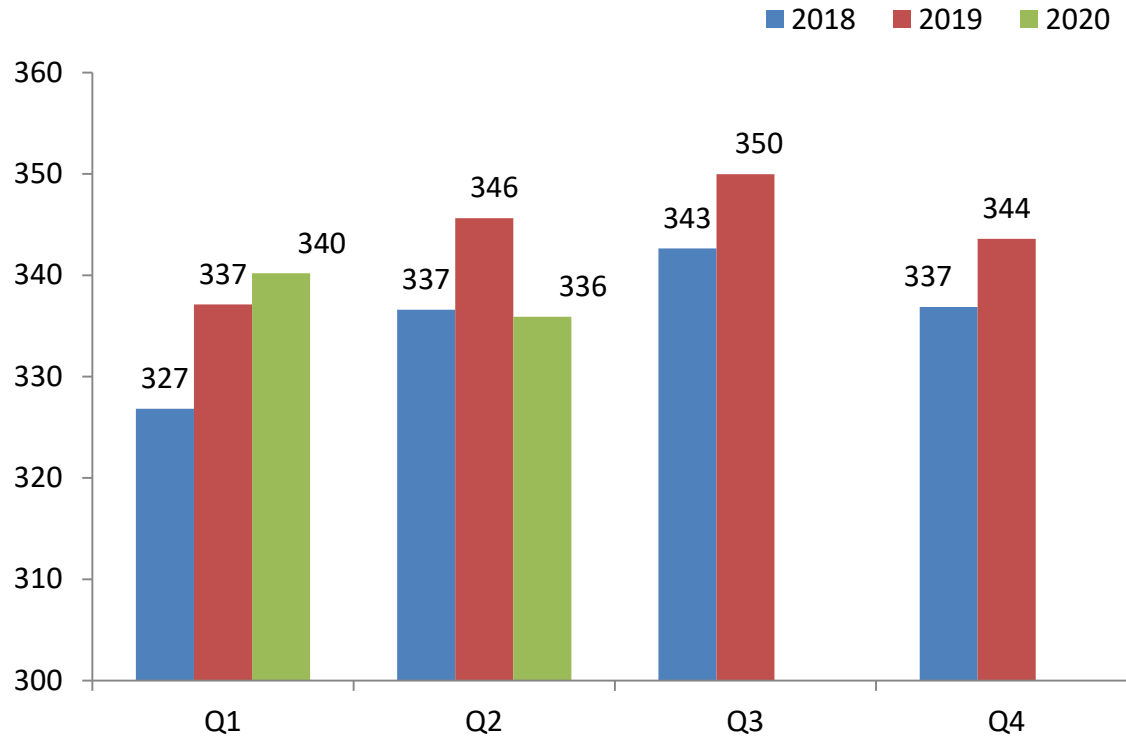
Carcase weights 2018-2020 (Steers)



Carcase weights 2018-2020 (Heifers)



Carcase weights 2018-2020 (Young Bulls)

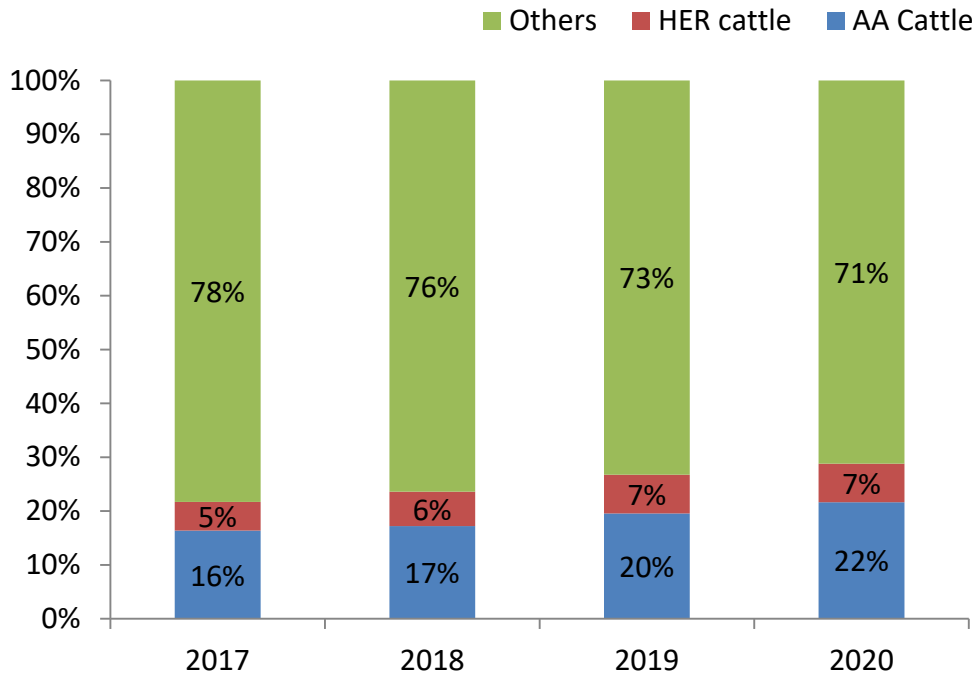


Overview of prime kill April-June 2018-2020

	Heifers		Steers		Young bulls	
	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter	Avg Cold Wt	Age at Slaughter
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
2020	322.9	25.7	358.3	25.4	334.2	15.7

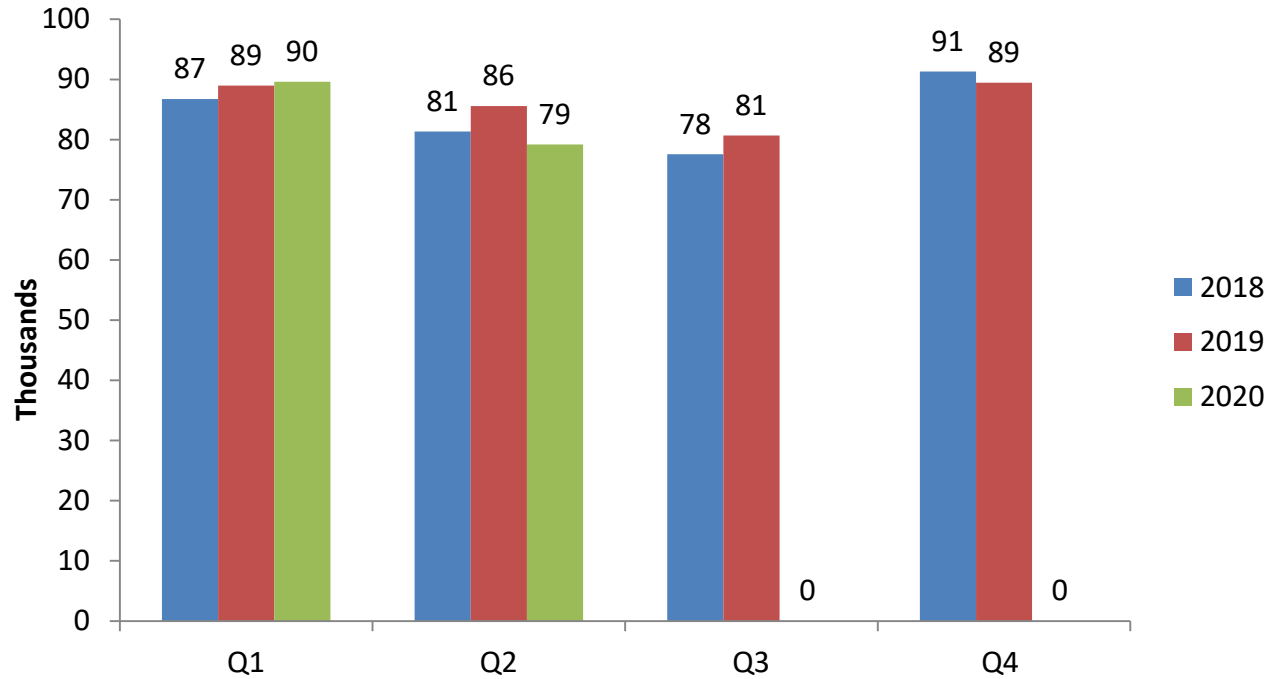
Premium cattle kill

April-June 2017-2020



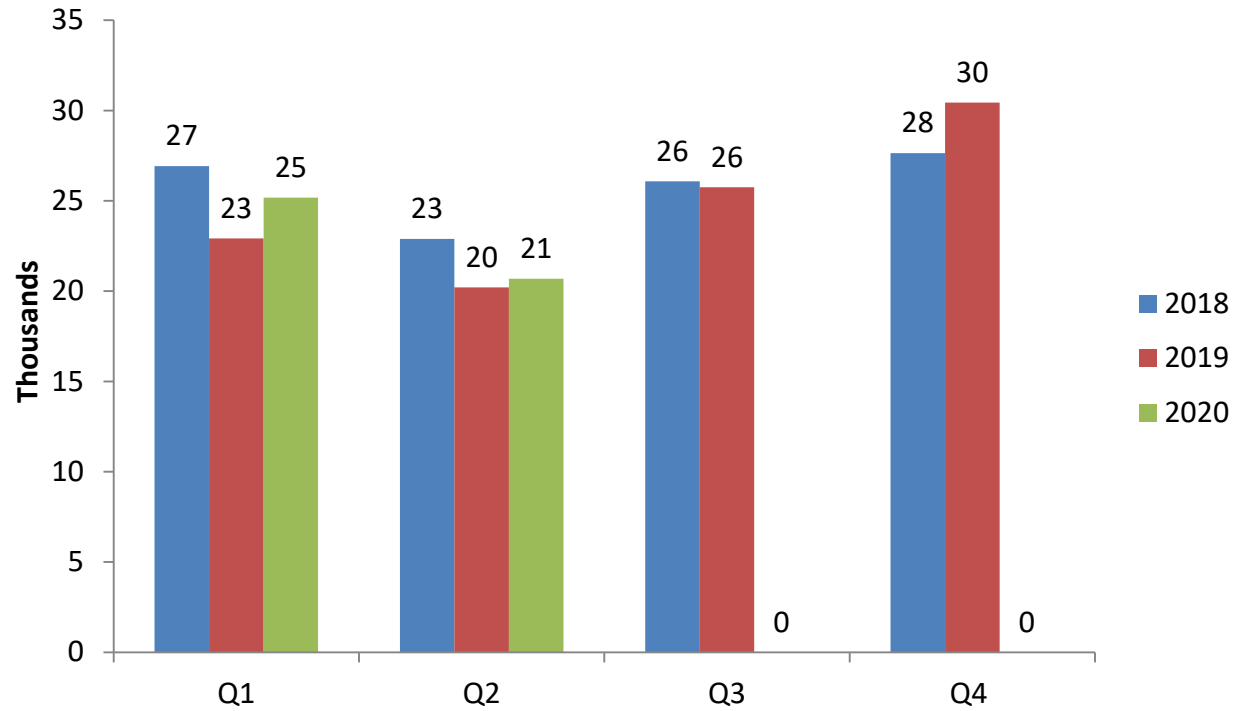
	AA Cattle	HER cattle	Others
2017	16%	5%	78%
2018	17%	6%	76%
2019	20%	7%	73%
2020	22%	7%	71%

Quarterly Prime Cattle Kill 2018-2020



Prime Cattle kill	2018	2019	2020
Q1	86,738	88,966	89,607
Q2	81,359	85,562	79,183
Q3	77,583	80,692	-
Q4	91,311	89,451	-

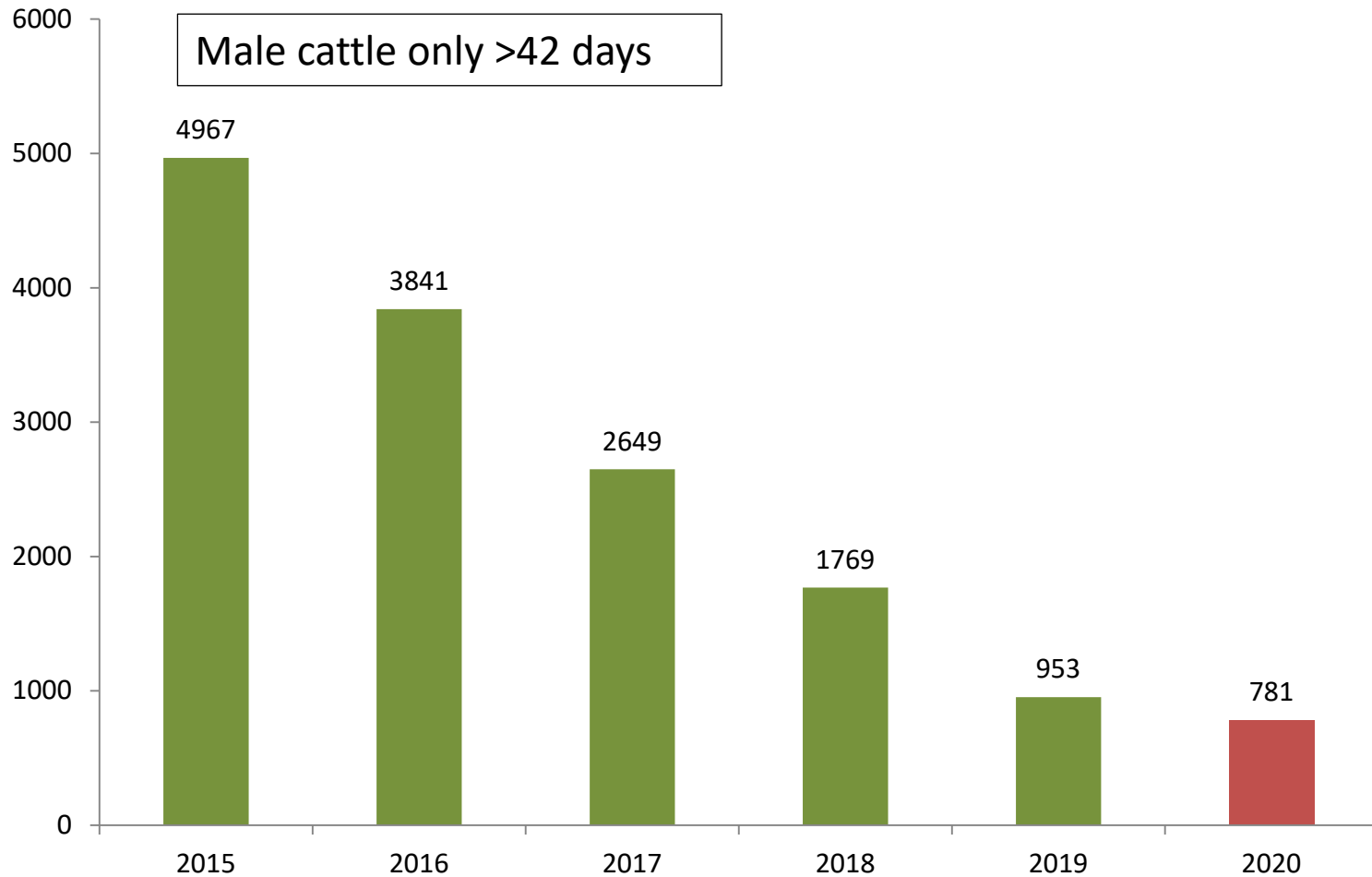
Quarterly Cow Kill 2018-2020



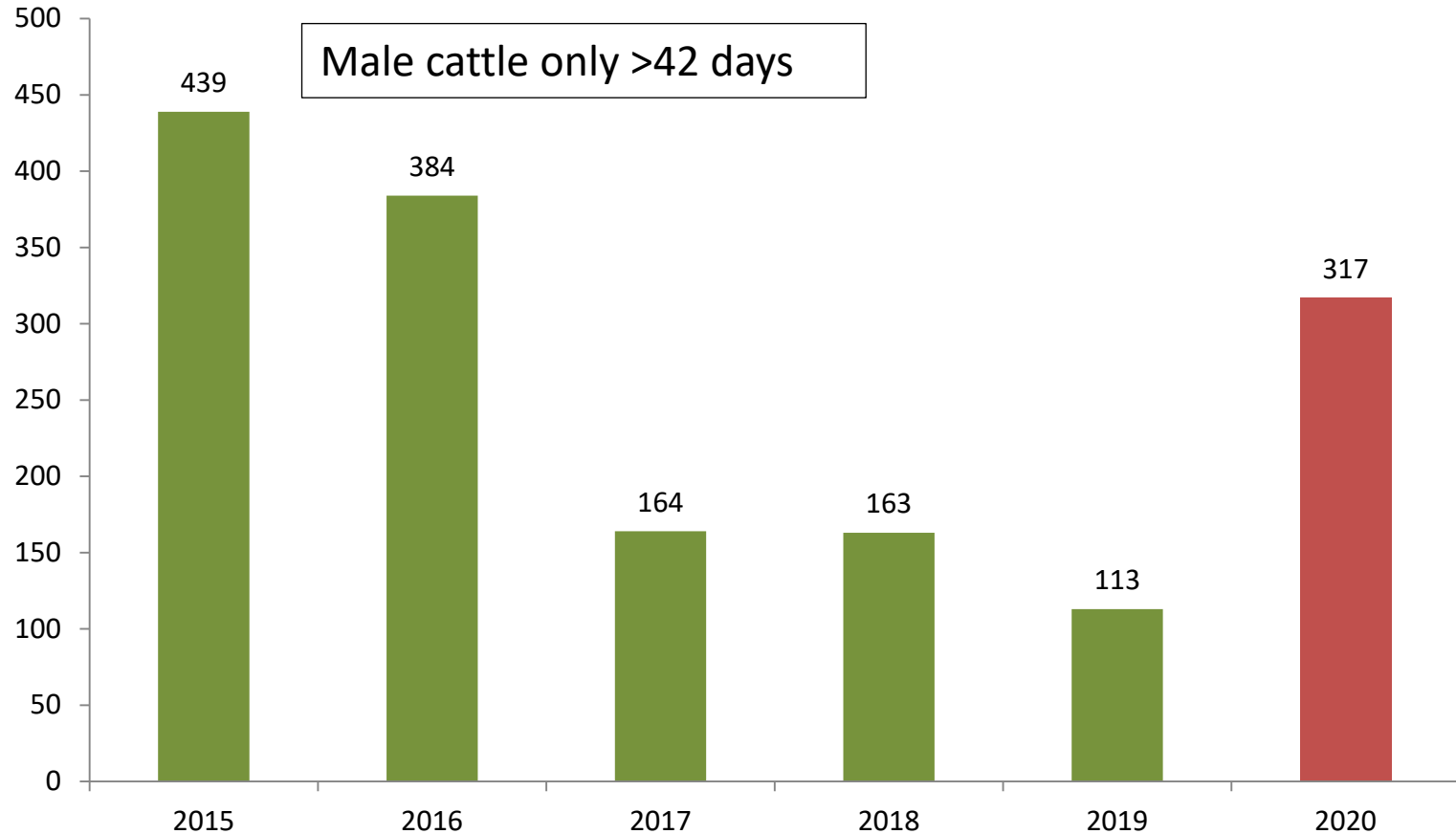
Cow Slaughtering	2018	2019	2020
Q1	26,924	22,920	25,181
Q2	22,890	20,206	20,688
Q3	26,079	25,753	-
Q4	27,640	30,442	-

Live Exports

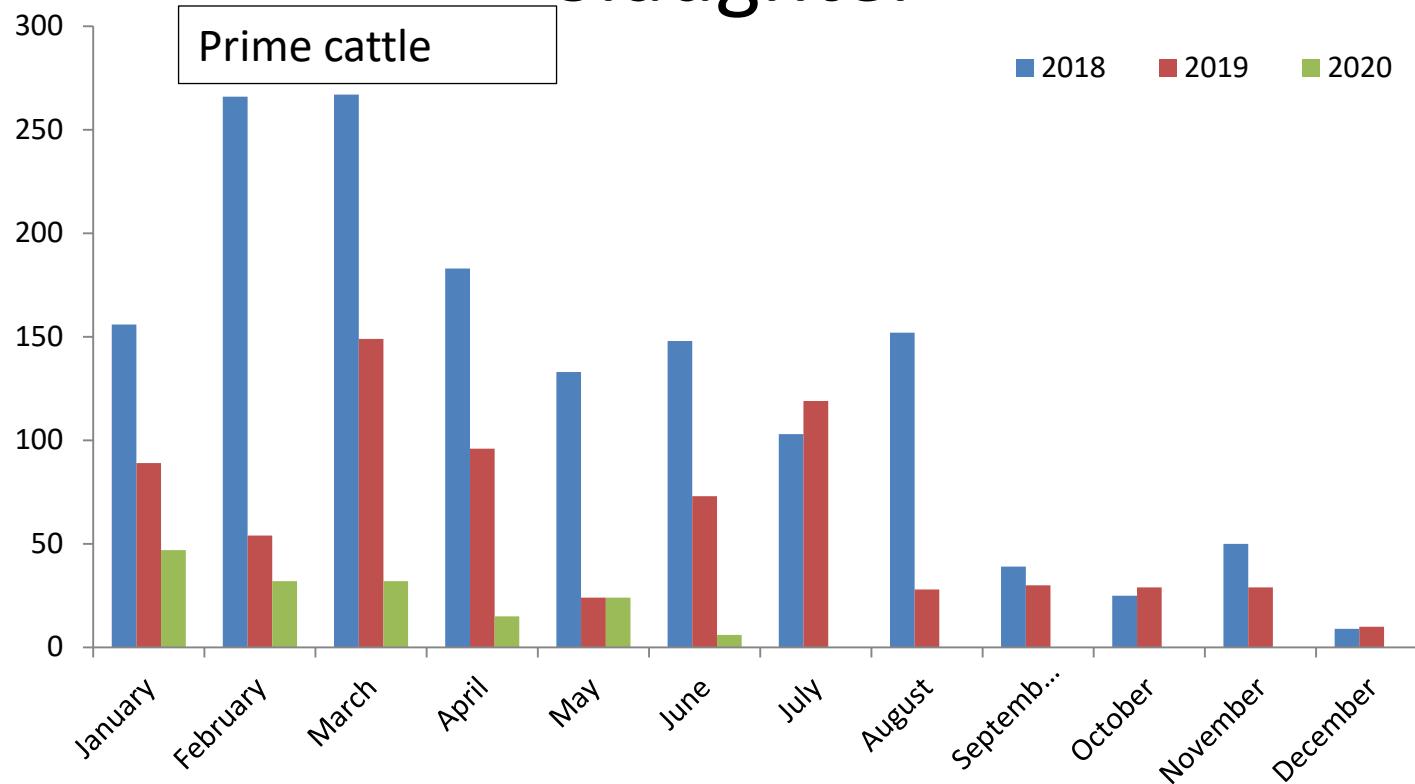
Exports to GB for further production



Exports to ROI for Further Production



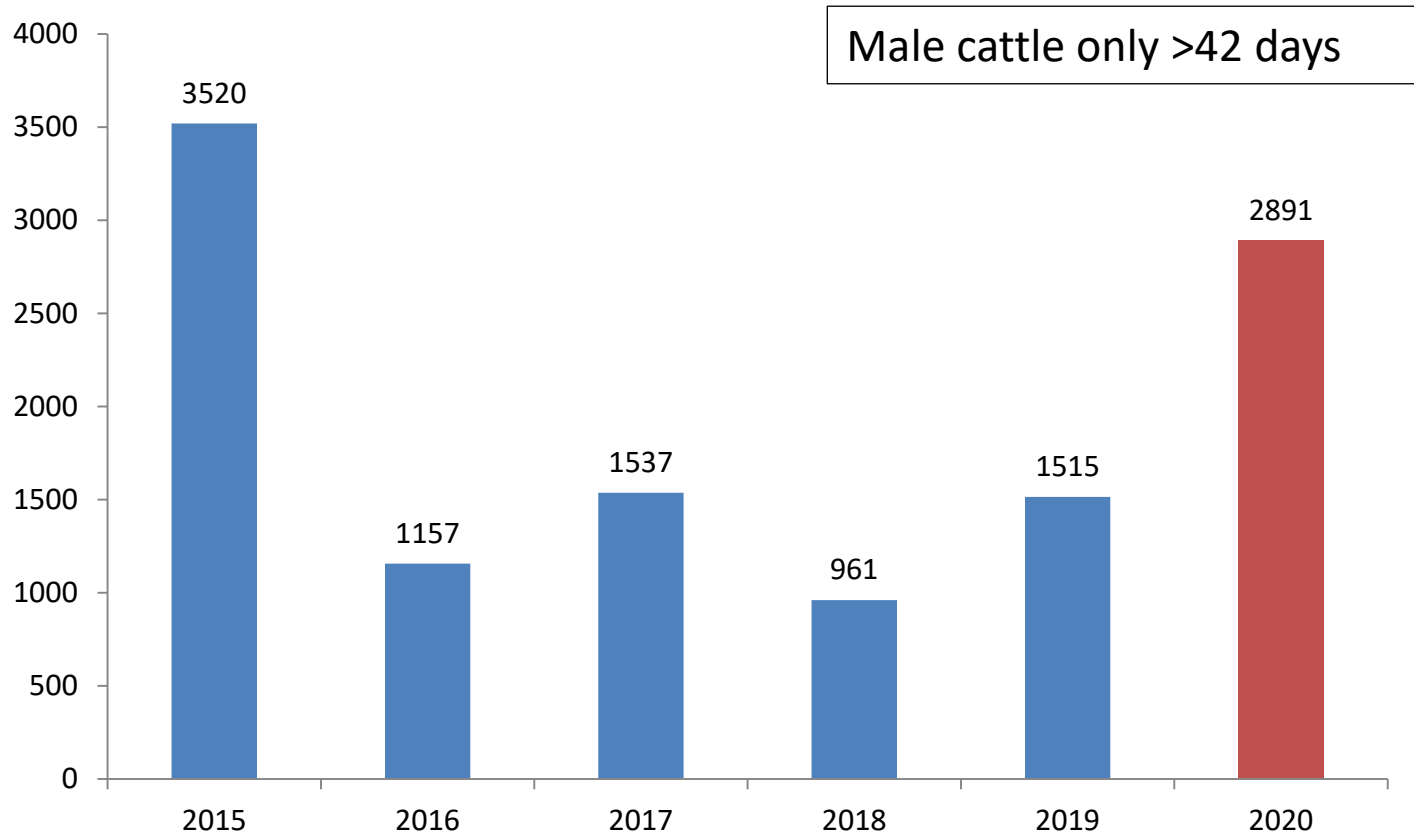
Prime cattle exports to ROI for Direct Slaughter



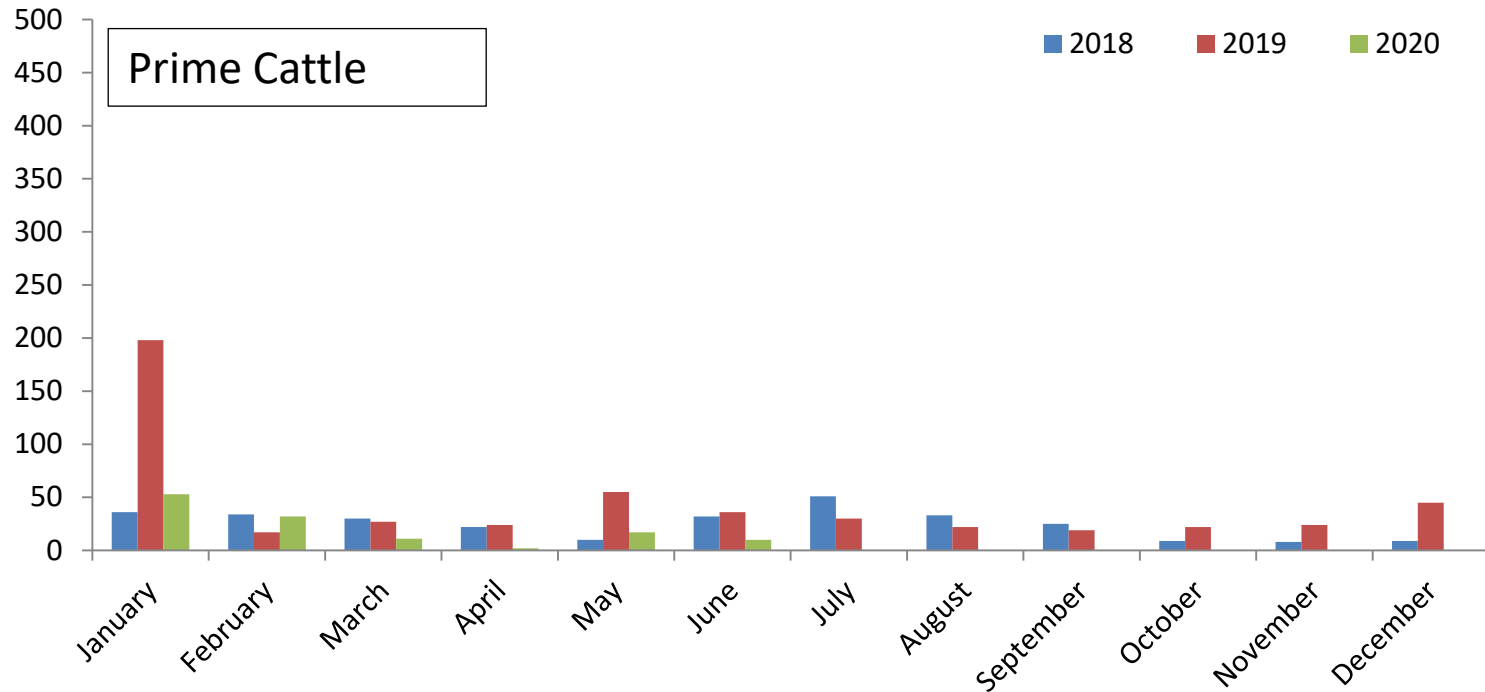
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
2018	156	266	267	183	133	148	103	152	39	25	50	9	1153
2019	89	54	149	96	24	73	119	28	30	29	29	10	485
2020	47	32	32	15	24	6							156

Live Imports

Imports from ROI for Further Production



Prime cattle Imports from GB for Direct Slaughter

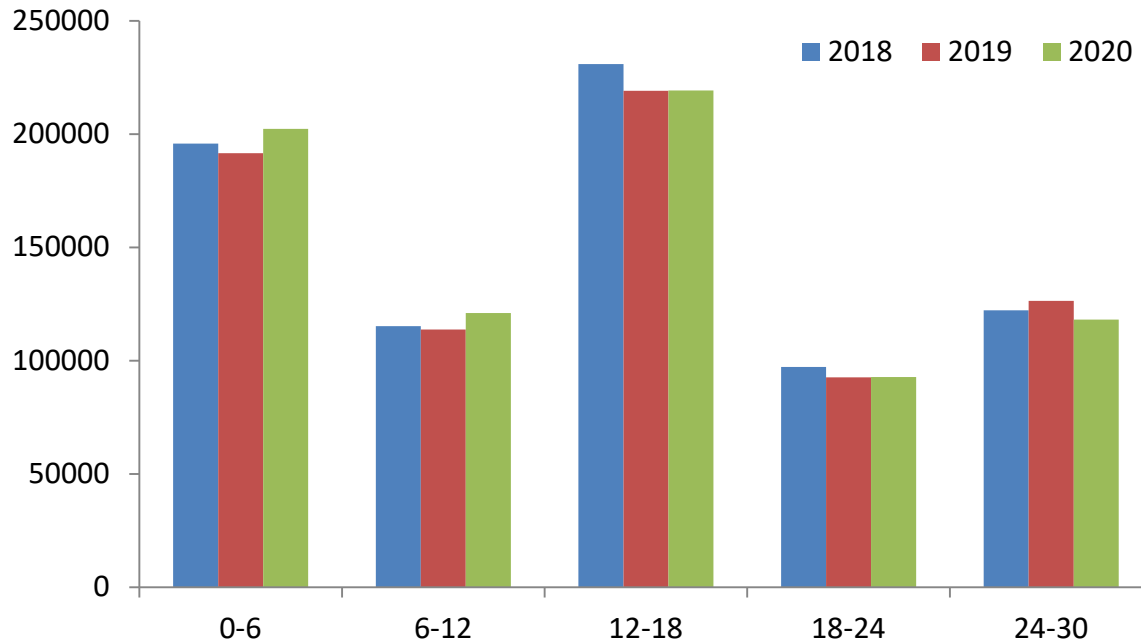


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
2018	36	34	30	22	10	32	51	33	25	9	8	9	164
2019	198	17	27	24	55	36	30	22	19	22	24	45	357
2020	53	32	11	2	17	10							125

Cattle Supplies

Beef sired cattle on NI farms

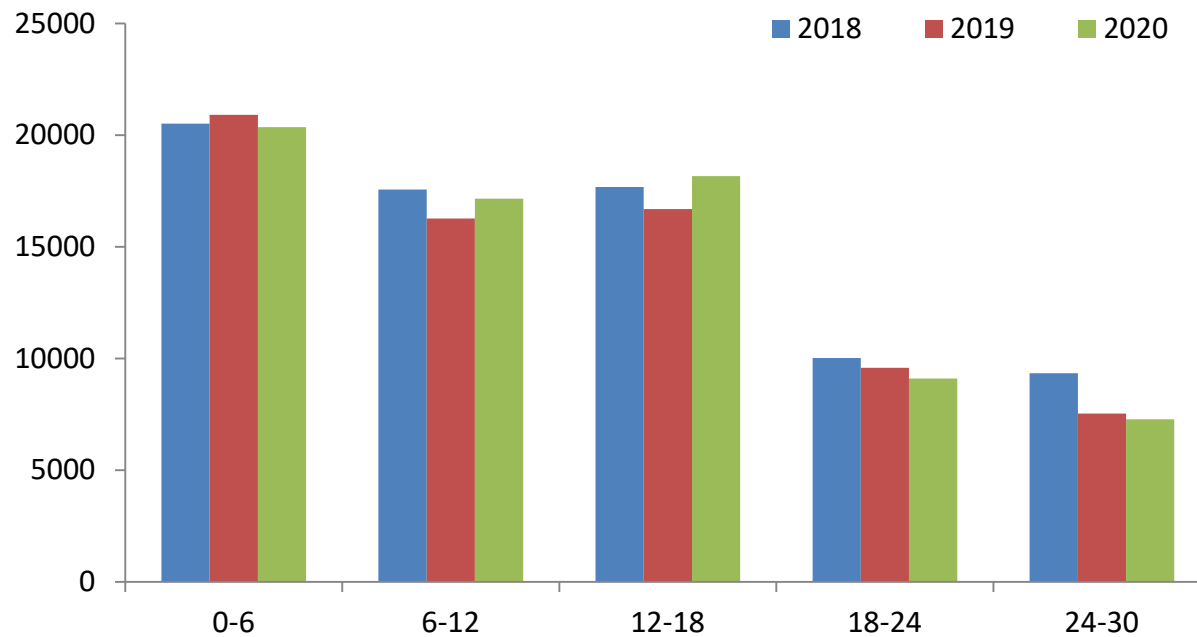
30 June 2020



Age (Months)	2018	2019	2020	2019/2020	2018/2020
0-6	195826	191570	202293	5.6%	3.3%
6-12	115260	113789	121069	6.4%	5.0%
12-18	230879	219115	219234	0.1%	-5.0%
18-24	97243	92660	92774	0.1%	-4.6%
24-30	122250	126404	118152	-6.5%	-3.4%

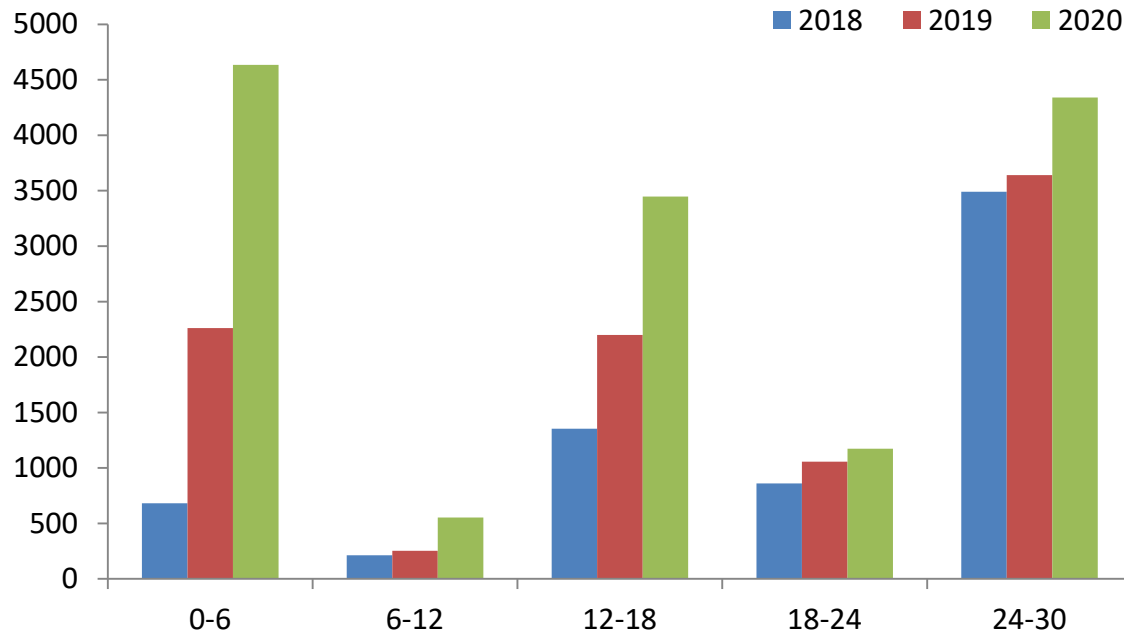
Dairy sired male cattle on NI farms

30 June 2020



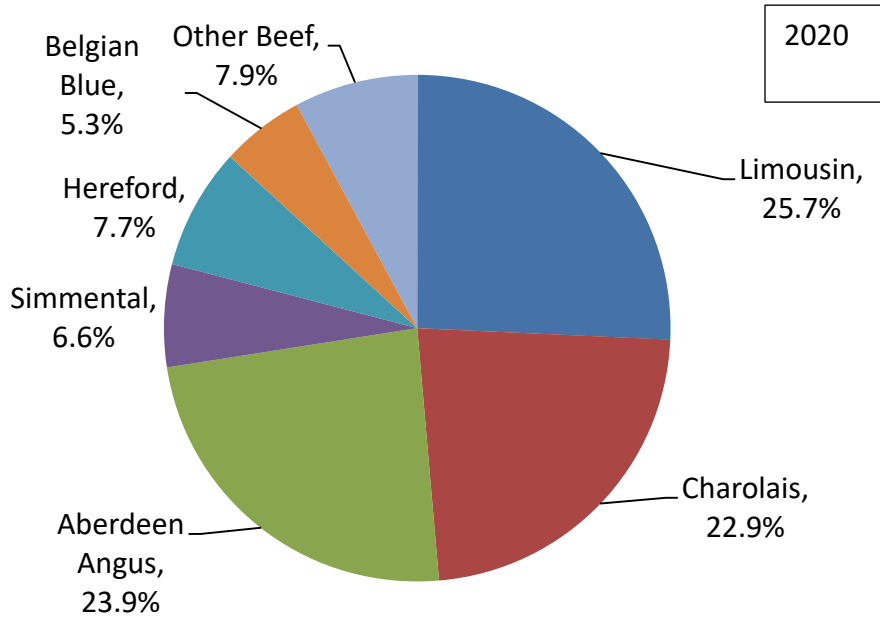
Dairy sired males	2018	2019	2020	2019/2020	2018/2020
0-6	15270	16198	17108	5.6%	12.0%
6-12	22467	22494	22923	1.9%	2.0%
12-18	12706	12133	13310	9.7%	4.8%
18-24	13054	12157	12816	5.4%	-1.8%
24-30	6911	5740	5620	-2.1%	-18.7%

Nomad cattle on NI farms 30 June 2020



ROI Nomads (beef sired +dairy male)	2018	2019	2020	2019/2020	2018/2020
0-6	682	2261	4635	105.0%	579.6%
6-12	212	253	553	118.6%	160.8%
12-18	1354	2200	3447	56.7%	154.6%
18-24	860	1057	1174	11.1%	36.5%
24-30	3491	3641	4340	19.2%	24.3%

Beef Calf Registrations by Breed

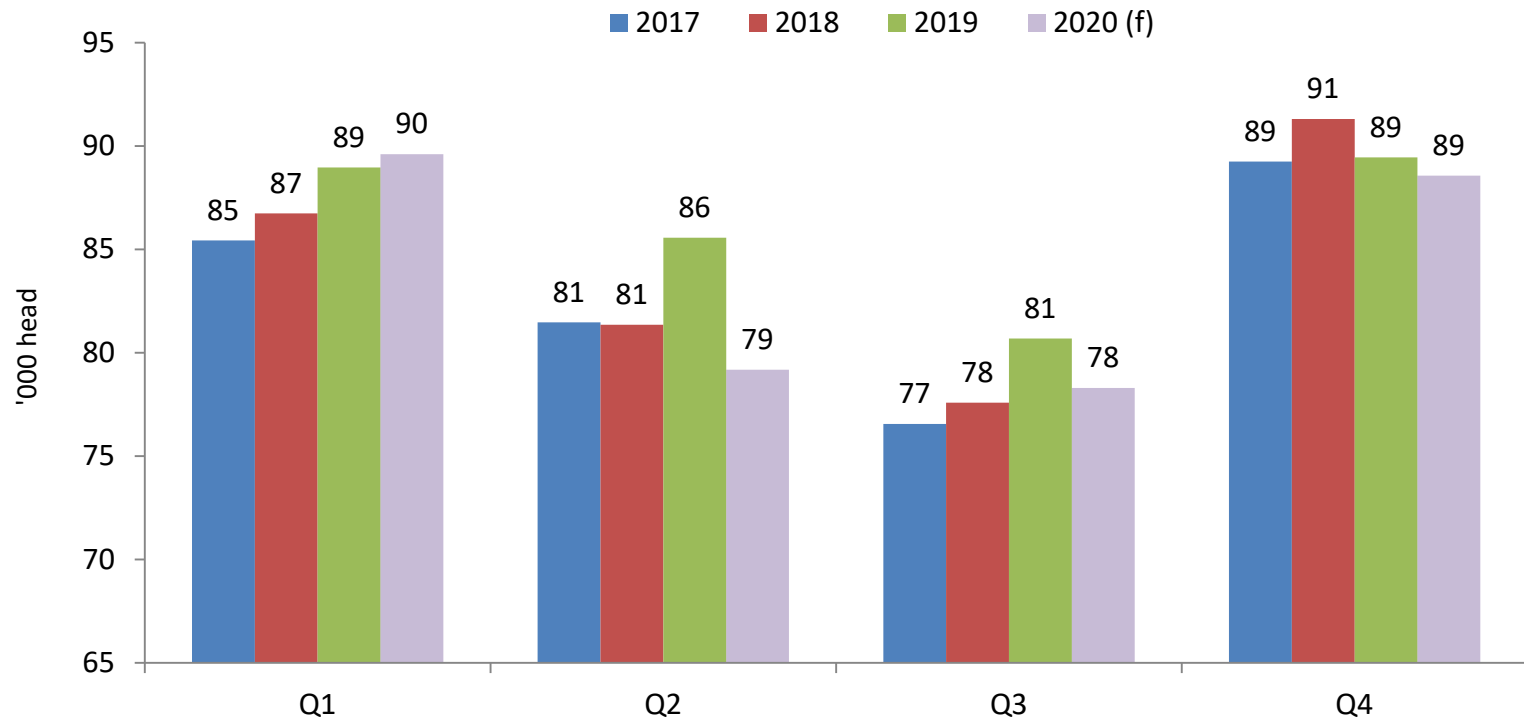


Proportion Dairy Dam	2018	2019	2020
Jan	51%	53%	53%
Feb	51%	51%	54%
Mar	40%	43%	39%
Apr	26%	27%	25%
May	19%	20%	22%
Jun	24%	25%	25%
Jul	28%	28%	
Aug	31%	32%	
Sep	40%	41%	
Oct	49%	49%	
Nov	54%	55%	
Dec	60%	58%	
Grand Total	35%	36%	

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2019 YTD	23.8%	20.0%	25.7%	6.9%	9.1%	6.6%	8.0%
2020 YTD	25.7%	22.9%	23.9%	6.6%	7.7%	5.3%	7.9%

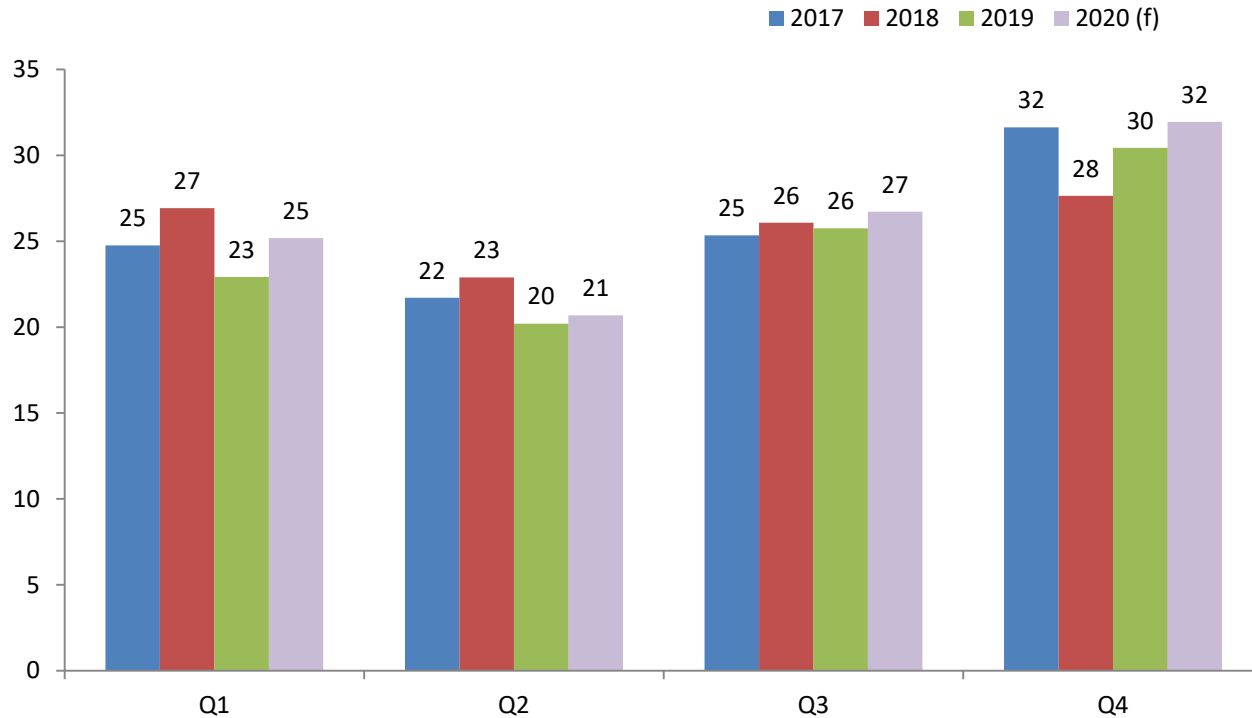
Forecast

Forecast NI Prime Cattle Kill 2020



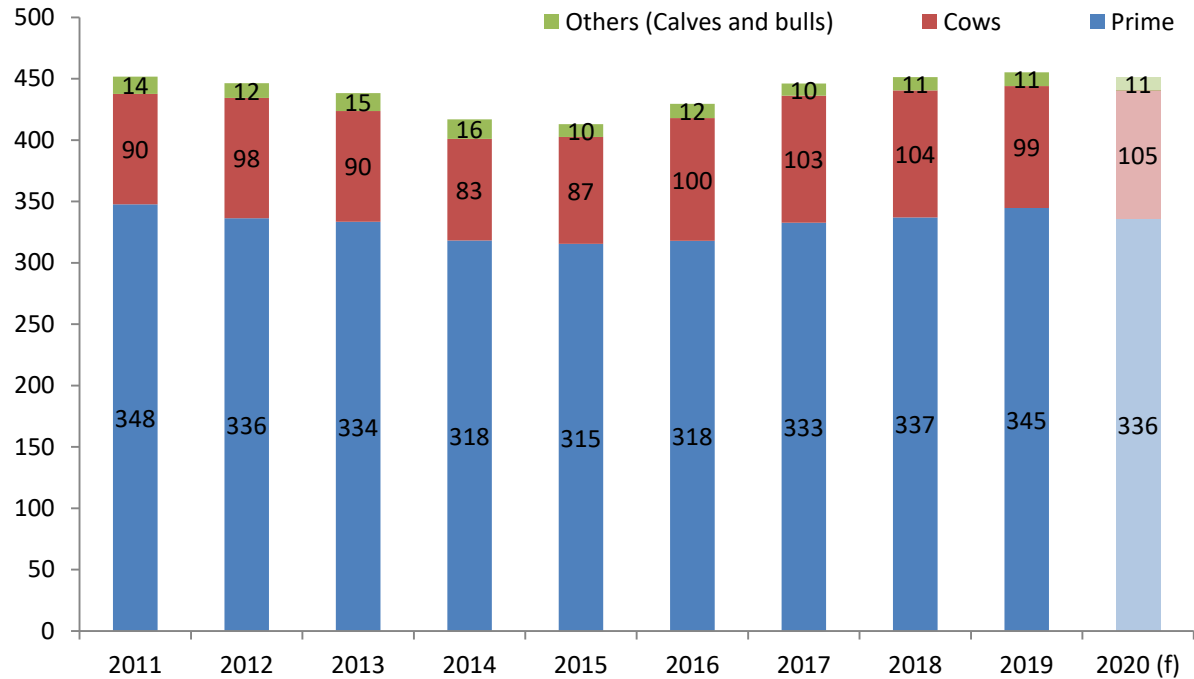
	2017	2018	2019	2020 (f)	2019/20 % Change
Q1	85430	86738	88966	89607	0.7%
Q2	81474	81359	85562	79183	-7.8%
Q3	76560	77583	80692	78300	-3.1%
Q4	89251	91311	89451	88568	-1.0%
Total	332715	336991	344671	335658	-2.7%

Forecast NI Cow Kill 2020



	2017	2018	2019	2020 (f)	2019/20 % Change
Q1	24760	26924	22920	25181	+8.4%
Q2	21706	22890	20206	20688	+2.1%
Q3	25339	26079	25753	26725	+3.7%
Q4	31635	27640	30442	31944	+5.4%
Total	103440	103533	99321	104538	+5.0%

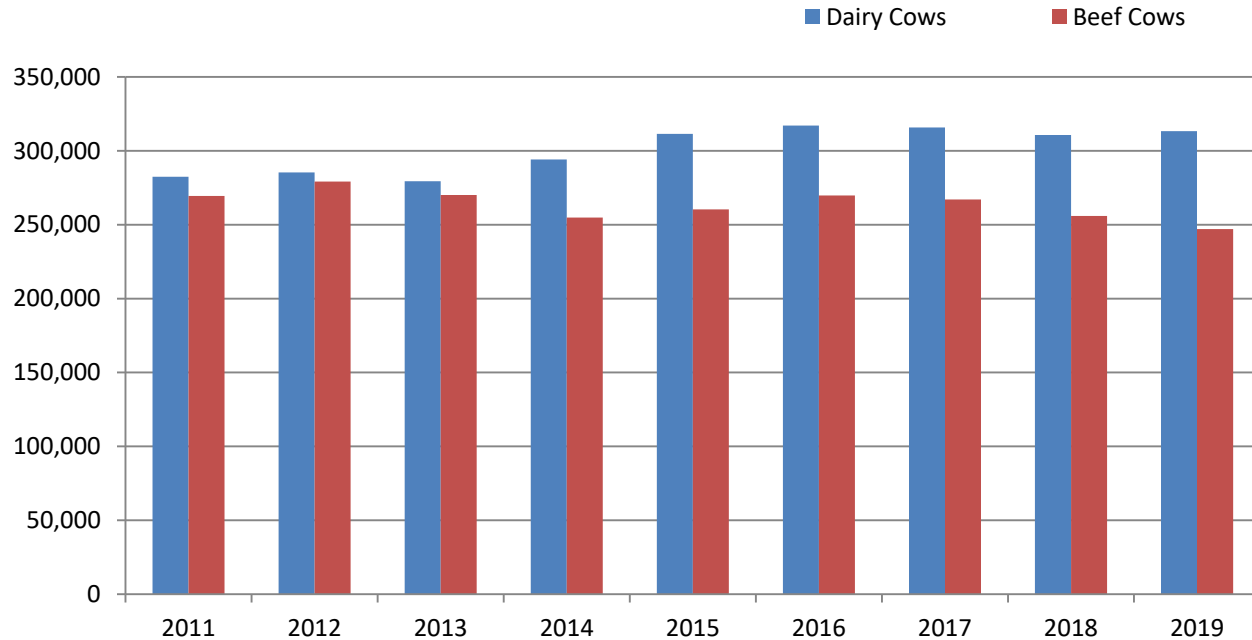
Forecast Total Cattle Kill 2020 (Inc bulls and calves)



Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020 (f)
Total cattle throughput	451,716	446,356	438,335	416,895	413,062	429,618	446,112	451,339	455,280	451,484

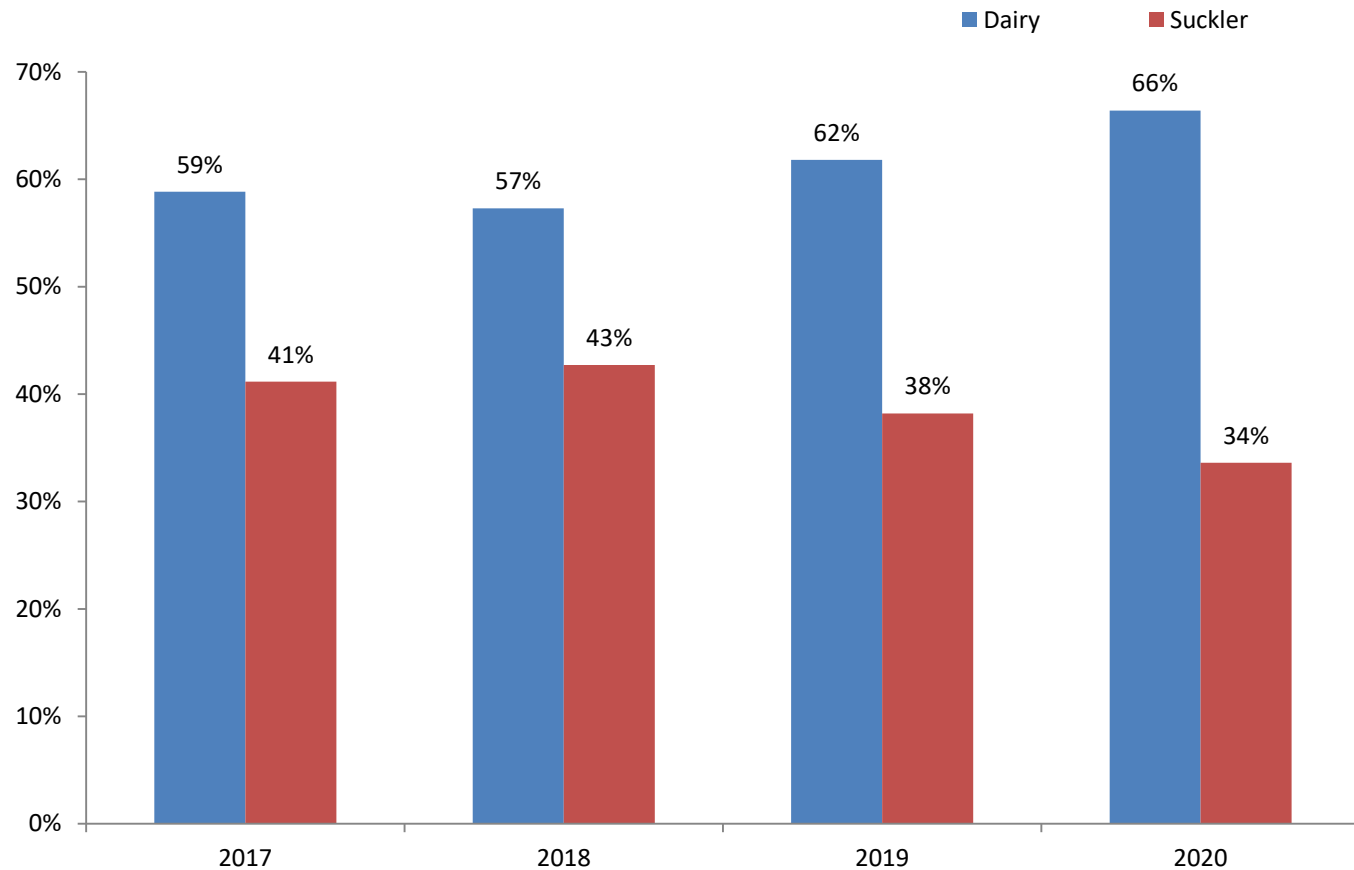
Longer term outlook

Breeding females June Census



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Dairy Cows	281,043	282,487	285,369	279,481	294,192	311,520	317,146	315,800	310,718	313,349
Beef Cows	257,648	269,488	279,195	270,105	254,870	260,325	269,746	267,100	255,904	247,009

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