

# Seamus Mc Menamin



## Slaughter Trends 2020/21

# NI Slaughterings September 2020

NI CATTLE AND SHEEP SLAUGHTERINGS						
	September			Year to Date		
	(4 weeks ended 26/09/20)			(39 weeks ended 26/09/20)		
	Sep-19	Sep-20	% Change	2019	2020	Change
<b>CATTLE – FOODCHAIN</b>						
Steers	15,196	14,646	-4%	117,925	123,735	+5%
Heifers	10,782	10,123	-6%	100,804	100,008	-1%
Young Bulls	3,680	2,484	-33%	36,491	26,886	-26%
<b>Total Prime Cattle</b>	<b>29,658</b>	<b>27,253</b>	<b>-8%</b>	<b>255,220</b>	<b>250,629</b>	<b>-2%</b>
Calves	481	431	-10%	4,353	4,106	-6%
Cows	9,161	8,303	-9%	68,879	72,435	+5%
Mature Bulls	413	661	+60%	3,927	4,073	+4%
<b>Total Cattle</b>	<b>39,713</b>	<b>36,648</b>	<b>-8%</b>	<b>332,379</b>	<b>331,243</b>	<b>0%</b>
<b>SHEEP</b>						
Lambs & Hoggets	37,254	39,117	+5%	278,970	311,281	+12%
Ewes & Rams	2,869	2,306	-20%	21,688	17,729	-18%
	<b>40,123</b>	<b>41,423</b>	<b>+3%</b>	<b>300,658</b>	<b>329,010</b>	<b>+9%</b>

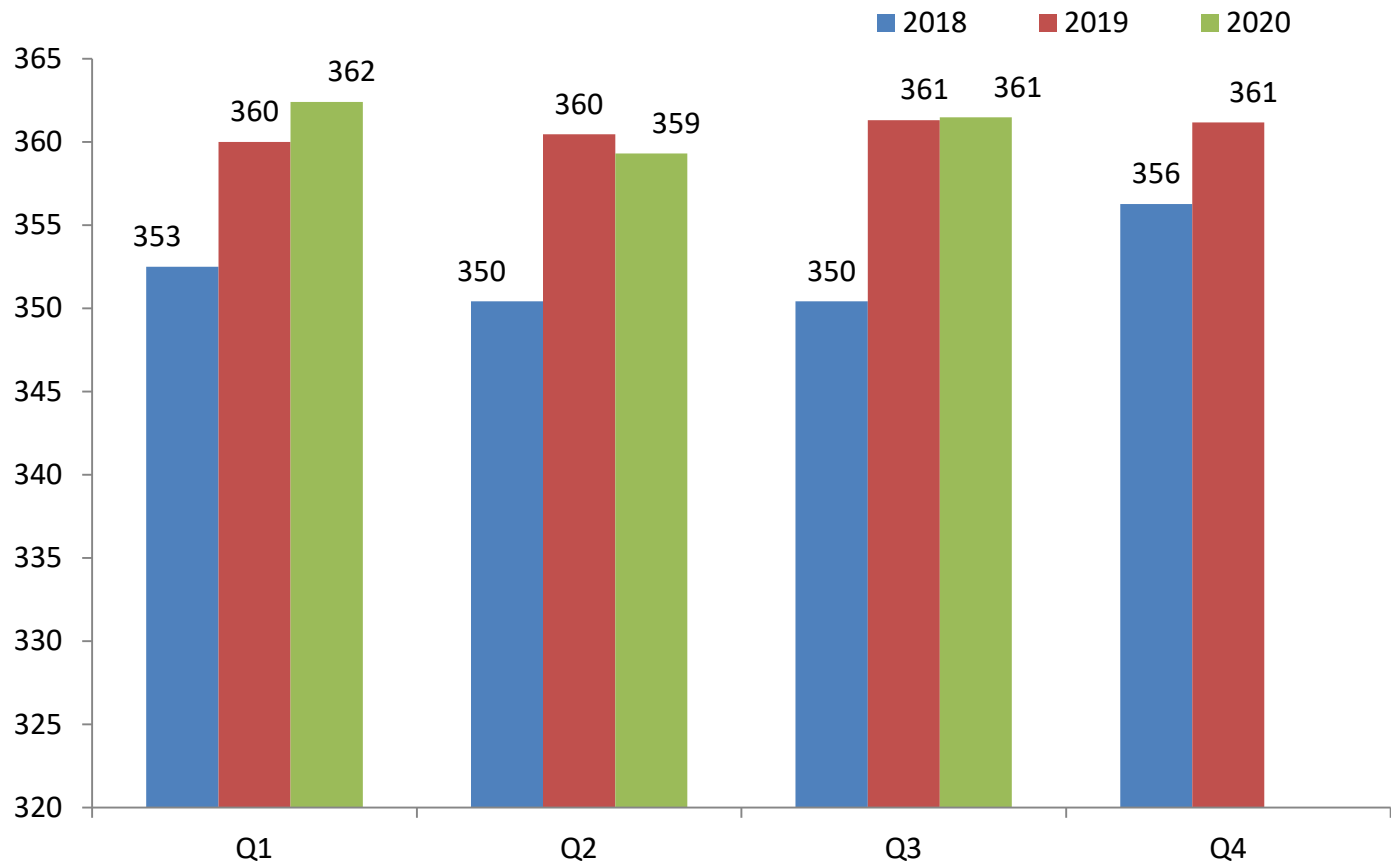
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

# NI Beef & Lamb Production Sept 2020

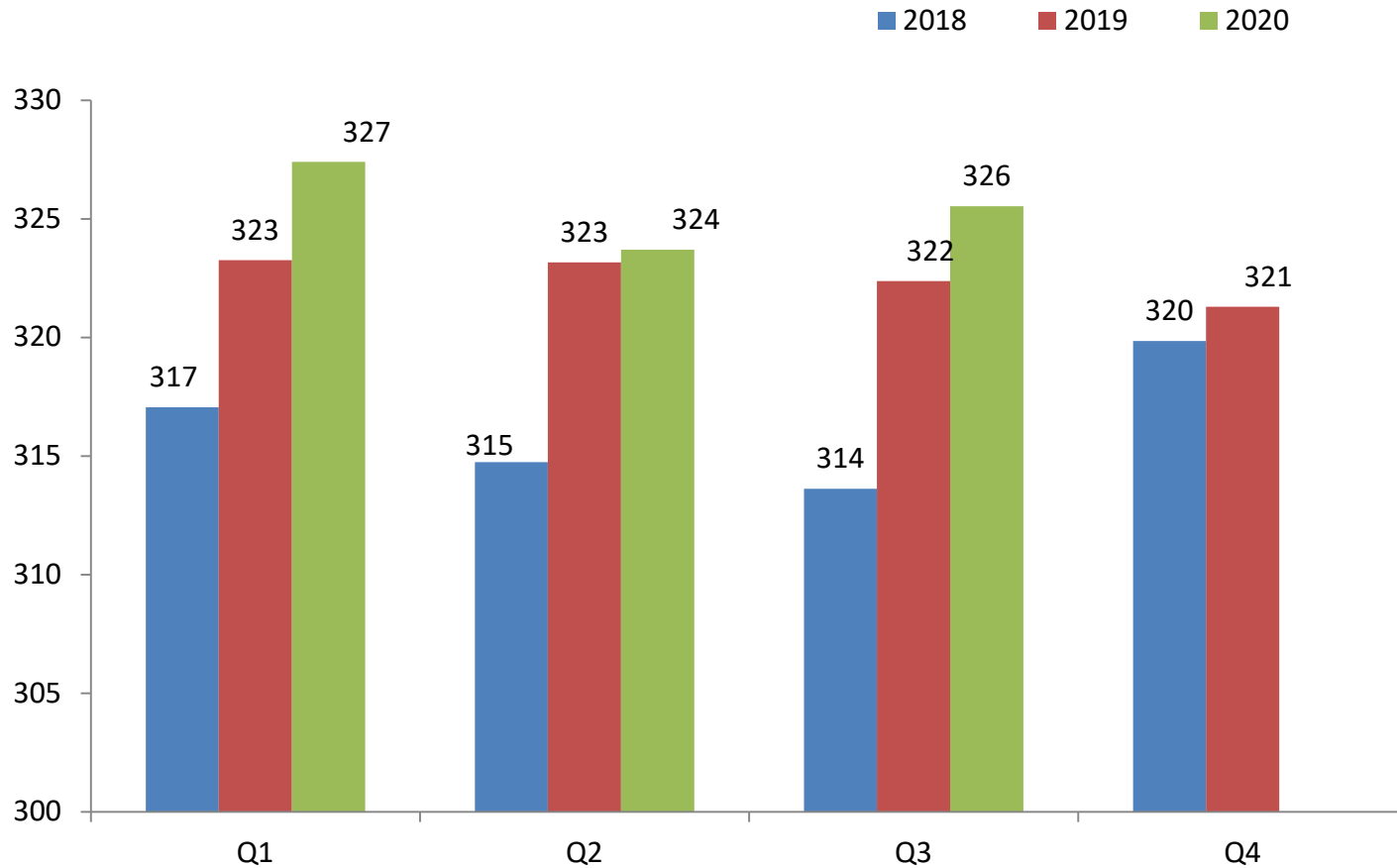
NI BEEF AND SHEEPMET PRODUCTION						
	September			Year to Date		
	(4 weeks ended 26/09/20)			(39 weeks ended 26/09/20)		
	Sep-19	Sep-20	% Change	2019	2020	Change
<b>CATTLE - FOODCHAIN</b>						
Steers	5,524	5,325	-4%	42,520	44,691	5%
Heifers	3,500	3,307	-6%	32,557	32,568	0%
Young Bulls	1,286	859	-33%	12,588	9,184	-27%
<b>Total Prime Cattle</b>	<b>10,310</b>	<b>9,490</b>	<b>-8%</b>	<b>87,665</b>	<b>86,442</b>	<b>-1%</b>
Calves	100	88	-12%	920	835	-9%
Cows	2,789	2,556	-8%	21,278	22,720	7%
Mature Bulls	191	299	56%	1,710	1,854	8%
<b>Total Cattle</b>	<b>13,391</b>	<b>12,433</b>	<b>-7%</b>	<b>111,574</b>	<b>111,851</b>	<b>0%</b>
<b>SHEEP</b>						
Lambs & Hoggets	800	831	4%	6,167	6,710	9%
Ewes & Rams	80	62	-23%	642	504	-21%
	<b>880</b>	<b>1,124</b>	<b>28%</b>	<b>6,809</b>	<b>7,214</b>	<b>6%</b>

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

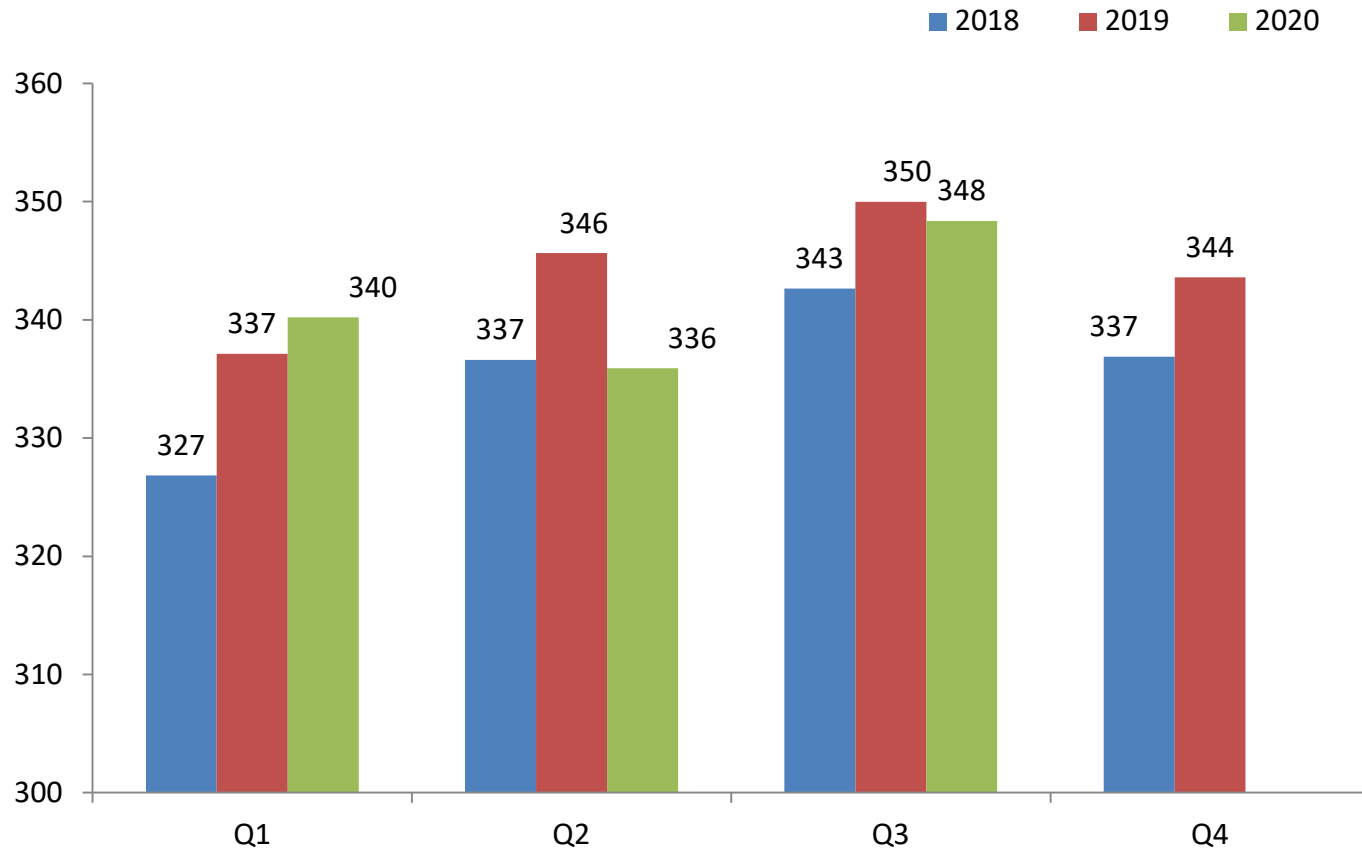
# Carcase weights 2018-2020 (Steers)



# Carcase weights 2018-2020 (Heifers)



# Carcase weights 2018-2020 (Young Bulls)



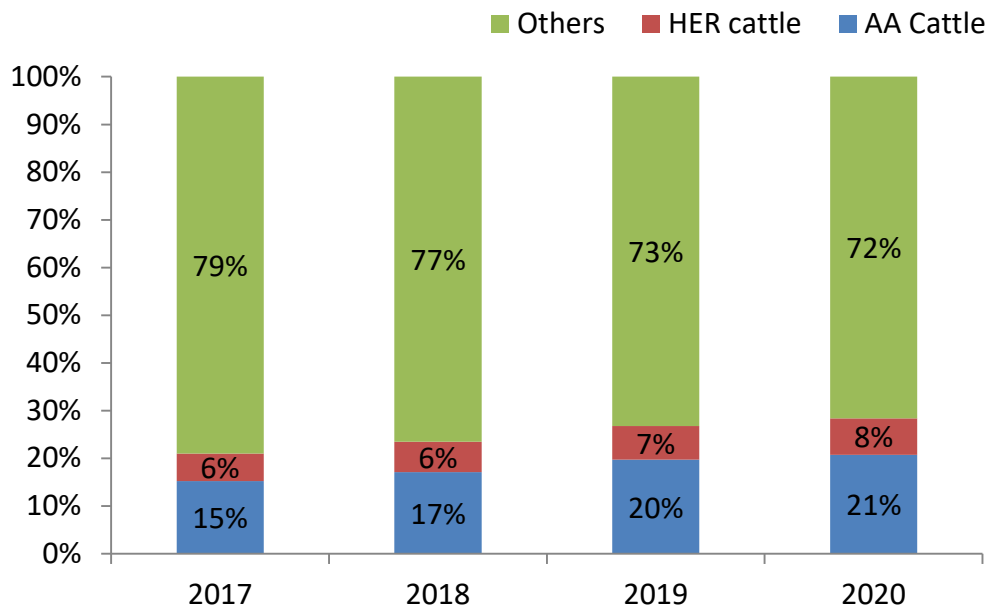
# Overview of prime kill July-Sept 2018-2020

	Heifers		Steers		Young bulls	
	Avg Cold Wt (kg)	Age at Slaughter (Months)	Avg Cold Wt (kg)	Age at Slaughter (Months)	Avg Cold Wt (kg)	Age at Slaughter (Months)
<b>2018</b>	314.7	26.5	351.8	26.2	342.1	15.9
<b>2019</b>	323.6	26.5	361.9	26.5	350.1	15.7
<b>2020</b>	325.5	26.3	360.4	26.0	345.8	15.9

# Premium cattle kill

## July-Sept 2017-2020

Proportion of AA and HER cattle in price reported prime kill Q3 2017-2020

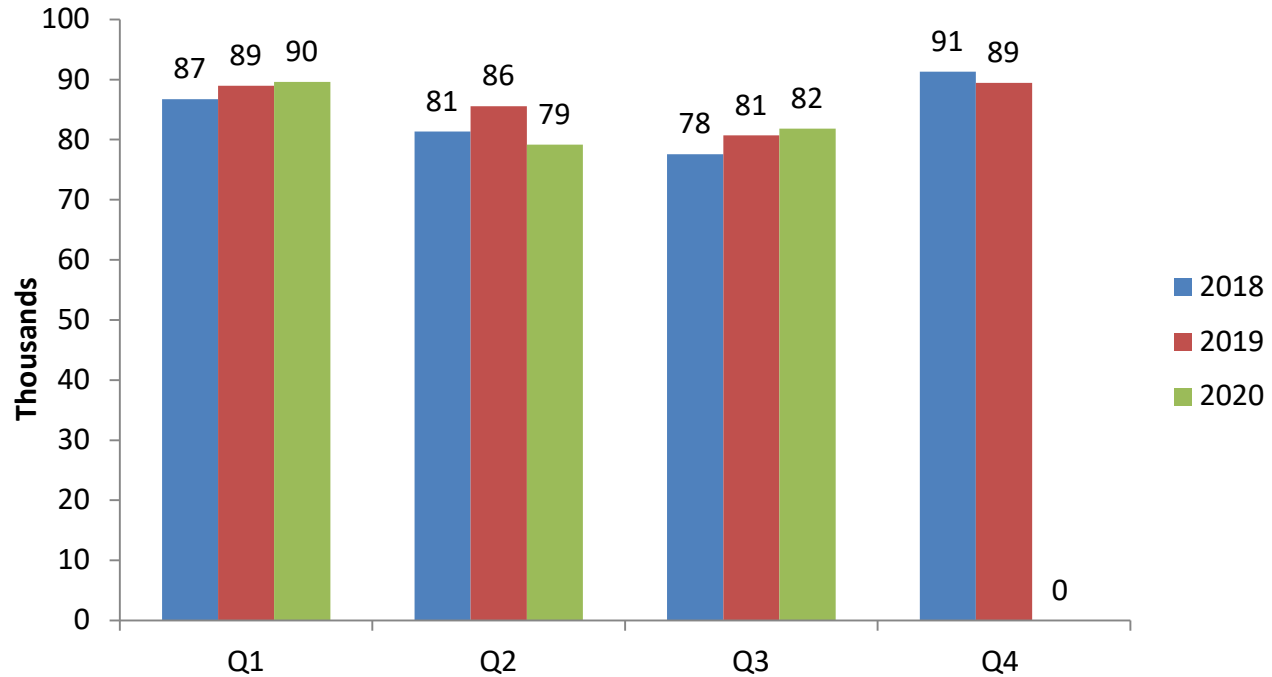


Breakdown of Price reported prime kill Q3 2017-2020

	AA Cattle	HER cattle	Others
<b>2017</b>	9455	3582	49076
<b>2018</b>	12036	4492	53827
<b>2019</b>	13230	4726	49190
<b>2020</b>	12712	4692	43934

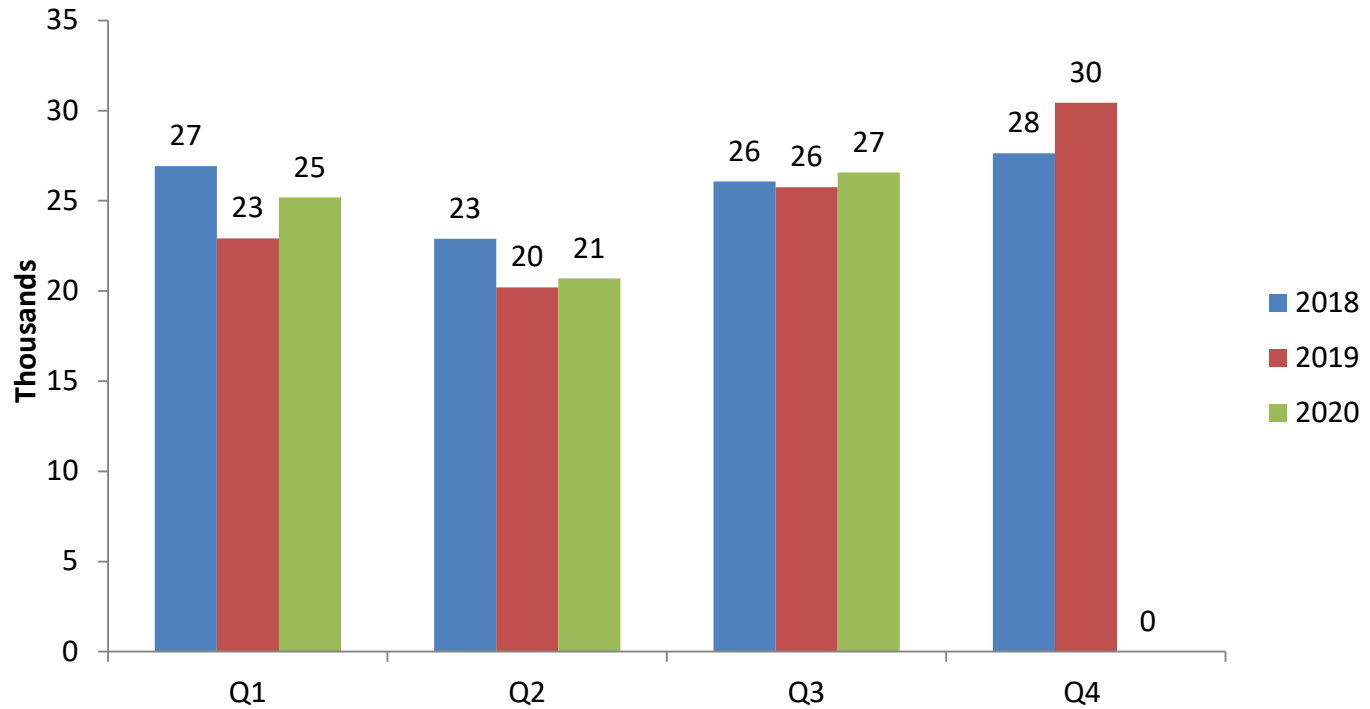


# Quarterly Prime Cattle Kill 2018-2020



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	81,839
Q4	91,311	89,451	-

# Quarterly Cow Kill 2018-2020

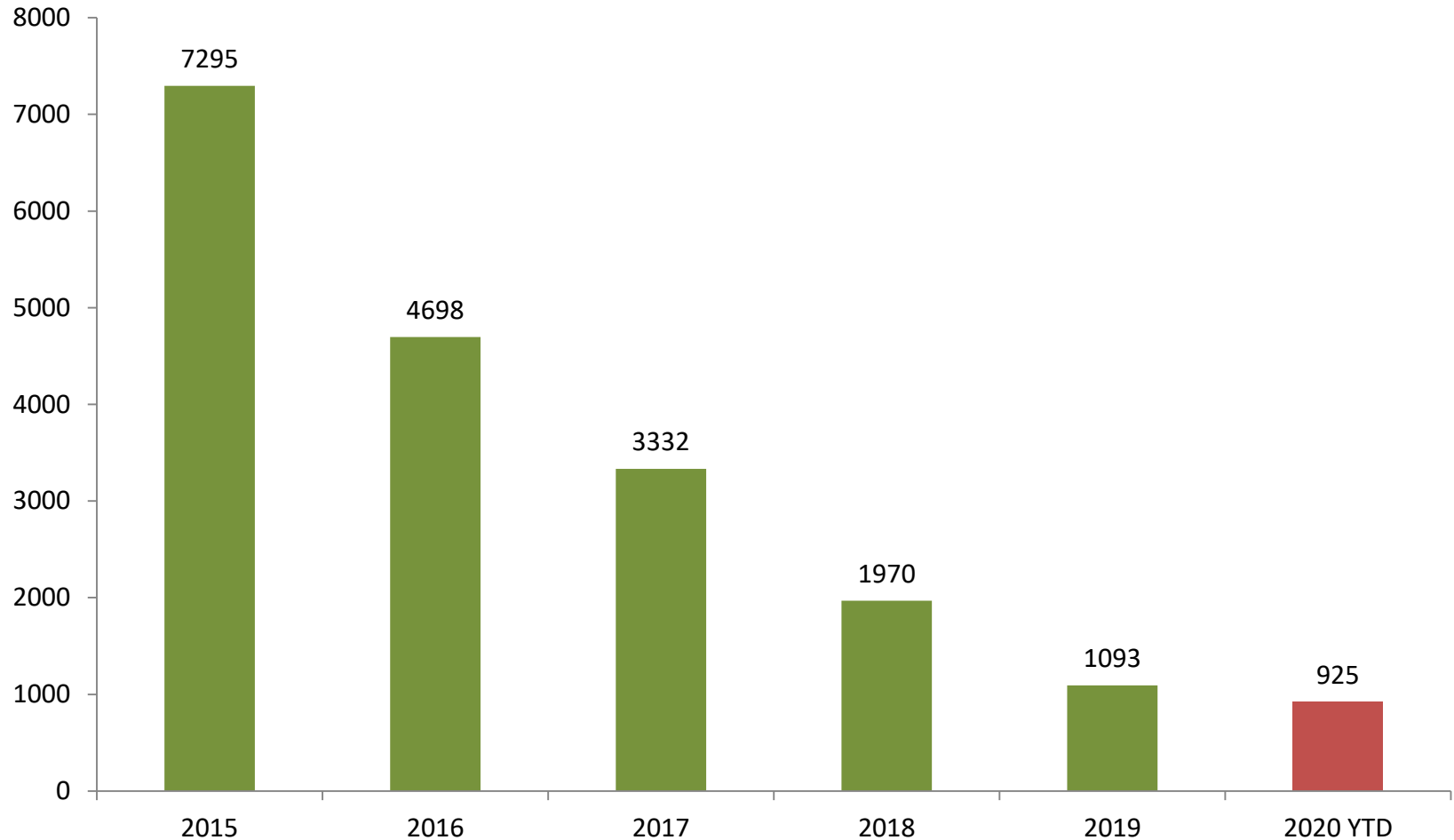


Cow Slaughtering	2018	2019	2020
Q1	26,924	22,920	25,181
Q2	22,890	20,206	20,688
Q3	26,079	25,753	26,566
Q4	27,640	30,442	-

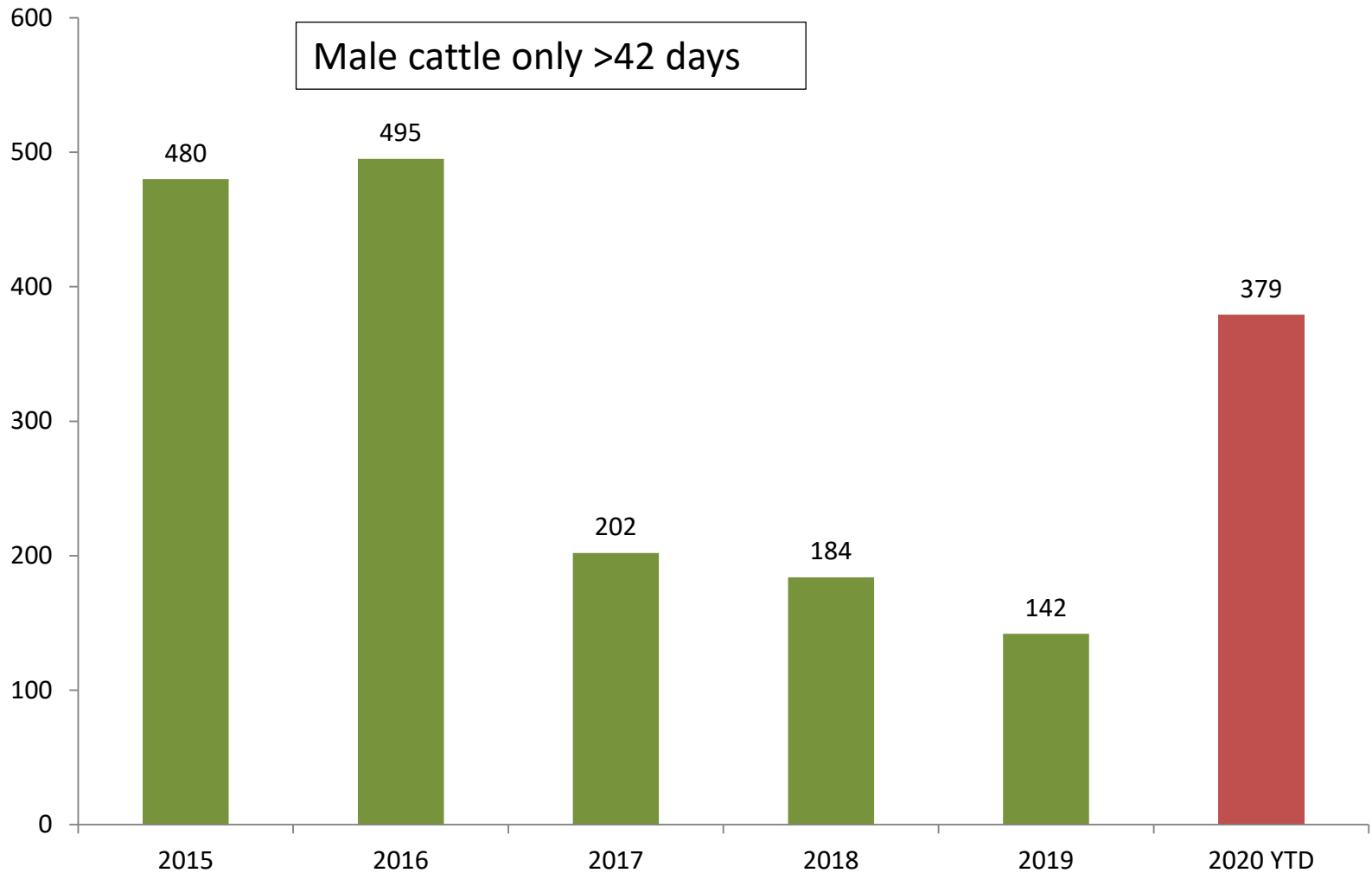
# Live Exports

# Exports to GB for further production

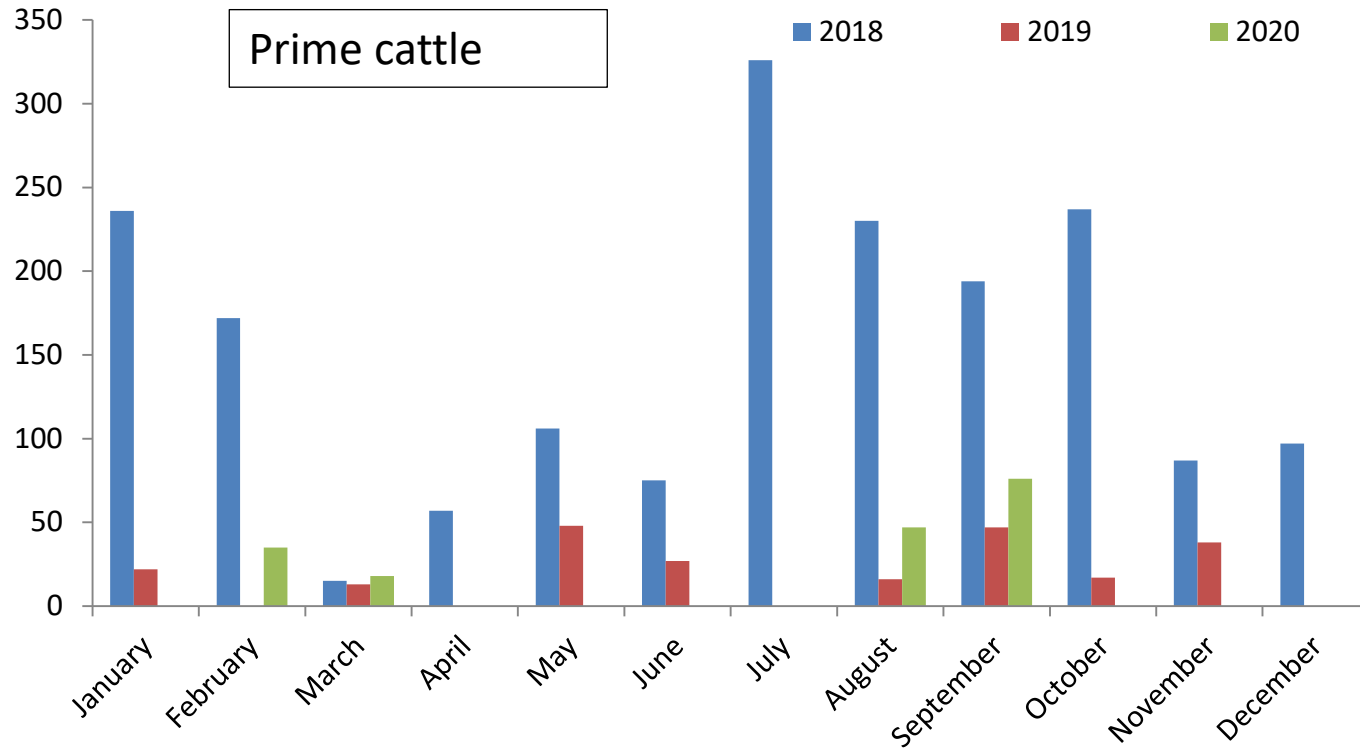
Male cattle only >42 days



# Exports to ROI for Further Production

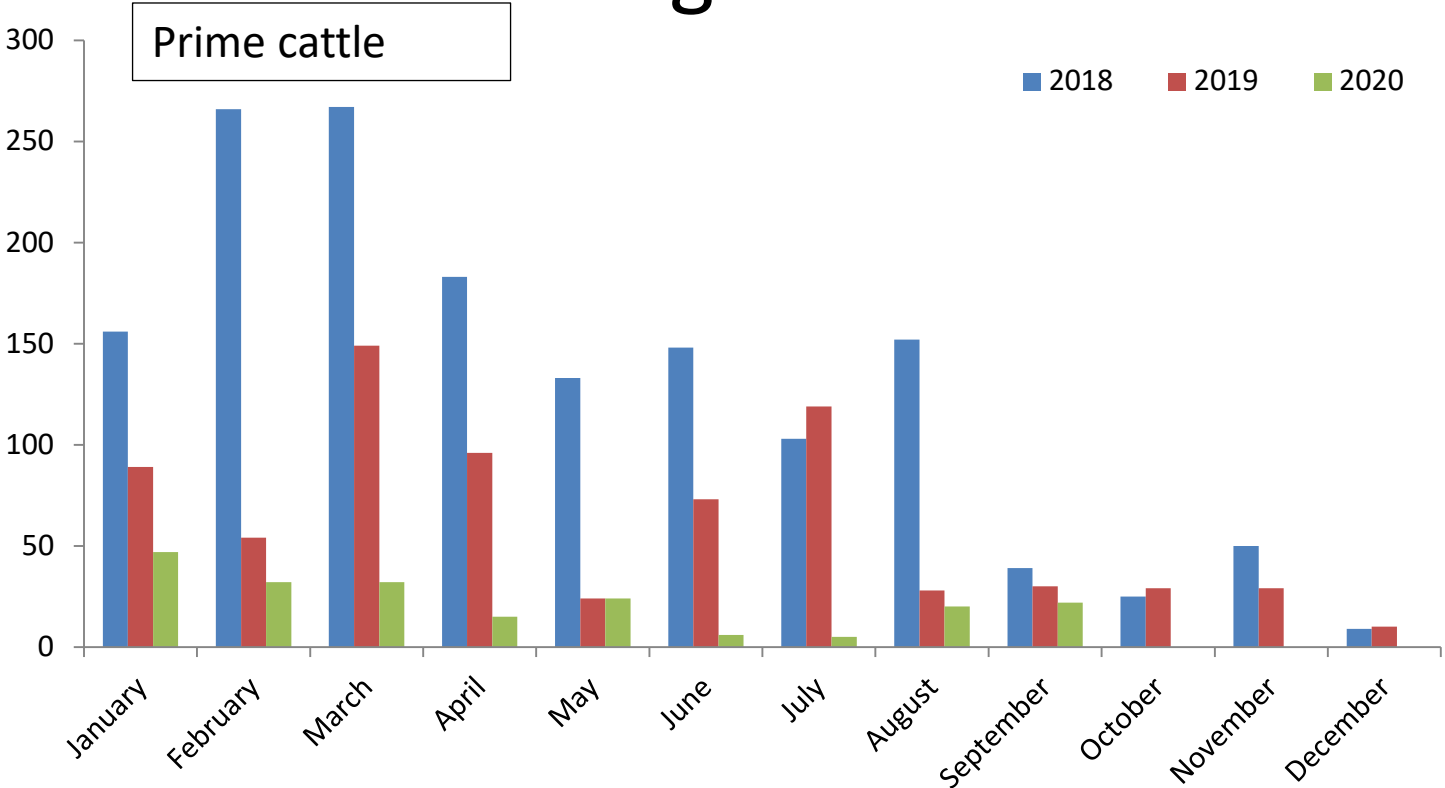


# Prime cattle exports to GB for Direct Slaughter



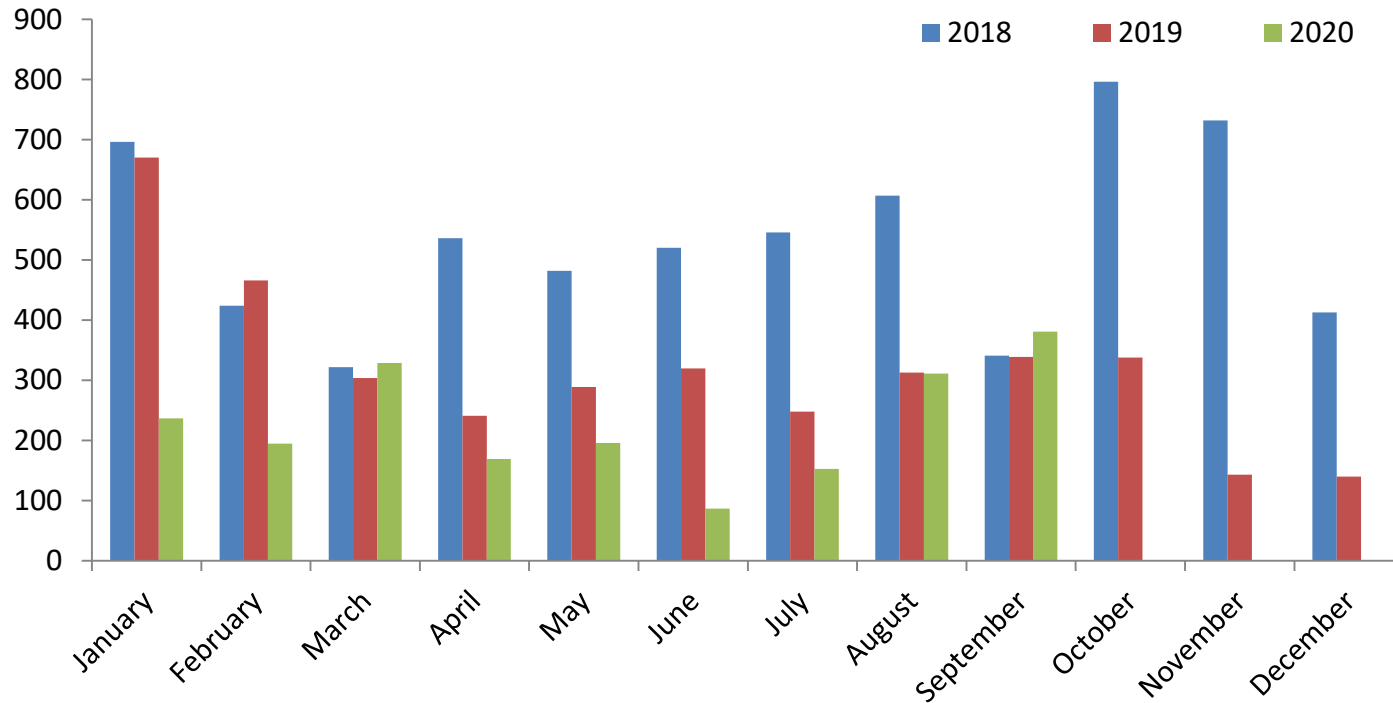
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	236	172	15	57	106	75	326	230	194	237	87	97	1,411
<b>2019</b>	22	0	13	0	48	27	0	16	47	17	38	0	173
<b>2020</b>	0	35	18	0	0	0	0	47	76				176

# Prime cattle exports to ROI for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	156	266	267	183	133	148	103	152	39	25	50	9	1447
<b>2019</b>	89	54	149	96	24	73	119	28	30	29	29	10	662
<b>2020</b>	47	32	32	15	24	6	5	20	22				203

# Cow exports to ROI for Direct Slaughter

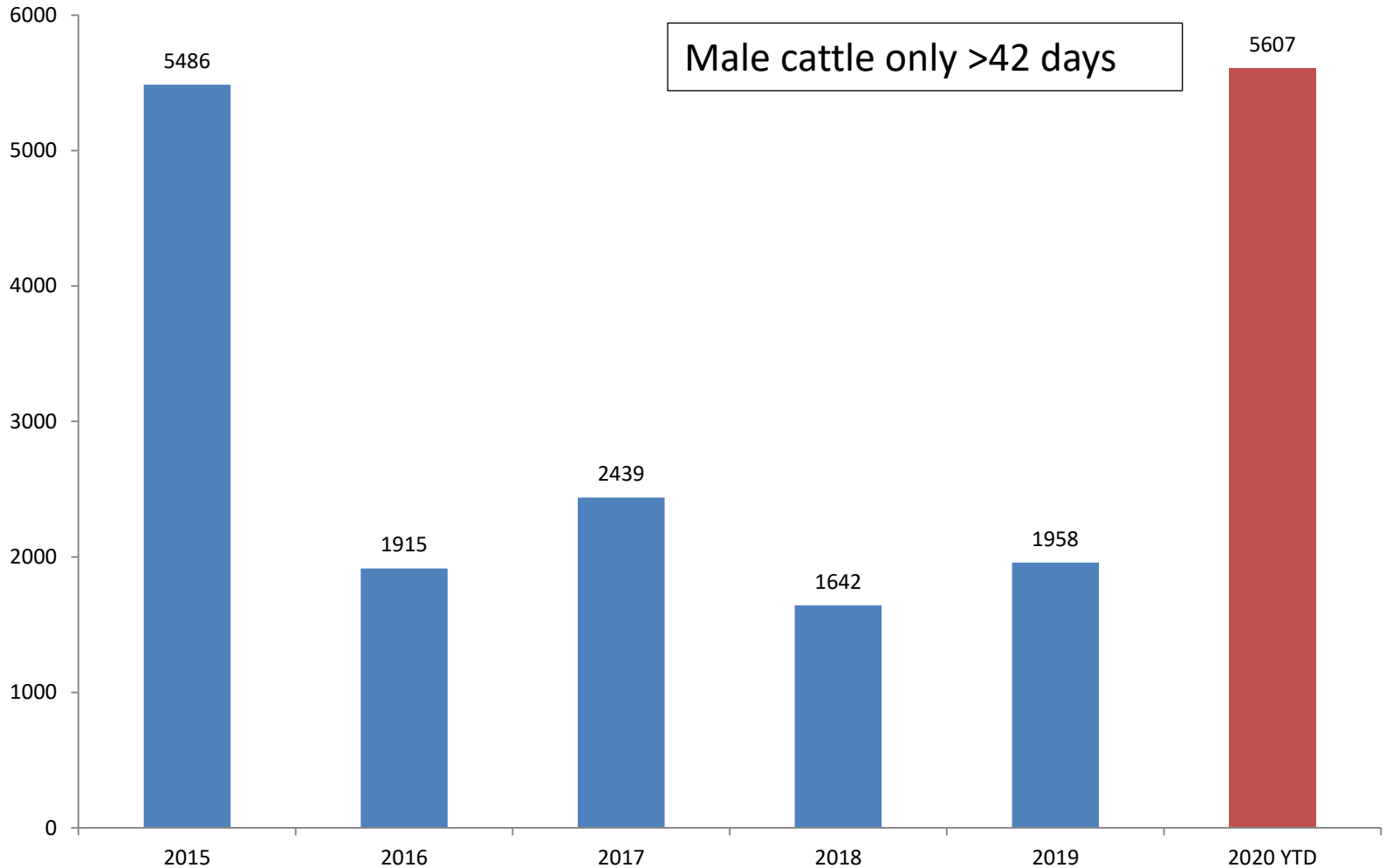


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	696	424	322	536	482	520	546	607	341	796	732	413	4474
<b>2019</b>	670	466	304	241	289	320	248	313	339	338	143	140	3190
<b>2020</b>	237	195	329	169	196	87	153	311	381				2058

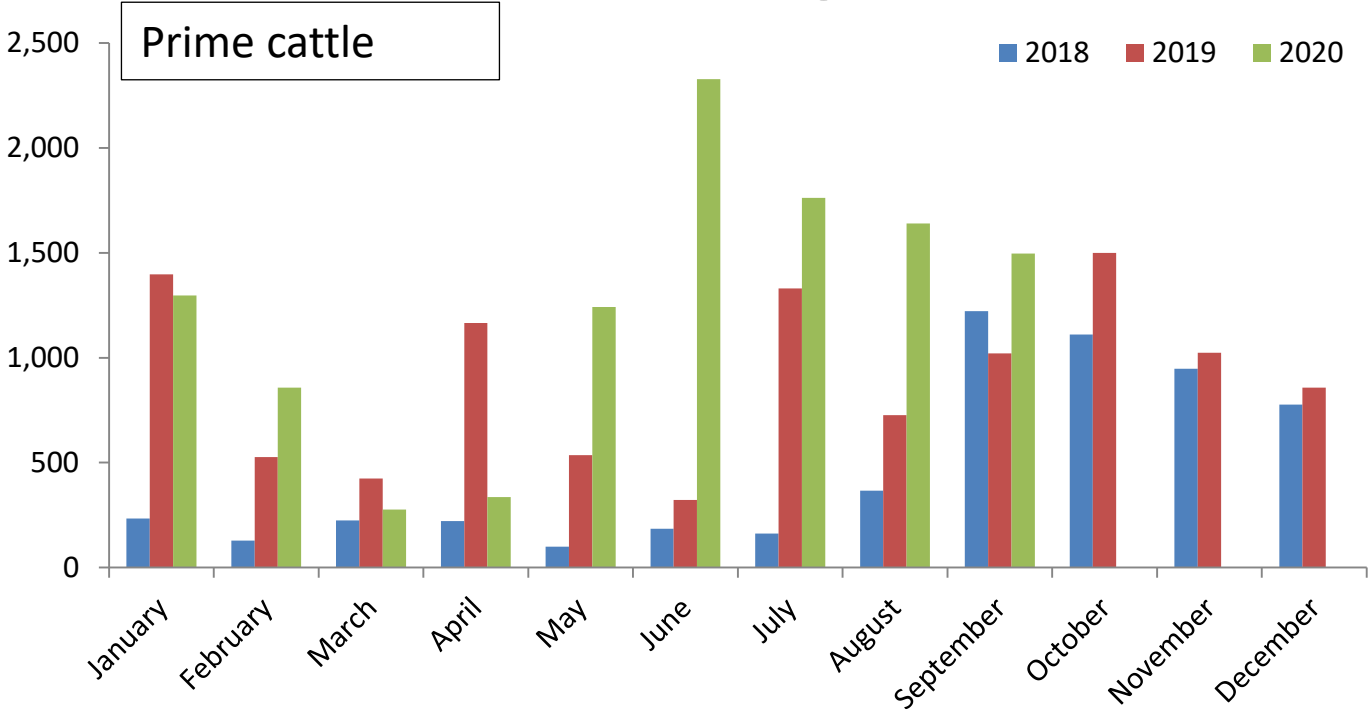


Live Imports

# Imports from ROI for Further Production

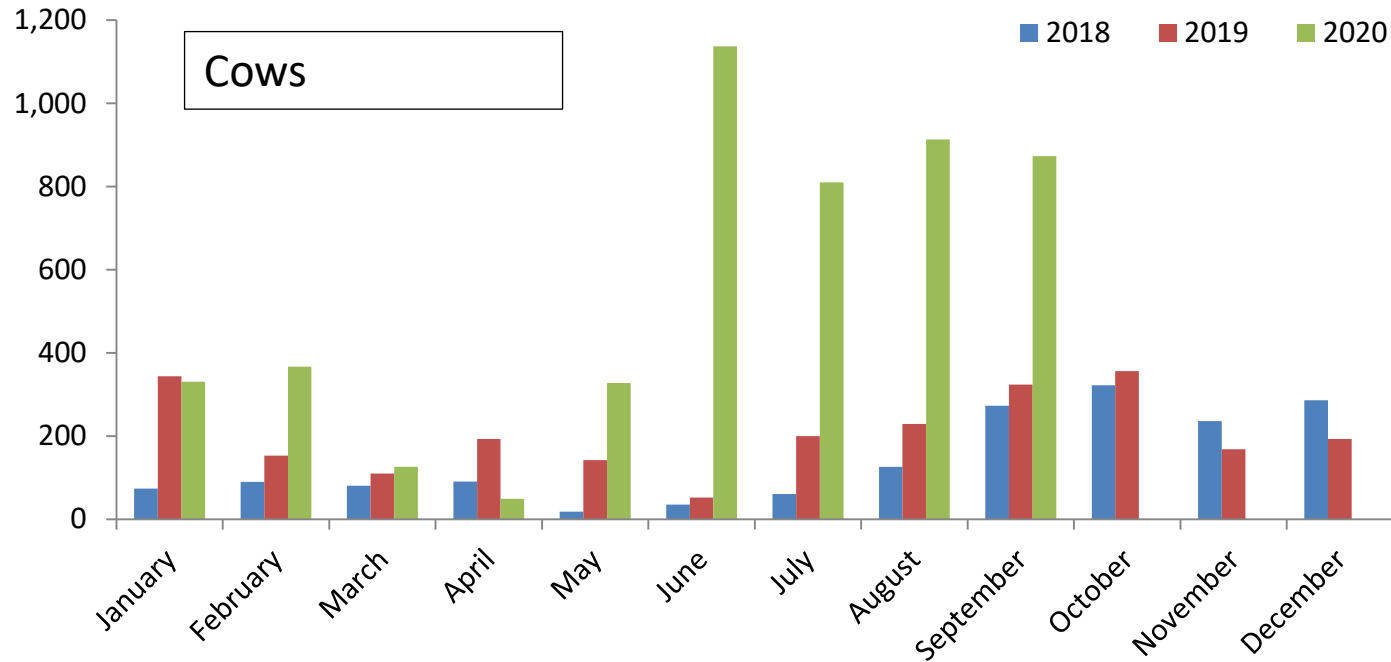


# Prime cattle Imports from ROI for Direct Slaughter



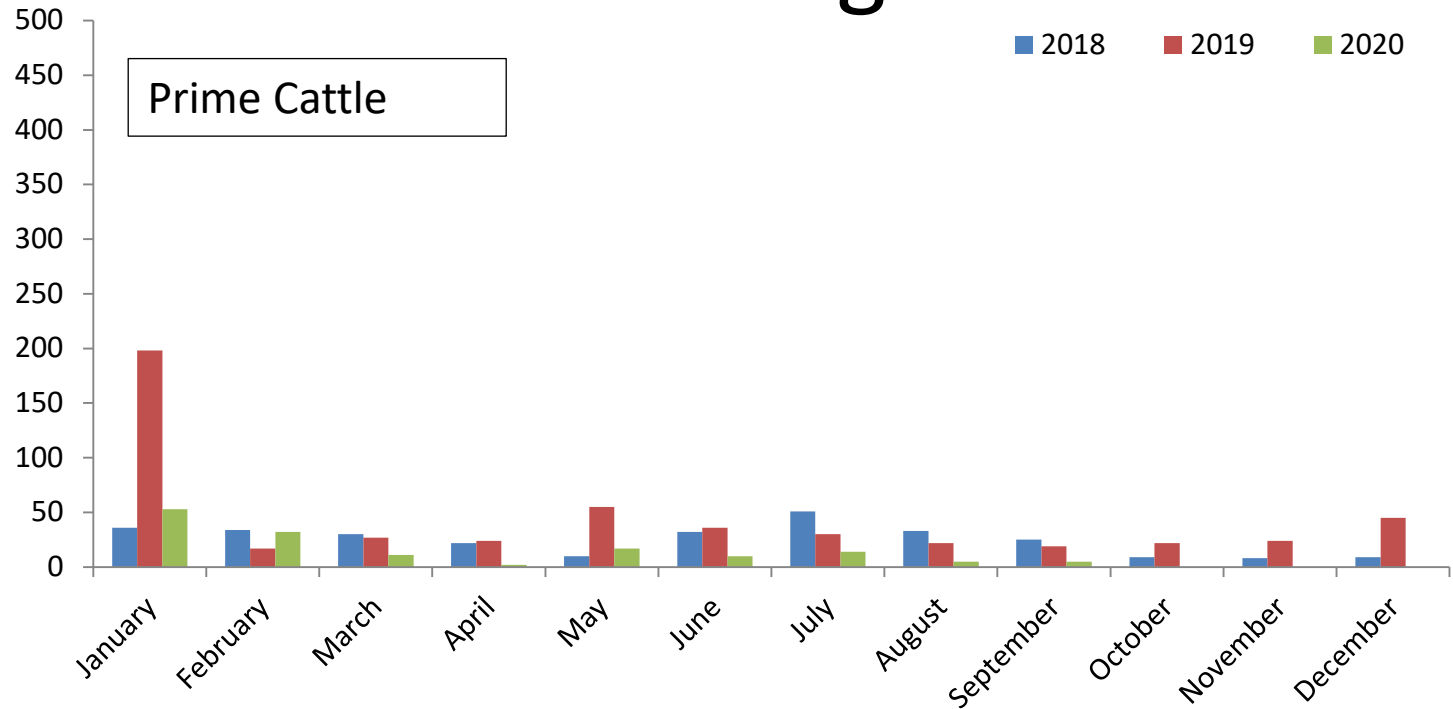
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	234	129	225	221	100	185	162	366	1222	1111	947	777	2844
<b>2019</b>	1398	526	425	1166	536	322	1330	727	1021	1500	1023	857	7451
<b>2020</b>	1297	858	276	336	1242	2328	1,762	1,640	1,496				11235

# Cow Imports from ROI for Direct Slaughter



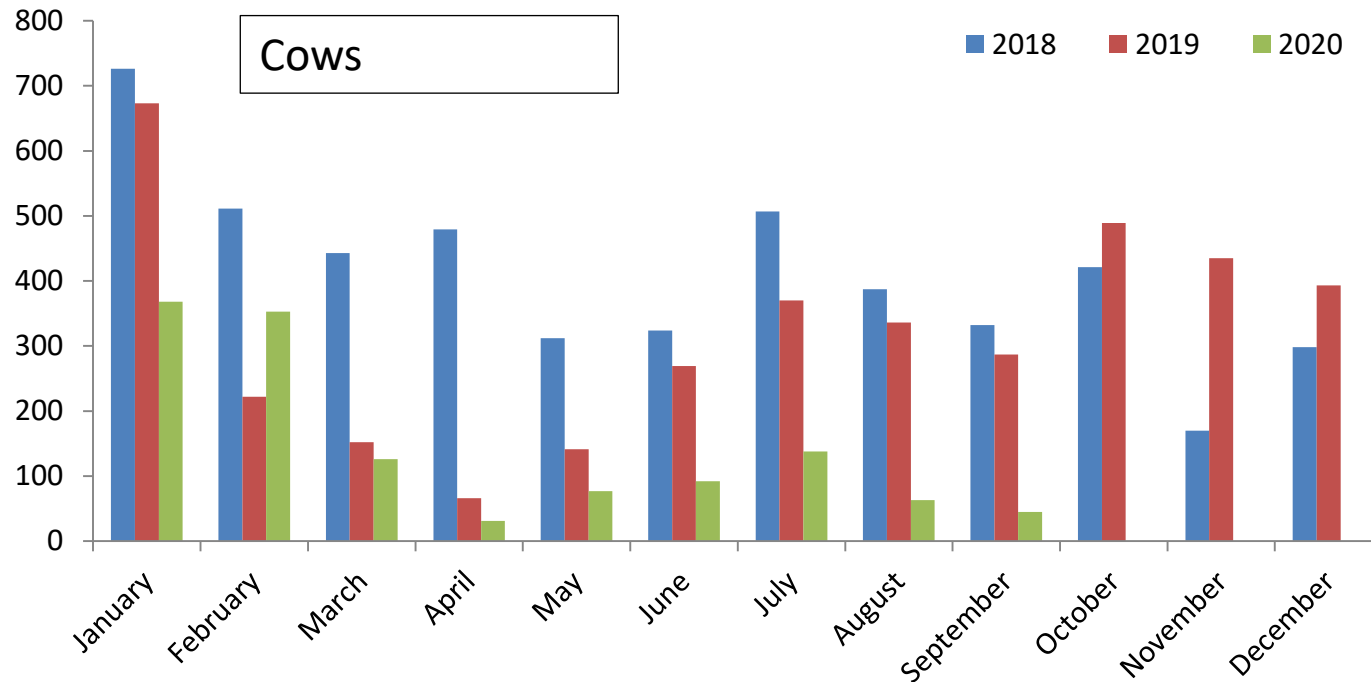
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	74	90	81	91	18	35	61	126	273	322	236	286	849
<b>2019</b>	344	153	110	193	142	52	200	229	324	356	168	193	1747
<b>2020</b>	331	367	126	49	328	1137	810	913	873				4934

# Prime cattle Imports from GB for Direct Slaughter



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	36	34	30	22	10	32	51	33	25	9	8	9	273
<b>2019</b>	198	17	27	24	55	36	30	22	19	22	24	45	428
<b>2020</b>	53	32	11	2	17	10	14	5	5				149

# Cow Imports from GB for Direct Slaughter

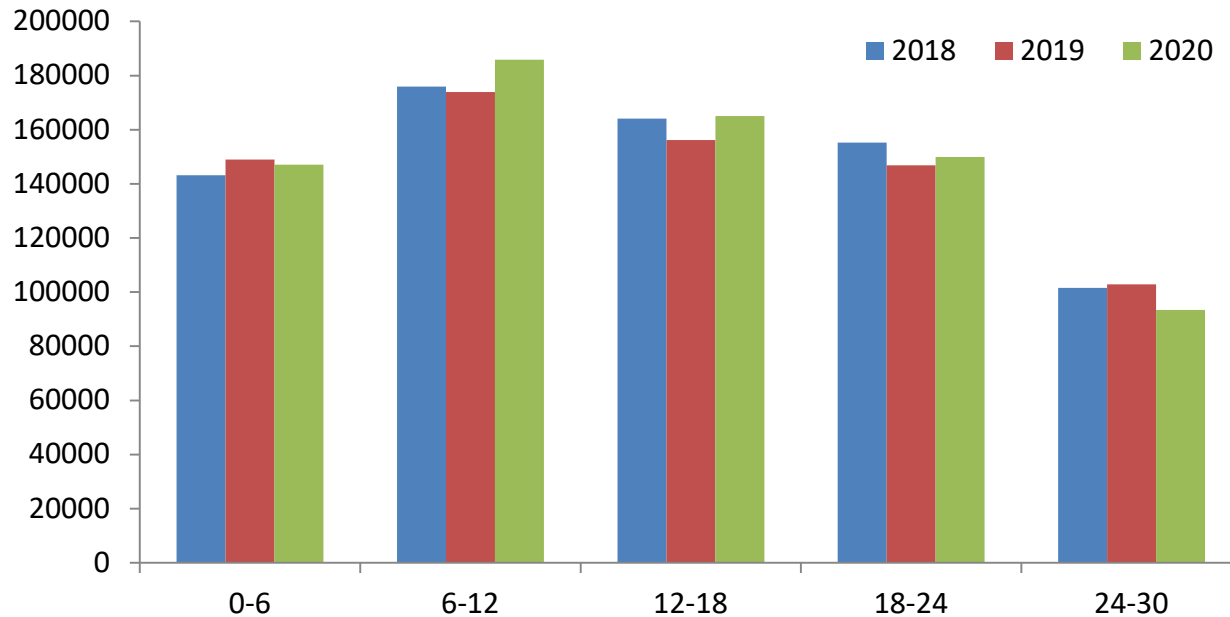


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	726	511	443	479	312	324	507	387	332	421	170	298	4021
<b>2019</b>	673	222	152	66	141	269	370	336	287	489	435	393	2516
<b>2020</b>	368	353	126	31	77	92	138	63	45				1293

# Cattle Supplies

# Beef sired cattle on NI farms

## 30 September 2020

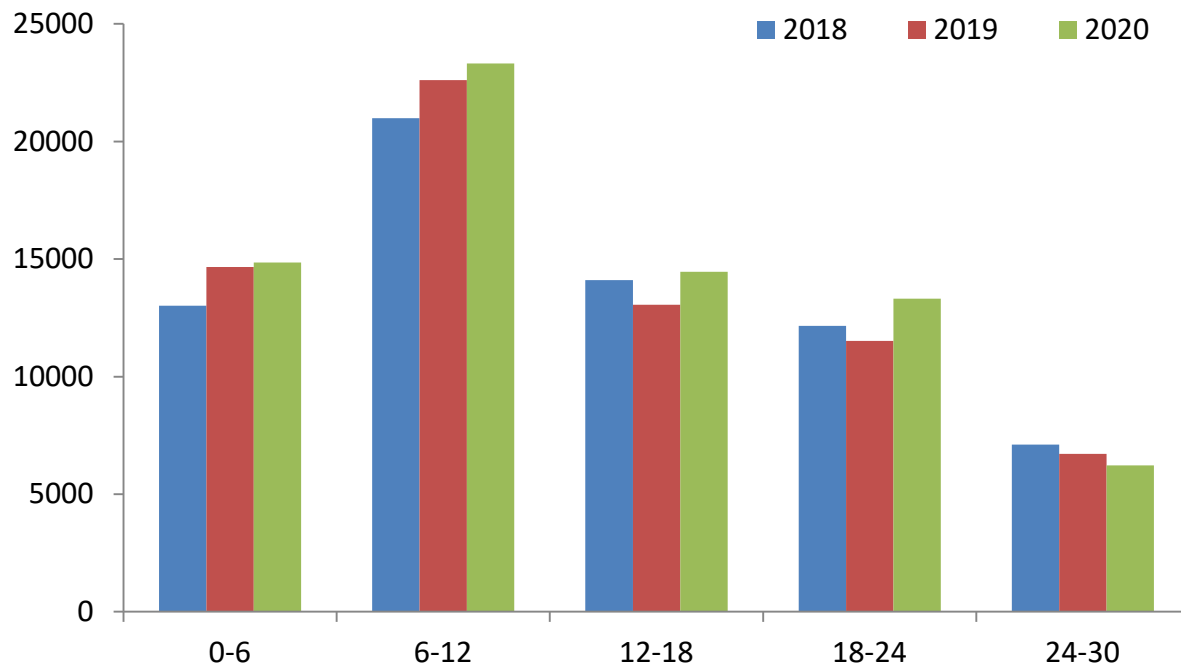


Age (Months)	2018	2019	2020	2019/2020	2018/2020
0-6	143218	148988	147041	-1.3%	2.7%
6-12	175884	173879	185880	6.9%	5.7%
12-18	164083	156212	165030	5.6%	0.6%
18-24	155189	146874	149865	2.0%	-3.4%
24-30	101520	102828	93437	-9.1%	-8.0%



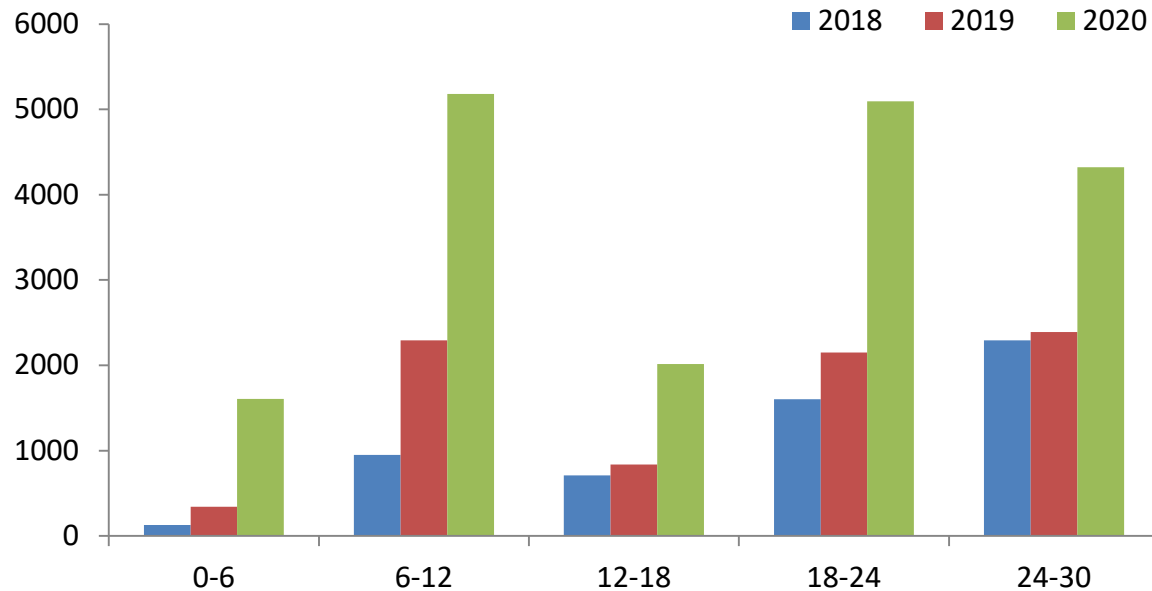
# Dairy sired male cattle on NI farms

## 30 September 2020



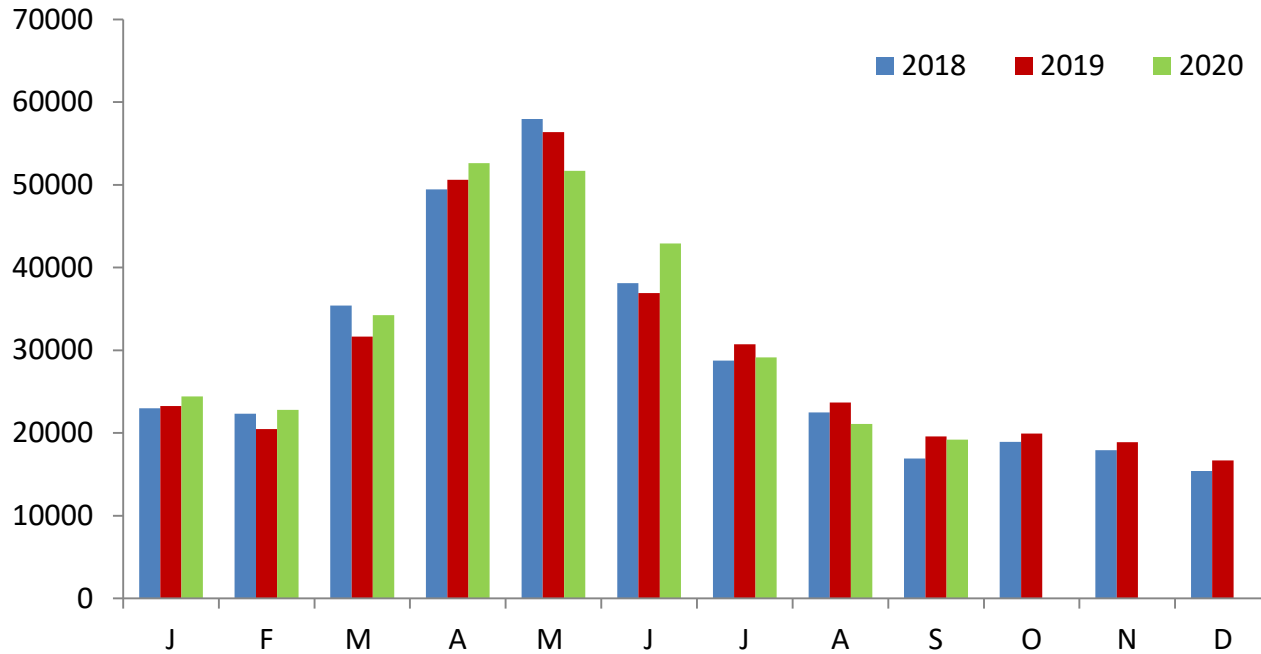
Dairy sired males	2018	2019	2020	2019/2020	2018/2020
<b>0-6</b>	13015	14657	14858	1.4%	14.2%
<b>6-12</b>	20997	22616	23316	3.1%	11.0%
<b>12-18</b>	14108	13054	14463	10.8%	2.5%
<b>18-24</b>	12161	11512	13311	15.6%	9.5%
<b>24-30</b>	7109	6709	6225	-7.2%	-12.4%

# Nomad cattle on NI farms 30 September 2020



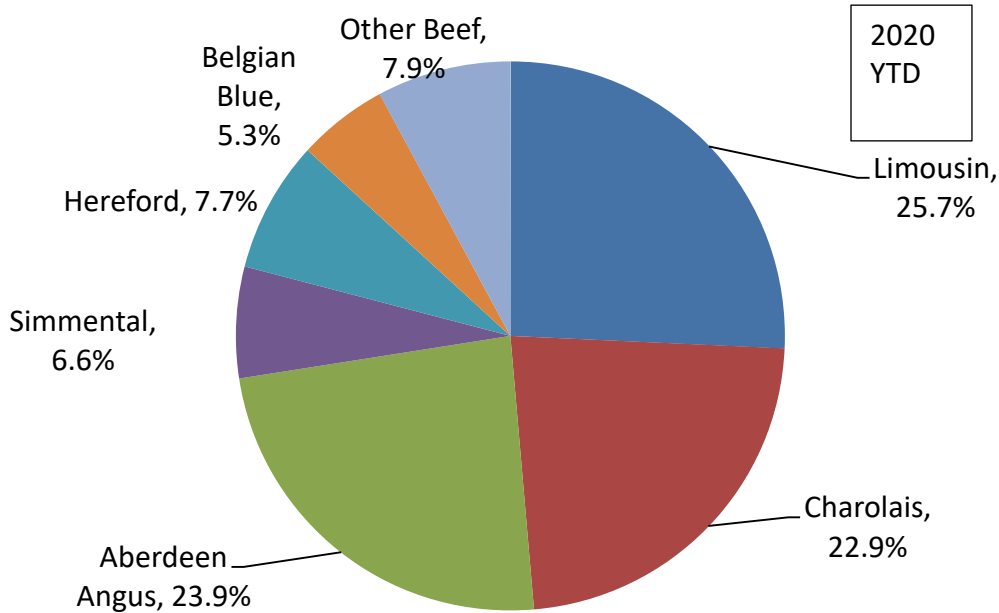
ROI Nomads (beef sired +dairy male)	2018	2019	2020	2019/2020	2018/2020
<b>0-6</b>	128	341	1606	371.0%	1154.7%
<b>6-12</b>	948	2291	5181	126.1%	446.5%
<b>12-18</b>	708	836	2015	141.0%	184.6%
<b>18-24</b>	1601	2150	5093	136.9%	218.1%
<b>24-30</b>	2294	2389	4322	80.9%	88.4%

# NI Beef Sired Calf Registrations 2020



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2019</b>	23262	20461	31658	50617	56386	36912	30720	23702	19603	19943	18886	16697	293321
<b>2020</b>	24432	22801	34248	52617	51695	42923	29127	21085	19204				298132
<b>% Change</b>	5.0%	11.4%	8.2%	4.0%	-8.3%	16.3%	-5.2%	-11.0%	-2.0%				+1.6%

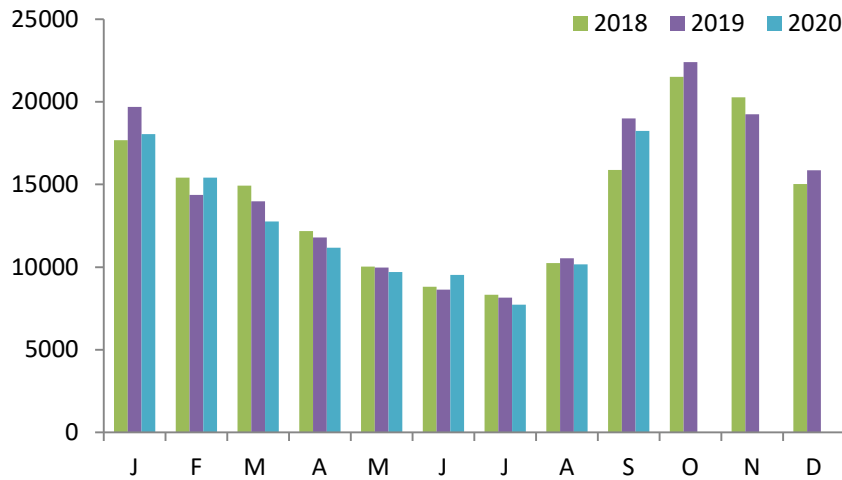
# Beef Calf Registrations by Breed



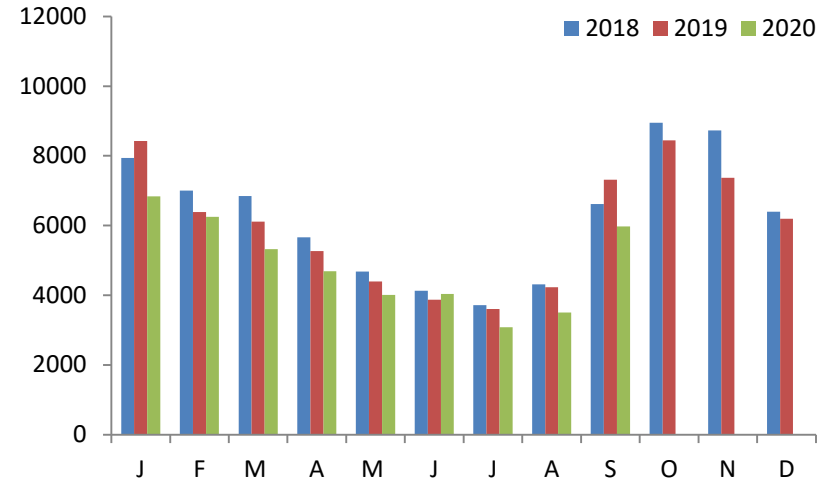
Proportion Dairy Dam	2018	2019	2020
Jan	51%	53%	53%
Feb	51%	51%	54%
Mar	40%	43%	39%
Apr	26%	27%	25%
May	19%	20%	22%
Jun	24%	25%	25%
Jul	28%	28%	28%
Aug	31%	32%	35%
Sep	40%	41%	42%
Oct	49%	49%	
Nov	54%	55%	
Dec	60%	58%	
<b>Grand Total</b>	35%	36%	

	Limousin	Charolais	Aberdeen Angus	Simmental	Hereford	Belgian Blue	Other Beef
2019 YTD	26.3%	23.3%	22.6%	7.0%	8.2%	5.6%	8.0%
2020 YTD	25.7%	22.9%	23.9%	6.6%	7.7%	5.3%	7.9%

# NI Dairy Sired Calf Registrations 2020



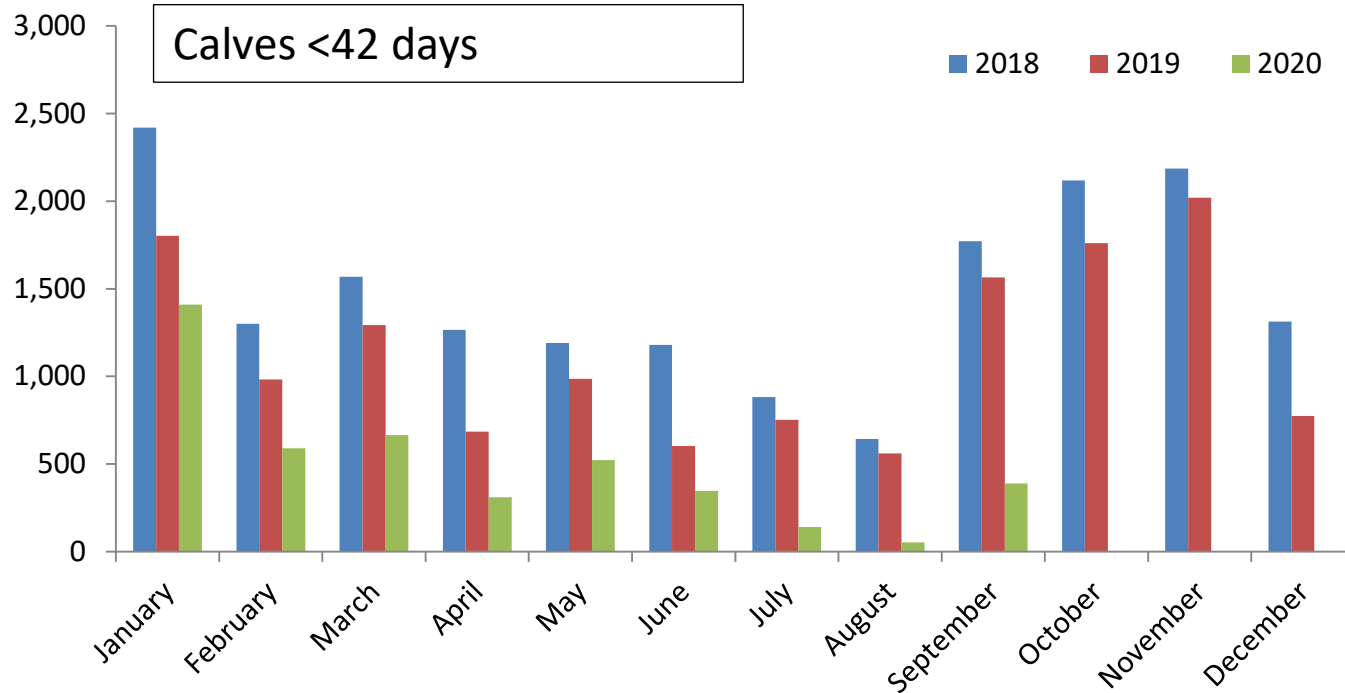
Total dairy calf registrations



Male dairy calf registrations

Males	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2019</b>	8423	6392	6110	5270	4394	3877	3607	4234	7312	8447	7371	6193	49619
<b>2020</b>	6837	6250	5321	4692	4011	4035	3084	3504	5979				43713
<b>% Change</b>	-18.8%	-2.2%	-12.9%	-11.0%	-8.7%	4.1%	-14.5%	-17.2%	-18.2%				-11.9%

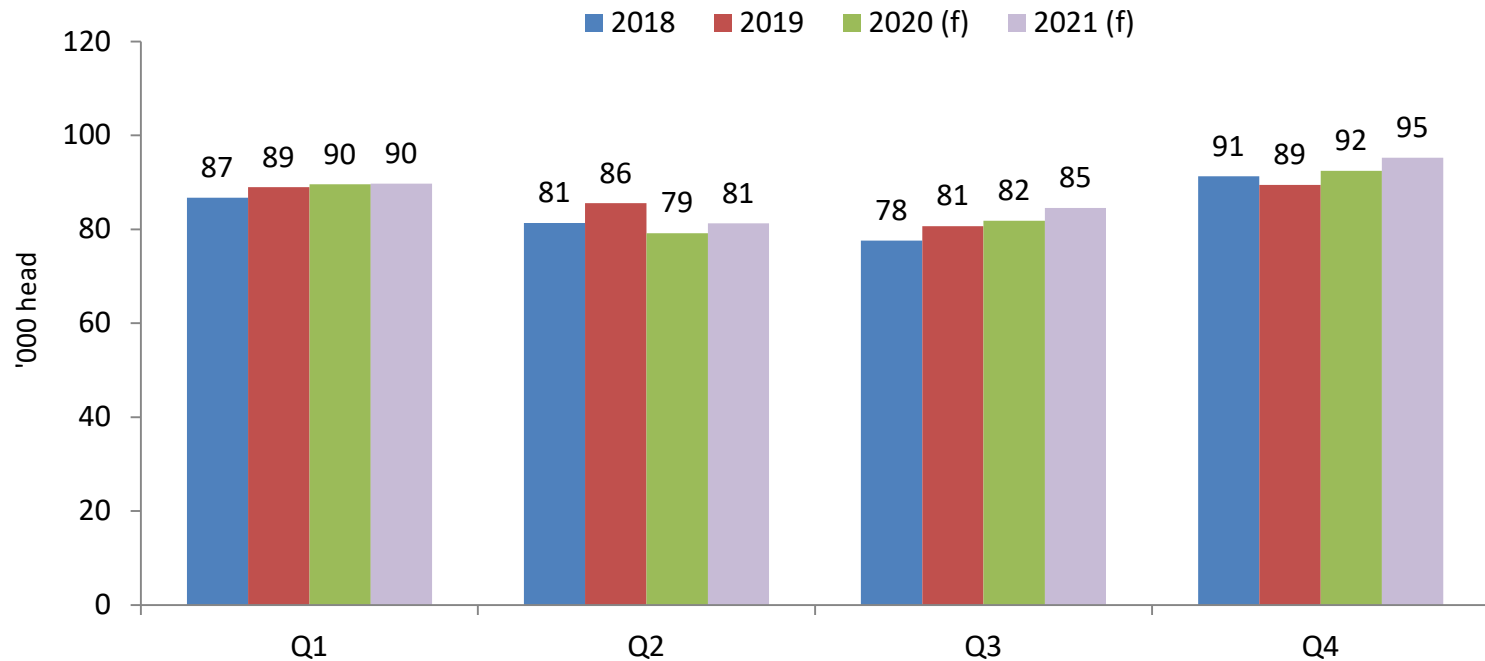
# Dairy Bull Calf Exports



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total YTD
<b>2018</b>	2419	1300	1568	1265	1191	1180	881	642	1772	2119	2186	1313	12218
<b>2019</b>	1802	983	1293	685	986	602	752	561	1564	1761	2020	775	9228
<b>2020</b>	1409	589	664	310	522	347	140	53	388				4422

Forecast

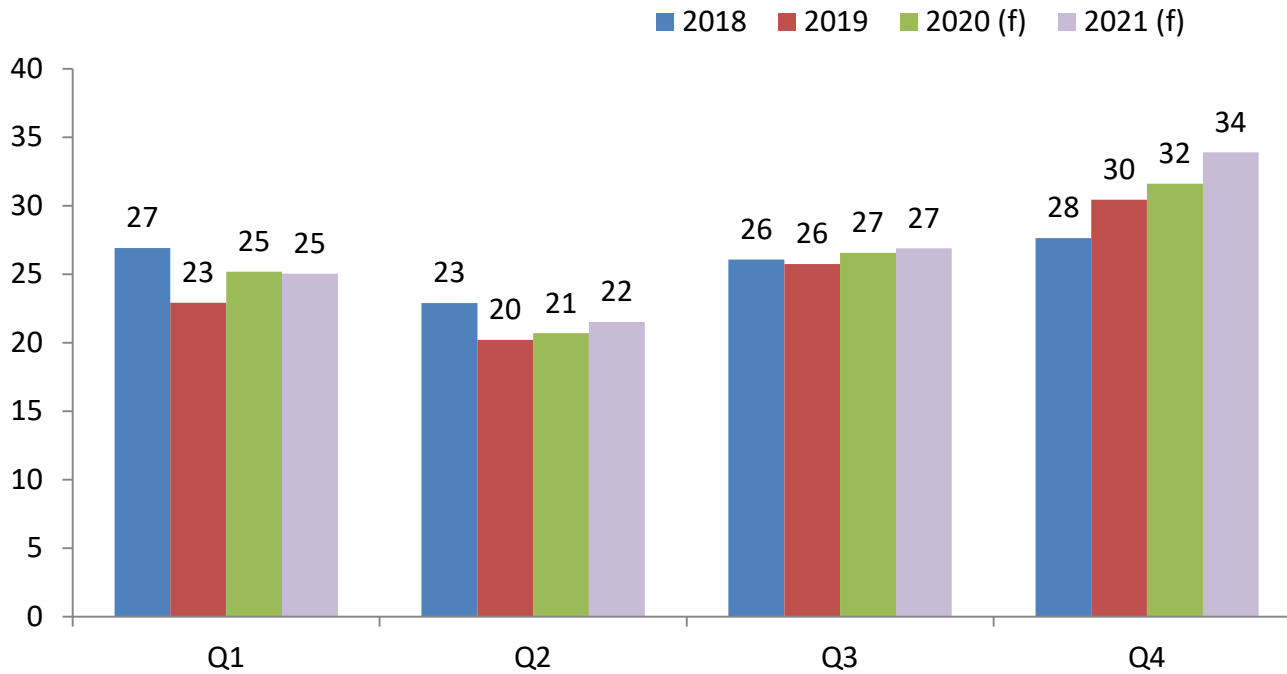
# Forecast NI Prime Cattle Kill 2020/21



	2018	2019	2020 (f)	2021 (f)	2020/21 % Change
<b>Q1</b>	86738	88966	89607	89716	+0.1%
<b>Q2</b>	81359	85562	79183	81295	+2.5%
<b>Q3</b>	77583	80692	81839	84513	+3.3%
<b>Q4</b>	91311	89451	92439	95267	+3.2%
<b>Total</b>	336991	344671	343068	350791	+2.2%

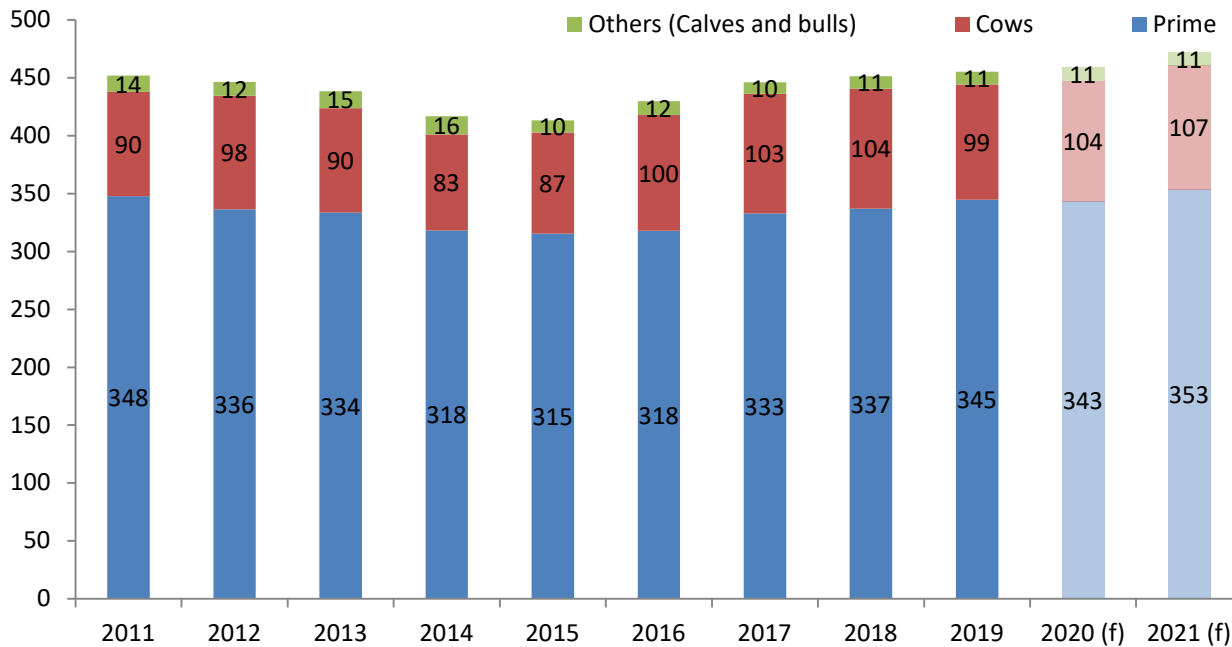


# Forecast NI Cow Kill 2020/21



	2018	2019	2020 (f)	2021 (f)	2020/21 % Change
<b>Q1</b>	26924	22920	25181	25045	-0.6%
<b>Q2</b>	22890	20206	20688	21526	+4.1%
<b>Q3</b>	26079	25753	26566	26881	+1.2%
<b>Q4</b>	27640	30442	31608	33891	+7.5%
<b>Total</b>	103533	99321	104043	107342	+3.3%

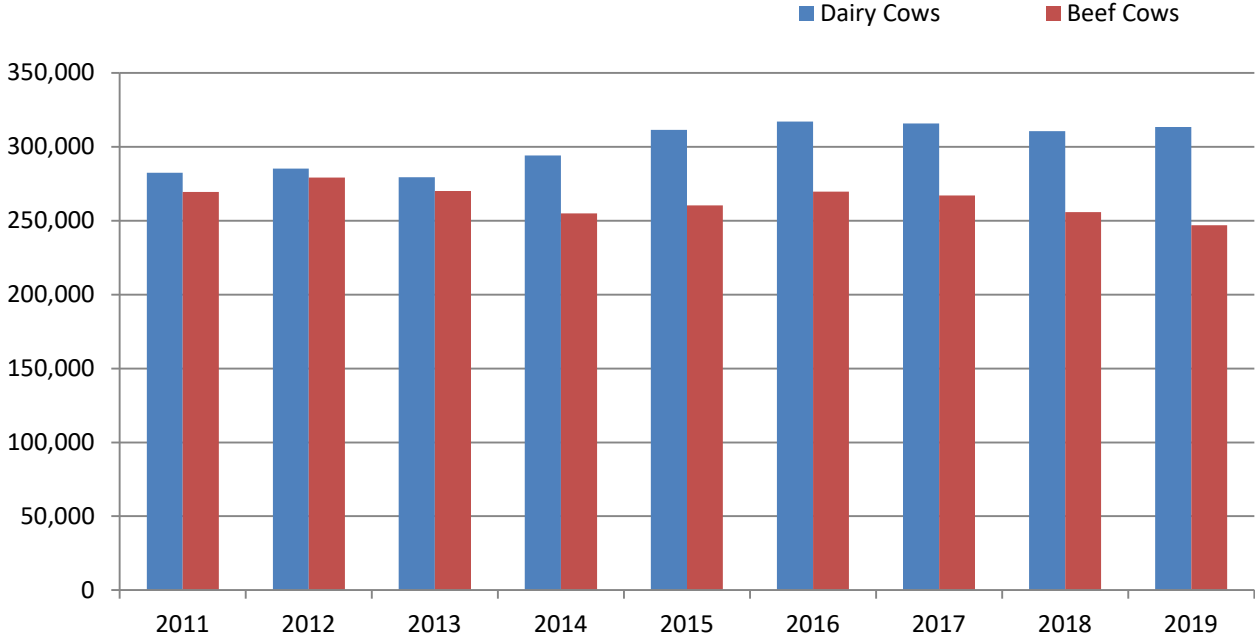
# Forecast Total Cattle Kill 2020/21 (Inc bulls and calves)



	2016	2017	2018	2019	2020 (f)	2021 (f)
Prime	317,959	332,715	336,991	344,671	343,068	353,376
Cows	99,943	103,440	103,533	99,321	104,043	107,342
Others (Calves and bulls)	11,716	9,957	10,815	11,288	11,288	11,288
Total Throughput	429,618	446,112	451,339	455,280	458,399	472,007

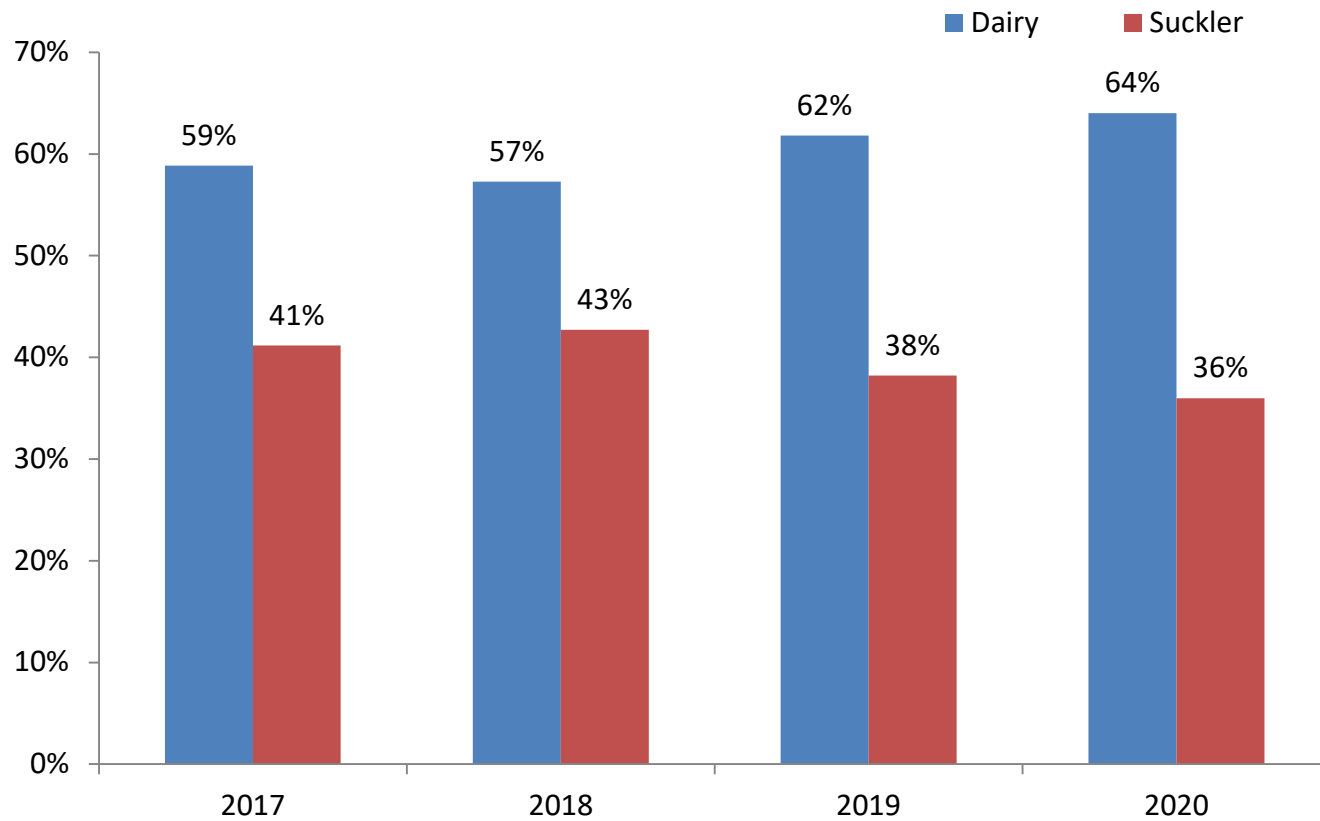
Longer term outlook

# Breeding females June Census



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Dairy Cows</b>	281,043	282,487	285,369	279,481	294,192	311,520	317,146	315,800	310,718	313,549
<b>Beef Cows</b>	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