

# TIGHTER SUPPLIES AND FIRM DEMAND DRIVING LOCAL LAMB TRADE

Base quotes for lamb from processors in Northern Ireland have continued to firm with 460-470p/kg up to 22kg available for R3 grading lambs towards the end of this week. The local deadweight trade for lambs has continued to operate well ahead of the corresponding week in 2019 when the base quotes for R3 grading lambs were 390p/kg up to 22kg.

With base quotes from the processors firming in recent weeks the average price paid for lambs has been following a similar trend. Last week the average reported lamb price in Northern Ireland was 461.8p/kg, an increase of just over 20p/kg from two weeks previous.

Reports have indicated a tightening in the availability of lambs for slaughter in recent weeks which has helped to support the deadweight trade. The liveweight lamb trade has also remained strong with the marts reporting keen demand for any well fleshed lambs passing through the sale rings.

Lamb throughput in Northern Ireland last week totalled 8,992 head. This was back by five per cent from the previous week and is operating eight per cent behind the corresponding week last year. As outlined in **Figure 1** lamb throughput has dipped below 2019 levels in the last few weeks.

### Strong throughput in early summer

The deadweight lamb trade has been particularly strong in Northern Ireland during 2020 and this has encouraged producers to market lambs earlier than they typically would. Lamb throughput was very strong during June and July this year when compared to 2019 levels as indicated in **Figure 1**. During this two month period 81,137 lambs passed through Northern Ireland processing plants. This was an increase of almost 10,000 head or 14 per cent from the same two month period in 2019.

A further 48,589 lambs were exported out of Northern Ireland for direct slaughter in processing plants south of the border during June and July 2020. This was an increase of 8,000 head or 19 per cent from the corresponding period in 2019.

### Fewer live exports Autumn 2020

During the period August to November 2020 lamb throughput in local plants totalled 186,527 head which was ten per cent higher than the corresponding period in 2019. However much of this increase in local throughput of lambs was due to notably lower levels of exports for direct slaughter in Irish processing plants.

Between August and November 2020 115,523 lambs were exported from

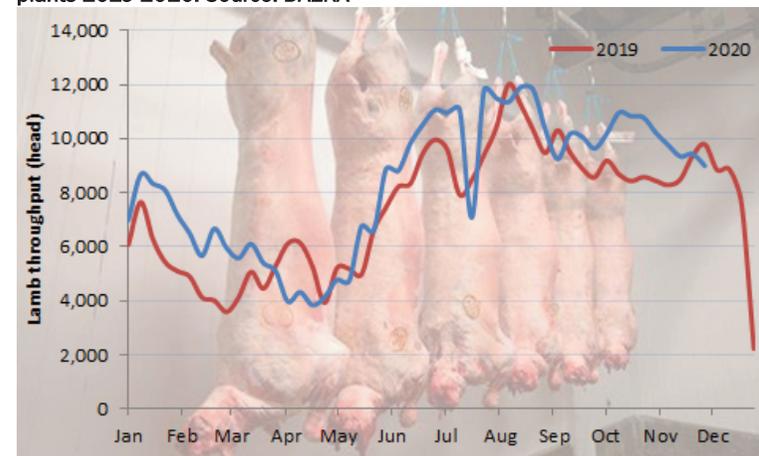
Northern Ireland to processing plants in the Republic of Ireland for direct slaughter. This was back 34,300 head or 23 per cent from year earlier levels.

### Output year to date

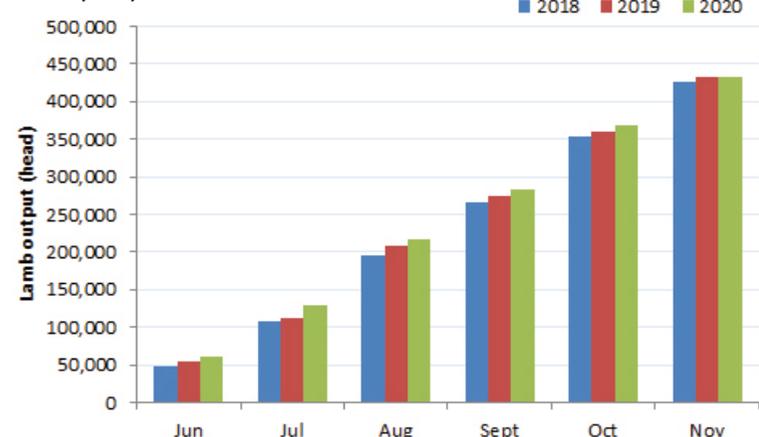
Overall output from the Northern Ireland sheep flock since June 2020 has totalled 431,776 head, almost identical to the 431,873 lambs slaughtered during the same period last year as indicated in **Figure 2**. The DAERA Agricultural Survey recorded the breeding flock (including ewe lambs tupp) at 905,779 head in December 2019, a 2.2 per cent increase from the previous year. Given the larger breeding flock and relatively good weather conditions during Spring 2020 the lamb crop is expected to have been slightly bigger during 2020.

Taking these figures into consideration the number of lambs still on local farms is expected to be similar to late 2019. However given the strong trade this year there has been a strong interest in retaining ewe lambs for breeding which may be having some impact on the availability of lambs for slaughter in recent weeks. The Republic of Ireland continues to be a valuable outlet for the local sheep industry and the level of export will also impact the availability of lambs/hoggets for local processors over the coming weeks and months.

**Figure 1: Weekly hogget/lamb throughput in Northern Ireland processing plants 2019-2020. Source: DAERA**



**Figure 2: Cumulative output of Northern Ireland sheep flock (Local slaughter and exports) June-November 2018-2020. Source: DAERA**



# EU SHEEPMEAT OUTLOOK 2021

Figure 3: Developments in the Sheep/Goat meat market in the EU 2020/2021 (f)  
Source: EU Commission.

SHEEP & GOAT 	2020	2021
Production	 -3.0%	 -1.0%
Exports	 +6.0%	 +0.0%
Imports	 -4.0%	 -3.0%
Consumption	 -4.0%	 -1.6%

During the first half of 2020 EU sheep and goat meat production was back almost four per cent from 2019 levels. This was driven by reduced throughput in key production regions including Greece, Ireland, France, Romania and Spain according to the latest Short Term Outlook Report from the EU Commission.

There has been some recovery in sheep/goat throughput across the EU as

the year has progressed with overall production expected to be back by three per cent for the whole of 2020 as outlined in **Figure 3**.

A reduction in ewe numbers in some key production regions, stagnated domestic demand, uncertainty linked to trade and bad weather conditions in some parts of the trading bloc have all contributed to the decline in sheepmeat production

during 2020. Forecasts have indicated a further one per cent decline in overall sheep/goat meat production next year.

Exports of sheepmeat out of the EU increased strongly in the first half of 2020 however tighter supplies have limited the EU's capability to export in the second half of the year and export growth is expected to stagnate in 2021.

Imports of sheep meat are expected to be back by four per cent in 2020 due to tighter global supplies of sheepmeat and the redirection of available product from Australia and New Zealand to China and other more valuable Asian markets. Imports are forecast to decline by a further three per cent next year.

Reduced sheepmeat production in the EU combined with reduced imports has had an impact on product availability. This has had a negative influence on consumption which is back four per cent to 1.3kg per capita in 2020 and is expected to be back by a further 1.6 per cent next year.

## CALF REGISTRATIONS INCREASE IN NOVEMBER

During November 2020 there were 20,042 beef sired calves registered in Northern Ireland which takes the total for the year to date to 339,164 head. This is an increase of 7,014 head or 2.1 per cent from the corresponding period in 2019.

There has been an increase in the number of beef sired calves registered to both beef and dairy cows in Northern Ireland during 2020 to date. Beef calves registered to dairy cows have accounted for 35 per cent of all beef sired calf registrations in the region during 2020 to date with the remaining 65 per cent of beef calves registered to suckler cows. These proportions are unchanged from previous years.

While the number of beef sired calves has been increasing the number of dairy sired calves has been going the

opposite direction. There were 154,671 dairy sired calves registered during the first 11 months of 2020, back 3,100 head or two per cent from 2019 levels. The number of these that are male calves has declined from 65,437 head in the 2019 period to 57,270 head this year.

During 2020 to date there have been 5,014 calves aged under 42 days exported out of Northern Ireland, a notable decline from the 11,109 head exported during the corresponding period in 2019. The largest majority of the calves exported out of Northern Ireland have been destined for Spain.

This reduction in calf exports combined with higher levels of calf registrations in Northern Ireland during 2020 should contribute to higher cattle availability for slaughter in 2022.

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# WEEKLY BEEF & LAMB MARKETS



## CATTLE TRADE

### NI FACTORY BASE QUOTES FOR CATTLE

(P/KG DW)	This Week 30/11/20	Next Week 07/12/20
<b>Prime</b>		
U-3	356 - 368p	356 - 368p
R-3	350 - 362p	350 - 362p
O+3	344 - 356p	344 - 356p
P+3	290 - 306p	290 - 306p
	Including bonus where applicable	
<b>Cows</b>		
O+3 & better	240 - 260p	240 - 265p
Steakers	140 - 170p	140 - 170p
Blues	120 - 130p	120 - 130p

Cow quotes vary depending on weight and grade. Pricing policies vary from plant to plant. Producers are advised to check pricing policies before presenting cattle for slaughter.

### Deadweight Cattle Trade

Base quotes from the plants for in spec U-3 grade prime cattle remained steady this week ranging from 356-368p/kg. The majority of plants are quoting at the upper end for both steers and heifers. Base quotes for O+3 grade cows this week ranged from 240-260p/kg with the majority of plants quoting 250-260p/kg.

Last week prime cattle throughput decreased from the previous week to 6,800 head processed locally. This brings total throughput of prime cattle to date in 2020 to 315,354 head, a 1.7 per cent decrease when compared to the 320,960 prime cattle processed in the same period in 2019. Cow throughput in NI recorded an increase last week to just over 2,500 cows. This brings the total cow throughput to date in 2020 to 94,276 head, a 2.8 per cent increase when compared to the same period in 2019 when 91,669 cows were processed locally.

Imports of prime cattle from ROI for direct slaughter in NI plants last week totalled 242 head with 199 cows also imported. This brings total prime cattle imports from ROI during 2020 to date to 13,799 head, an increase of 38 per cent from the same period in 2019. Meanwhile cattle exports from NI for slaughter in ROI plants consisted of 79 cows last week. This brings total cattle exports during 2020 to date to 3,039 head, back 31 per cent when compared to the same period in 2019.

The average steer price in NI last week was up by 0.8p/kg to 366.9p/kg while the R3 steer price increased by a penny to 375.3p/kg from the previous week. The average NI heifer price last week recorded a decrease of 3.7p/kg to 366.2p/kg with the R3 heifer price back by 3.3p/kg to 374.4p/kg. The average young bull price last week decreased by 0.4p/kg to 348.5p/kg while the R3 young bull price was back by 1.6p/kg to 362.4p/kg. Meanwhile the average cow price in NI last week was back by 2.7p/kg to 240.2p/kg with the O3 cow price up by 1.6p/kg to 268.5p/kg.

In GB last week the average steer price was up by 1.3p/kg to 375.9p/kg with the R3 steer price slightly up to 382.1p/kg compared to the previous week. There were variations last week across the GB regions with the R3 steer price holding steady in Scotland, an increase reported in Northern England (+3.9p/kg) and decreases reported in Southern England (-2.2p/kg) and the Midlands (-0.6p/kg). The average heifer price in GB last week increased by 1.6p/kg to 374.8p/kg with the R3 heifer price back 0.6p/kg to 381.4p/kg. The R3 heifer price increased in Northern England (+2.4p/kg) and decreased across the other GB regions last week. Meanwhile last week the average GB cow price came back marginally from the previous week to 219.2p/kg with the O3 cow price in GB back by 0.7p/kg to 245.7p/kg.

The prime cattle deadweight trade in ROI last week reported increases with the majority of grades when compared to the previous week. The R3 steer price increased last week by the equivalent of 3.7p/kg to 328.8p/kg, while the R3 heifer price was up by just under 3p/kg to 333.4p/kg. The cow trade strengthened in ROI last week with the O3 price up by 8.4p/kg to 253.1p/kg, 15.4p/kg behind the same price in NI.

### LAST WEEK'S DEADWEIGHT CATTLE PRICES (UK / ROI)

	W/E 28/11/20	Northern Ireland	Rep of Ireland	Scotland	Northern England	Midlands & Wales	Southern England	GB
Steers	U3	378.3	336.7	390.7	385.8	386.7	385.2	387.3
	R3	375.3	328.8	390.9	382.2	380.4	376.7	382.1
	R4	373.9	328.1	393.3	388.8	378.1	376.1	387.4
	O3	365.6	312.7	376.8	372.2	356.9	356.3	363.4
	AVG	366.9	-	389.6	378.0	369.3	367.4	375.9
Heifers	U3	381.4	344.8	395.5	390.0	392.4	386.7	391.5
	R3	374.4	333.4	388.9	380.7	381.4	376.0	381.4
	R4	371.7	334.8	391.9	382.3	380.5	376.4	384.6
	O3	366.9	324.8	367.5	366.2	355.4	358.2	359.9
	AVG	366.2	-	388.7	375.2	368.3	366.8	374.8
Young Bulls	U3	369.6	323.6	384.8	366.1	382.4	380.0	382.4
	R3	362.4	314.3	379.2	368.8	374.1	359.1	374.0
	O3	346.2	301.2	349.0	350.7	344.3	362.2	348.6
	AVG	348.5	-	368.7	350.0	364.4	358.7	363.1
Prime Cattle Price Reported		5180	-	6123	7230	8706	4719	26778
Cows	O3	268.5	253.1	248.6	248.2	247.2	238.2	245.7
	O4	269.2	254.3	251.7	250.4	248.0	237.0	246.9
	P2	230.1	225.2	204.8	204.3	203.8	196.3	201.8
	P3	247.2	242.0	214.3	216.8	218.3	210.2	216.0
	AVG	240.2	-	238.7	229.1	216.7	206.0	219.2

Notes: (i) Prices are p/kg Sterling-ROI prices converted at 1 euro=89.12p Stg  
(ii) Shading indicates a lower price than the previous week.  
(iii) AVG is the average of all grades in the category, not just those listed

### REPORTED NI CATTLE PRICES - P/KG

W/E 28/11/20	Steers	Heifers	Young Bulls
U3	377.8	381.3	369.9
R3	372.7	373.6	364.1
O+3	365.9	365.3	352.8

\*Prices exclude AA, HER and Organic cattle

### REPORTED COW PRICES NI - P/KG

W/E 28/11/20	Weight Bands			
	<220kg	220-250kg	250-280kg	>280kg
P1	159.5	173.2	187.4	206.0
P2	188.2	201.0	228.1	241.5
P3	196.9	224.6	241.4	251.8
O3	-	234.6	263.3	269.2
O4	200.0	230.0	257.8	270.0
R3	-	-	-	287.5

### LATEST LIVEWEIGHT CATTLE MART PRICES NI

W/E 28/11/20	1st QUALITY			2nd QUALITY		
	From	To	Avg	From	To	Avg
<b>Finished Cattle (p/kg)</b>						
Steers	236	248	239	215	235	225
Friesians	165	193	174	126	164	145
Heifers	221	234	225	205	220	212
Beef Cows	158	195	169	130	157	145
Dairy Cows	116	146	121	100	115	107
<b>Store Cattle (p/kg)</b>						
Bullocks up to 400kg	230	264	247	205	229	218
Bullocks 400kg - 500kg	240	293	250	210	239	220
Bullocks over 500kg	210	234	215	180	209	195
Heifers up to 450kg	240	275	248	210	239	225
Heifers over 450kg	220	249	230	195	219	208
<b>Dropped Calves (£/head)</b>						
Continental Bulls	415	510	445	320	410	360
Continental Heifers	350	430	380	250	345	300
Friesian Bulls	200	375	265	130	195	165
Holstein Bulls	100	160	130	10	95	50

# SHEEP TRADE

## NI SHEEP BASE QUOTES

(P/Kg DW)	This Week 30/11/20	Next Week 07/12/20
R3 Lambs up to 22kg	460 - 470p	460 - 470p

## REPORTED SHEEP PRICES

(P/KG)	W/E 14/11/20	W/E 21/11/20	W/E 28/11/20
NI L/W Lambs	423.2	436.9	429.5
NI D/W Lambs	441.3	456.4	461.8
GB D/W Lambs	462.9	462.2	473.9
ROI D/W	457.2	466.0	468.3

## Deadweight Sheep Trade

Base quotes from the plants held steady this week for R3 grading lambs at 460-470p/kg up to 22kg. Lamb throughput in local plants decreased to 8,992 head last week this brings the year to date throughput for lambs/hoggets to 401,788 head. This is an increase of 12.2 per cent when compared to 358,200 lambs/hoggets processed in the same period in 2019. Exports of lambs to ROI for direct slaughter last week was back slightly to 6,539 head. This brings the total lambs/hoggets exported to ROI for direct slaughter to 279,832 to date in 2020, a decrease of 6.4 per cent when compared the same period in 2019. Exports of lambs/hoggets to ROI have accounted for just over 40 per cent of the total NI lamb output to date in 2020. The deadweight lamb price in NI last week increased by 5.4p/kg to 461.8p/kg while the ROI lamb price increased by the equivalent of 2.3p/kg to 468.3p/kg.

## Liveweight Sheep Trade

Many of the marts have reported smaller numbers of lambs passing through most of the sale rings this week. In Omagh last Saturday 649 lambs sold from 426-467p/kg compared to 652 lambs last week selling from 432-486p/kg. On Monday 620 lambs sold in Kilrea from 423-462p/kg compared to 300 lambs last week selling from 425-536p/kg. In Rathfriland this week 400 lambs sold from 424-488p/kg (avg 449p/kg) compared to 600 lambs last week selling from 420-542p/kg (avg 450p/kg). In Markethill this week 1,210 lambs sold from 430-460p/kg compared to 1,350 lambs last week selling from 430-470p/kg. Across the marts this week the cull ewe prices ranged from £105-£151.

## LATEST SHEEP MARTS (P/KG LW)

From: 28/11/20		Lambs			
To: 03/12/20		No	From	To	Avg
Saturday	Omagh	649	426	467	-
	Swatragh	700	405	439	-
Monday	Massereene	620	425	468	-
	Kilrea	620	423	462	-
Tuesday	Saintfield	585	425	500	-
	Rathfriland	400	424	488	449
Wednesday	Ballymena	2463	415	477	431
	Enniskillen	508	408	454	-
	Armoy	474	425	475	-
	Markethill	1210	430	460	-

Strict Covid - 19 restrictions are in place  
across all of the livestock marts

Information supplied by LMC / DAERA/ AHDB/ DAFM

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## IMPROVED SUSTAINABILITY WILL BE DRIVEN BY GREATER COLLABORATION

The launch of the UK Cattle Sustainability Platform (UKCSP) is further evidence of an on-the-ground visible response to global sustainability challenges such as climate change and antimicrobial resistance.

Chief Executive Ian Stevenson is quick to point to the role that this new collaboration will play in formulating a strategic approach to improve sustainability in ways that will deliver meaningful results for local farmers.

areas endorsed by ERBS address the issues of: the environment, animal welfare, the use of medicines on farms and farm management & safety practises. ERBS is fully aligned to the principles of the Global Roundtable for Sustainable Beef (GRSB) and other major international bodies.

by the UK beef industry and this will have a very strong resonance with farmers on the ground across the UK.

collaborate, communicate and support sustainable farming practices that will benefit farmers, industry, consumers and the environment.

He said: "Sustainability impacts at a number of levels. Yes, improving the environment is important. But sustainability must also encompass the need for farming businesses to remain profitable and for the beef industry, as a whole, to remain socially cohesive."

Ian Stevenson again: "The UK sustainability platform is an excellent example of a country based response to a global challenge facing the beef industry.

"There is a continuing job of work to be done by the beef industry globally in communicating the positive impact it makes in terms of protecting the environment, feeding a growing population, generating jobs, securing livelihoods and maintaining the fabric of communities in rural areas. UKCSP brings together farmer representatives, processors, retailers and support agencies working towards a set of common goals."

Ian Stevenson concluded: "Collaboration of this nature also brings with it the extra value of goals being achieved without the need for significant additional financial investment on the part of those involved.

"Specific projects can be out sourced, if and when required. But above all else, UKCSP provides the beef industry with an opportunity to work with one another on a pre-competitive basis on a range of critically important sustainability issues that impact on all its constituent stakeholder groups."

The new UK platform has been recognised by and will liaise closely with the European Roundtable for Beef Sustainability (ERBS), of which Ian Stevenson is a recently elected board member. The four sustainability priority

"I feel that the new platform can do more than simply align itself with the agreed priorities of the ERBS. It can develop a cohesive approach to capture, promote and influence the journey of sustainability being followed

The launch of the new platform comes after two years of comprehensive multi-stakeholder consultation, which recognised the pressing need to



Significantly, Livestock and Meat Commission for Northern Ireland (LMC)

## LOCAL AGRICULTURE PLAYING ITS PART AS INDUSTRY'S RELIANCE ON ANTIMICROBIALS RECEDES

The recently published Responsible Use of Medicines in Agriculture Alliance (RUMA) 'Targets Task Force Report 2020' confirms that sales of antibiotics to treat UK farm animals have halved since 2017. This extremely welcome development sets the backdrop against which new antimicrobials usage targets have been set.

RUMA is an agricultural and food industry alliance which promotes responsible use of medicines in farm animals. Its 26 member organisations represent all stages of the animal food chain from 'farm to fork' that have an interest in the stewardship of animal medicines in agriculture.

Most livestock sectors are now capturing data on antibiotic use across 90 per cent or more of their spheres of influence. While the RUMA figures cover the UK as a whole, specific steps are being taken to ensure that Northern Ireland remains fully compliant with all antimicrobial usage targets and policies, something that LMC has been leading on behalf of the beef and sheep industry.

LMC Industry Development Manager Colin Smith commented. "LMC has strong evidence to confirm that ruminant livestock farmers here in Northern Ireland are doing their part to tackle the challenge of antimicrobial resistance. This is very positive news. However, farmers will know through their attendance at training courses and workshops on the Responsible Use of Antimicrobials on beef and sheep and dairy farms that there is no room for complacency. The key challenge within the ruminant sectors is that of gathering accurate data on the use of antimicrobials at farm level."

Here in Northern Ireland LMC has been instrumental in helping the beef industry tackle

the issue of antimicrobial resistance and encouraging responsible use of antibiotics. A case in point was the introduction of new Northern Ireland Beef and Lamb Farm Quality Assurance Scheme standards in February of this year. These were designed to encourage beef and sheep farmers to review and reduce their levels of antimicrobial usage.

Colin continued: "LMC has been working on collating data for the Northern Ireland beef industry on antibiotic usage and is encouraged that overall antibiotic usage has reduced by almost 10 per cent from 2018 to 2019. More significant reductions have been seen for critically important antibiotics with a decrease in usage of over 50 per cent. Again, the good news is that Northern Ireland's beef sector is on track to meet the RUMA 2020 targets.

"However, this data is based on a sample of approximately eight per cent of the local cattle population. All of this is excellent news: the challenge going forward is to increase the sample size and continue the good work that has been started."

Image 1. LMC's Industry Development Manager, Colin Smith



## THE GLOBAL MEAT ALLIANCE HELPING THE BEEF INDUSTRY TO FORMULATE ITS COVID-19 RESPONSE

The onset of the Covid-19 lockdown earlier this year provided members of the International Meat Secretariat (IMS) with an opportunity to develop the use of 'virtual' hosting technologies to drive a truly global debate on how best to develop a coherent response to the unfolding crisis.

LMC Chief Executive Ian Stevenson takes up the story: "Weekly meetings of the IMS Marketing and Communications Forum initially allowed us to quickly gather information and share learnings of how countries and their meat industries were responding directly to the threat of Covid-19.

"Thereafter, our discussions addressed the need to re-set the industry. And now it's a case of charting a course towards full recovery and beyond."

He continued: "What started off as a series of discussions driven by absolute need, has evolved into a highly structured framework that allows regular contact involving many of the leading organisations and business decision makers within the international beef sector.

"Yes it has been an evolving process. However, it has highlighted the many benefits that can be accrued when those involved within a global industry take the time to communicate with each other in an open and conducive manner."

"The discussion forum has been given greater momentum with the recent launch of the Global Meat Alliance which has spearheaded a project of fortnightly global insight calls with leading experts from around the world." The aim of the new grouping is to connect the fragmented global meat industry by sharing the best insight and developing

joint programmes to positively impact consumer behaviour.

In addition to the vital sharing of ideas amongst those participating, a number of projects are already being championed by the alliance. These include the further development of the 'Meat Business Women' initiative and the hosting of the World Butchers' Challenge competition.

Ian Stevenson again: "Meat Business Women was founded by former beef and lamb sector strategy director at AHDB, Laura Ryan in 2015. Its aim is to further encourage the role of women at board level within the international meat industry. Bringing this project within the Global Meat Alliance sphere of influence makes perfect sense for both bodies."

He concluded: "The beef industry has a truly global footprint. Given this backdrop, it is critically important for Northern Ireland to have a strong engagement within bodies such as the Global Meat Alliance.

"The same principle holds when it comes to considering our role within other organisations of this type. These include the International Meat Secretariat, the European Roundtable for Beef Sustainability and, coming closer to home, the newly established UK Cattle Sustainability Platform.

"The good news for local livestock farmers is that LMC is involved at the very heart of all these bodies. In a post-Brexit world, being in a position to quickly assess the impact of international developments on our own beef and sheep sectors will be vitally important."



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