

# LMC Market Information Department



## Slaughter Trends 2022

Completed January 2022

# NI Slaughterings December 2021

| NI CATTLE AND SHEEP SLAUGHTERINGS |   |               |                 |   |                |                 |
|-----------------------------------|---|---------------|-----------------|---|----------------|-----------------|
|                                   | December  |               |                 | Year to Date  |                |                 |
|                                   | (5 weeks ended 01/01/22 compared to 5 weeks ended 02/01/21) |               |                 | (52 weeks ended 01/01/22 compared to 52 weeks ended 02/01/21) |                |                 |
| <b>CATTLE</b>                     | <b>Dec-20</b>   | <b>Dec-21</b> | <b>% Change</b> | <b>2020</b>   | <b>2021</b>    | <b>% Change</b> |
| Steers                            | 15,306  | 16,410        | 7%              | 174,392   | 176,198        | 1%              |
| Heifers                           | 12,498  | 13,055        | 4%              | 136,771   | 134,896        | -1%             |
| Young Bulls                       | 2,482   | 2,914         | 17%             | 34,477  | 36,408         | 6%              |
| <b>Total Prime Cattle</b>         | <b>30,286</b>   | <b>32,379</b> | <b>7%</b>       | <b>345,640</b>  | <b>347,502</b> | <b>1%</b>       |
| Calves                            | 490   | 566           | 16%             | 5,500   | 5,931          | 8%              |
| Cows                              | 10,230  | 11,118        | 9%              | 104,506   | 104,694        | 0%              |
| Mature Bulls                      | 398   | 450           | 13%             | 5,600   | 5,489          | -2%             |
| <b>Total Cattle</b>               | <b>41,404</b>   | <b>44,513</b> | <b>8%</b>       | <b>461,246</b>  | <b>463,616</b> | <b>1%</b>       |
| <b>SHEEP</b>                      |   |               |                 |   |                |                 |
| Lambs & Hoggets                   | 41,353  | 37,565        | -9%             | 443,141   | 428,641        | -3%             |
| Ewes & Rams                       | 1,690   | 2,698         | 60%             | 23,510  | 30,862         | 31%             |
| <b>Total Sheep</b>                | <b>43,043</b>   | <b>40,263</b> | <b>-6%</b>      | <b>466,651</b>  | <b>459,503</b> | <b>-2%</b>      |

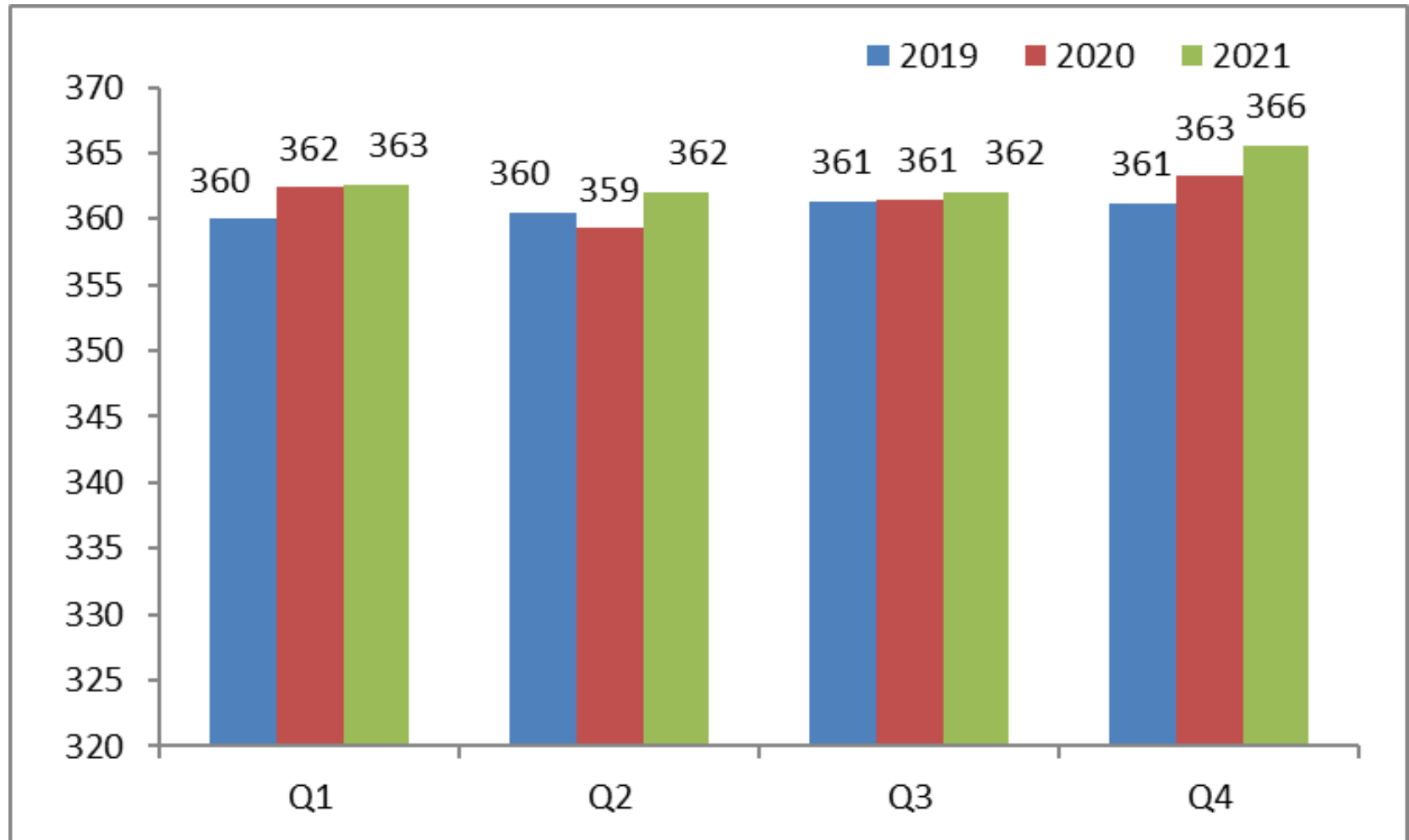
The above figures are provisional; any amendments will be incorporated in the cumulative data (source DAERA).

# NI Beef & Lamb Production December 2021

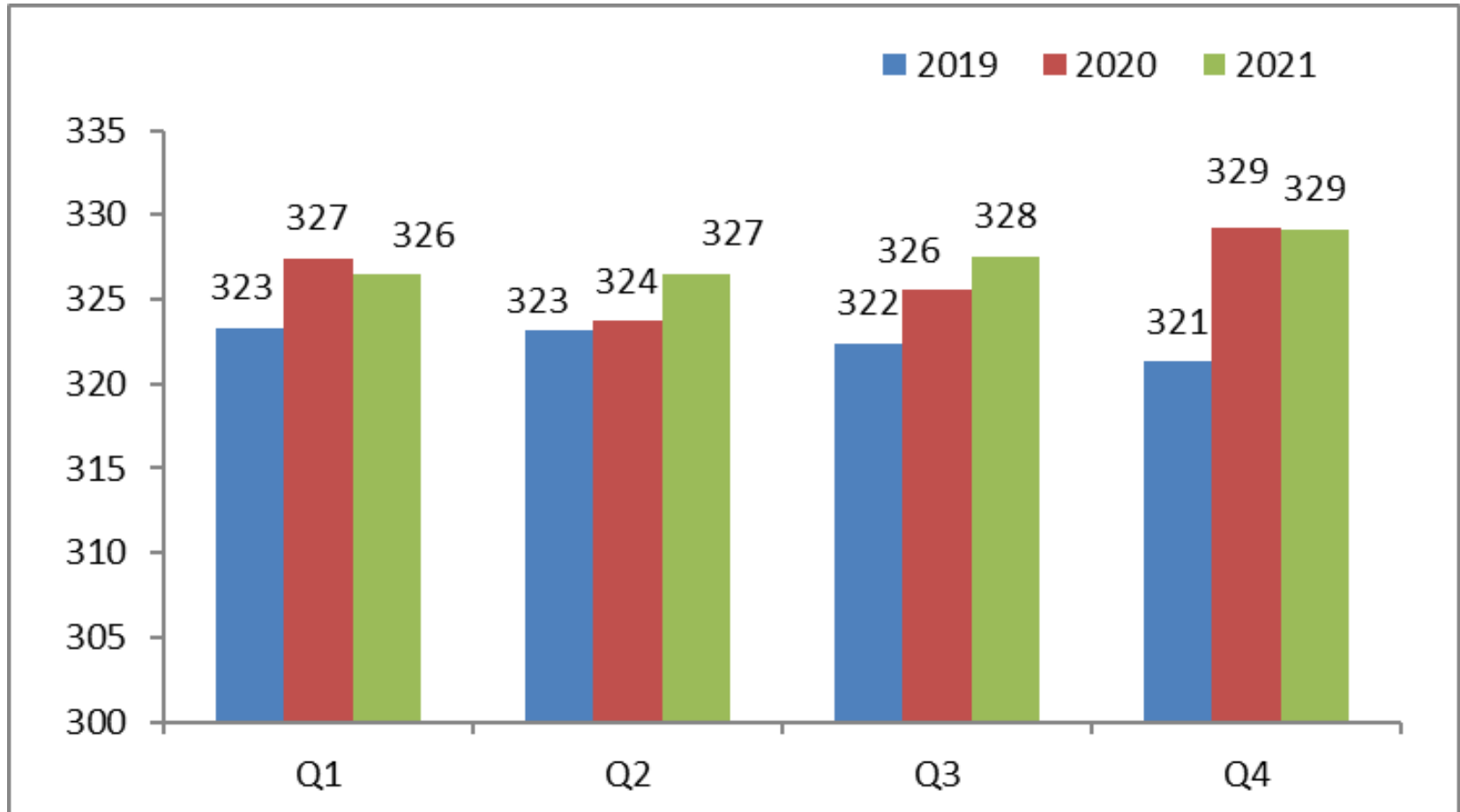
| NI BEEF AND SHEEPMEAT PRODUCTION |   |               |                 |   |                |                 |
|----------------------------------|---|---------------|-----------------|---|----------------|-----------------|
|                                  | December  |               |                 | Year to Date  |                |                 |
|                                  | (5 weeks ended 01/01/22 compared to 5 weeks ended 02/01/21) |               |                 | (52 weeks ended 01/01/22 compared to 52 weeks ended 02/01/21) |                |                 |
| <b>CATTLE</b>                    | <b>Dec-20</b>   | <b>Dec-21</b> | <b>% Change</b> | <b>2020</b>   | <b>2021</b>    | <b>% Change</b> |
| Steers                           | 5,547   | 5,999         | 8%              | 63,096  | 63,986         | 1%              |
| Heifers                          | 4,105   | 4,299         | 5%              | 44,667  | 44,165         | -1%             |
| Young Bulls                      | 853   | 1,027         | 20%             | 11,823  | 12,686         | 7%              |
| <b>Total Prime Cattle</b>        | <b>10,505</b>   | <b>11,326</b> | <b>8%</b>       | <b>119,586</b>  | <b>120,837</b> | <b>1%</b>       |
| Calves                           | 89  | 112           | 26%             | 1,103   | 1,163          | 5%              |
| Cows                             | 3,201   | 3,426         | 7%              | 32,655  | 32,461         | -1%             |
| Mature Bulls                     | 182   | 214           | 18%             | 2,582   | 2,594          | 0%              |
| <b>Total Cattle</b>              | <b>13,977</b>   | <b>15,078</b> | <b>8%</b>       | <b>155,926</b>  | <b>157,055</b> | <b>1%</b>       |
| <b>SHEEP</b>                     |   |               |                 |   |                |                 |
| Lambs & Hoggets                  | 925   | 868           | -6%             | 9,617   | 9,375          | -3%             |
| Ewes & Rams                      | 46  | 70            | 54%             | 660   | 844            | 28%             |
| <b>Total Sheep</b>               | <b>971</b>  | <b>939</b>    | <b>-3%</b>      | <b>10,277</b>   | <b>10,219</b>  | <b>-1%</b>      |

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

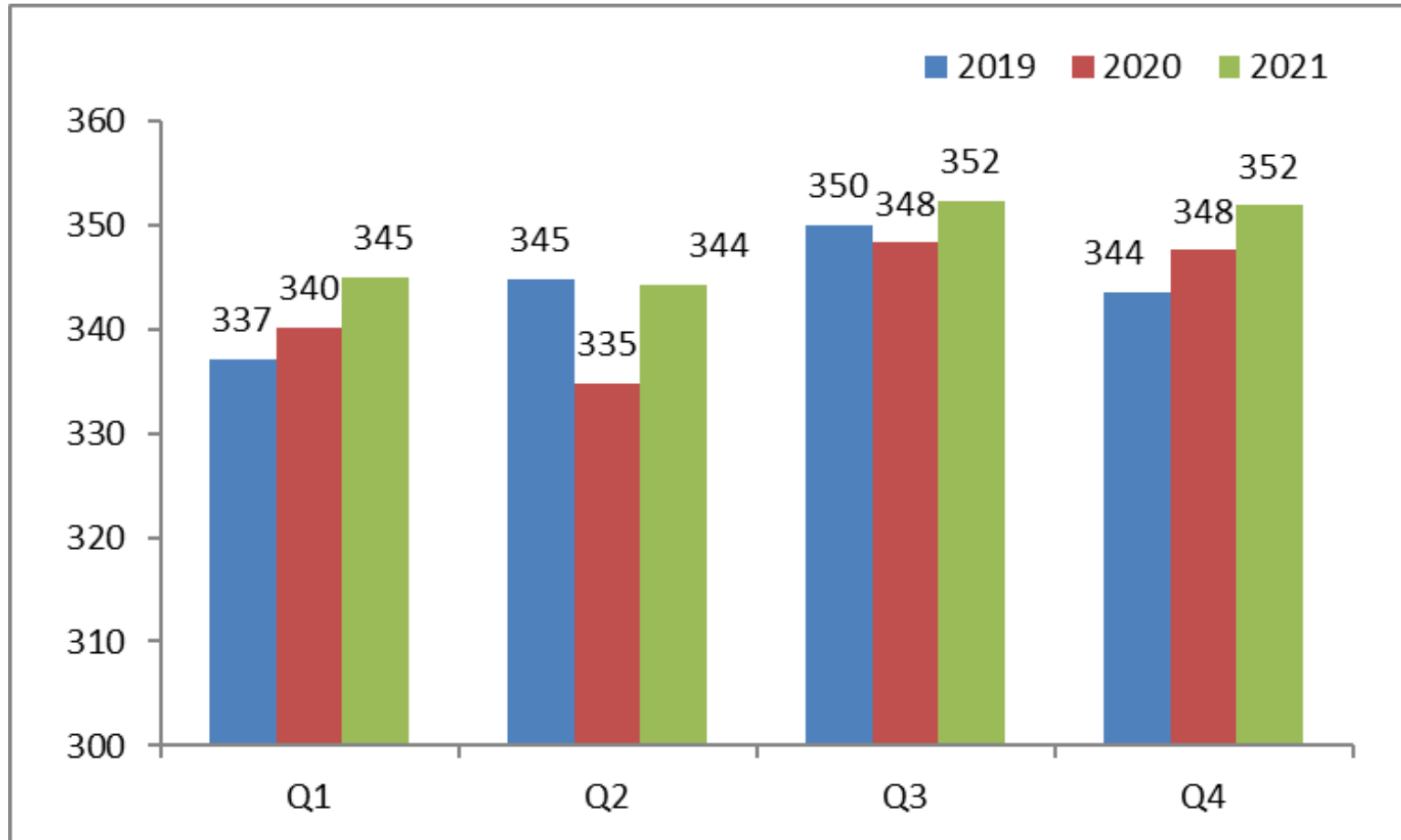
# Carcase weights 2019-2021 (Steers)



# Carcase weights 2019-2021 (Heifers)



# Carcase weights 2019-2021 (Young Bulls)

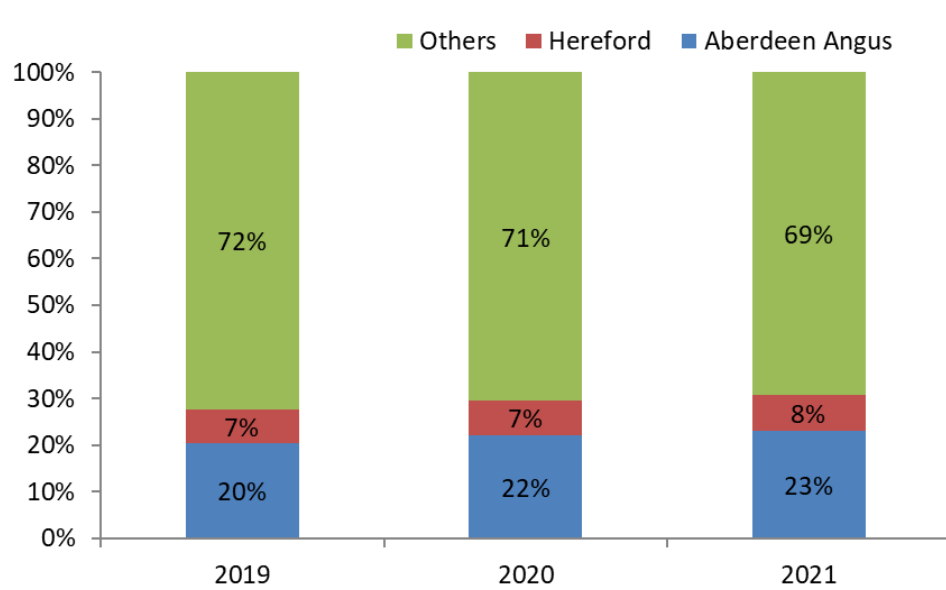


# Overview of prime kill based on DWPR data October to December 2019-2021

|      | Heifers             |                  | Steers              |                  | Young bulls         |                  |
|------|---------------------|------------------|---------------------|------------------|---------------------|------------------|
|      | Average Cold Weight | Age at Slaughter | Average Cold Weight | Age at Slaughter | Average Cold Weight | Age at Slaughter |
| 2019 | 325.3               | 26.2             | 360.4               | 26.0             | 341.9               | 16.3             |
| 2020 | 328.9               | 25.9             | 361.8               | 25.5             | 341.9               | 16.4             |
| 2021 | 327.7               | 25.7             | 364.3               | 25.7             | 343.7               | 16.4             |

# Aberdeen Angus and Hereford cattle proportion of kill October to December 2019-2021

Proportion of Aberdeen Angus and Hereford cattle in price reported prime kill Quarter 4 2019-2021

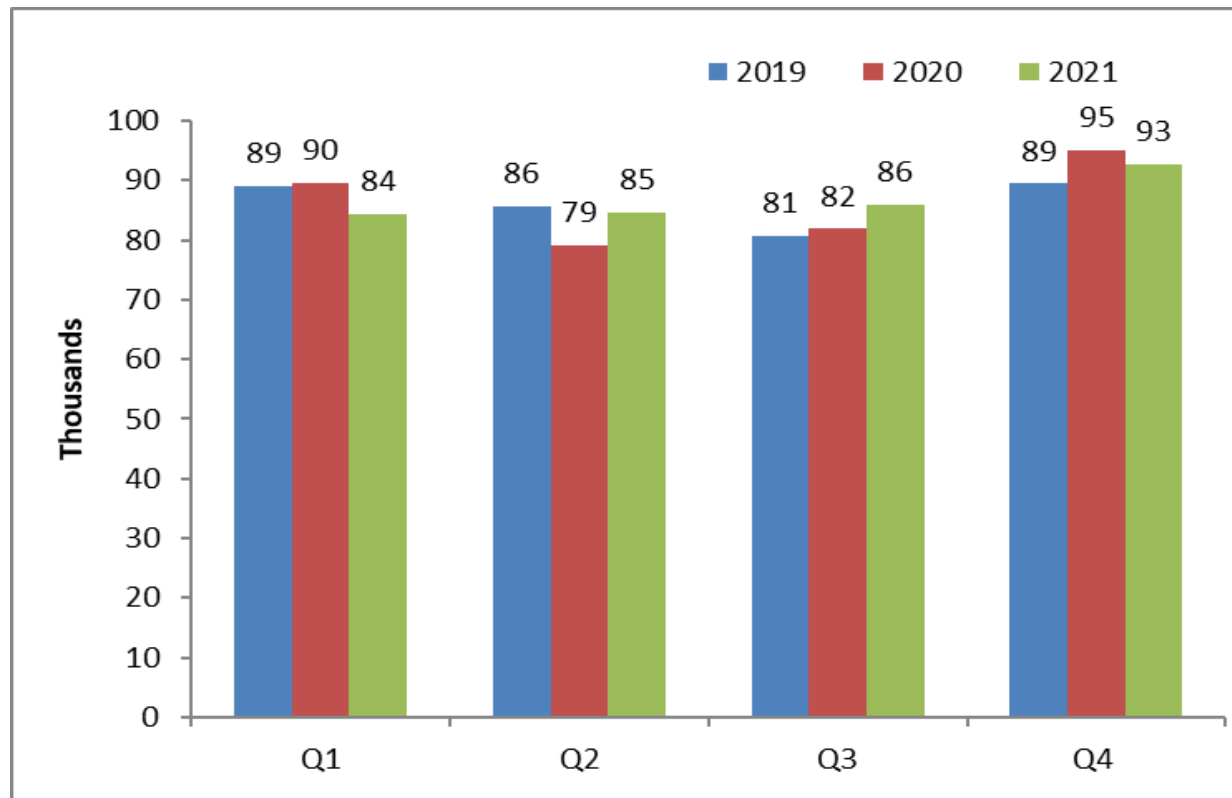


Breakdown of Price reported prime kill Quarter 4 2019-2021

|             | Aberdeen Angus cattle | Hereford cattle | Others |
|-------------|-----------------------|-----------------|--------|
| <b>2019</b> | 14,844                | 5,427           | 52,885 |
| <b>2020</b> | 15,320                | 5,175           | 48,981 |
| <b>2021</b> | 15,687                | 5,309           | 47,097 |

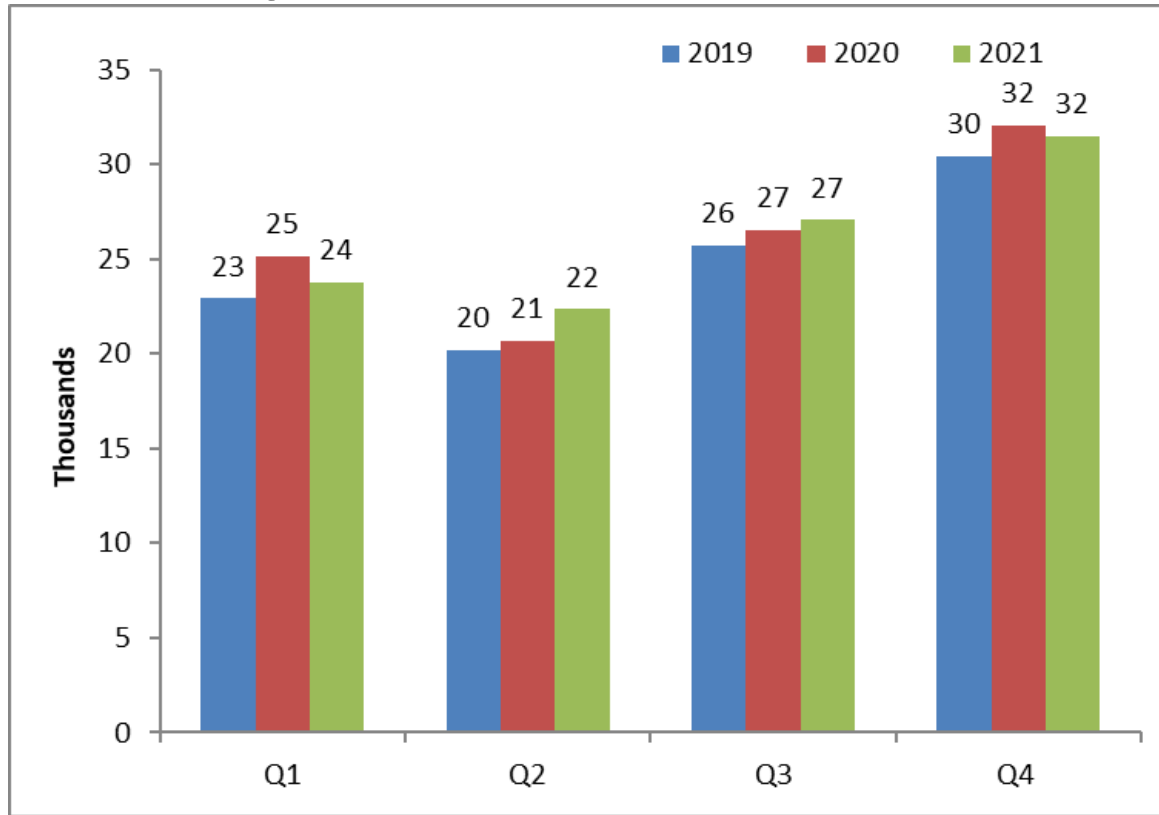


# Quarterly NI Prime Cattle Kill 2019-2021



| Prime cattle processed | 2019   | 2020   | 2021   |
|------------------------|--------|--------|--------|
| Quarter 1              | 88,966 | 89,607 | 84,374 |
| Quarter 2              | 85,562 | 79,183 | 84,553 |
| Quarter 3              | 80,692 | 81,839 | 85,876 |
| Quarter 4              | 89,451 | 95,011 | 92,699 |

# Quarterly NI Cow Kill 2019-2021

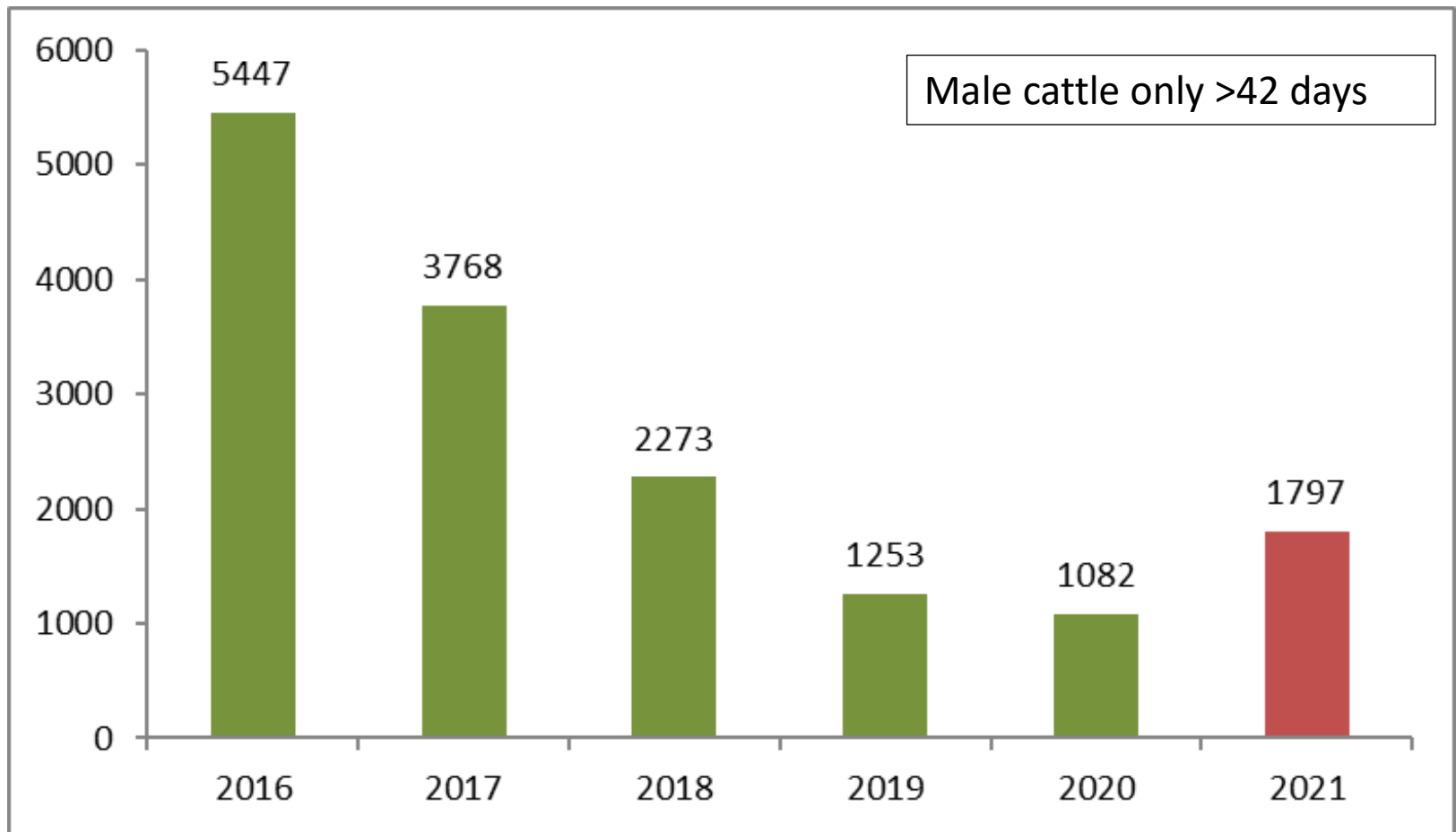


| Cows processed | 2019   | 2020   | 2021   |
|----------------|--------|--------|--------|
| Quarter 1      | 22,920 | 25,181 | 23,790 |
| Quarter 2      | 20,206 | 20,688 | 22,344 |
| Quarter 3      | 25,753 | 26,566 | 27,057 |
| Quarter 4      | 30,442 | 32,071 | 31,503 |

# Live Exports

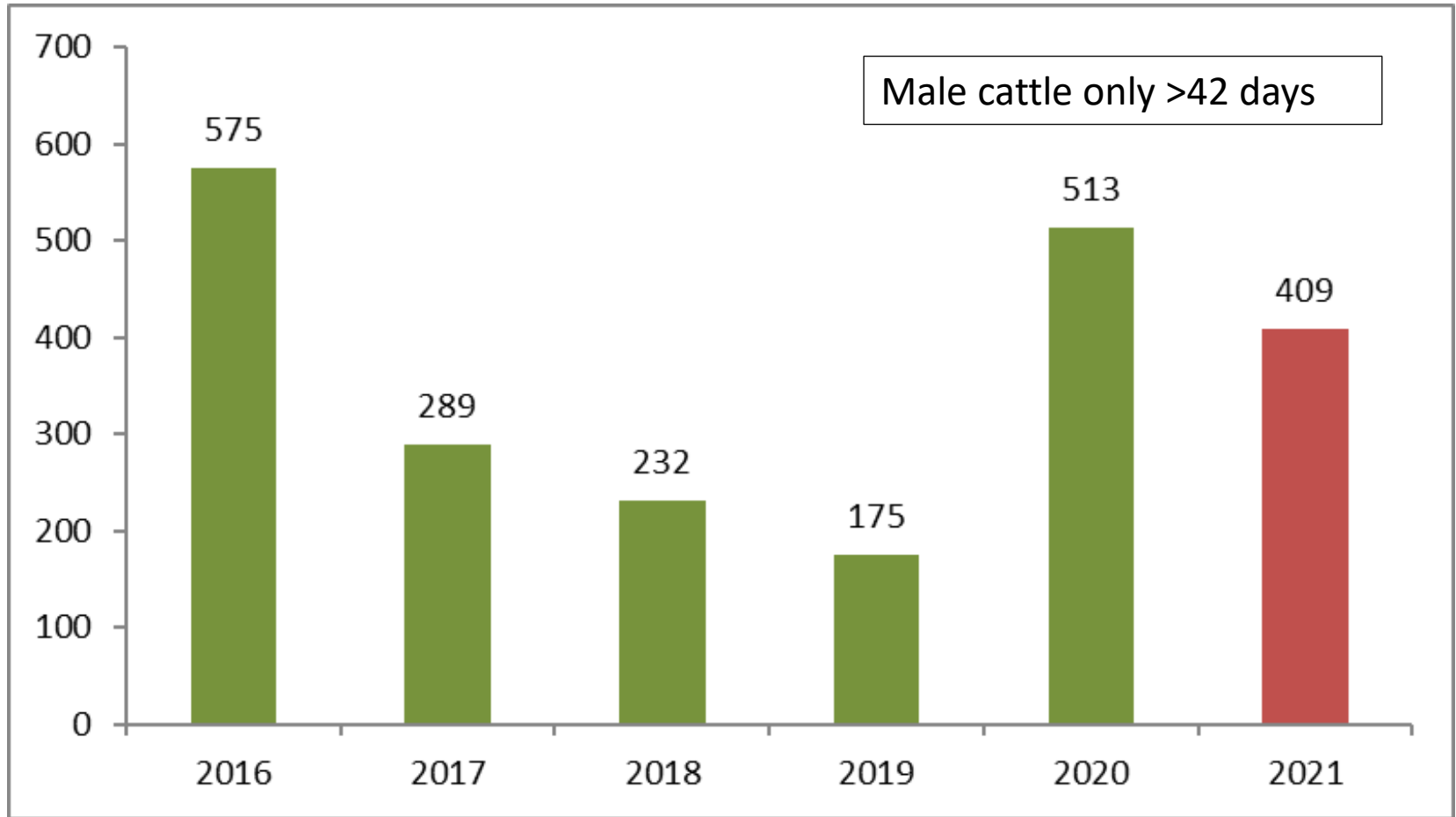
# Exports to GB for further production

## January to December comparison

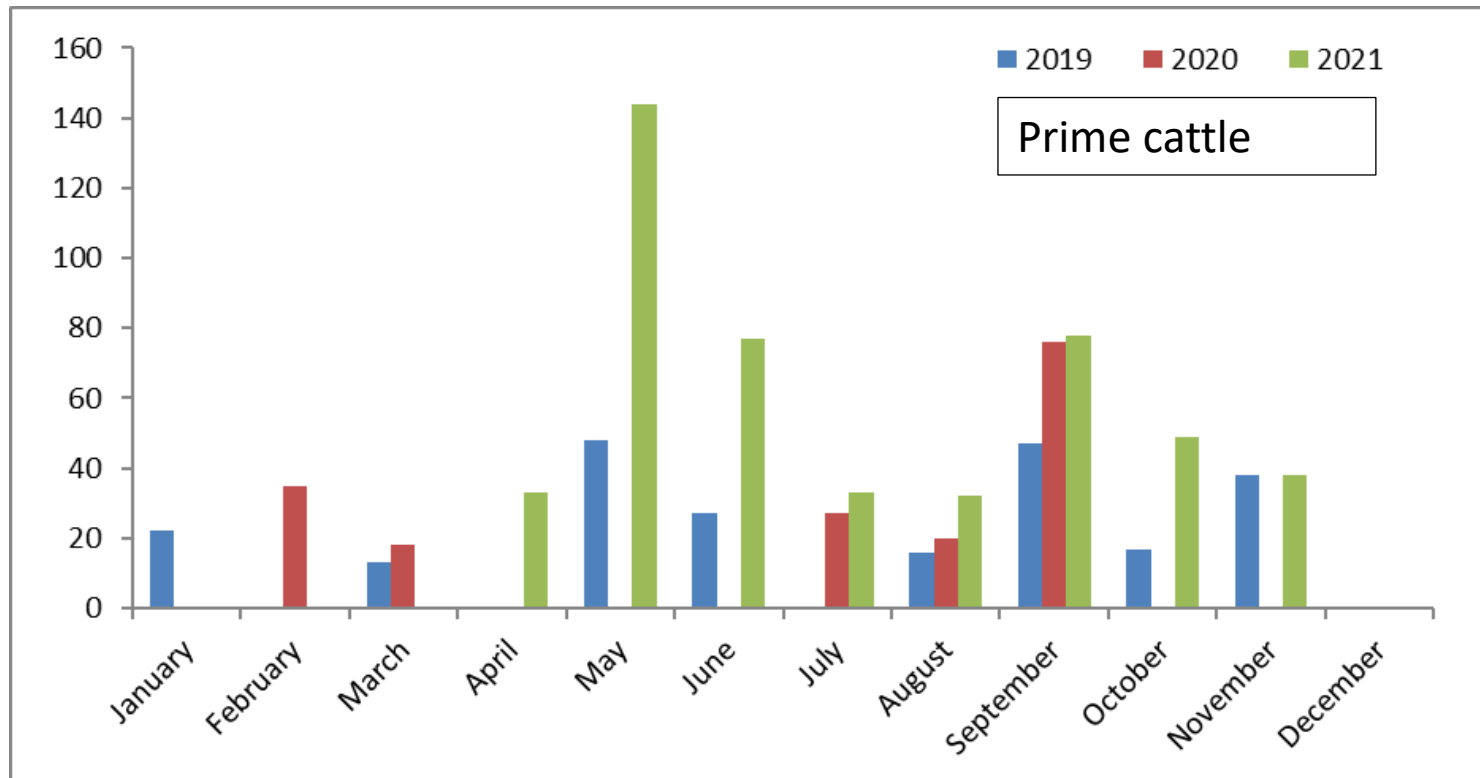


# Exports to ROI for Further Production

## January to December comparison

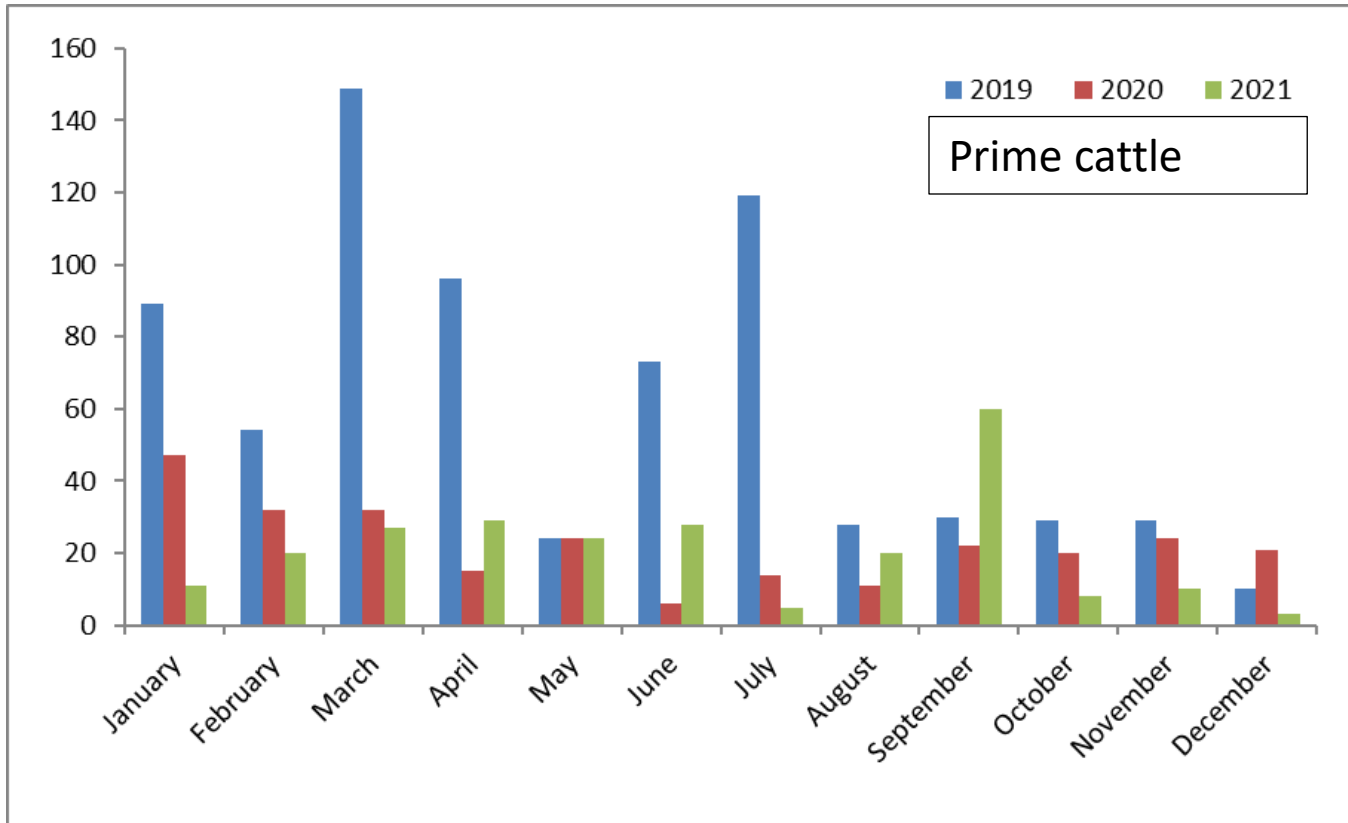


# Prime cattle exports to GB for Direct Slaughter



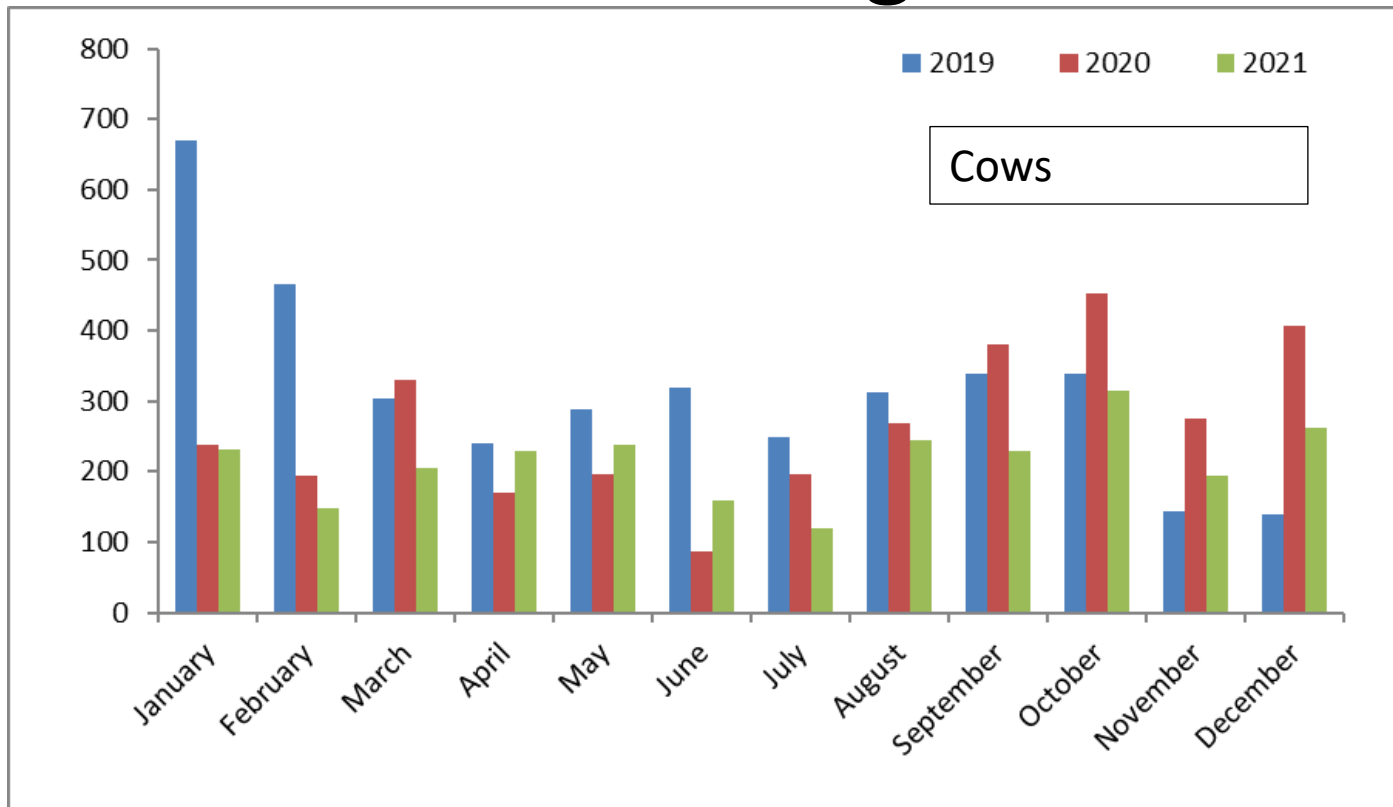
|             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec | Total<br>Jan - Dec |
|-------------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|--------------------|
| <b>2019</b> | 22  | -   | 13  | -   | 48  | 27  | -   | 16  | 47   | 17  | 38  | -   | 228                |
| <b>2020</b> | -   | 35  | 18  | -   | -   | -   | -   | 47  | 76   | -   | -   | -   | 176                |
| <b>2021</b> | -   | -   | -   | 33  | 144 | 77  | 33  | 32  | 78   | 49  | 38  | -   | 484                |

# Prime cattle exports to ROI for Direct Slaughter



|             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec | Total<br>Jan - Dec |
|-------------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|--------------------|
| <b>2019</b> | 89  | 54  | 149 | 96  | 24  | 73  | 119 | 28  | 30   | 29  | 29  | 10  | 730                |
| <b>2020</b> | 47  | 32  | 32  | 15  | 24  | 6   | 14  | 11  | 31   | 20  | 24  | 21  | 277                |
| <b>2021</b> | 11  | 20  | 27  | 29  | 24  | 28  | 5   | 20  | 60   | 8   | 10  | 3   | 245                |

# Cow exports to ROI for Direct Slaughter

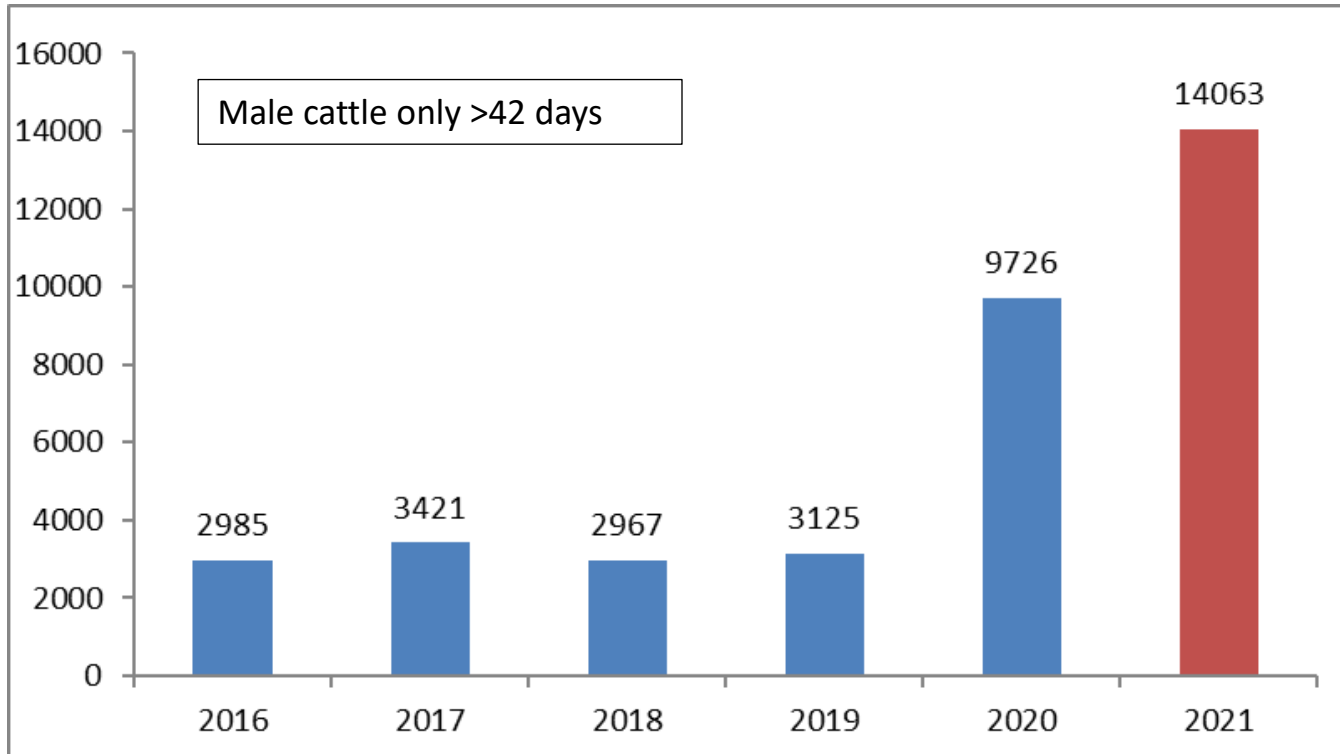


|             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec | Total<br>Jan - Dec |
|-------------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|--------------------|
| <b>2019</b> | 670 | 466 | 304 | 241 | 289 | 320 | 248 | 313 | 339  | 338 | 143 | 140 | 3,811              |
| <b>2020</b> | 237 | 195 | 329 | 169 | 196 | 87  | 196 | 268 | 381  | 453 | 275 | 406 | 3,192              |
| <b>2021</b> | 232 | 149 | 205 | 229 | 239 | 160 | 119 | 245 | 229  | 315 | 193 | 263 | 2,578              |



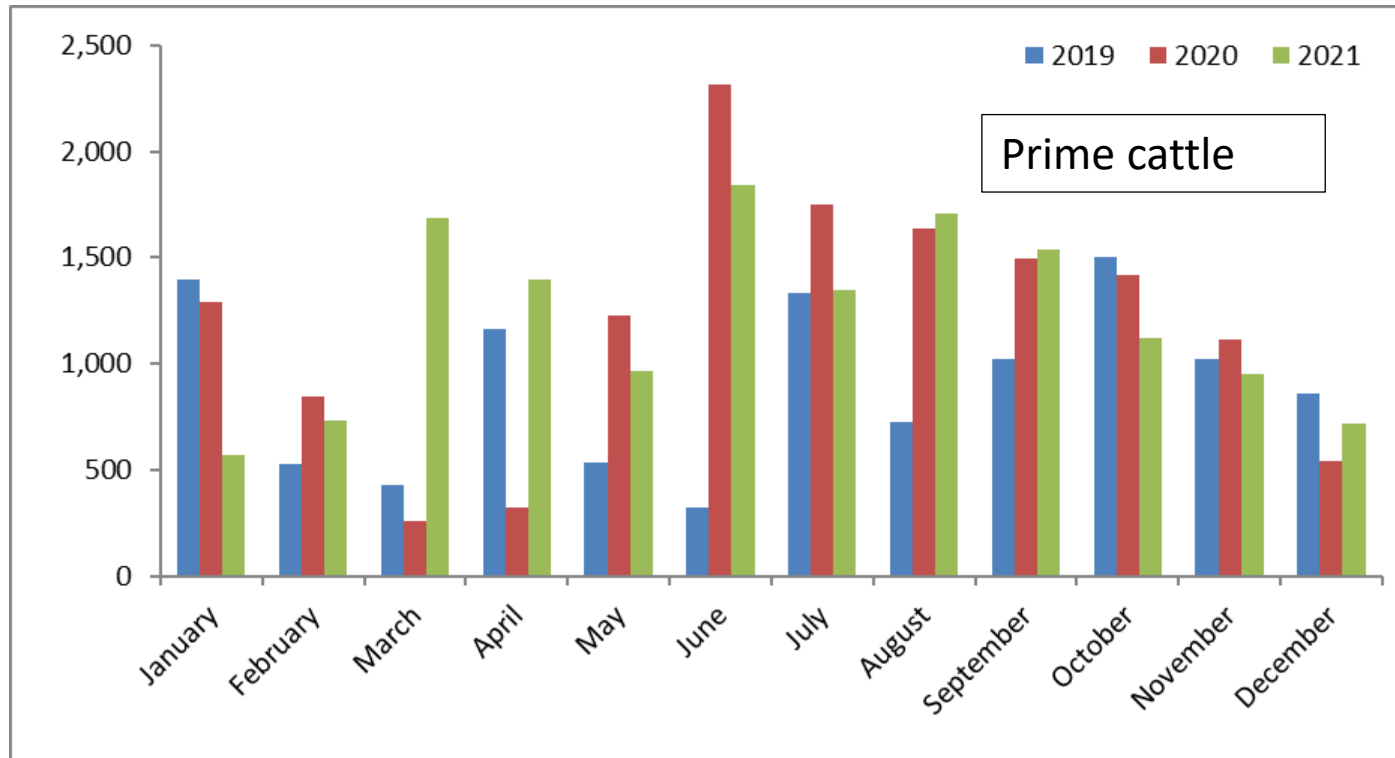
# Live Imports

# Imports from ROI for Further Production January to December 2016-2021



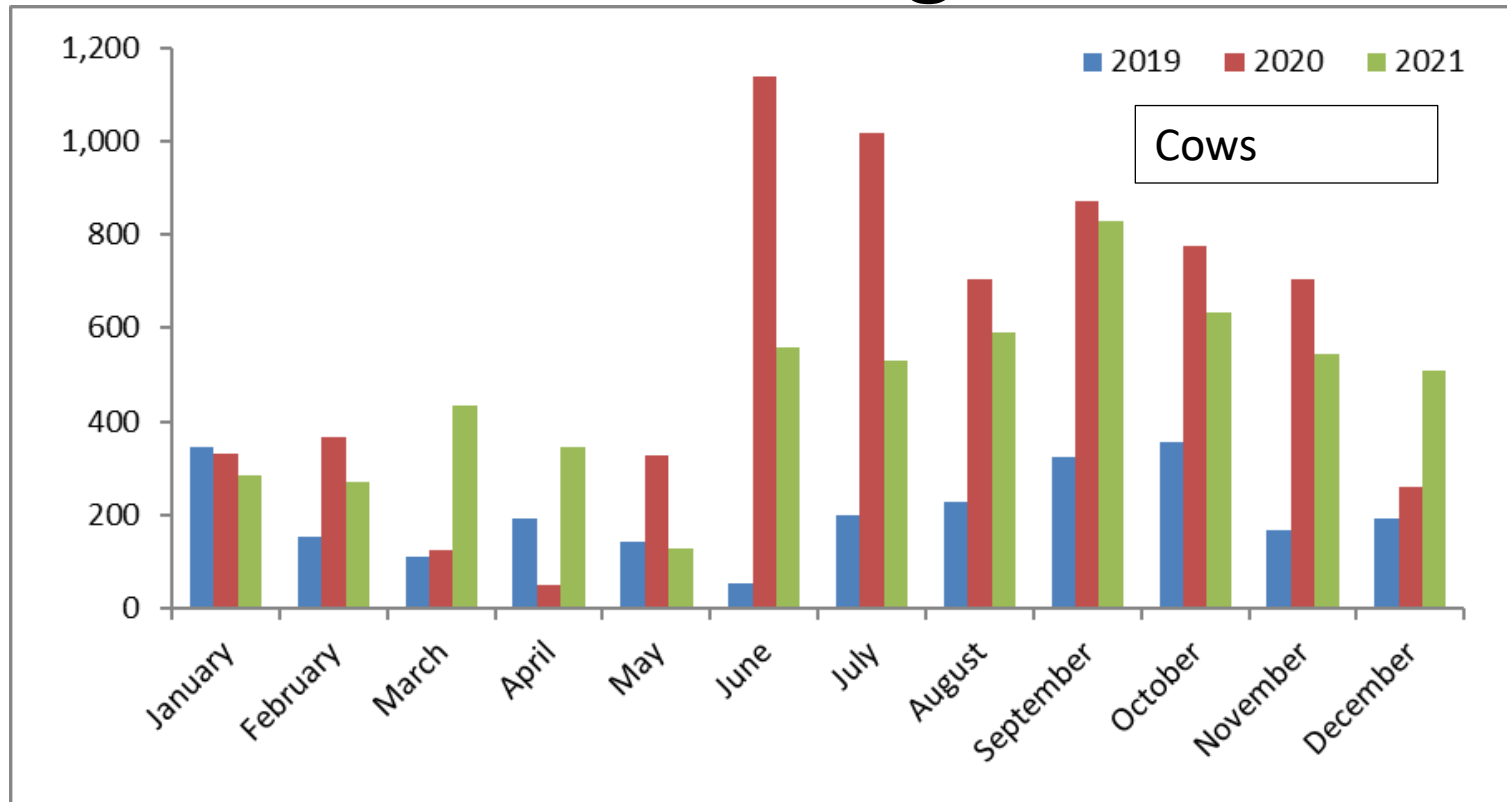
|               | 2016   | 2017   | 2018   | 2019   | 2020   | 2021   |
|---------------|--------|--------|--------|--------|--------|--------|
| <b>Female</b> | 10,347 | 10,460 | 12,955 | 13,706 | 27,585 | 30,008 |
| <b>Male</b>   | 2,985  | 3,421  | 2,967  | 3,125  | 9,726  | 14,063 |
| <b>Total</b>  | 13,332 | 13,881 | 15,922 | 16,831 | 37,311 | 44,071 |

# Prime cattle Imports from ROI for Direct Slaughter



|             | Jan   | Feb | Mar   | Apr   | May   | Jun   | Jul   | Aug   | Sept  | Oct   | Nov   | Dec | Total<br>Jan - Dec |
|-------------|-------|-----|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----|--------------------|
| <b>2019</b> | 1,398 | 526 | 425   | 1,166 | 536   | 322   | 1,330 | 727   | 1,021 | 1,500 | 1,023 | 857 | 10,831             |
| <b>2020</b> | 1,288 | 847 | 258   | 324   | 1,224 | 2,316 | 1,752 | 1,635 | 1,493 | 1,415 | 1,115 | 543 | 14,210             |
| <b>2021</b> | 573   | 731 | 1,689 | 1,397 | 967   | 1,841 | 1,349 | 1,709 | 1,534 | 1,123 | 950   | 719 | 14,582             |

# Cow Imports from ROI for Direct Slaughter



|             | Jan | Feb | Mar | Apr | May | Jun   | Jul   | Aug | Sept | Oct | Nov | Dec | Total<br>Jan - Dec |
|-------------|-----|-----|-----|-----|-----|-------|-------|-----|------|-----|-----|-----|--------------------|
| <b>2019</b> | 344 | 153 | 110 | 193 | 142 | 52    | 200   | 229 | 324  | 356 | 168 | 193 | 2,464              |
| <b>2020</b> | 331 | 367 | 126 | 49  | 328 | 1,137 | 1,018 | 705 | 873  | 774 | 704 | 259 | 6,671              |
| <b>2021</b> | 284 | 270 | 434 | 345 | 127 | 557   | 530   | 591 | 830  | 634 | 544 | 510 | 5,656              |

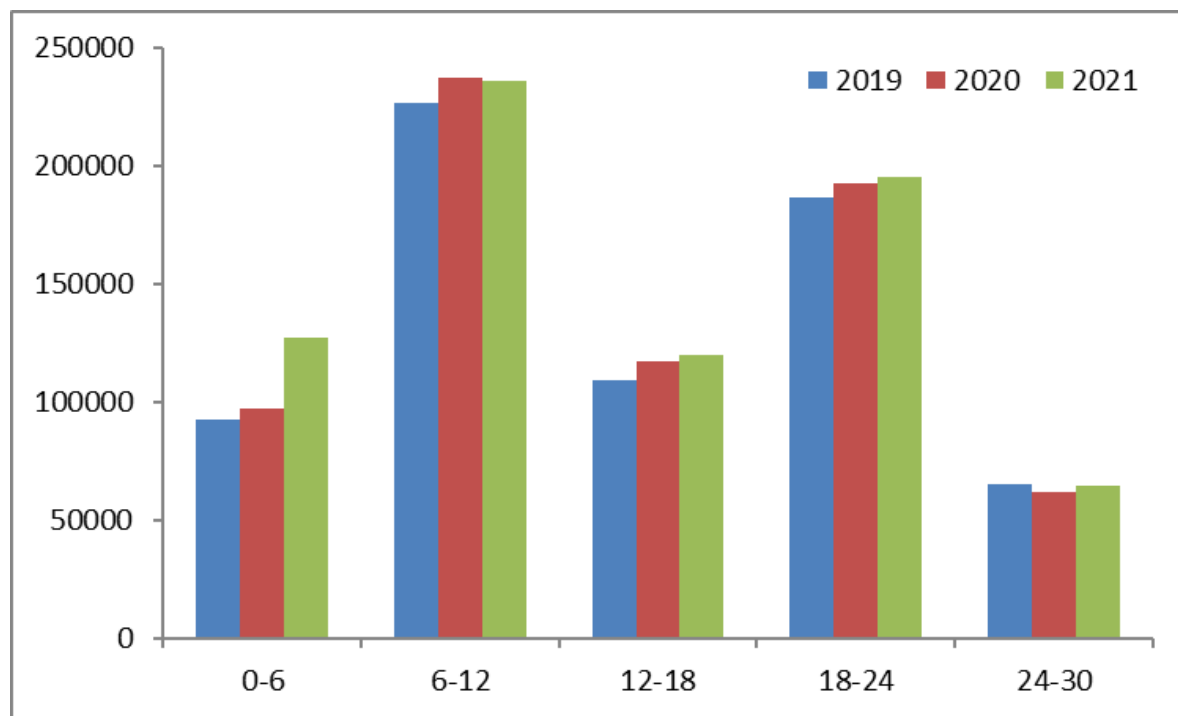




# Cattle Supplies

# Beef sired cattle on NI farms

## 31 December 2021

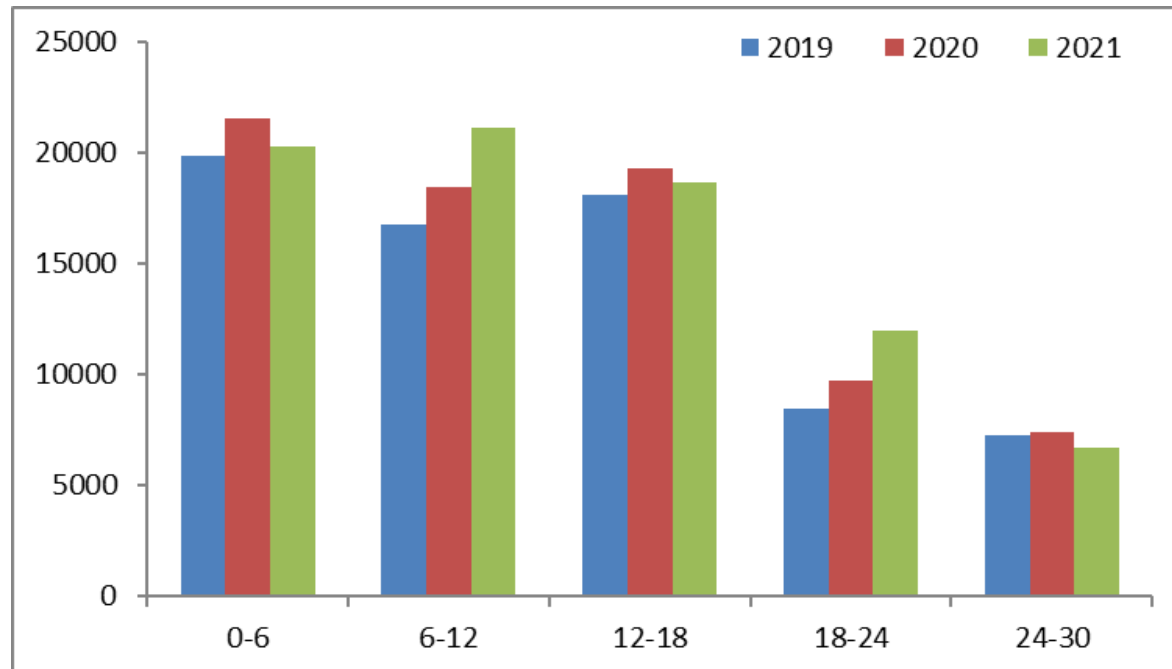


| Age (Months) | 2019    | 2020    | 2021    | 2020/2021 | 2019/2021 |
|--------------|---------|---------|---------|-----------|-----------|
| 0-6          | 92,544  | 96,860  | 127,011 | +31.1%    | +37.2%    |
| 6-12         | 226,750 | 236,995 | 235,892 | -0.5%     | +4.0%     |
| 12-18        | 108,903 | 117,353 | 119,802 | +2.1%     | +10.0%    |
| 18-24        | 186,436 | 192,655 | 195,221 | +1.3%     | +4.7%     |
| 24-30        | 65,313  | 61,756  | 64,262  | +4.1%     | -1.6%     |



# Dairy sired male cattle on NI farms

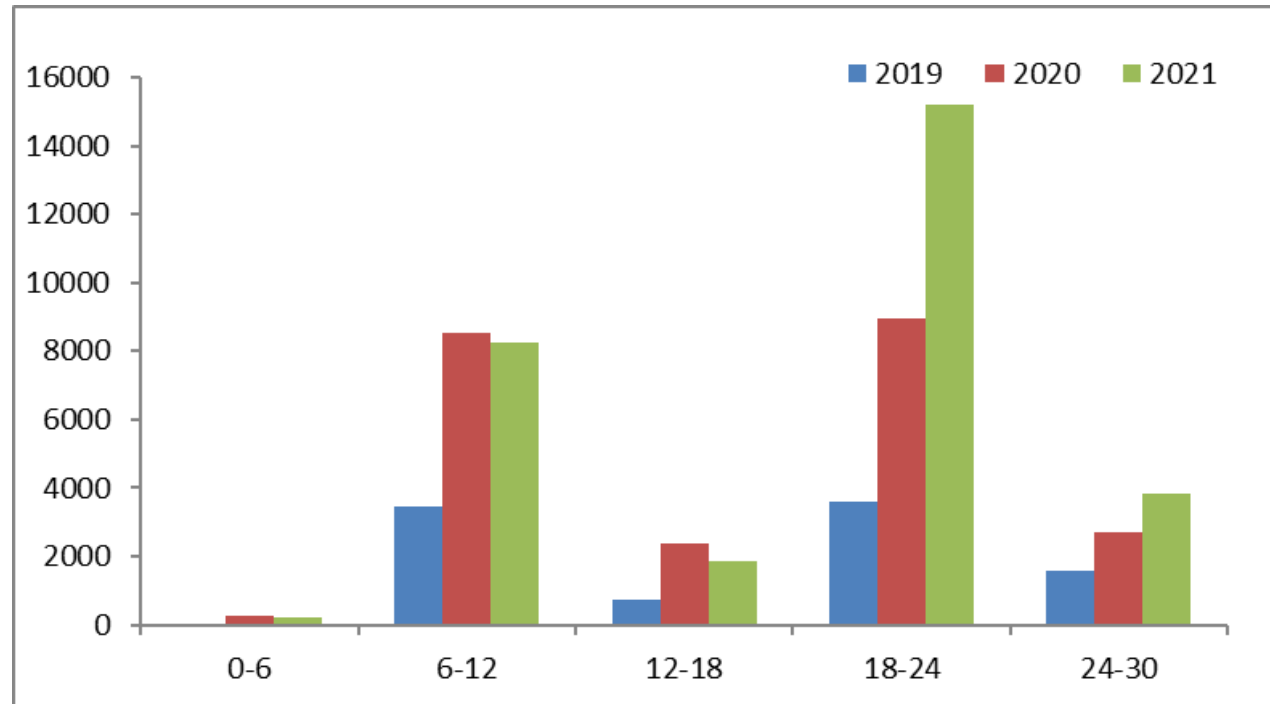
## 31 December 2021



| Dairy sired males<br>Age (months) | 2019   | 2020   | 2021   | 2020/2021 | 2019/2021 |
|-----------------------------------|--------|--------|--------|-----------|-----------|
| 0-6                               | 19,827 | 21,511 | 20,288 | -5.7%     | +2.3%     |
| 6-12                              | 16,740 | 18,433 | 21,126 | +14.6%    | +26.2%    |
| 12-18                             | 18,120 | 19,283 | 18,643 | -3.3%     | +2.9%     |
| 18-24                             | 8,463  | 9,721  | 11,968 | +23.1%    | +41.4%    |
| 24-30                             | 7,276  | 7,394  | 6,701  | -9.4%     | -7.9%     |

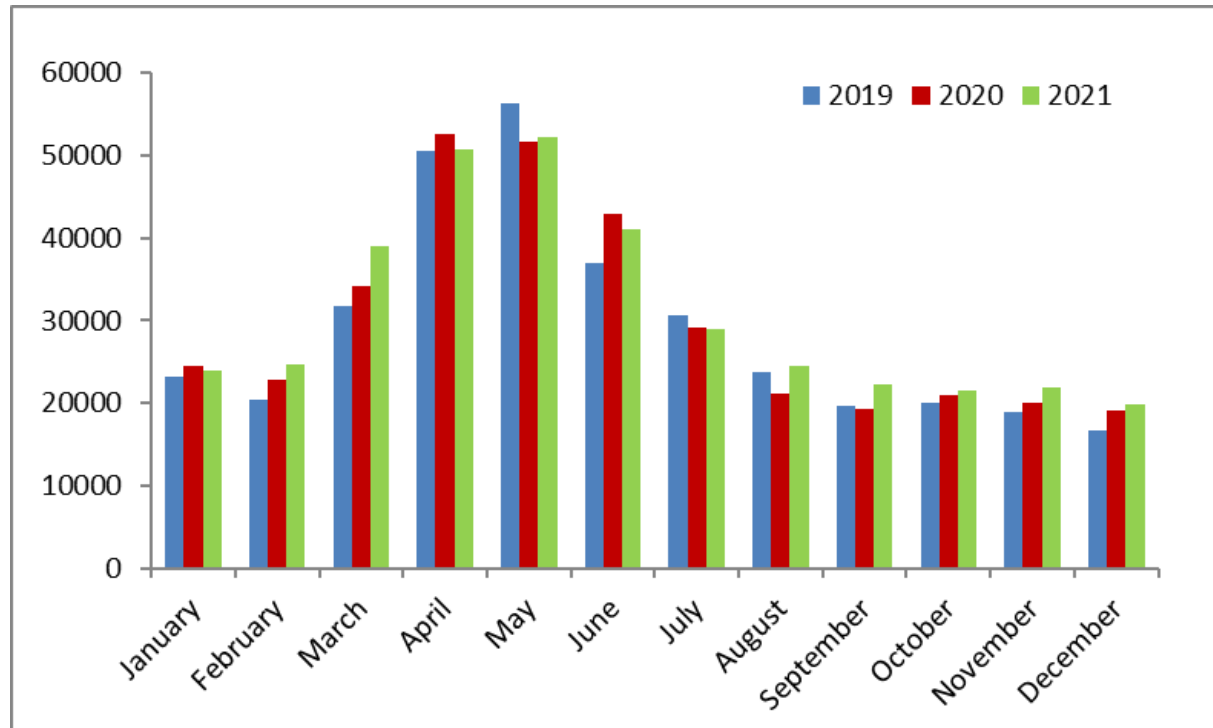
# Nomad cattle on NI farms

## 31 December 2021



| ROI Nomads<br>(beef sired and dairy males)<br>Age (months) | 2019  | 2020  | 2021   | 2020/2021 | 2019/2021 |
|--|-------|-------|--------|-----------|-----------|
| 0-6  | 39    | 262   | 211    | -19.5%    | +441.0%   |
| 6-12   | 3,434 | 8,537 | 8,239  | -3.5%     | +139.9%   |
| 12-18  | 733   | 2,397 | 1,876  | -21.7%    | +155.9%   |
| 18-24  | 3,588 | 8,951 | 15,184 | +69.6%    | +323.2%   |
| 24-30  | 1,556 | 2,702 | 3,823  | +41.5%    | +145.7%   |

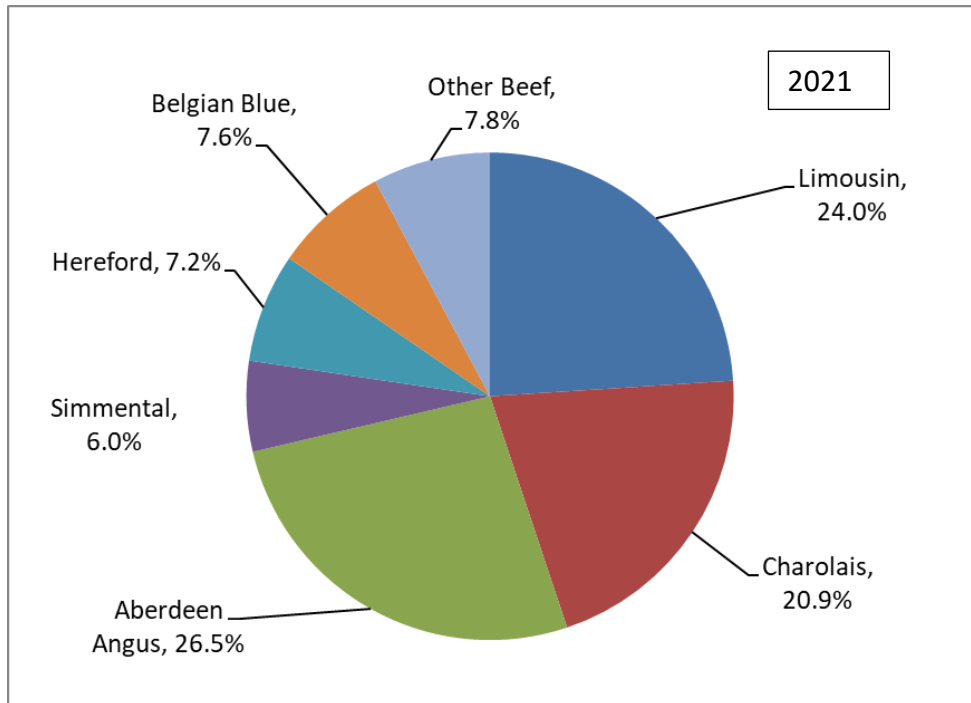
# NI Beef Sired Calf Registrations January to December 2021



|                 | Jan    | Feb    | Mar    | Apr    | May    | Jun    | Jul    | Aug    | Sept   | Oct    | Nov    | Dec    | Total<br>Jan - Dec |
|-----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------------------|
| <b>2020</b>     | 24,430 | 22,801 | 34,248 | 52,617 | 51,695 | 42,923 | 29,127 | 21,085 | 19,204 | 20,992 | 20,042 | 19,170 | 358,334            |
| <b>2021</b>     | 24,016 | 24,685 | 39,073 | 50,705 | 52,177 | 41,063 | 28,961 | 24,465 | 22,255 | 21,575 | 21,864 | 19,816 | 370,655            |
| <b>% Change</b> | -1.7%  | +8.3%  | +14.1% | -3.6%  | +0.9%  | -4.3%  | -0.6%  | +16.0% | +15.9% | +2.8%  | +9.1%  | +3.4%  | +3.4%              |

# Beef Calf Registrations by Breed

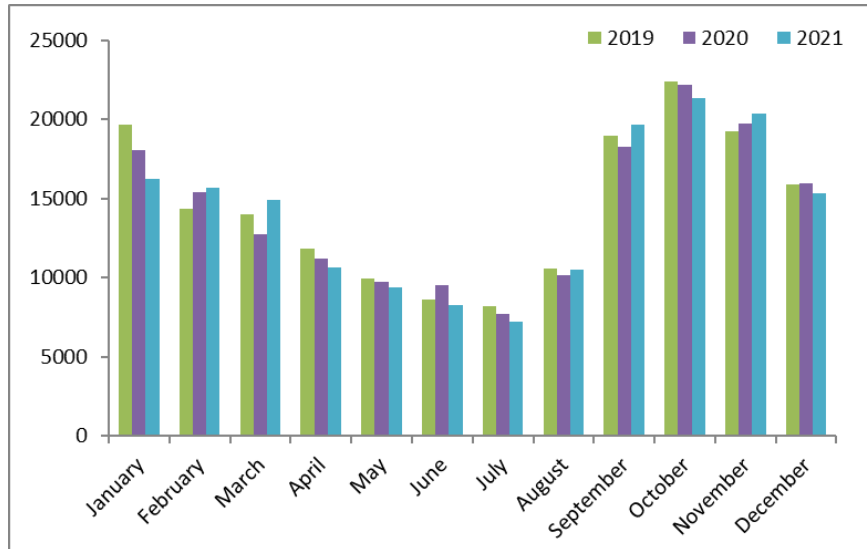
## January to December 2021



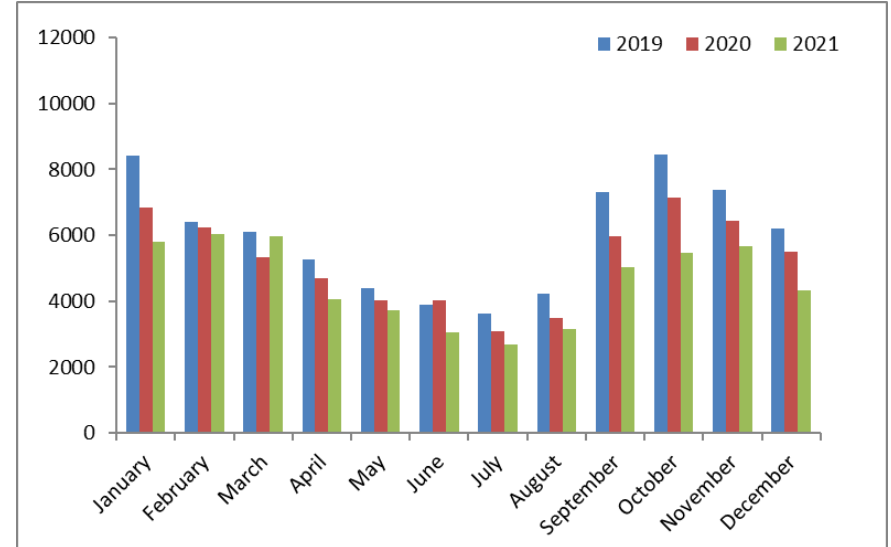
| Proportion Dairy Dam | 2019 | 2020 | 2021 |
|----------------------|------|------|------|
| <b>January</b>       | 53%  | 53%  | 57%  |
| <b>February</b>      | 51%  | 54%  | 56%  |
| <b>March</b>         | 43%  | 39%  | 41%  |
| <b>April</b>         | 27%  | 25%  | 27%  |
| <b>May</b>           | 20%  | 22%  | 22%  |
| <b>June</b>          | 25%  | 25%  | 24%  |
| <b>July</b>          | 28%  | 28%  | 27%  |
| <b>August</b>        | 32%  | 35%  | 33%  |
| <b>September</b>     | 41%  | 42%  | 43%  |
| <b>October</b>       | 49%  | 53%  | 52%  |
| <b>November</b>      | 55%  | 57%  | 60%  |
| <b>December</b>      | 58%  | 61%  | 61%  |
| <b>Grand Total</b>   | 36%  | 37%  | 38%  |

|                        | Limousin | Charolais | Aberdeen Angus | Simmental | Hereford | Belgian Blue | Other Beef |
|------------------------|----------|-----------|----------------|-----------|----------|--------------|------------|
| <b>Jan to Dec 2020</b> | 24.7%    | 21.6%     | 25.4%          | 6.2%      | 7.9%     | 6.7%         | 7.5%       |
| <b>Jan to Dec 2021</b> | 24.0%    | 20.9%     | 26.5%          | 6.0%      | 7.2%     | 7.6%         | 7.8%       |

# NI Dairy Sired Calf Registrations January to December 2021



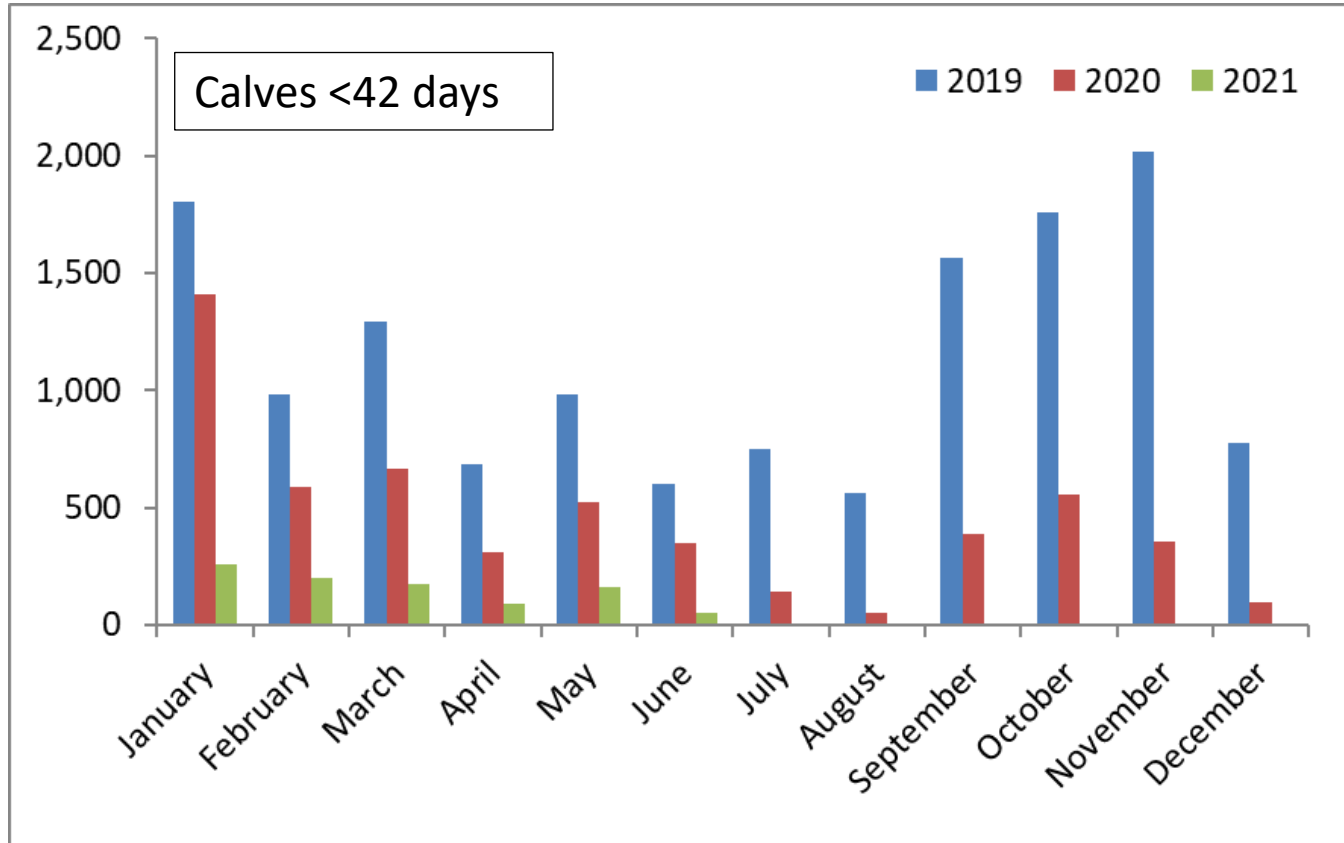
Total dairy calf registrations



Male dairy calf registrations

| Male Dairy Sired | Jan    | Feb   | Mar    | Apr    | May   | Jun    | Jul    | Aug    | Sept   | Oct    | Nov    | Dec    | Total Jan - Dec |
|------------------|--------|-------|--------|--------|-------|--------|--------|--------|--------|--------|--------|--------|-----------------|
| <b>2020</b>      | 6,837  | 6,250 | 5,321  | 4,691  | 4,011 | 4,035  | 3,084  | 3,504  | 5,979  | 7,134  | 6,423  | 5,507  | 62,776          |
| <b>2021</b>      | 5,799  | 6,029 | 5,967  | 4,051  | 3,716 | 3,062  | 2,683  | 3,139  | 5,015  | 5,461  | 5,660  | 4,316  | 54,898          |
| <b>% Change</b>  | -15.2% | -3.5% | +12.1% | -13.6% | -7.4% | -24.1% | -13.0% | -10.4% | -16.1% | -23.5% | -11.9% | -21.6% | -12.5%          |

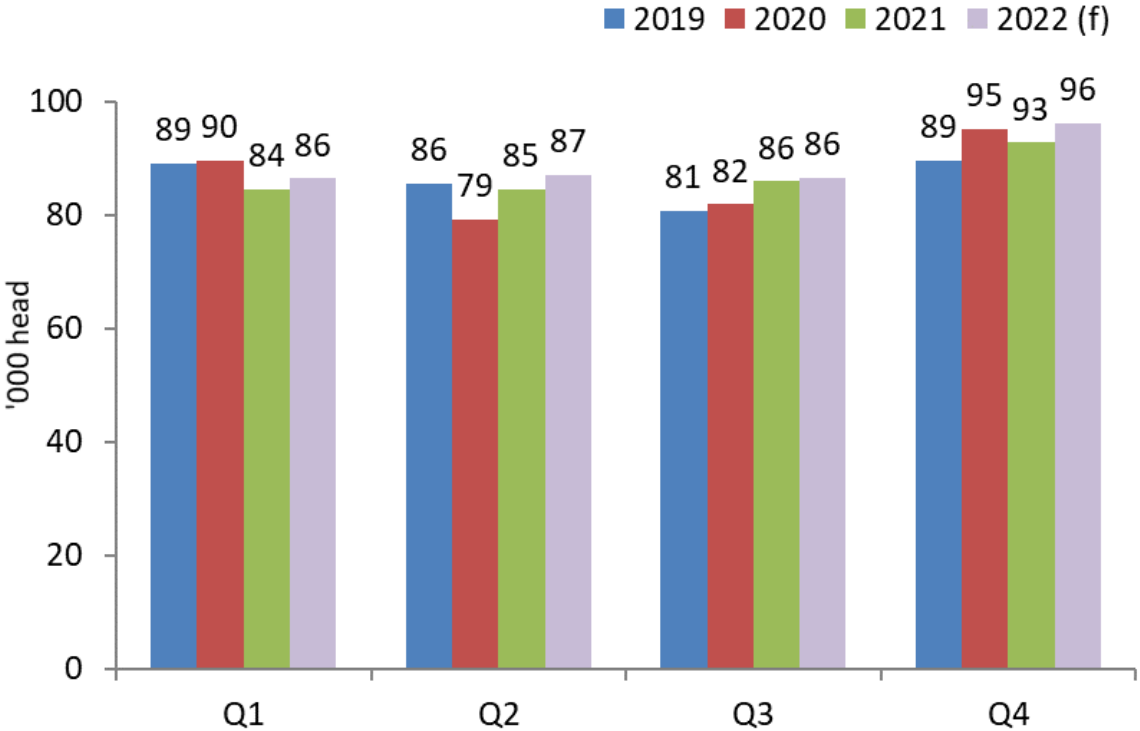
# Dairy Bull Calf Exports



|             | Jan   | Feb | Mar   | Apr | May | Jun | Jul | Aug | Sept  | Oct   | Nov   | Dec | Total<br>Jan - Dec |
|-------------|-------|-----|-------|-----|-----|-----|-----|-----|-------|-------|-------|-----|--------------------|
| <b>2019</b> | 1,802 | 983 | 1,293 | 685 | 986 | 602 | 752 | 561 | 1,564 | 1,761 | 2,020 | 775 | 13,784             |
| <b>2020</b> | 1,409 | 589 | 664   | 310 | 522 | 347 | 140 | 53  | 388   | 555   | 358   | 95  | 5,430              |
| <b>2021</b> | 256   | 199 | 175   | 90  | 164 | 51  | -   | -   | -     | -     | -     | 1   | 936                |

Forecast

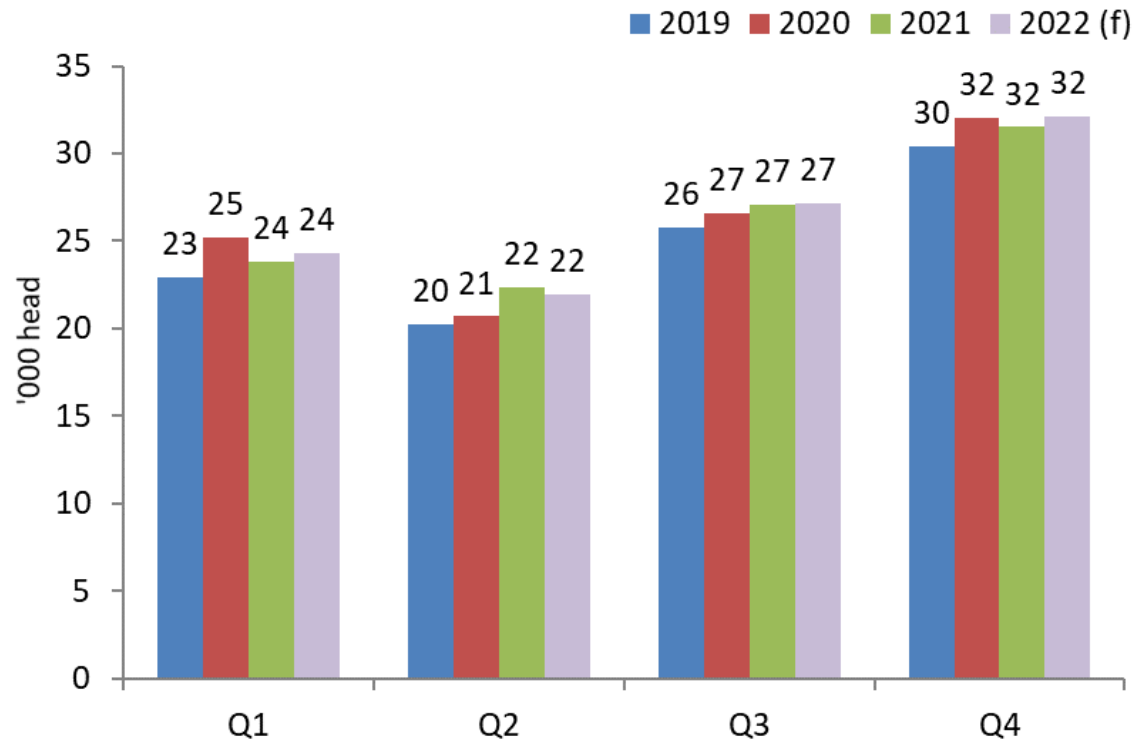
# Forecast NI Prime Cattle Kill 2022



|              | 2019           | 2020           | 2021           | 2022 (f)       | 2022/2021 % Change |
|--------------|----------------|----------------|----------------|----------------|--------------------|
| Quarter 1    | 88,966         | 89,607         | 84,374         | 86,392         | +2.4%              |
| Quarter 2    | 85,562         | 79,183         | 84,553         | 87,003         | +2.9%              |
| Quarter 3    | 80,692         | 81,839         | 85,876         | 86,414         | +0.6%              |
| Quarter 4    | 89,451         | 95,011         | 92,699         | 96,173         | +3.7%              |
| <b>Total</b> | <b>344,671</b> | <b>345,640</b> | <b>347,502</b> | <b>355,982</b> | <b>+2.4%</b>       |

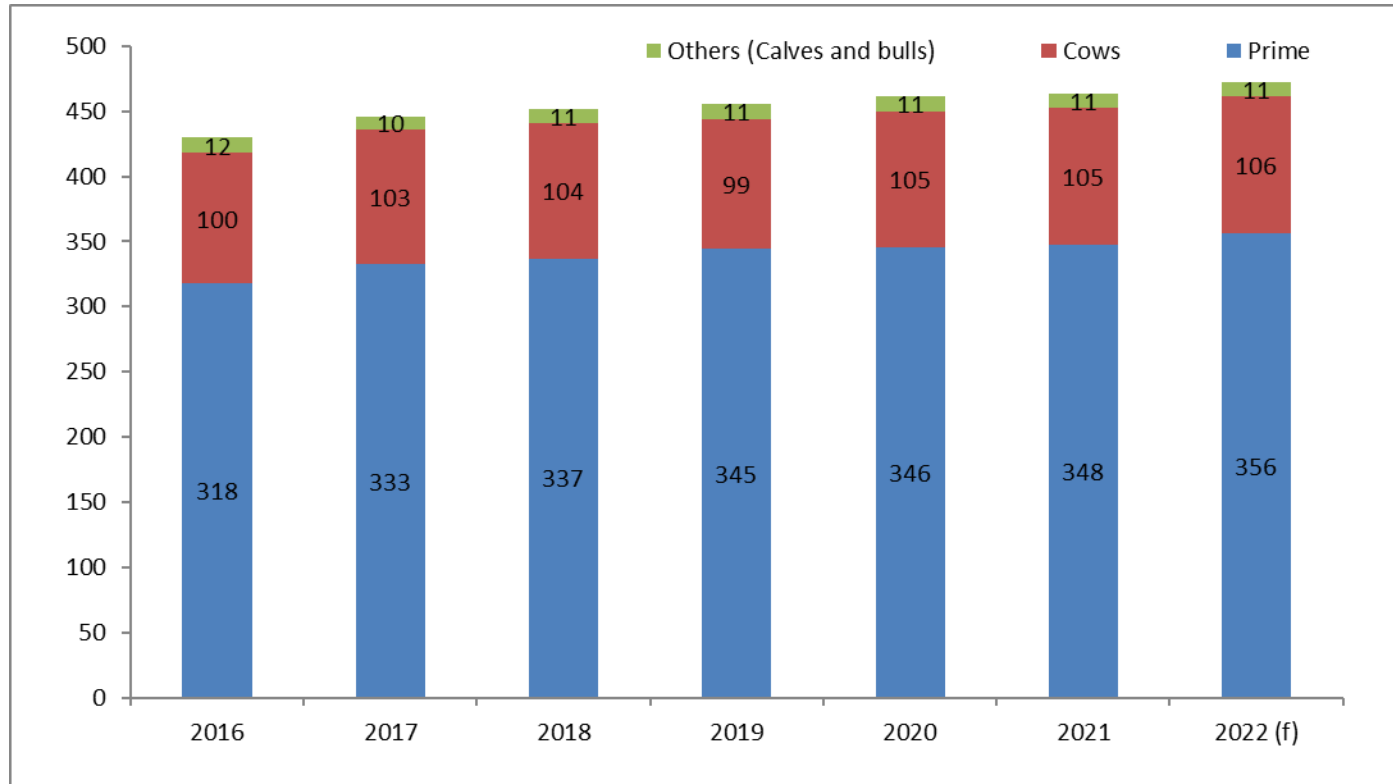


# Forecast NI Cow Kill 2022



|                  | 2019   | 2020    | 2021    | 2022 (f) | 2021/2020 % Change |
|------------------|--------|---------|---------|----------|--------------------|
| <b>Quarter 1</b> | 22,920 | 25,181  | 23,790  | 24,308   | +2.2%              |
| <b>Quarter 2</b> | 20,206 | 20,688  | 22,344  | 21,935   | -1.8%              |
| <b>Quarter 3</b> | 25,753 | 26,566  | 27,057  | 27,169   | +0.4%              |
| <b>Quarter 4</b> | 30,442 | 32,071  | 31,503  | 32,138   | +2.0%              |
| <b>Total</b>     | 99,321 | 104,506 | 104,694 | 105,550  | +0.8%              |

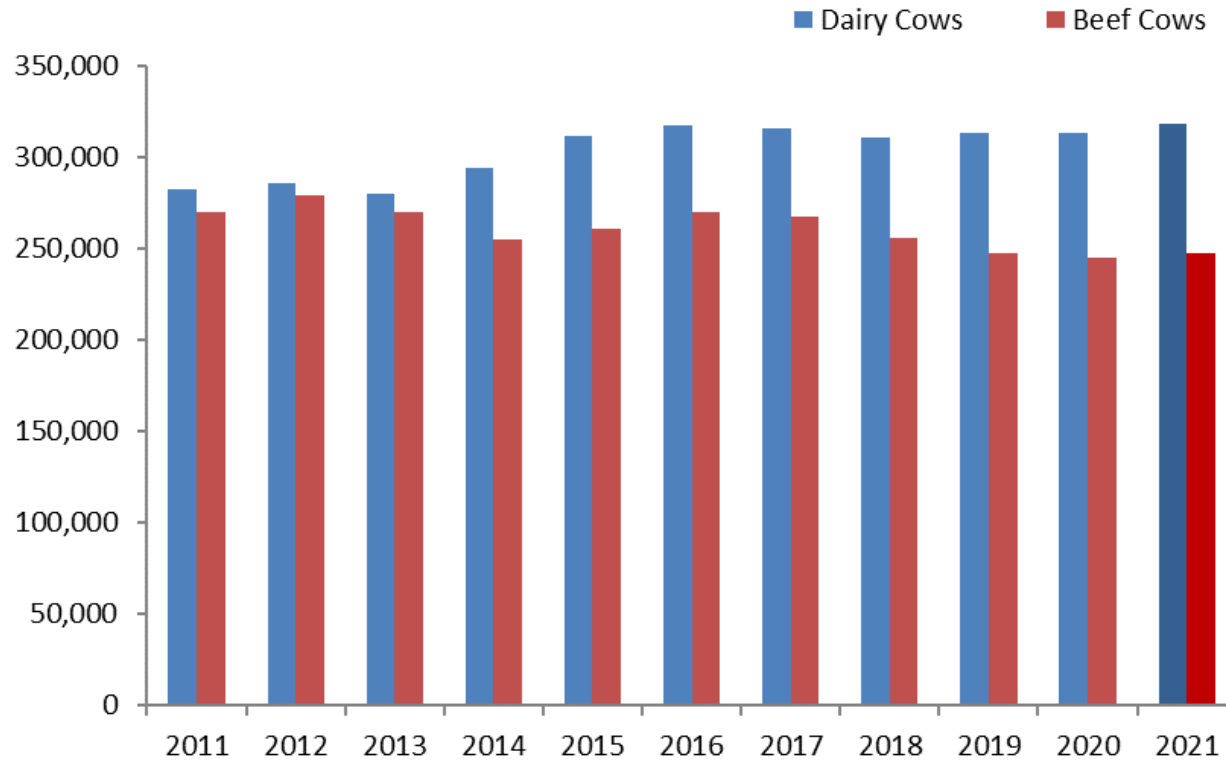
# Forecast Total Cattle Kill 2022 (Inc bulls and calves)



|                           | 2017    | 2018    | 2019    | 2020    | 2021    | 2022 (f) |
|---------------------------|---------|---------|---------|---------|---------|----------|
| Prime                     | 332,715 | 336,991 | 344,671 | 345,640 | 347,502 | 355,982  |
| Cows                      | 103,440 | 103,533 | 99,321  | 104,506 | 104,694 | 105,550  |
| Others (Calves and bulls) | 9,957   | 10,815  | 11,288  | 11,100  | 11,420  | 11,000   |
| Total Throughput          | 446,112 | 451,339 | 455,280 | 461,246 | 463,616 | 472,532  |

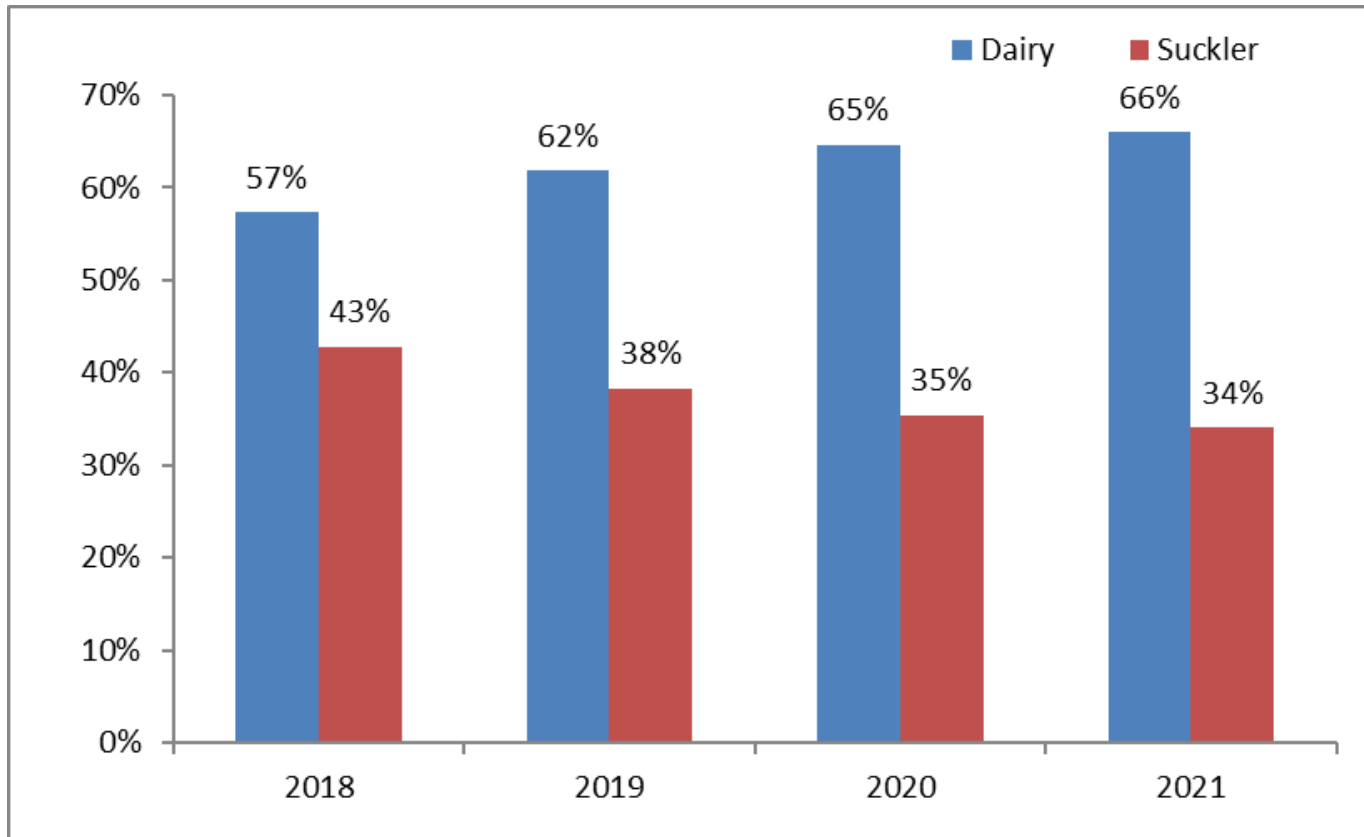
Longer term outlook

# Breeding females June Census



|                   | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 2021<br>(provisional) |
|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------------------|
| <b>Dairy Cows</b> | 282,487 | 285,369 | 279,481 | 294,192 | 311,520 | 317,146 | 315,800 | 310,718 | 313,549 | 313,283 | 318,372               |
| <b>Beef Cows</b>  | 269,488 | 279,195 | 270,105 | 254,870 | 260,325 | 269,746 | 267,100 | 255,904 | 247,009 | 244,702 | 246,956               |

# Origin cows in NI slaughter mix January to December 2018-2021



# Key Assumptions for Forecast

- Live imports for direct slaughter from ROI continue at current levels
- Exports to ROI for direct slaughter continue at similar levels
- Live imports and exports to GB will be lower than previous years
- 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