HCC Market Bulletin

August 2022

"BCMS has recently released calf registration figures for Wales which show the beef and dairy trends during the first half of this year. This month's Market Bulletin looks deeper at these figures which hint that supply may be tight if calf registrations remain subdued for during the latter half of 2022."

Glesni Phillips – Data Analyst

During the first six months of 2022, overall calf birth registrations in Wales fell by 0.8% compared to the same period a year ago. According to recent data, the British Cattle Movement Service (BCMS) registered 228,100 calves during the period, 1,800 less year-on-year. When compared to the same 6-month period in 2020, the current figure is 1% higher.

Calf registrations in Wales (H1 of 2022):

- Beef females **-0.3%** year-on-year
- Beef males **+1.1%** year-on-year
- Dairy females **+1.8%** year-on-year
- Dairy males **-12.5%** year-on-year

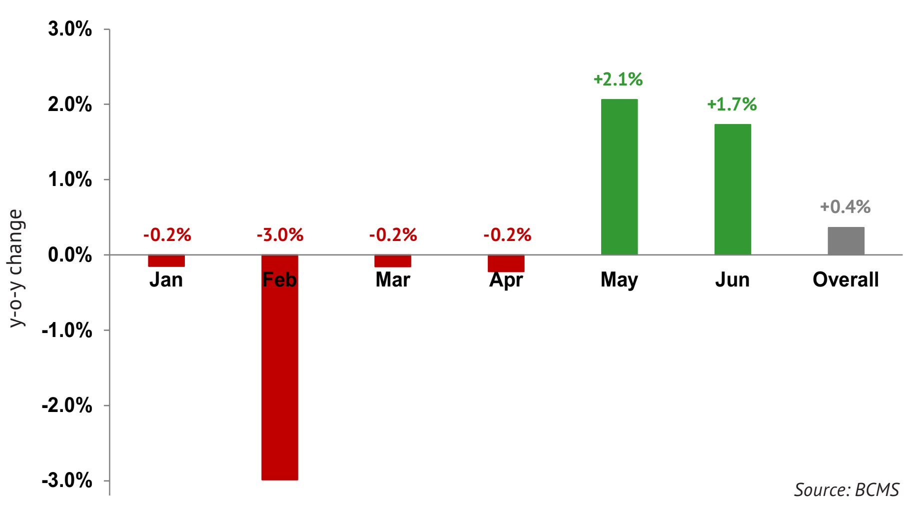
The number of calves registered that would be available for **beef production** (dairy male calves and beef calves of both sexes) fell by 1% on the year to 183,000 head – although some of the beef females would be retained as suckler replacements in the herd. This was largely due to fewer registrations of dairy male calves, which fell by 13% (3,000 head) on the year. This movement follows the longer-term trend in numbers of male dairy cattle. When compared to the same 6-month period in 2020, the number of animals that would potentially become available for beef production in the future was also 1% less. The figures for H1 of 2022 therefore suggest the supply of animals for beef production may be tight in the future – however calf registrations may increase during the latter half of the year.

Calves registered that would be available for **beef production** (dairy male calves and beef calves of both sexes)

-1% at 183,000 head

Looking at **beef** calf registrations only; males and females combined were up 0.4% on the year to 160,500 head, but down 0.7% when compared to 2020. There was a notable increase in beef calf registrations in Wales during May – with numbers up 2% on the year, this suggests there has been an increase in the number of producers in Wales having a more defined Spring calving block this year.

Changes in Beef Calf Registrations in Wales, 2022



Source: BCMS

On the **dairy** side, registrations of dairy female calves during the first six months of 2022 in Wales increased by 1.8% compared to the same period a year ago, which may contribute to some stabilisation in the dairy herd. The number of dairy males recorded a notable decrease of 12.5% on the year, with numbers during H1 of 2022 also being 4% lower than 2020. This change in numbers of dairy males and females being registered reflects increasing use of sexed and beef semen within the dairy sector.

GB Level;

In a similar manner to Wales; total calf registrations in Great Britain (GB) during H1 of 2022 fell by 0.9% (or 13,800 head) on the year to stand at 1.6 million head. Dairy males were the driver of this decline with registrations down 17% on the year, whilst both beef males and females recorded small increases on the year (less than 1% each). The number of calves potentially available for beef production in the future was down 0.9% - suggesting that supply could be tight if registrations remain dampened during H2 of the year.

Monthly Market Round-Up

CATTLE

Prices – week ending 13 August

The prime cattle average price at auction markets in England and Wales stood at **244.7p/kg**. This was:

- - 0.2p on the previous week,
- + 12.9p compared with year-earlier levels,
- 42.2p higher than the 5-year average (2017-21 average: 202.5p/kg).

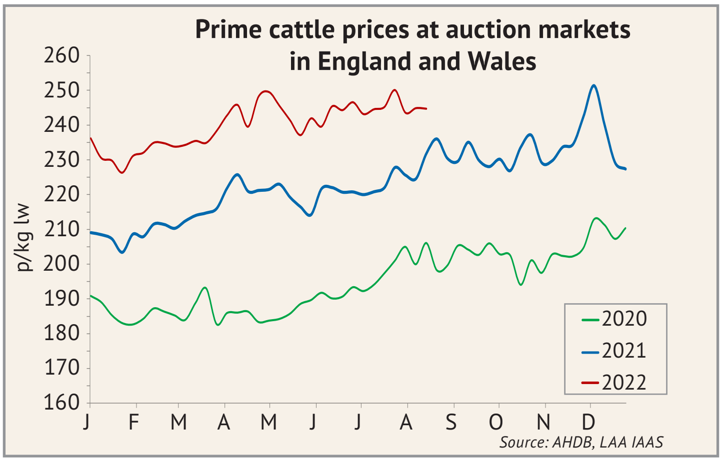
The average deadweight prices in England and Wales for steers stood at **430.7p/kg**. This was:

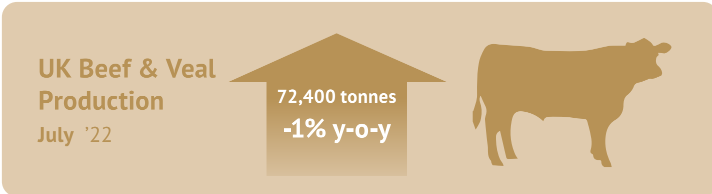
- - 2.7p on the previous week,
- 25.0p above year-earlier levels.

The deadweight prices for heifers stood at 428.9p/kg (-2.2p on the week), young bulls at 423.0p/kg (-2.6p), and cull cows at 343.8p/kg (-3.0p).

Throughput – July 2022

- Total cattle throughput at UK abattoirs = 218,600 head – similar on the year
- Total prime cattle throughput = 161,400 head – similar on the year.
  - ➢ *steers -4%, heifers +2%, and young bulls +6%.*
- Average prime cattle carcase weights = 344.2kg (-3.1kg on the year).
- Adult cattle throughput = 51,900 head – up 1% on the year.





SHEEP

Prices – week ending 13 August

The prime lamb average liveweight SQQ at auction markets in Wales stood at **240.4p/kg**. This was:

- - 8.9p on the previous week,
- + 7.9p compared with year-earlier levels,
- 43.5p higher than the 5-year average (2017-21 average: 196.9p/kg).

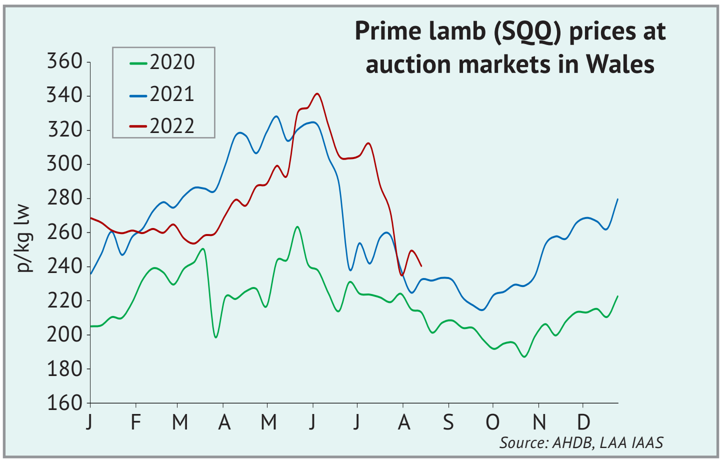
Cull ewe prices at auction markets in Wales averaged **£69.00/head**. This was:

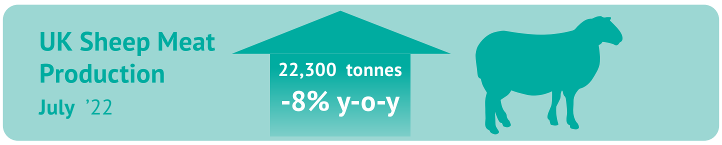
- - £3.90 on the previous week,
- 20p below year-earlier levels.

GB deadweight lamb prices averaged 545.4p/kg (+19.8p on the week).

Throughput – July 2022

- Total sheep throughput at UK abattoirs = 1.1 million head – down 9% on the year.
- Lamb throughput = 989,100 head – down 9% on the year.
- Average lamb carcase weights = 19.6kg (similar on the year).
- Cull ewe and ram throughput = 100,400 head – down 9% on the year.





PIGS

Prices – week ending 06 August

The EU-spec All Pig Price (APP) in GB stood at **199.8p/kg**. This was:

- + 0.2p on the previous week,
- + 34.4p compared with year-earlier levels,
- 38p higher than the 5-year average (2017-21 average: 161.8p/kg).

Throughput – July 2022

- Total pig throughput at UK abattoirs = 902,400 head – down 6% on the year.
- Clean pig throughput = 883,400 head – down 6% on the year.
- Average clean pig carcase weights = 88.0kg (+1.7kg on the year)
- Sow and boar throughput = 19,000 head – down 12% on the year.