

“ BCMS recently released cattle population data as of 1 July 2022, which indicates that supply of prime cattle will likely be more plentiful for the remainder of this year and into 2023. This month’s Market Bulletin looks deeper at these figures, which also reflect the increased throughput of older cattle since the start of the year.



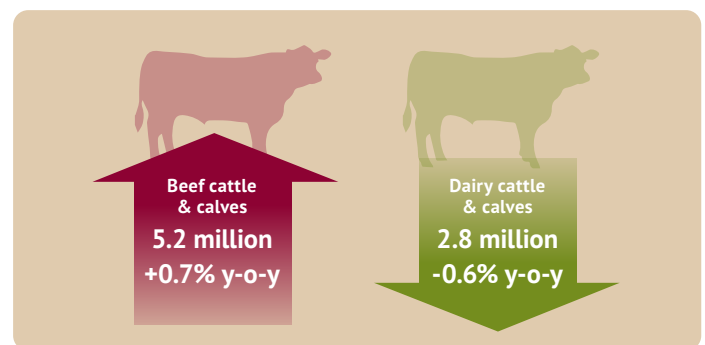
Glesni Phillips – Data Analyst ”

## CURRENT CATTLE POPULATION

According to recent population data from the British Cattle Movement Service (BCMS), the total number of cattle and calves on the ground in GB stood at 8.0 million head as of 01 July 2022 – an increase of 0.3% (or 20,600 head) on the year, but 0.5% smaller than in July 2020. Beef cattle numbers increased by 0.7% to 5.2 million head, whilst the dairy herd contracted by 0.6% to 2.8 million head (a continuation of the trend seen in recent years).

There were around 2.9 million head of cattle aged over 30 months – a notable decrease of 2.1% (or 59,900 head) on the year, and a 4.4% decrease when compared to July 2020. Cull cow farmgate prices have been strong during the last 6 months and have been trending at least 50p/kg higher than year-earlier levels. As a result, it is likely that producers have been marketing older, unproductive stock (particularly as farm input costs have been increasing significantly). Following on from this, females over

the age of 30 months (which give an indication of the size of the breeding herd in GB), recorded a reduction of 2.0% on the year to 2.8 million head. This was a result of both the beef and dairy breeding herds declining by around 29,000 head each.



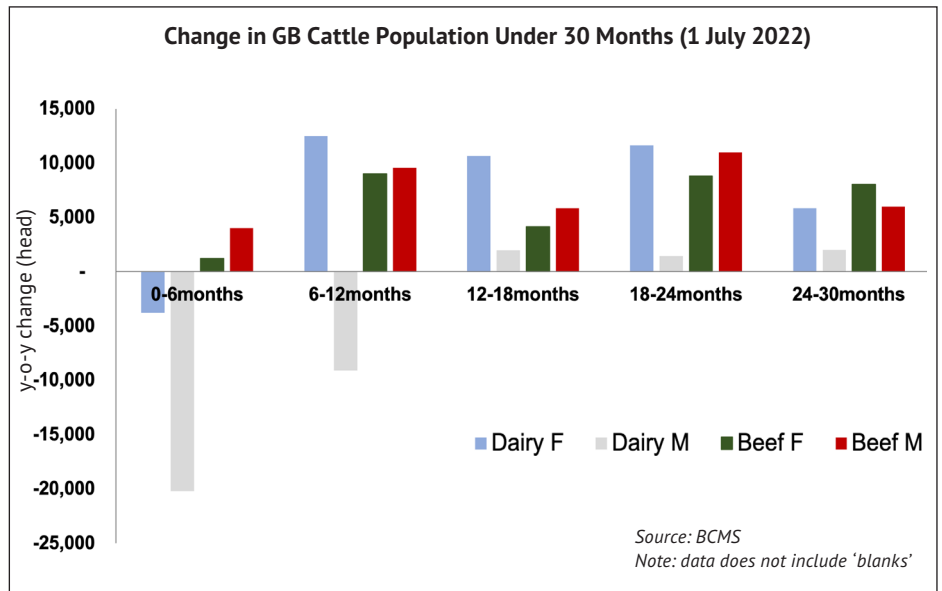
## LOOKING AHEAD

By breaking down the cattle categories and age brackets, it is possible to estimate the potential supply of cattle onto the market during the short and longer terms. Cattle aged under 30 months in GB on 1 July 2022 increased by 1.6% (or 80,500 head) on year-earlier levels to almost 5.2 million head.

Data for beef cattle and dairy males aged 12-30 months give an indication of the potential supply of prime cattle onto the market in the **short term**. There were 2.5% more animals on the ground when compared to 2021, which suggests that supply in the shorter term will be more plentiful when compared to 2021 (whilst also noting that some of these cattle may be used as suckler replacements).

Figures for beef cattle and dairy males aged 0-12 months give a **longer term** outlook. A fall of 0.3% on the year to almost 2.0 million head suggests that prime cattle supplies onto the market may stabilise somewhat in the future (although some of these cattle will be used for suckler replacements). Dairy male numbers recorded a notable decrease of 18% on the year – likely as a result of increased use of sexed dairy semen. A reduction in this category could have

a significant impact on production levels. The continued increased use of beef semen on dairy cows may counteract this further down the line as more beef-type animals will come from the dairy herd, but, the ongoing contraction of both the dairy and suckler herds (due to issues including increased input costs and associated effects on profitability) could act as a limiter for further growth in beef production.



**ARE YOU A BEEF OR SHEEP FARMER IN WALES? WE WANT TO HEAR FROM YOU!**

In order to better understand the impact of high costs on the farming & food sector, please take part in our survey:

<https://www.surveymonkey.co.uk/r/HCC-ENG>

# Monthly Market Round-Up

## CATTLE

### Prices – week ending 24 September

The prime cattle average price at auction markets in England and Wales stood at **250.8p/kg**. This was:

- + 8.2p on the previous week,
- + 22.7p compared with year-earlier levels,
- 52.5p higher than the 5-year average (2017-21 average: 202.5p/kg).

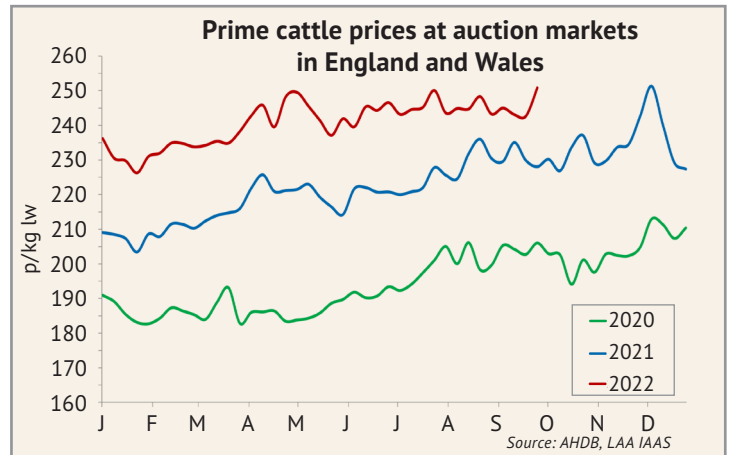
The average deadweight prices in England and Wales for steers stood at **436.4p/kg**. This was:

- +1.3p on the previous week,
- 26.6p above year-earlier levels.

The deadweight prices for heifers stood at 432.1p/kg (+0.7p on the week), young bulls at 425.4p/kg (-0.7p), and cull cows at 338.1p/kg (-0.2p).

### Throughput – August 2022

- Total cattle throughput at UK abattoirs = 223,300 head – up 2% on the year
- Total prime cattle throughput = 162,000 head – up 1% on the year.
  - steers -1%, heifers +2%, and young bulls +12%.
- Average prime cattle carcase weights = 342.4kg (-3.3kg on the year).
- Adult cattle throughput = 55,300 head – down 1% on the year.



**UK Beef & Veal Production**  
August '22

73,000 tonnes  
+0.1% y-o-y



## SHEEP

### Prices – week ending 24 September

The prime lamb average liveweight SQQ at auction markets in Wales stood at **222.8p/kg**. This was:

- - 6.6p on the previous week,
- + 8.0p compared with year-earlier levels,
- 43.3p higher than the 5-year average (2017-21 average: 179.5p/kg).

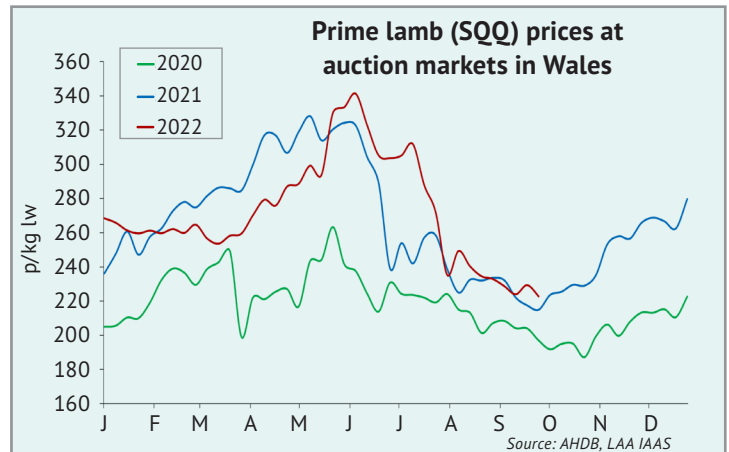
Cull ewe prices at auction markets in Wales averaged **£53.40/head**. This was:

- - £6.00 on the previous week,
- £4.40 below year-earlier levels.

GB deadweight lamb prices averaged 524.8p/kg (+1.2p on the week).

### Throughput – August 2022

- Total sheep throughput at UK abattoirs = 1.1 million head – up 0.5% on the year.
- Lamb throughput = 1.0 million head – up 0.4% on the year.
- Average lamb carcase weights = 19.7kg (-0.1kg on the year).
- Cull ewe and ram throughput = 111,000 head – up 1% on the year.



**UK Sheep Meat Production**  
August '22

22,700 tonnes  
-1% y-o-y



## PIGS

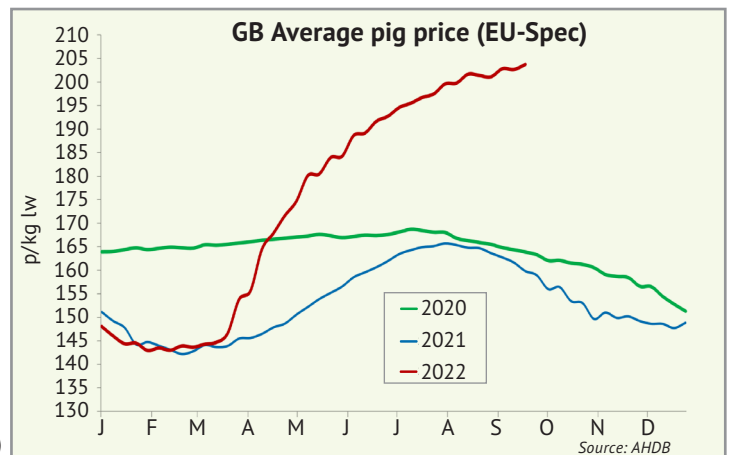
### Prices – week ending 17 September

The EU-spec All Pig Price (APP) in GB stood at **203.7p/kg**. This was:

- + 1.0p on the previous week,
- + 43.8p compared with year-earlier levels,
- 44.5p higher than the 5-year average (2017-21 average: 159.2p/kg).

### Throughput – August 2022

- Total pig throughput at UK abattoirs = 952,300 head – up 1% on the year.
- Clean pig throughput = 932,100 head – similar on the year.
- Average clean pig carcase weights = 88.0kg (+1.7kg on the year)
- Sow and boar throughput = 20,200 head – over 70% higher on the year.



**UK Pork Production**  
August '22

84,500 tonnes  
+2% y-o-y

