

“ The ‘June 2022 Survey of Agriculture and Horticulture’ has recently been released by Welsh Government and provides estimates of livestock numbers on Welsh holdings for 2022. The survey reveals a small fall in the number of sheep and lambs, whilst the beef herd continues to contract in size.

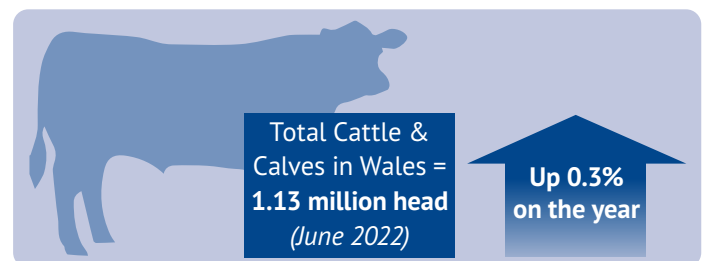
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## CATTLE

The June 2022 survey reveals that the total number of cattle and calves on Welsh holdings recorded a small year-on-year increase for a third consecutive year. Numbers totalled 1,131,800 head – **up 0.3% on the year** – with dairy females in the 1-2years age category driving the uplift with a 9% increase on the year. The number of dairy females aged 2+ years that had calved (i.e., the **dairy herd**) continued the longer-term trend of increases and had risen by 0.2% to 255,900 head. Most categories of dairy females recorded a notable increase on year-earlier levels, and years previous. This is likely a result of the increased use of sexed semen within the dairy industry leading to further expansion of the herd. The **beef breeding herd** (i.e., beef females aged 2+ years that had calved) however continues to fall. Numbers stood at 156,690 head - a decline of 2% on the year. This is the smallest beef breeding herd since the highs of 2005. As a result, the Welsh breeding herd (which accounts for both the beef and dairy breeding herd) was 0.6% smaller than in June 2021, and is the smallest breeding herd size since 2014.

Dairy females with no offspring (aged 2+ years) on Welsh holdings was the category which saw the largest decline – down 7% to 33,280 head, whilst beef females of the same description were up by 0.3% on the year to total 39,580 head. It is unclear how many of these female cattle will move into the breeding herd. The number of cattle under the age of 12 months increased by 4% to stand at 343,500 head – largely driven by an increase in dairy females in this category.

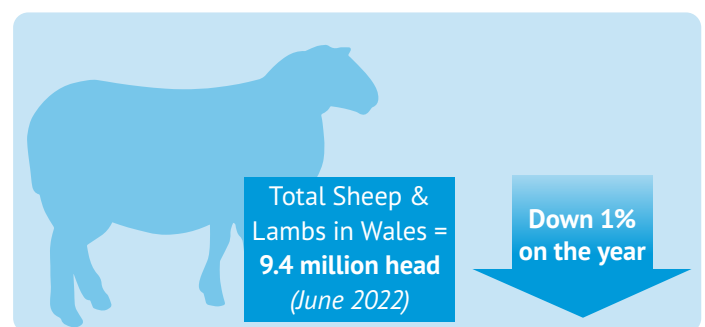


## SHEEP

There was a small fall in the total number of sheep and lambs in Wales according to the June survey results – **numbers were down 1% on the year** to total 9.4 million head. This fall was driven by reduced numbers of both sheep and lambs. Total sheep were down 0.8% on the year, with numbers in the ‘Other sheep (aged 1+)’ category driving this fall with a year-on-year decline of 31%. This suggests that fewer animals were left on farm from the previous lamb crop, and that there were also fewer animals retained on farm with an unclear objective (i.e., to cull or retain for breeding).

The **Welsh lamb crop** experienced a 1.6% decline on the year to stand at 4.6 million head. With the exception of the June 2020 lamb crop – this is the smallest lamb crop recorded since June 2012. A notable decrease in the number of lambs on the ground will have a knock-on effect on supply coming onto the market, however supply has been supported with adult sheep throughput this year (again, as a knock-on effect of increased farm input costs influencing farmer decisions).

The **breeding flock** also experienced a small contraction of 0.4% (or 16,400 head) on the year to 4.4 million head. This may lead to a smaller lamb crop next year; however, producers may have offloaded unproductive animals to better focus on the output of remaining ewes which may then achieve an increased lambing percentage from the smaller breeding flock. Ewes set for cull/slaughter however were up almost 3% on the year at 260,100 head. This increase is likely a result of result of producers looking to sell unproductive stock due to uncertainty over forage quantities and significant rises in farm input costs.



## PIGS

As of 1 June 2022, the total number of pigs in Wales stood at 26,900 head – **a small decrease of 1% on year-earlier levels**. This decrease is driven by a notable decrease in the number of **breeding pigs** within the herd – when compared to both year-earlier levels, and historical levels. At 2,640 head, the June 2022 survey has recorded the lowest number of breeding pigs in Wales on record. This may be a reflection of the ever-rising cost of production within the sector, which is making it difficult for producers to create a profit.

2022, fattening pigs now account for 90% of the herd. The number of pigs intended for meat production on Welsh holdings increased by 0.4% on the year to total 24,260 head, suggesting that farms are looking to diversify into finishing units.

This movement is having a knock-on effect on the proportion of the pig herd in Wales. In 2010, **fattening pigs** which are used for meat production accounted for 83% of the herd, but as of June



# Monthly Market Round-Up

## CATTLE

### Prices – week ending 19<sup>th</sup> November

The prime cattle average price at auction markets in England and Wales stood at **247.9p/kg**. This was:

- + 3.4p on the previous week,
- + 13.4p compared with year-earlier levels,
- 47.2p higher than the 5-year average (2017-21 average: 200.7p/kg).

The average deadweight prices in England and Wales for steers stood at **438.7p/kg**. This was:

- - 1.3p on the previous week,
- 27.1p above year-earlier levels.

The deadweight prices for heifers stood at 435.6p/kg (-0.6p on the week), young bulls at 430.4p/kg (+5.4p), and cull cows at 322.1p/kg (-3.9p).

### Throughput – October 2022

- Total cattle throughput at UK abattoirs = 254,300 head – up 10% on the year
- Total prime cattle throughput = 173,200 head – up 8% on the year.
  - steers +7%, heifers +8%, and young bulls +15%.
- Average prime cattle carcase weights = 340.9kg (+0.3kg on the year).
- Adult cattle throughput = 72,400 head – up 13% on the year.

## SHEEP

### Prices – week ending 19<sup>th</sup> November

The prime lamb average liveweight SQQ at auction markets in Wales stood at **234.5p/kg**. This was:

- - 2.2p on the previous week,
- - 22.0p compared with year-earlier levels,
- 38.1p higher than the 5-year average (2017-21 average: 196.5p/kg).

Cull ewe prices at auction markets in Wales averaged **£58.20/head**. This was:

- - £7.20 on the previous week,
- £6.8 below year-earlier levels.

GB deadweight lamb prices averaged 547.2p/kg (+12.7p on the week).

### Throughput – October 2022

- Total sheep throughput at UK abattoirs = 1.2 million head – down 0.4% on the year.
- Lamb throughput = 1.1 million head – down 1% on the year.
- Average lamb carcase weights = 19.9kg (similar on the year).
- Cull ewe and ram throughput = 108,100 head – up 7% on the year.

## PIGS

### Prices – week ending 12<sup>th</sup> November

The EU-spec All Pig Price (APP) in GB stood at **204.9p/kg**. This was:

- + 0.3p on the previous week,
- + 55.0p compared with year-earlier levels,
- 50.3p higher than the 5-year average (2017-21 average: 154.6p/kg).

### Throughput – October 2022

- Total pig throughput at UK abattoirs = 945,600 head – similar on the year.
- Clean pig throughput = 926,000 head – down 1% on the year.
- Average clean pig carcase weights = 88.7kg (+0.2kg on the year)
- Sow and boar throughput = 19,600 head – up 53% on the year.

