The UK cattle yearbook 2019

BEEF & LAMB

Contents

Cattle: Chapter 1 – Introduction

Some of the statistics in the latest edition of the UK cattle yearbook belie the fact that 2018 was a testing year, following the relative stability of 2017. The weather had the biggest role to play, against a backdrop of continued political uncertainty.

The Beast from the East hit cattle herds in the spring and, unfortunately, calves and cows were lost. Summer was unrelenting and drought affected large areas of the country. This raised concerns about the availability of forage for the winter and the rising cost of buying in feed. Cow slaughter increased as farmers rationalised their herds, but the full effects of the weather will be felt in the coming years, through a smaller breeding herd and lower domestic beef production.

Prime cattle prices started the year above the five-year average and fell slightly due to a combination of good supply and weaker demand. The poor spring restricted supply and prices strengthened. Demand for manufacturing beef remained healthy and cow prices picked up from the start of the year. When farmers were forced to send forward both prime animals and cows in July, although the price for both fell, abattoirs were much better able to take cows than prime cattle. Prime cattle slaughter was 1.994 million head in 2018, approximately 1% higher than the year before. Cow slaughter was 5% higher at 677 thousand head. Beef production grew by 2% to 922.5 thousand tonnes, driven by the increase in cow slaughter.

Sterling continued to remain weak and, with increased domestic production, combined to support exports, which grew by 5.2%. Imports also increased compared with the year before, by 2.3%, as the supply chain laid down stocks to prepare for Britain's exit from the EU in early 2019. Including stock changes, supplies of beef and veal available for consumption increased to approximately 1.23 million tonnes.

The content of ***The UK cattle yearbook 2019*** provides an overview of the facts and figures from the beef sector during 2018. We hope that it serves as a useful reference guide for industry and other interested stakeholders.

Chapter 2 – Marketing chain

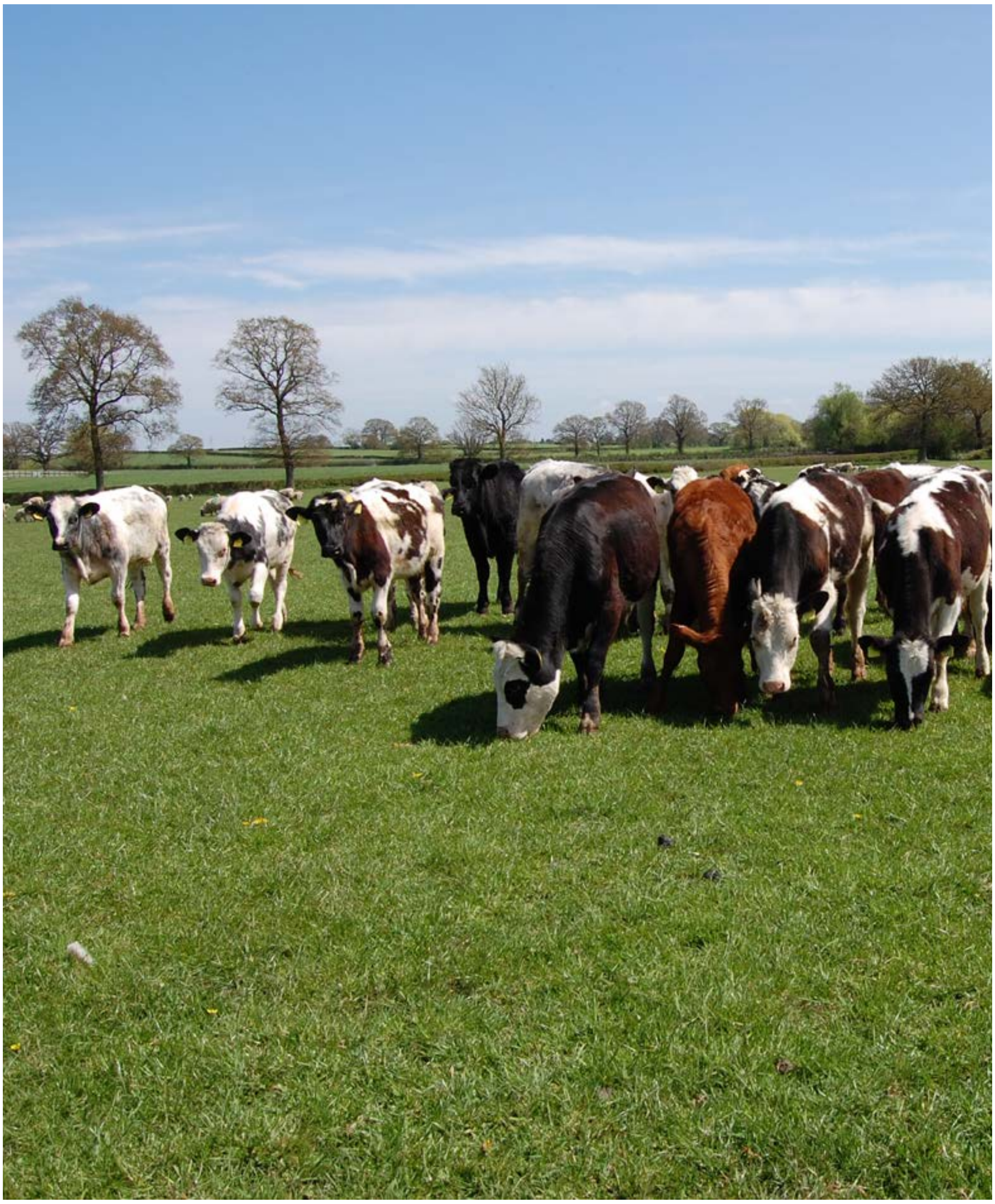
Table 2.1 Beef and veal balance sheet, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Production	922.5	2.0
Fresh/frozen imports	361.3	6.1
Processed imports	91.6	-10.5
Total imports	452.8	2.3
Exports	147.1	5.2
Total consumption	**1,228.2**	**1.7**

Total consumption is a balance calculation based upon total supplies available for consumption, i.e. production + imports - exports

All data has been converted to carcase weight equivalent

Source: AHDB, Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC



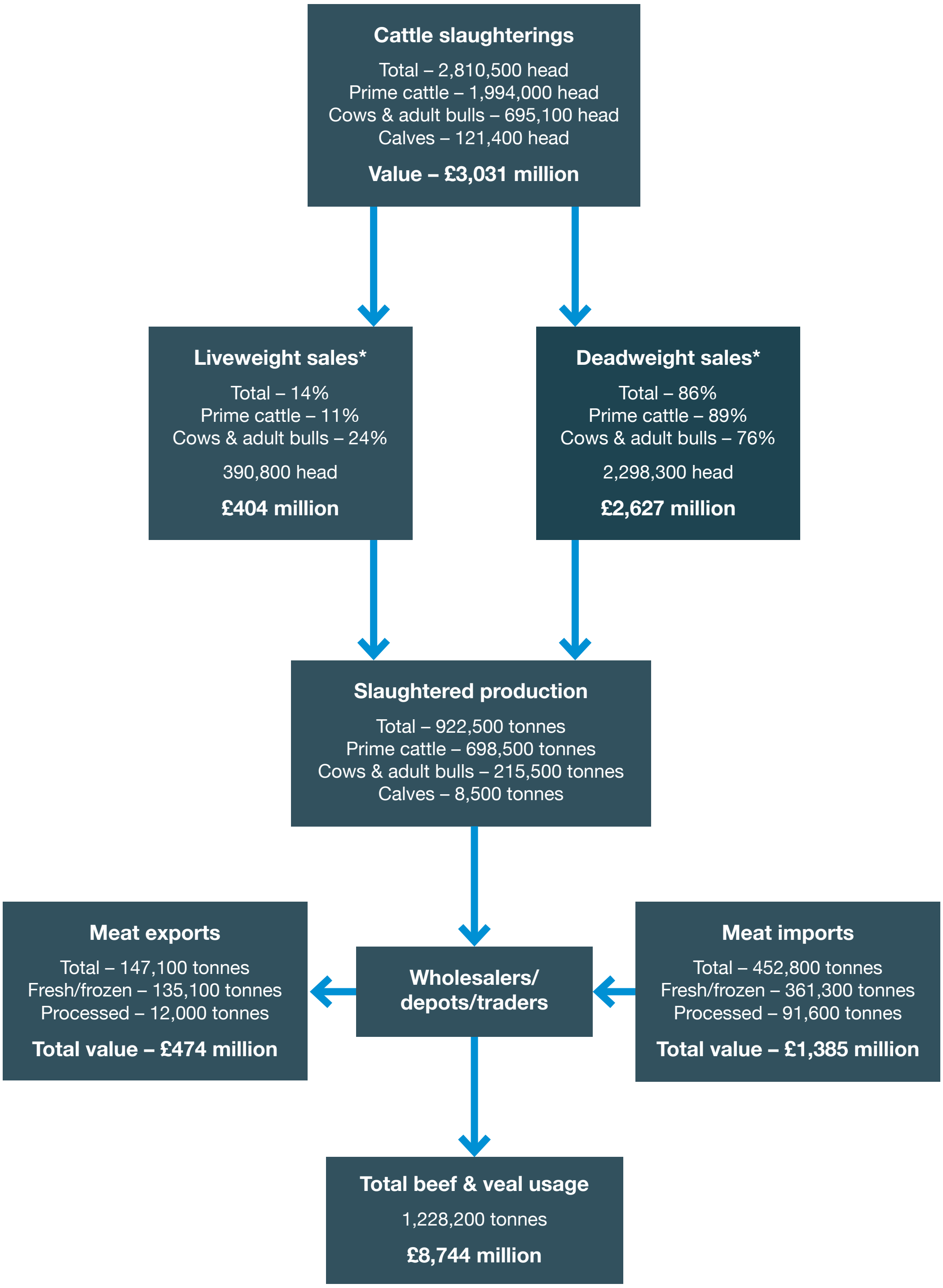


Figure 2.1 UK product flows in the cattle marketing chain, 2018

*Excludes calves
Liveweight and deadweight percentage splits are estimated using GB data
Totals may not add up due to rounding
All data has been converted to carcase weight equivalent

Source: AHDB, Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC

Chapter 3 – Livestock numbers

Table 3.1 Cattle numbers by category, UK, June 2018

	Cattle numbers ('000)				
	England	Wales	Scotland	Northern Ireland	UK
All female cattle	3,890	863	1,243	1,171	7,167
Aged 2 years or more	2,240	514	718	678	4,149
Total breeding herd	1,855	421	599	567	3,441
Beef herd	712	167	424	256	1,558
Dairy herd	1,143	254	175	311	1,883
Other female cattle	385	93	119	111	708
Beef herd	194	43	79	62	378
Dairy herd	192	49	39	49	330
Aged between 1 and 2 years	792	163	250	239	1,443
Beef herd	478	91	196	156	921
Dairy herd	314	71	54	83	522
Less than 1 year	858	187	276	255	1,575
Beef herd	535	112	220	165	1,032
Dairy herd	323	75	56	89	543
All male cattle	1,483	271	512	458	2,723
Total cattle and calves	**5,372**	**1,134**	**1,755**	**1,629**	**9,891**

Historical data available on **www.gov.uk/government/statistical-data-sets/structure-of-the-livestock-industry-in-england-at-december**

Source: Defra

Table 3.2 Cattle holdings and average herd size by region, June 2017

	2017	Change on year (%)
England		
Number of dairy cow holdings	12,038	-3.5
Average dairy herd size (head)	93	3.1
Number of beef cow holdings	25,759	-1.4
Average beef herd size (head)	27	1.1
Total cattle holdings	39,419	-2.0
Wales		
Number of dairy cow holdings	2,965	-2.1
Average dairy herd size (head)	N/A	N/A
Number of beef cow holdings	8,238	-1.7
Average beef herd size (head)	N/A	N/A
Total cattle holdings	10,587	-0.9
Scotland		
Number of dairy cow holdings	1,826	0.2
Average dairy herd size (head)	96	-0.6
Number of beef cow holdings	8,989	-1.8
Average beef herd size (head)	48	0.9
Total cattle holdings	11,477	-1.8
Northern Ireland		
Number of dairy cow holdings	3,428	-2.9
Average dairy herd size (head)	92	2.5
Number of beef cow holdings	14,724	-0.2
Average beef herd size (head)	18	-0.8
Total cattle holdings	20,237	1.5

Cow holding numbers shown are based upon animals aged 2 years or over with offspring, except Wales, which are based upon all animals over 2 years as further breakdown is not available. As a result, average beef and dairy herd size figures for Wales are not available on the same basis

Dairy herd sizes are based on number of holdings with dairy cattle rather than number of registered dairy producers

Source: Daera, Defra, Scottish Government, Welsh Government

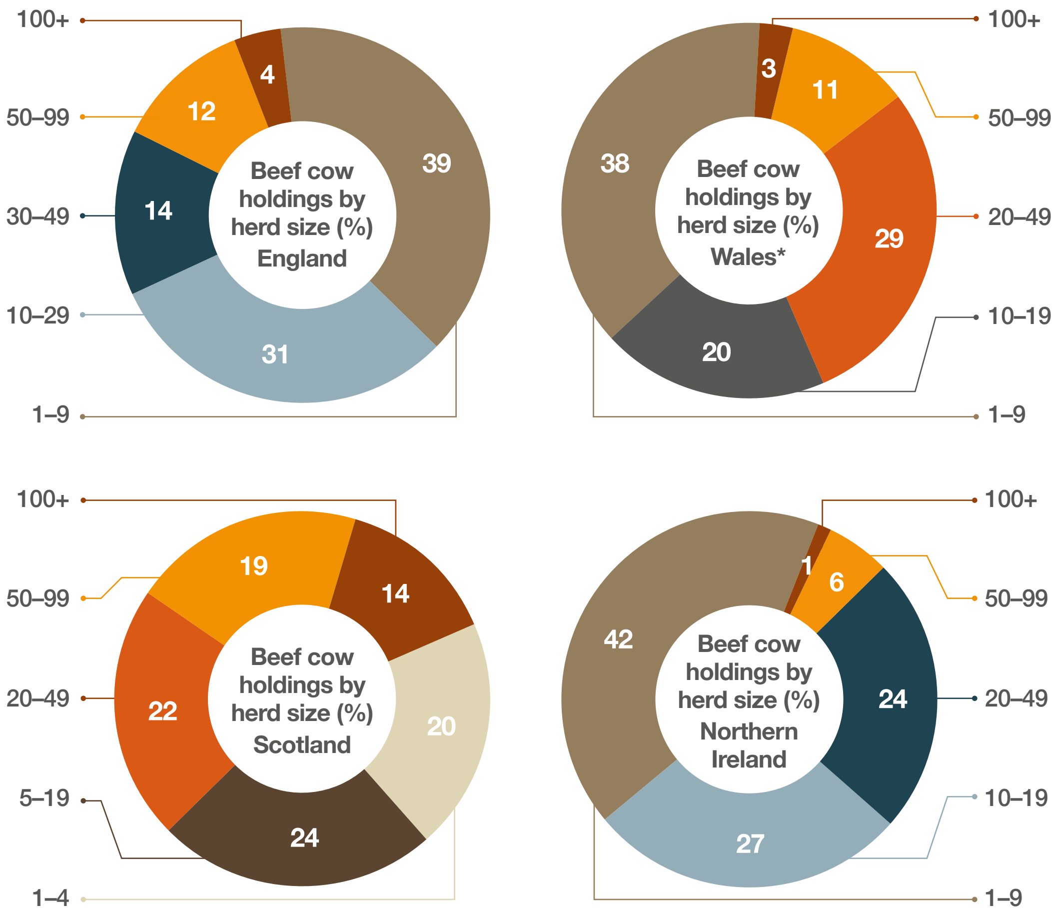


Figure 3.1 Beef cow holdings by herd size and region, UK, June 2017

*Data shown is for 2016

Beef cow holding numbers shown are based upon animals aged 2 years or over with offspring, except Wales, which are based upon all holdings with beef cows over 2 years

Totals may not add up to 100% due to rounding

Source: Daera, Defra, Scottish Government, Welsh Government

Chapter 4 – Slaughterings and production

Table 4.1 Red meat production, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Beef and veal	922.5	2.0
Lamb and mutton	288.6	-3.6
Pig meat	926.6	2.7
Total red meat[a]	2,137.7	1.5

a = excludes offal

Historical data available on **www.gov.uk/government/statistics/cattle-sheep-and-pig-slaughter**

Source: Defra

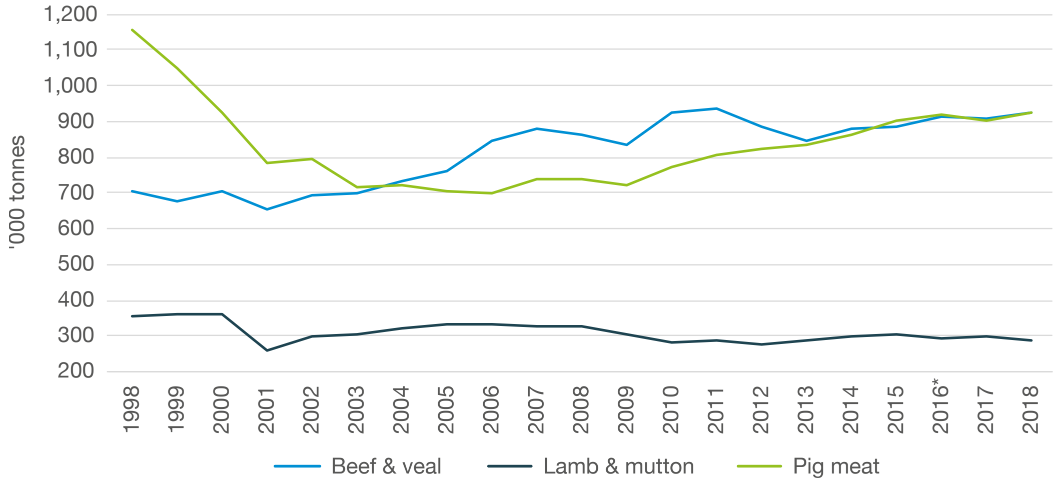


Figure 4.1 Trends in red meat production, UK, 1998–2018

*Defra changed to calendar months from February 2016
Historical available on **www.gov.uk/government/statistics/cattle-sheep-and-pig-slaughter**
Source: Defra

Table 4.2 Cattle slaughterings by region, UK, 2018

	Slaughterings ('000 head)			
	England & Wales	Scotland	Northern Ireland	UK
Prime cattle	1,265	391	339	1,994
Cows and bulls	518	69	109	695
Total cattle and calves	**1,782***	**459***	**447***	**2,811**

*Excludes calves
Historical data available on **www.gov.uk/government/statistics/cattle-sheep-and-pig-slaughter**
Source: Defra

Table 4.3 Cattle average carcase weights, UK, 2018

	2018 (kg dw)	Change on year (%)
Steers	368.5	0.4
Heifers	330.4	0.1
Young bulls	333.7	2.2

Historical data available on **www.gov.uk/government/statistics/cattle-sheep-and-pig-slaughter**
Source: Defra

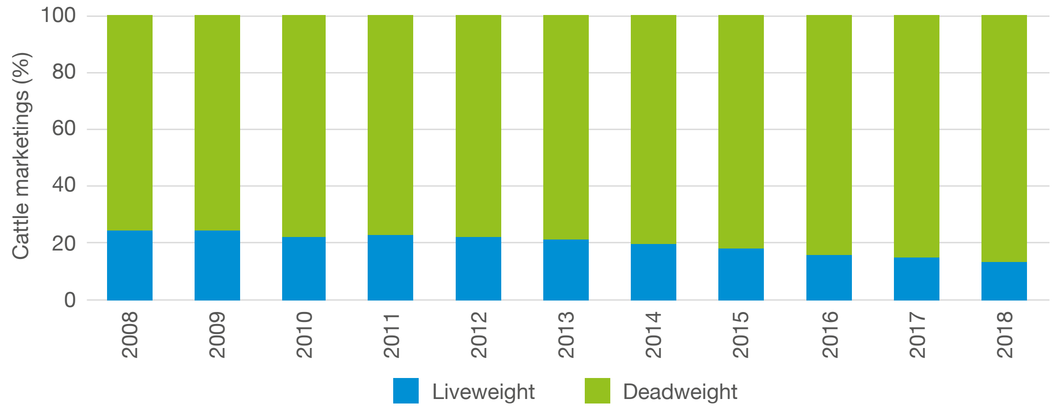


Figure 4.2 Liveweight/deadweight cattle marketings, GB, 2008–2018

Chapter 5 – Livestock and meat prices

Table 5.1 Deadweight cattle prices by region, 2018

	2018 (p/kg dw)	Change on year (%)
Great Britain		
Steers R4L	375.3	0.8
Steers overall	362.3	0.8
Heifers R4L	373.9	0.7
Heifers overall	363.7	0.4
Young bulls R3	357.4	0.6
Young bulls overall	342.6	0.7
Cows -O4L	263.9	0.5
Cows overall	237.7	0.3
England & Wales		
Steers R4L	372.7	0.8
Steers overall	357.3	0.9
Heifers R4L	371.2	0.8
Heifers overall	358.5	0.4
Young bulls R3	354.8	0.8
Young bulls overall	338.3	0.6
Cows -O4L	263.2	0.5
Cows overall	233.9	0.1
Scotland		
Steers R4L	382.9	0.8
Steers overall	377.3	0.6
Heifers R4L	381.7	0.5
Heifers overall	378.5	0.3
Young bulls R3	368.5	-0.4
Young bulls overall	361.2	1.1
Cows -O4L	269.0	1.1
Cows overall	266.0	1.6

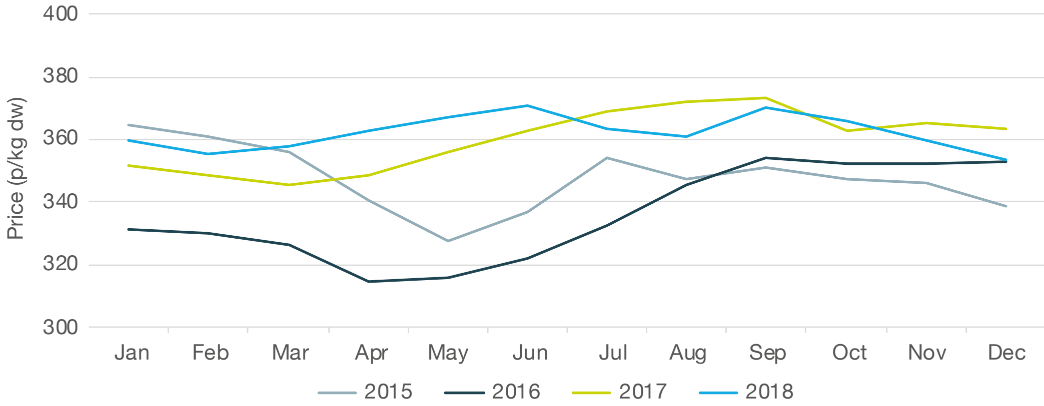


Figure 5.1 Seasonality of deadweight beef prices, GB, 2015–2018

Based on GB monthly deadweight cattle prices for steers

Table 5.2 Liveweight finished cattle prices, GB, 2018

	2018 (p/kg)	Change on year (%)
Steers	192.6	0.3
Heifers	204.4	0.5
Young bulls	184.3	0.6
Cows	114.1	-0.8

Source: AHDB, LAA, IAAS

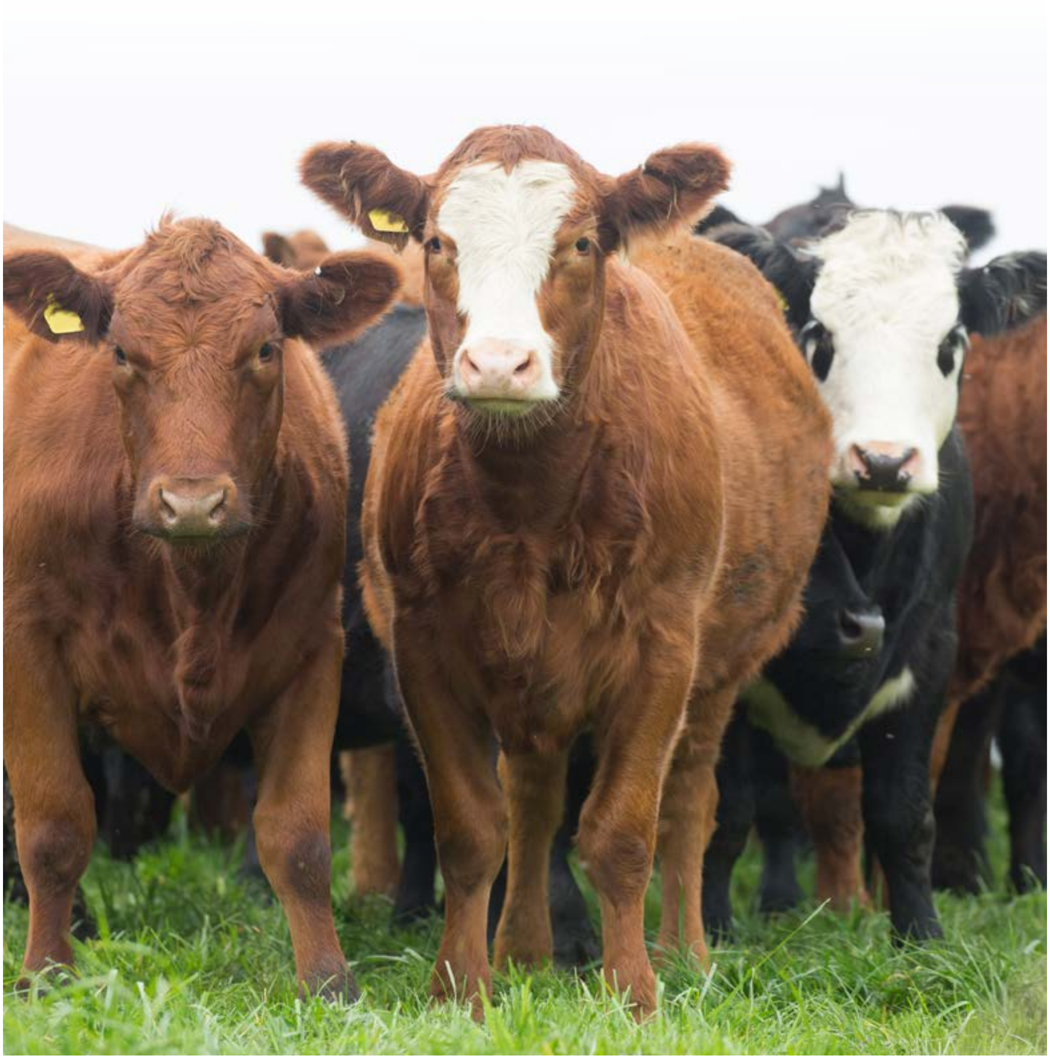


Table 5.3 Store cattle and rearing calf prices, England & Wales, 2018

		2018 (£ per head)	Change on year (%)
Rearing calves (up to 3 weeks)			
Friesian/Holstein/cross	Bulls	39.01	-12.9
	Heifers	51.41	6.8
Hereford/cross	Bulls	140.52	-18.8
	Heifers	95.33	-26.3
Continental/cross	Bulls	207.83	-12.3
	Heifers	158.06	-19.2
Others/cross	Bulls	96.81	-15.9
	Heifers	79.41	-26.9
Yearling store cattle			
Friesian/Holstein/cross	Steers	380.00	-5.9
	Heifers	341.63	-10.3
Hereford/cross	Steers	635.24	-5.0
	Heifers	479.82	-8.2
Continental/cross	Steers	862.13	-2.6
	Heifers	746.22	-3.1
Others/cross	Steers	679.97	-3.3
	Heifers	541.92	-4.5
18-month old store cattle			
Friesian/Holstein/cross	Steers	555.86	-3.0
	Heifers	481.97	-3.5
Hereford/cross	Steers	746.53	-5.8
	Heifers	603.86	-6.9
Continental/cross	Steers	929.92	-4.7
	Heifers	823.96	-4.9
Others/cross	Steers	787.44	-5.0
	Heifers	665.35	-5.8
2-year old store cattle			
Friesian/Holstein/cross	Steers	697.07	-1.0
	Heifers	602.84	-5.7
Hereford/cross	Steers	894.17	-2.7
	Heifers	741.04	-5.0
Continental/cross	Steers	1,030.99	-2.7
	Heifers	921.59	-3.0
Others/cross	Steers	923.81	-2.2
	Heifers	805.96	-2.9

Source: AHDB, LAA

Chapter 6 – Carcase classification

Table 6.1 Distribution of prime cattle carcases by conformation and fat class, GB, 2018

%		Fat class							
		1	2	3	4L	4H	5L	5H	**Total**
Conformation	E	0.0	0.2	0.2	0.0	0.0	0.0	0.0	**0.5**
	U+	0.1	1.0	2.1	0.8	0.1	0.0	0.0	**4.0**
	-U	0.1	1.6	6.1	6.0	1.2	0.0	0.0	**15.1**
	R	0.2	3.0	16.1	19.2	5.7	0.3	0.0	**44.6**
	O+	0.1	1.6	8.0	9.7	3.0	0.2	0.0	**22.7**
	-O	0.2	1.5	5.4	3.4	0.5	0.0	0.0	**11.0**
	P+	0.2	0.6	0.7	0.2	0.0	0.0	0.0	**1.7**
	-P	0.2	0.1	0.1	0.0	0.0	0.0	0.0	**0.4**
	Total	**1.1**	**9.7**	**38.7**	**39.4**	**10.4**	**0.6**	**0.1**	

Totals may not add up to 100% due to rounding

Table 6.2 Distribution of prime cattle carcases, GB, 2018

	2018 (%)	Change on year (%)
Steers	57	-2.1
Heifers	36	3.8
Young bulls	7	-1.4

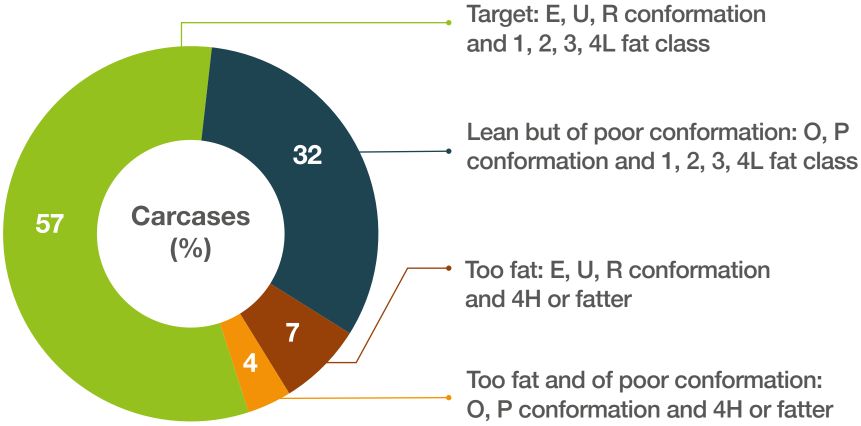


Figure 6.1 Prime cattle carcases meeting target specification, GB, 2018

Chapter 7 – Abattoirs

Table 7.1 Red meat abattoirs by type, England, 2018

	2018	Change on year (%)
Killing cattle	148	-3.9
Killing sheep	149	-0.7
Killing pigs	115	2.7
Total number of abattoirs	**179**	**-2.7**

Table 7.2 Size profile of abattoirs slaughtering cattle, England, 2018

Size group (head)	Number of abattoirs	Total throughput (head)	Share of throughput (%)
1–1,000	71	20,204	1.1
1,001–5,000	25	61,541	3.5
5,001–10,000	17	118,463	6.7
10,001–20,000	10	158,911	9.0
20,001–30,000	4	98,154	5.5
30,001–50,000	8	322,547	18.2
>50,000	13	991,676	56.0
Total	**148**	**1,771,496**	**100.0**

Includes cattle and calves

Chapter 8 – Auction markets

Table 8.1 Auction market centres by region, GB, 2018

England	Wales	Scotland	GB
76	26	26	128

Data relates to markets reporting cattle and sheep to AHDB

Source: AHDB, LAA, IAAS

Table 8.2 Auction market throughputs by region, GB, 2018

	England	Wales	Scotland	GB
Steers	39,109	3,274	5,388	47,771
Heifers	64,005	3,931	10,777	78,713
Young bulls	55,733	834	656	57,223
Cull cows	95,234	10,462	29,747	135,443

Data relates to finished markets only

Source: AHDB, LAA, IAAS

Table 8.3 Auction market cattle sales by region, GB, 2018

England	Wales	Scotland	GB
2,675	429	509	3,613

Data relates to finished markets only

Source: AHDB, LAA, IAAS

Table 8.4 Cattle auction markets by size, GB, 2018

Size group (head)	Auction market centres (number)	Total marketings (head)	Share of throughput (%)
1–2,500	45	36,156	11.3
2,501–5,000	16	55,219	17.3
5,001–7,500	5	31,136	9.8
7,501–10,000	7	61,412	19.2
10,001–12,500	2	21,305	6.7
>12,500	7	113,922	35.7
Total	**82**	**319,150**	**100.0**

Data relates to finished markets only

Source: AHDB, LAA, IAAS

Chapter 9 – Imports and exports

Table 9.1 Volume and value of beef and veal imports, UK, 2018

	2018	Change on year (%)
Fresh/Frozen		
Volume ('000 tonnes)	289.5	5.1
Value (£ million)	1,166.0	8.2
Processed		
Volume ('000 tonnes)	72.0	-9.8
Value (£ million)	218.6	-14.9
Offal		
Volume ('000 tonnes)	18.9	107.5
Value (£ million)	21.7	38.1

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Table 9.2 Imports of fresh/frozen beef and veal by source, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Fresh/frozen		
Bone-in	50.1	-15.2
Boneless	239.4	10.6
Frozen	94.3	18.1
Fresh/chilled	195.2	-0.2
Total	**289.5**	**5.1**
EU-28		
Irish Republic	210.6	8.6
Netherlands	19.3	-6.7
Poland	17.2	-12.3
Germany	8.9	-13.6
Italy	4.5	32.7
Total	**273.4**	**5.3**
Non-EU		
Brazil	3.6	44.5
Botswana	3.0	-23.0
Uruguay	2.7	24.4
Australia	2.4	-15.7
Namibia	1.6	-19.7
New Zealand	1.2	14.0
Total	**16.1**	**1.7**

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Table 9.3 Imports of processed beef and beef offal by source, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Corned beef		
Brazil	22.9	11.2
France	3.3	-25.3
Total	**27.1**	**6.7**
Other processed beef		
Irish Republic	30.7	-22.4
Sweden	3.4	-5.9
Total	**44.9**	**-17.5**
Beef offal		
Irish Republic	13.4	229.2
Germany	2.0	29.3
Total	**18.9**	**107.5**

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

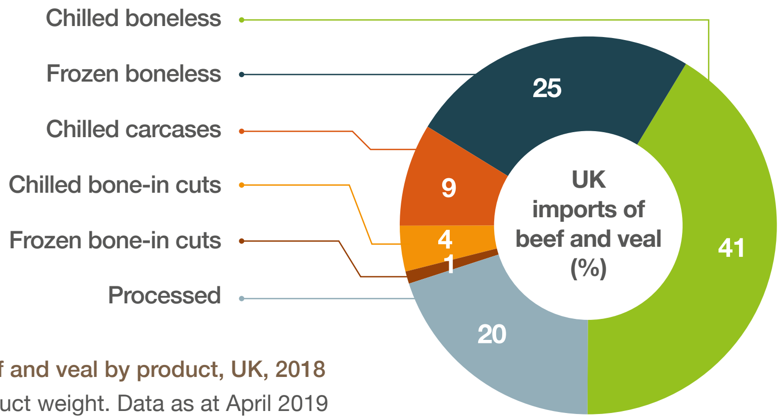


Figure 9.1 Imports of beef and veal by product, UK, 2018

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Table 9.4 Volume and value of beef and veal exports, UK, 2018

	2018	Change on year (%)
Fresh/Frozen		
Volume ('000 tonnes)	110.5	4.6
Value (£ million)	435.1	7.4
Offal		
Volume ('000 tonnes)	38.4	-4.2
Value (£ million)	59.3	4.9

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Table 9.5 Exports of fresh/frozen beef and veal by destination, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Fresh/frozen		
Bone-in	28.5	-5.3
Boneless	82.0	8.6
Frozen	27.2	0.7
Fresh/chilled	83.3	6.0
Total	**110.5**	**4.6**
EU-28		
Irish Republic	36.4	6.6
Netherlands	27.7	15.2
France	9.2	12.2
Italy	5.4	5.3
Germany	5.1	25.7
Belgium	3.8	2.6
Sweden	2.7	4.0
Total	**98.0**	**7.4**
Non-EU		
Total	**12.5**	**-12.7**

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Table 9.6 Exports of beef offal by destination, UK, 2018

	2018	Change on year (%)
EU-28		
Volume ('000 tonnes)	21.9	7.7
Value (£ million)	34.9	18.3
Non-EU		
Volume ('000 tonnes)	16.5	-16.4
Value (£ million)	24.4	-9.7
Total		
Volume ('000 tonnes)	38.4	-4.2
Value (£ million)	59.3	4.9

Volumes are shipped product weight. Data as at April 2019

Source: IHS Maritime & Trade – Global Trade Atlas®/HMRC

Chapter 10 – Consumption

Table 10.1 Meat consumption, UK, 2018

	2018 ('000 tonnes)	Change on year (%)
Beef and veal	1,228	1.7
Lamb and mutton	293	-2.3
Pig meat	1,726	0.5
Poultry	2,447	2.2
Total meat	**5,694**	**1.3**

Consumption is a balance calculation based upon total supplies available for consumption, i.e. production + imports - exports

Source: AHDB. Calculations based on data from Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC

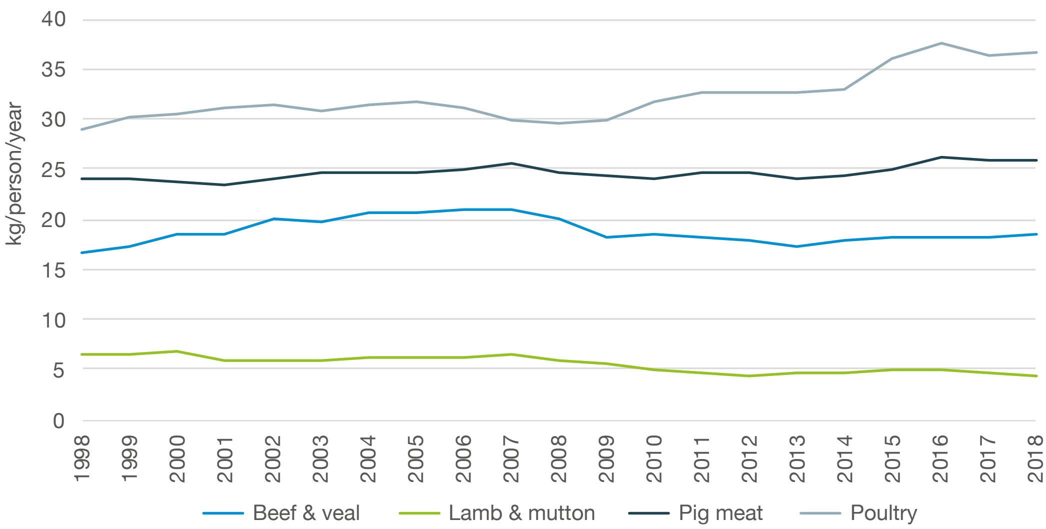


Figure 10.1 Trends in per capita meat consumption, UK, 1998–2018

Per capita consumption is a calculation based upon total supplies available for consumption, i.e. production + imports - exports divided by the mid-year population estimate

All data has been converted to carcase weight equivalent

Source: AHDB. Calculations based on data from Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC, Office for National Statistics

Table 10.2 Self-sufficiency rates, UK, 2018

	2018 (%)	Change on year*
Beef and veal	75.1	0.2
Lamb and mutton	98.5	-1.3
Pig meat	53.7	1.1
Poultry	77.7	2.0
Total meat	**70.9**	**1.2**

*Change in percentage points

Self-sufficiency (%) = production/consumption (where consumption is production + imports - exports)

Source: AHDB. Calculations based on data from Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC

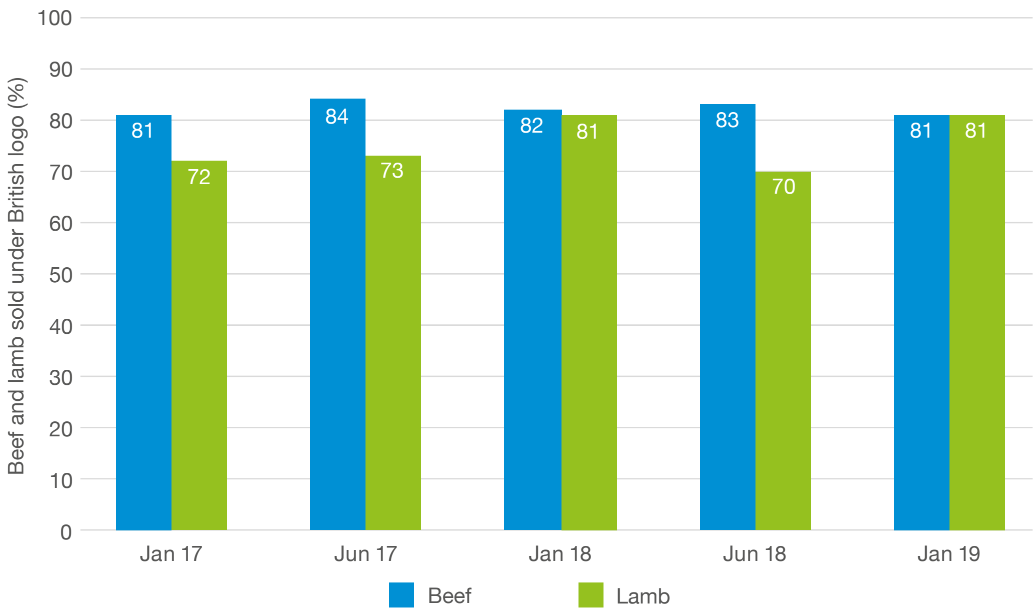


Figure 10.2 Percentage of beef and lamb sold under British logo, GB, 2017–2019

Source: ESA

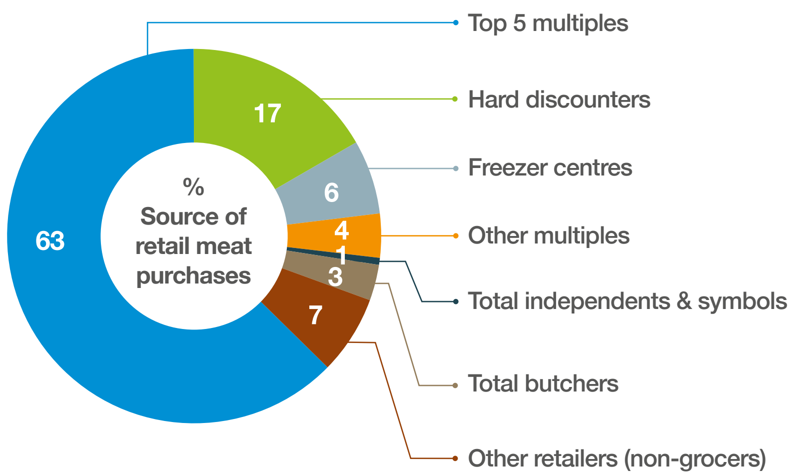


Figure 10.3 Source of retail meat purchases by volume, GB, 2018

Data covers 52 weeks ending 30 December 2018

Source: Kantar Worldpanel

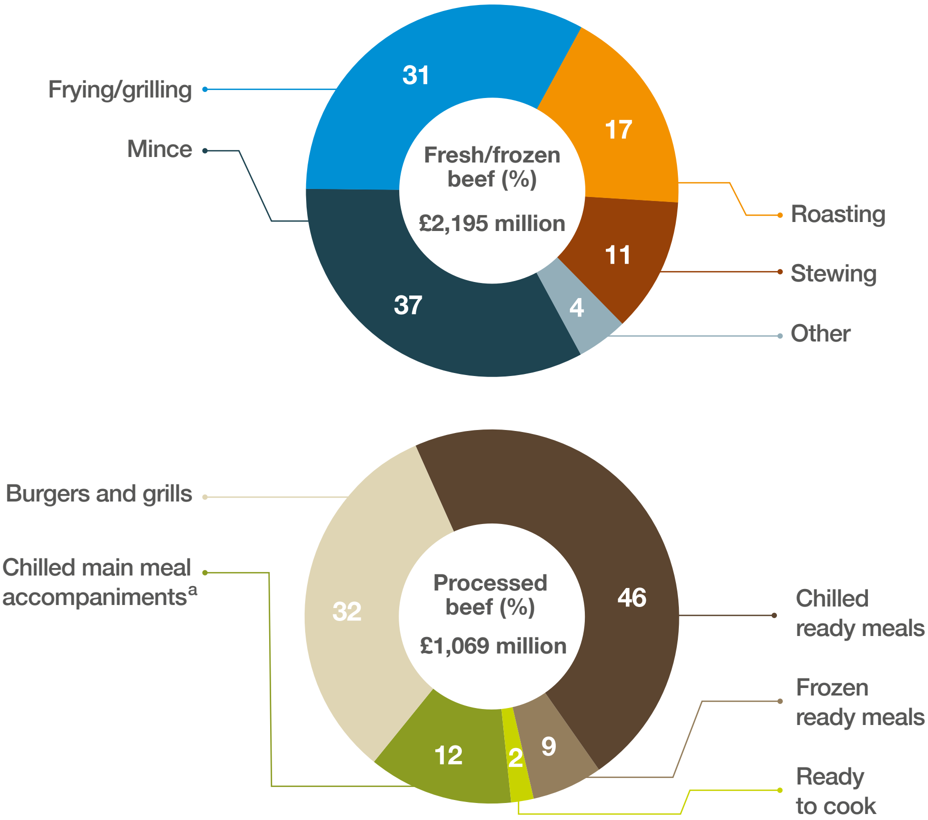


Figure 10.4 Retail expenditure profile for beef, GB, 2018

a = includes single-protein meal solutions
Data covers 52 weeks ending 30 December 2018
Source: Kantar Worldpanel

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Produced for you by:

AHDB
Stoneleigh Park
Kenilworth
Warwickshire
CV8 2TL

T 024 7669 2051
E comms@ahdb.org.uk
W ahdb.org.uk
@AHDB_BeefLamb

If you no longer wish to receive this information, please email us on **comms@ahdb.org.uk**

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