

“ Herd performance indicators, along with estimates on cost of production are key for providing insight into the productivity and efficiency of the suckler herd in Wales. This Market Bulletin takes a look at the BCMS and FBS data in greater detail. ”

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CALVING PERIOD

According to the latest data from the British Cattle Movement Service (BCMS), the **average calving interval** for beef dams in Wales was **419 days for 2023**. This is almost 4 days shorter than the average interval recorded for 2022, and looking at historical trends, this is some 7 days shorter than in 2013. Despite the progress seen over the last decade, there remains to be room for improvement to reach the 365-day target between calvings. Insufficient growth rates or unmanaged fertility within herds may cause longer calving intervals, whereas shorter intervals would in turn improve herd profitability by maximizing the number of calves possible in a dam's lifetime.

The **average age at first calving** can also impact the suckler herd's reproductive efficiency as the calf is the enterprise's primary output. In 2023, the average age at first calving for beef dams in Wales stood at **975 days** (or 32.1 months). This is a vast improvement when compared to 2022 (18 days younger), and when compared to the average age of 1,009 days recorded for 2013. Although there remains to be some room for improvement

Average calving interval for beef dams in Wales, 2023:
419 days



Average age at first calving for beef dams in Wales, 2023:
32 months



to reach the industry target of calving nearer to 24 months (or 730 days), beef herds in Wales have shown significant progress during the last decade. Managing heifers effectively so they calve at a younger age can increase profit and reduce production costs, with evidence suggesting heifers would wean more weight of calf over the course of their productive lifespan.

Reproductive efficiency is fundamental for profitability, regardless of the production system, and improving efficiencies can all support a reduction in the herd GHG emission levels, whilst also improving business profits.

PROFITABILITY

Suckler Beef Production Costs in Wales 2022/23:

p/kg liveweight	Average Performers	Bottom Third	Top Third
Total Costs	229.7	318.8	139.2
Market Returns	204.1	203.1	201.3
% Total Costs Covered by Market Returns	88.9	63.7	144.7

Source: Farm Business Survey

The Farm Business Survey publishes annual **cost of production** figures, which provides insight into the financial performance of beef herds in Wales. For the 2022/23, the data highlights that the top third performing herds had an **overall cost of 139.2p/kg**, and produced more kilograms per cow than the average performing herds at 307kg. The top third performing herds recorded slightly lower costs for both *variable* and *fixed* costs, which then led to an overall difference of 180.0p/kg between the top and bottom third performing herds in terms of total costs. As the market returns were similar for all three categories of performers, this does suggest that the focus should be on managing costs on farm in order to maximize profitability of suckler herds in Wales.

What does this mean for industry?

The main output from a beef suckler herd is the suckled calf, and therefore good cow management is key to optimizing herd fertility in order to produce a healthy suckler calf each year. Improving the reproductive efficiency of the suckler herd would also help to manage on farm costs and overall profitability of the business.



NEW BETWEEN THE LINES REPORT To read more about the current beef market, read the full report, 'Beef Supply – Update and Outlook' on the HCC website here:

<https://meatpromotion.wales/en/news-industry-info/market-analysis>

Monthly Market Round-Up

CATTLE

Prices – week ending 20th April

The average deadweight prices in England and Wales for steers stood at **486.2p/kg**. This was:

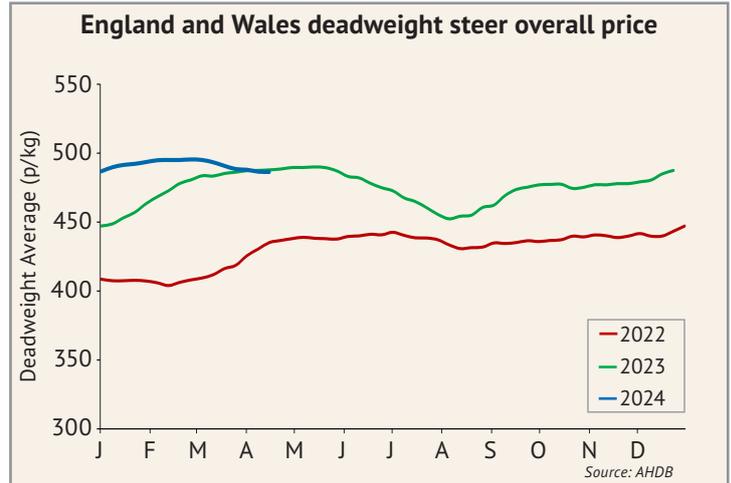
- - 0.2p on the previous week,
- 1.6p below year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 481.8p/kg (+0.1p on the week),
- Young bulls: 470.4p/kg (-1.9p on the week), and
- Cull cows: 355.0p/kg (+1.9p on the week).

Throughput – March 2024

- Total cattle throughput at UK abattoirs = 232,100 head – down 5% on the year.
- Total prime cattle throughput = 173,200 head – down 2% on the year.
 - steers -5%, heifers +0.3%, and young bulls -1%.
- Average prime cattle carcass weights = 345.4kg (similar on the year).
- Adult cattle throughput = 48,800 head – down 8% on the year.



UK Beef & Veal Production
March '24

75,700 tonnes
-4% y-o-y



SHEEP

Prices – week ending 20th April

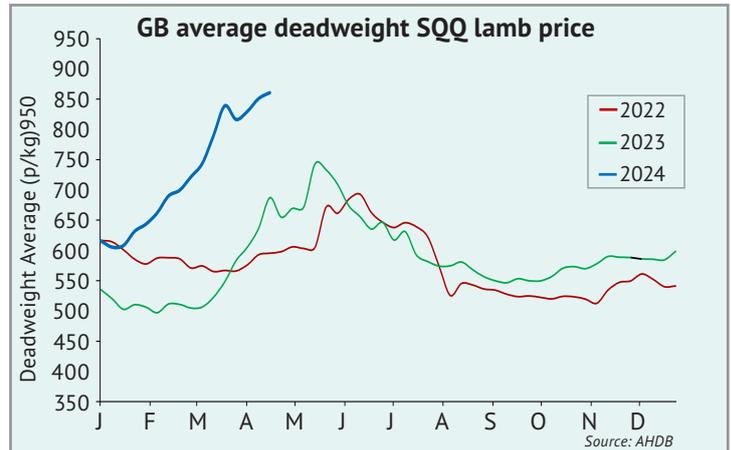
The deadweight lamb price in GB averaged 860.5p/kg. This was:

- + 9.8p on the previous week
- Numbers coming forward reached 25,000 head. This was:
- - 17% on the previous week, and
 - - 31% compared with year-earlier levels.

Note: Due to change in methodology of GB deadweight survey (from 25/11/2023) we recommend caution when making historical comparisons.

Throughput – March 2024

- Total sheep throughput at UK abattoirs = 1.1 million head – down 17% on the year.
- Lamb throughput = 988,000 head – down 16% on the year.
- Average lamb carcass weights = 20.6kg (similar on the year).
- Cull ewe and ram throughput = 112,300 head – down 28% on the year.



UK Sheep Meat Production
March '24

23,600 tonnes
-16% y-o-y



PIGS

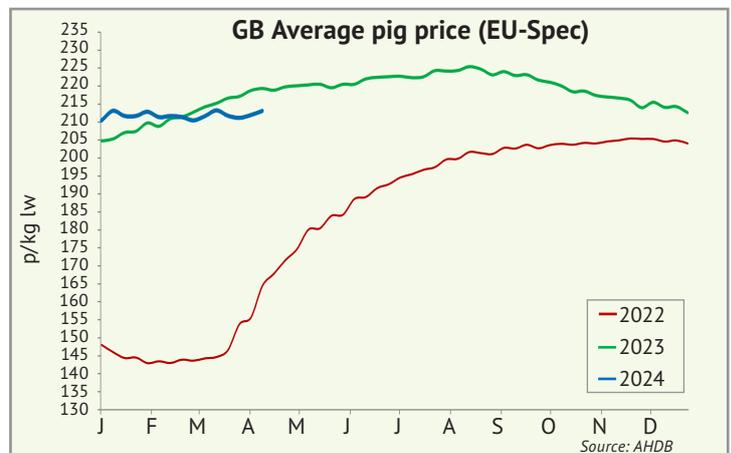
Prices – week ending 13th April

The EU-spec All Pig Price (APP) in GB stood at **213.1p/kg**. This was:

- + 0.8p on the previous week,
- - 6.2p compared with year-earlier levels,
- 45.1p higher than the 5-year average (2018-22 average: 168.0p/kg).

Throughput – March 2024

- Total pig throughput at UK abattoirs = 821,300 head – down 10% on the year.
- Clean pig throughput = 804,800 head – down 10% on the year.
- Average clean pig carcass weights = 90.4kg (+1.4kg on the year)
- Sow and boar throughput = 16,500 head – down 9% on the year.



UK Pork Production
March '24

75,300 tonnes
-9% y-o-y

