



Hybu Cig Cymru
Meat Promotion Wales

Little Book of Meat Facts

Compendium of Welsh Red Meat
and Livestock Industry Statistics 2021



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Hybu Cig Cymru – Meat Promotion Wales (HCC) is the industry led organisation responsible for the development, promotion and marketing of Welsh red meat.

Development within the Industry

HCC undertakes research and development, dissemination of information and training relevant to each part of the supply chain, to ensure the Welsh red meat industry is in a position to improve quality, increase cost-effectiveness and add value to Welsh red meat products across the whole supply chain.

Market Development

HCC is active in many important markets worldwide: developing and strengthening business opportunities for Welsh red meat exporters. At home HCC works with retailers, independents and food service operators, undertaking regular promotional programmes for Protected Geographical Indication (PGI) Welsh Lamb and Welsh Beef.

Communicating

HCC ensures that information regarding developments relating to Welsh red meat are made known to stakeholders and consumers.

For more information on any of the above topics, please visit the website at **meatpromotion.wales** or contact HCC on **01970 625050** or by email at **info@meatpromotion.wales**

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Notes and abbreviations

Where dates are written, for example, as 2020/21, this implies the financial year from April 2020 to March 2021. Volume data is shown in tonnes, carcase weight equivalent, unless otherwise specified.

Kantar data for 2020 is for the 52-week period ending 27 December 2020. The Kantar data was reported at the end of May 2021 and is subject to revision.

Data obtained from both Defra and HMRC (HM Revenue & Customs) for 2020 was reported at the end of May 2021 and is subject to revision.

North East Wales: Denbighshire, Flintshire, Conwy, Wrexham

North West Wales: Isle of Anglesey, Gwynedd

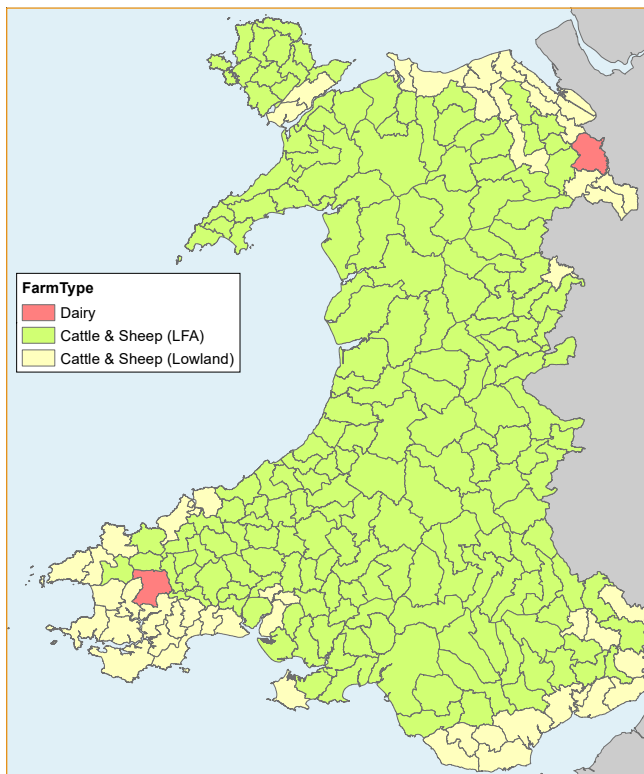
South Wales: Swansea, Neath Port Talbot, Bridgend, Vale of Glamorgan, Cardiff, Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport

Figures in the tables do not always add up to the totals shown because of rounding.

AHDB	Agriculture and Horticulture Development Board	
APP	All Pig Price	
BCMS	British Cattle Movement Service	
DAPP	Deadweight Average Pig Prices	
DARDNI	Department of Agriculture and Rural Development Northern Ireland	
Defra	Department for Environment, Food and Rural Affairs	
EFS	Expenditure and Food Survey	
EU	European Union	
FSA	Food Standards Agency	
GBU	GB Livestock Units	
GVA	Gross Value Added	
Ha	Hectare	
HCC	Meat Promotion Wales	
IAAS	Institute of Auctioneers and Appraisers in Scotland	
LAA	Livestock Auctioneers Association	
LFA	Less Favoured Area	
RPA	Rural Payments Agency	
SQQ	Standard Quality Quotation	- = none
SPP	Standard Pig Price	na= not available

Section 1 – General Information

Figure 1.1 Most common farm types in Wales, by region, June 2020



Source: GI Services Branch, DEPC, Aberystwyth © Crown copyright

Section 1 – General Information

Table 1.1 Human population and land area by Welsh region and by UK country, 2020

	Human population (000 head)	Land area (sq km)
Carmarthenshire	190	2,372
Ceredigion	73	1,790
North East Wales	508	2,910
North West Wales	196	3,262
Pembrokeshire	127	1,619
Powys	133	5,196
South Wales	1,944	3,630
Wales	3,170	20,780
England	56,550	130,281
Scotland	5,466	77,925
Northern Ireland	1,896	13,576
United Kingdom	67,081	242,562

Source: Welsh Government

Table 1.2 Agricultural holdings by size (hectares) by UK country, 2019

	Wales	England	Scotland	Northern Ireland
Number of holdings (000)	37	106	51	25
Total area (000 ha)	1,764	9,206	5,660	1,023
Average area (ha)	48	87	112	41
% of total numbers				
<20 ha	54.1	38.7	62.7	40.0
20-49.9 ha	18.9	19.8	11.8	32.0
50-99.9 ha	13.5	17.0	9.8	16.0
>100 ha	13.5	23.6	17.6	8.0
% of total area on holdings with 100 hectares and over:				
	59.6	74.9	87.9	35.0

Note: England figures for 2020 are currently unavailable, therefore this table can not be updated with UK 2020 data.

Source: Agriculture in the United Kingdom 2020, Defra

Section 1 – General Information

Table 1.3 Welsh holdings by farm type, June 2020

	Holdings (number)	Share of total (%)
Cattle and sheep (LFA)	6,287	15.8
Cattle and sheep (lowland)	1,176	3.0
Dairy	1,469	3.7
Mixed (a)	420	1.1
Cereals	312	0.8
Specialist pigs or poultry	146	0.4
Horticulture	168	0.4
General cropping	71	0.2
Other types (b)	150	0.4
Very small (c)	14,478	36.4
Dormant holdings	15,051	37.9
Total number of holdings	39,728	

(a) Combination of cropping with various types of livestock

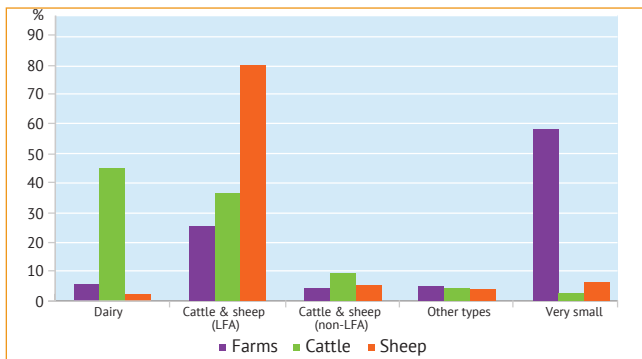
(b) Mainly grass and forage or specialist horses

(c) Holdings with small amounts of agricultural activity are grouped together irrespective of farm type.

Note: Numbers may not total 100% due to rounding.

Source: Welsh Government

Figure 1.2 Distribution of farms, cattle and sheep by farm type 2020



Source: Welsh Government

Section 1 – General Information

Table 1.4 Value of Welsh agricultural output, 2019 (p)

	Value (£ million)	Share of total value %
Milk & milk products	522	32.7
Finished cattle & calves	288	18.0
Finished sheep & lambs	239	15.0
Poultry & eggs	108	6.8
Store cattle & sheep sales	119	7.4
Finished pigs	6	0.4
Total cereal	26	1.6
Horticulture & potatoes	65	4.1
Other products	19	1.2
Capital formation in livestock (a)	72	4.5
Other agricultural activities	134	8.4
Total Wales	1,599	
United Kingdom	27,481	

(a) Investment in buildings, work physically undertaken by the farmer and the value of the physical increase in breeding livestock

(p) Provisional.

Note: Numbers may not total 100% due to rounding.

Source: Welsh Government, *Agriculture in the United Kingdom 2020*, Defra

Section 1 – General Information

Table 1.5 Contribution of agriculture to the regional UK economies, 2020 (p)

	Agricultural gross value added (GVA) at basic prices (£ million)	Total income from farming (£ million)
Wales	548	322
England	6,768	2,550
Scotland	1,445	791
Northern Ireland	674	456
United Kingdom	9,435	4,119

(p) Provisional

Note: England data based on commercial holdings only, and derived from other UK economic data

Source: *Agriculture in the United Kingdom 2020*, Defra

Table 1.6 Farm business income by country and type of farm

(At current prices)	2017/18	2018/19	2019/20
	(£000/farm)		
Wales:			
Dairy	82.5	46.5	50.5
Grazing livestock (LFA)	27.0	19.0	22.5
Grazing livestock (lowland)	24.0	17.0	16.5
England:			
Dairy	118.5	79.5	85.0
Grazing livestock (LFA)	27.0	15.5	23.0
Grazing livestock (lowland)	20.5	12.5	9.5
Specialist pigs	30.0	29.5	37.5
Scotland:			
Dairy	76.5	68.0	51.0
Grazing livestock (LFA)	24.5	16.0	15.5
Northern Ireland:			
Dairy	68.0	58.0	52.0
Grazing livestock (LFA)	17.5	14.5	15.0

Note: Farm typology based on 2013 standard output coefficients for 2017/18 onwards.

Source: *Agriculture in the United Kingdom 2020*, Defra

Section 1 – General Information

Table 1.7 Direct payments to farmers in the UK

	2018	2019	2020 (p)
	(£ million)		
Basic/Single Payment Scheme	2,729	2,766	2,804
Agri-environment schemes	374	365	368
LFA support schemes	72	51	30
Animal disease compensation	28	26	25
Other (a)	12	14	37

(a) Includes one-off payments

(p) Provisional

Source: *Agriculture in the United Kingdom 2020*, Defra

Table 1.8 Principal grants and subsidies in Wales

	2018	2019	2020
	(£ million)		
Basic Payment Scheme	235.6	233.4	240.0
Glastir Advanced	14.2	15.1	11.1
Glastir Entry	17.5	15.7	16.6
Glastir Commons	5.2	5.3	5.3
Glastir Woodland	4.4	2.6	0.9
Glastir Organic	4.0	3.7	3.6
Glastir Small Grants	2.1	2.2	1.1

Note: Payments are made on a continuous basis and as such are always subject to revision.

Source: *Welsh Government*

Section 1 – General Information

Table 1.9 Number and throughputs of all Welsh abattoirs

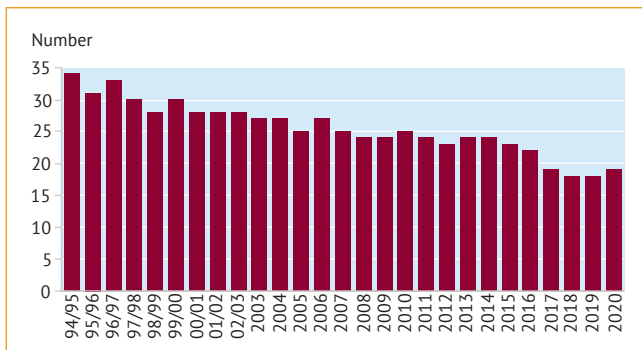
GB Livestock Units*	Abattoirs (number)		Throughputs (%)	
	2019	2020	2019	2020
0-1,000	3	3	0.1	0.1
1,001-10,000	10	10	5.7	5.7
10,001-30,000	1	2	2.1	4.6
30,001-100,000	1	1	10.8	11.2
100,001 and over	3	3	81.3	78.4
Total	18	19		

* GB Livestock Unit = 1 cattle beast = 5 sheep = 2 pigs

Note: Numbers may not total 100%, due to rounding.

Source: HCC

Figure 1.3 Changes in Welsh abattoir numbers*

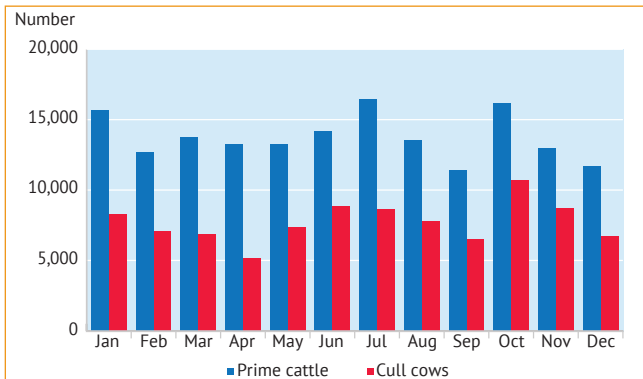


* Figures for 2004-2020 are for calendar years; previous figures relate to year ended March.

Source: HCC

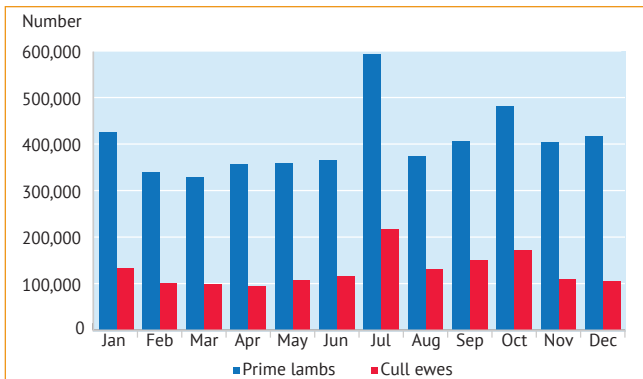
Section 1 – General Information

Figure 1.4 Monthly livestock auction market throughputs, cattle, England and Wales, 2020



Source: AHDB, LAA

Figure 1.5 Monthly livestock auction market throughputs, sheep, England and Wales, 2020



Source: AHDB, LAA

Section 1 – General Information

Table 1.10 Auction markets by size of finished stock throughput in Wales, 2020

GB Livestock Units*	Number of markets	Total marketings (GBU)	Average throughput (GBU)	Share of throughput (%)
1-5,000	6	11,870	1,978	3.6
5,001-10,000	6	37,100	6,183	11.3
10,001-15,000	6	75,363	12,560	22.9
15,001-30,000	2	34,970	17,485	10.6
30,001 and over	4	170,083	42,521	52.6
Total	24	329,386	13,724	100.0

* GB Livestock Unit = 1 cattle beast = 5 sheep = 2 pigs

Source: AHDB, LAA

Table 1.11 Auction market throughputs of finished stock by GB country, 2020

(head)	Wales	England	Scotland	GB
Total prime cattle	8,454	156,373	16,599	181,426
Cull cows	9,432	83,309	26,967	119,708
Total prime sheep	1,183,285	3,657,982	973,193	5,814,460
Cull ewes	374,212	1,152,813	328,419	1,855,444
Clean pigs	0	36,861	0	36,861
Cull sows	0	6,513	0	6,513

Source: AHDB, LAA, IAAS

Section 1 – General Information

Table 1.12 Abattoirs in Wales slaughtering cattle, sheep and pigs, March 2021

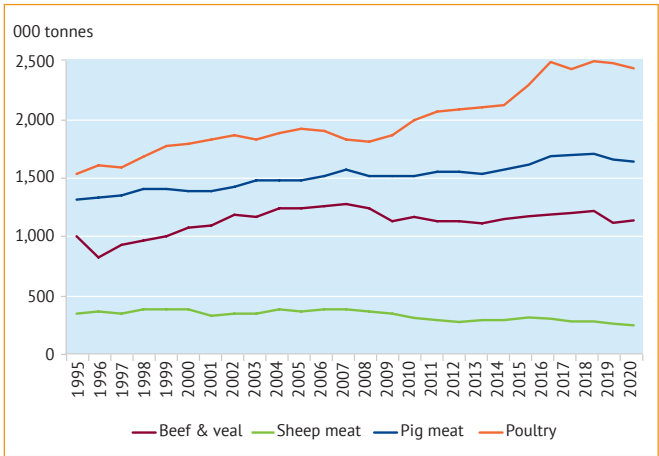
Trading Name	Location	Species Slaughtering		
		Cattle	Sheep	Pigs
Cig Calon Cymru Cyf	Cross Hands	Cattle		
Cig Eryri Snowdonia Meats Cyf	Blaenau Ffestiniog	Cattle	Sheep	
Cig Oen Caron	Tregaron	Cattle	Sheep	Pigs
CJ & AJ Butler Ltd T/A Hugh Phillips Gower Butcher	Swansea	Cattle	Sheep	Pigs
Conwy Valley Meats Ltd	Llanrwst	Cattle	Sheep	
D & J Thomas	Wrexham	Cattle	Sheep	Pigs
D T Havard, Caerphilly abattoir	Caerphilly	Cattle	Sheep	Pigs
Dunbia (Wales)	Llanybydder		Sheep	
E T Jones & Sons & Daughter	Holyhead	Cattle	Sheep	Pigs
Euro Farm Wales	Haverfordwest	Cattle		
Farmers Fresh (Wales) Ltd	Wrexham		Sheep	
G R Evans & Co	Corwen	Cattle	Sheep	Pigs
Jones Brothers	Wrexham	Cattle	Sheep	Pigs
M K (Wales) Ltd	Maesteg	Cattle	Sheep	Pigs
N S James	Raglan		Sheep	Pigs
Randall Parker Foods Ltd	Llanidloes		Sheep	
St Merryn Meats (Kepak Group Ltd)	Merthyr Tydfil	Cattle	Sheep	
W J George Butchers Ltd	Brecon	Cattle	Sheep	Pigs
William Lloyd Williams and Son	Machynlleth	Cattle	Sheep	Pigs

Plants listed in alphabetical order.

Source: HCC

Section 1 – General Information

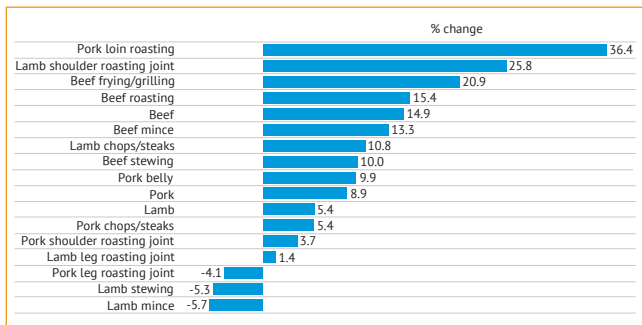
Figure 1.6 Changes in total UK meat consumption



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

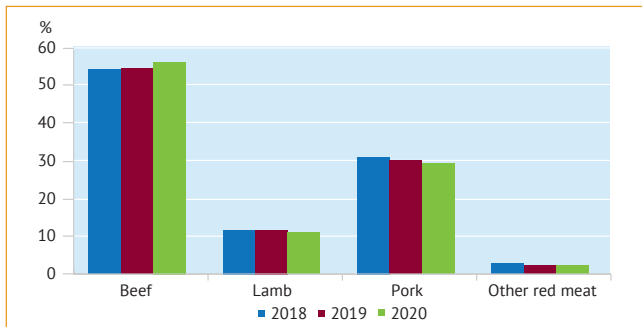
Section 1 – General Information

Figure 1.7 Changes in red meat purchases by product in GB, 2019/20



Source: Kantar

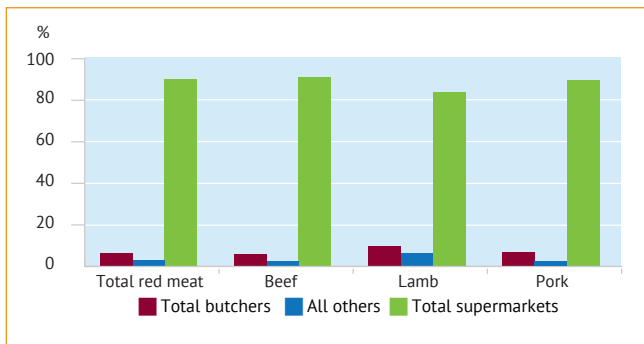
Figure 1.8 Comparison of retail market share by red meat type in GB



Source: Kantar

Section 1 – General Information

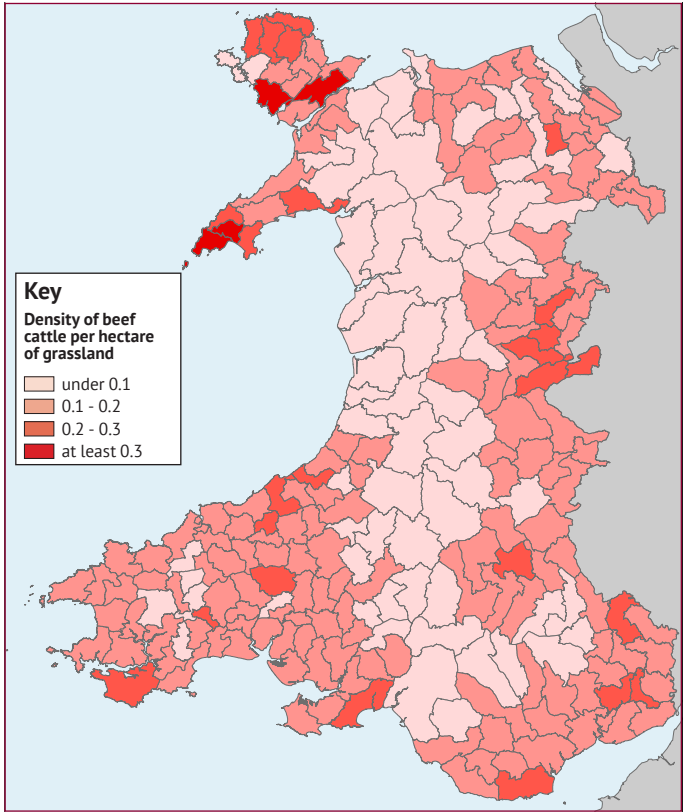
Figure 1.9 Retailer volume share of total red meat trade in GB, 2020



Source: Kantar

Section 2 – Cattle

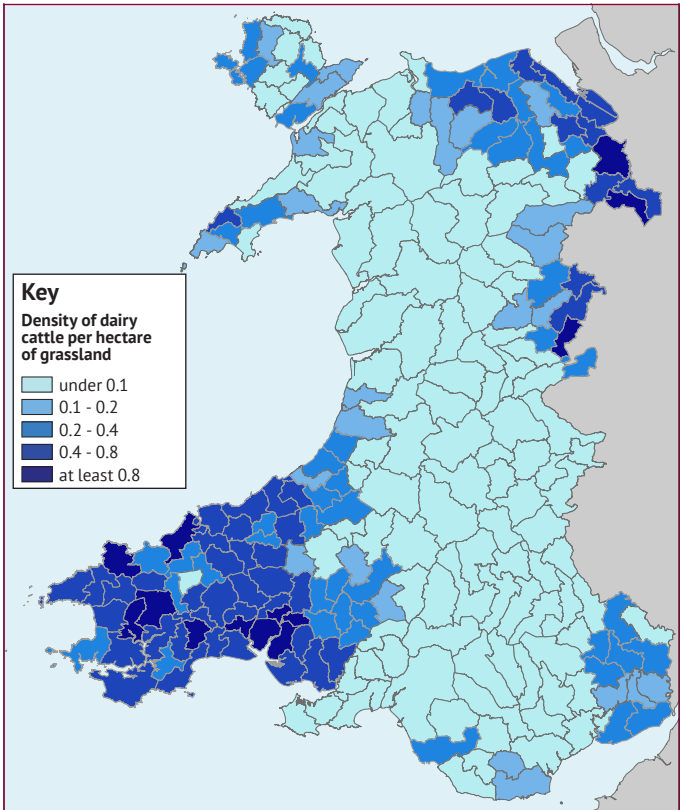
Figure 2.1 Beef cattle density in Wales, June 2019



Source: GI Services Branch, DEPC, Aberystwyth © Crown copyright

Section 2 – Cattle

Figure 2.2 Dairy cattle density in Wales, June 2019



Source: GI Services Branch, DEPC, Aberystwyth © Crown copyright

Section 2 – Cattle

Table 2.1 Welsh cattle numbers by category

(000 head)	June 2018	June 2019	June 2020
Cattle aged 2 years or more	553	541	535
– Female dairy breeds	304	297	294
– Female non-dairy breeds	210	207	204
– Males	39	37	37
Cattle aged 1-2 years	259	258	258
– Female dairy breeds	71	73	71
– Female non-dairy breeds	91	90	92
– Males	96	95	94
Cattle under 1 year	323	321	330
– Female dairy breeds	75	73	76
– Female non-dairy breeds	112	114	117
– Males	136	134	137
Total cattle and calves	1,134	1,120	1,122

Source: Cattle Tracing System

Table 2.2 Changes in number of holdings in Wales with beef and dairy cows

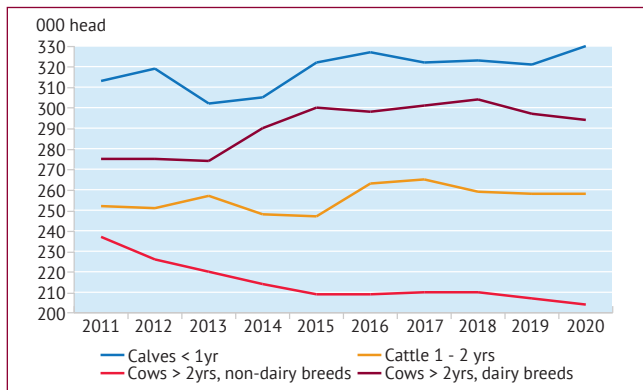
	June 2010	June 2020
Dairy females (a)	221,340	252,249
Number of dairy cow holdings	3,372	2,495
Average dairy herd size (head)	66	101
Beef females (a)	185,818	162,008
Number of beef cow holdings	8,579	7,043
Average beef size herd (head)	22	23
Total number of cattle and calf holdings	11,928	10,030

(a) Females aged 2 years or more that have calved

Source: Cattle Tracing System

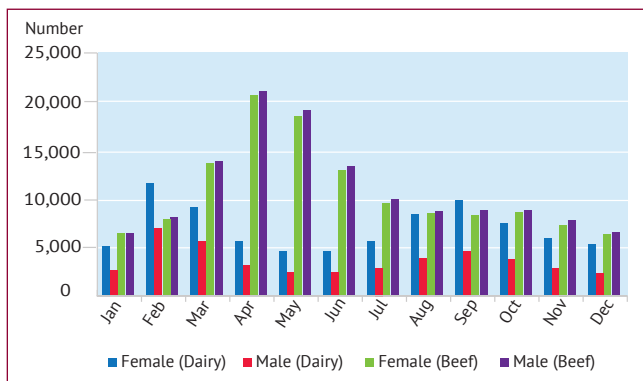
Section 2 – Cattle

Figure 2.3 Changes in cattle numbers in Wales



Source: Cattle Tracing System

Figure 2.4 Calf registrations on holdings in Wales, 2020



Source: Cattle Tracing System

Section 2 – Cattle

Table 2.3 Suckler calf production costs in Wales, 2019/20

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	63	74	51
Veterinary & medicines	14	19	9
Other	17	20	13
Total variable costs	94	113	72
Herd replacement	13	20	11
Labour	12	21	3
Power & machinery	77	108	50
Finance & general farm costs	67	93	39
Rent	8	12	7
Total fixed costs	163	234	99
Total costs	270	367	182

* Data relates to financial year ended March 2020. Based on 30 suckler herds. Top third and bottom third rankings are determined by net margin. Total costs comprise variable, fixed and herd replacement costs.

Source: *Farm Business Survey in Wales*

Section 2 – Cattle

Table 2.4 Throughput of cattle and calves in Welsh abattoirs

	Slaughterings (000 head)	Production (000 tonnes)
2018	139.4	40.0
2019	147.6	42.9
2020	157.7	51.4
2020 by month:		
January	11.1	3.6
February	11.6	3.7
March	12.3	3.9
April	17.8	6.0
May	18.3	6.1
June	11.1	3.7
July	13.5	4.4
August	10.8	3.5
September	14.4	4.5
October	13.1	4.2
November	12.6	4.1
December	11.2	3.6

Source: Defra

Table 2.5 Total cattle slaughterings by UK country, 2020

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
158	1,758	453	2,369	457

Source: Defra

Section 2 – Cattle

Table 2.6 Percentage distribution of prime cattle carcasses in GB by conformation and fat class, 2020

		Fat class Increasing fatness →							
		1	2	3	4L	4H	5L	5H	Overall
Conformation class Improving conformation ↑	E	0.1	0.2	0.1	0.0	0.0	0.0	0.0	0.4
	U+	0.1	1.1	1.8	0.5	0.1	0.0	0.0	3.6
	-U	0.2	1.9	6.1	5.2	0.9	0.0	0.0	14.2
	R	0.2	3.7	18.0	18.8	5.2	0.3	0.0	46.3
	O+	0.2	1.8	9.1	10.3	3.1	0.3	0.0	24.8
	-O	0.1	1.2	4.6	2.5	0.4	0.0	0.0	8.9
	P+	0.1	0.5	0.6	0.2	0.0	0.0	0.0	1.4
	-P	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.3
	Overall	1.2	10.5	40.4	37.5	9.6	0.7	0.1	

Source: AHDB

Table 2.7 Number and throughputs of abattoirs in Wales slaughtering cattle*

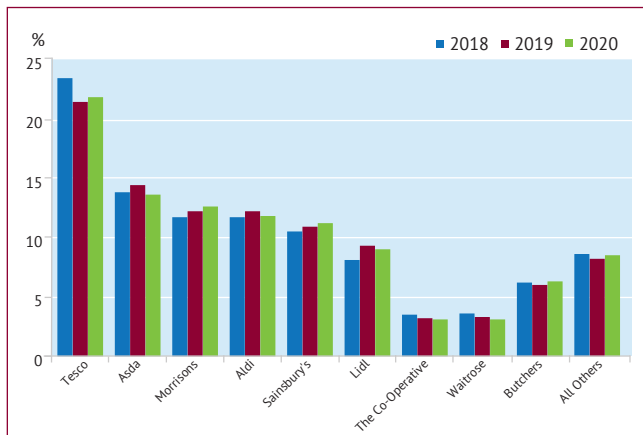
Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2019	2020	2019	2020
0-1,000	8	8	1.9	2.1
1,001-5,000	4	4	6.2	6.3
5,001 and over	3	3	117.5	133.9
Total	15	15	125.6	142.2

* Figures from Welsh Red Meat Levy returns

Source: HCC

Section 2 – Cattle

Figure 2.5 Retailer volume share of beef sales in GB 2018-2020



Source: Kantar

Table 2.8 Changes in beef purchases, expenditure and average price in Wales and GB, 2019/20

	Beef purchases (tonnes)	Beef purchases (% change)	Beef expenditure (£ million)	Beef expenditure (% change)	Beef average price (£/kg)	Beef average price (% change)
Wales	16,508	19.0	127.5	22.1	7.7	2.6
GB	321,704	15.1	2,503.4	15.9	7.8	0.7

Source: Kantar

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Table 2.9 Volume and value of UK beef imports

	Fresh/frozen beef and veal		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	241.3	953.1	24.5	14.1
2014	254.8	981.9	19.3	14.8
2015	269.7	1,032.6	16.8	16.8
2016	263.6	1,016.1	13.2	19.0
2017	274.7	1,073.9	9.1	15.7
2018	290.0	1,168.4	18.9	21.7
2019	251.0	991.7	20.2	17.9
2020	246.0	976.1	16.9	17.4

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Table 2.10 Volume and value of UK beef exports

	Fresh/frozen beef and veal		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	105.3	372.9	33.1	41.0
2014	112.3	374.9	44.2	62.8
2015	100.5	342.2	47.7	60.8
2016	110.4	369.3	42.2	52.8
2017	105.6	405.1	40.1	56.5
2018	110.5	435.1	38.4	59.3
2019	135.8	464.2	48.7	70.8
2020	117.1	384.1	49.3	69.1

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Section 2 – Cattle

Table 2.11 UK beef imports

		2018	2019	2020
		(000 tonnes, product weight)		
Total beef and veal		290.0	251.0	246.0
Of which from:	Irish Republic	210.5	192.1	194.1
	Poland	17.2	15.3	15.2
	Netherlands	19.3	17.0	15.0
	Germany	8.9	5.0	5.4
	Spain	2.3	2.1	2.7
	Belgium	3.0	2.6	2.6
	Italy	4.5	2.7	2.2
	Portugal	0.8	0.4	1.5
	Brazil	3.8	3.0	1.4
	Uruguay	2.9	2.6	1.3

Source: HM Revenue & Customs (HMRC)

Section 2 – Cattle

Table 2.12 UK beef exports

		2018	2019	2020
		(000 tonnes, product weight)		
Total beef and veal		110.5	135.8	117.1
Of which to:	Irish Republic	36.4	40.6	38.7
	Netherlands	27.7	34.9	22.6
	Hong Kong	7.2	11.0	12.5
	France	9.2	11.6	9.8
	Italy	5.4	6.2	4.1
	Philippines	0.9	3.4	3.5
	Belgium	3.8	3.6	2.7

Source: HM Revenue & Customs (HMRC)

Table 2.13 UK monthly beef trade, 2020

	UK beef imports	UK beef exports
	(000 tonnes, product weight)	
January	19.4	11.4
February	19.2	10.1
March	23.9	12.4
April	18.4	8.5
May	16.7	8.9
June	20.0	9.4
July	18.2	8.8
August	19.7	8.8
September	22.1	9.0
October	21.5	9.0
November	20.2	9.6
December	26.2	11.1

Source: HM Revenue & Customs (HMRC)

Section 2 – Cattle

Table 2.14 Deadweight cattle prices in England and Wales*

	R4L steers	R4L young bulls	R4L heifers	-04L cows
	(pence per kilogram deadweight)			
2018	372.7	352.5	371.2	263.2
2019	344.8	325.3	343.5	241.7
2020	359.7	340.3	358.5	255.1
2020 by month:				
January	339.2	316.2	338.8	240.6
February	342.4	317.5	341.6	250.4
March	345.0	320.7	343.1	252.7
April	337.0	317.7	334.1	233.0
May	340.4	330.0	339.3	251.3
June	362.6	351.1	363.6	271.4
July	369.3	352.7	367.9	274.6
August	379.2	361.0	377.8	282.1
September	377.4	355.7	376.2	265.5
October	376.6	352.4	374.0	259.6
November	380.9	361.0	379.0	244.3
December	378.9	356.9	376.5	243.0

* Prices collected from a sample of abattoirs slaughtering more than 20,000 cattle annually.

Source: AHDB

Section 2 – Cattle

Table 2.15 Liveweight cattle prices in England and Wales*

	Steers	Young bulls	Heifers	Cull cows
	(pence per kilogram liveweight)			
2018	190.2	184.3	203.1	112.7
2019	178.5	171.2	193.0	105.0
2020	191.3	185.6	202.8	115.0
2020 by month:				
January	181.3	176.2	194.0	108.9
February	183.1	174.9	193.4	114.3
March	184.8	178.2	194.2	113.7
April	180.2	178.1	191.8	109.2
May	185.2	177.4	194.7	119.6
June	189.7	180.9	200.5	123.0
July	195.7	187.7	207.4	125.5
August	198.8	193.7	208.2	124.6
September	200.4	196.5	212.8	115.1
October	194.2	191.8	208.9	110.3
November	197.5	193.5	212.4	104.6
December	208.3	198.3	220.3	109.3

* Prices collected from English and Welsh auction markets.

Source: AHDB, LAA

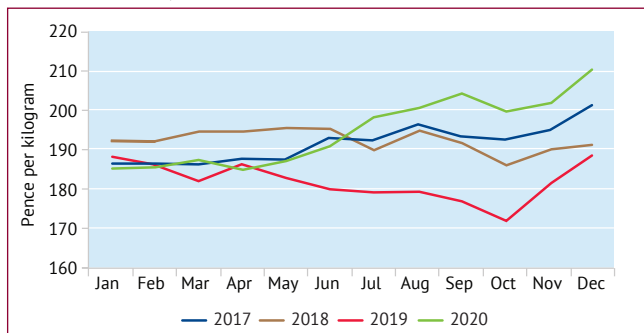
Table 2.16 Rearing calf prices in England and Wales

(£/head)	Holstein / Friesian (X)	Hereford (X)		Continental (X)	
	Bulls	Bulls	Heifers	Bulls	Heifers
2018	39.0	140.5	95.3	207.8	158.1
2019	30.1	108.7	68.8	172.4	125.5
2020	37.4	133.0	89.6	203.4	158.2

Source: AHDB, LAA

Section 2 – Cattle

Figure 2.6 Seasonality of prime cattle liveweight prices, England and Wales, 2017-2020



Source: AHDB, LAA

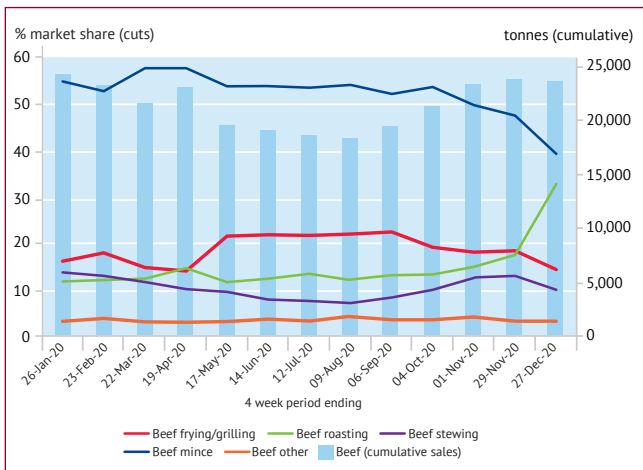
Table 2.17 Store cattle prices in England and Wales

(£/head)	Yearlings		18 months		2 years	
	Steers	Heifers	Steers	Heifers	Steers	Heifers
Friesian/Holstein X						
2018	380.0	341.6	555.9	482.0	697.1	602.8
2019	356.8	332.5	533.9	449.2	663.7	593.0
2020	438.0	417.0	609.7	549.4	751.3	694.3
Hereford X						
2018	635.2	479.8	746.5	603.9	894.2	741.0
2019	585.2	435.9	708.4	568.8	849.2	698.5
2020	624.0	479.0	771.9	630.5	892.9	761.6
Continental X						
2018	862.1	746.2	929.9	824.0	1,031.0	921.6
2019	812.7	699.9	883.0	784.3	969.1	869.6
2020	830.3	730.7	943.0	853.1	1,013.2	925.2

Source: AHDB, LAA

Section 2 – Cattle

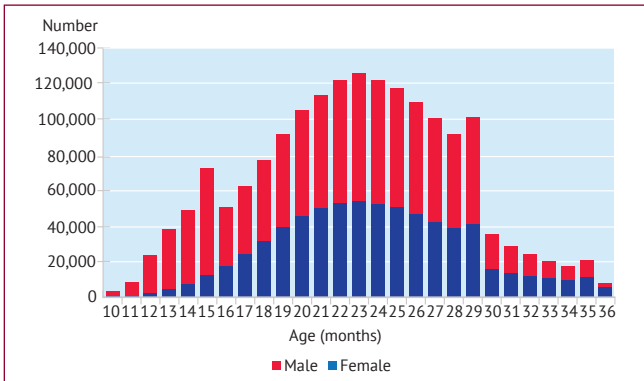
Figure 2.7 Seasonality of beef sales at GB retail by cut, 2020



Source: Kantar

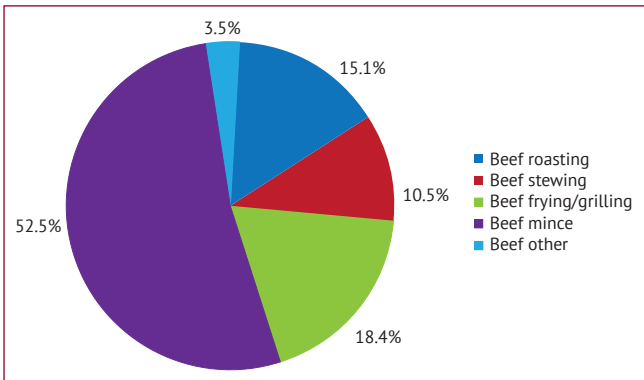
Section 2 – Cattle

Figure 2.8 Age profile of male and female prime cattle at GB abattoirs, 2020



Source: Cattle Tracing System

Figure 2.9 Retail beef cuts sold in GB by volume, 2020



Source: Kantar

Section 2 – Cattle

Table 2.18 Retail prices for selected beef cuts in Great Britain*

	Roasting Joint	Sirloin Steak	Fillet Steak	Standard Mince
	(pence per kilogram)			
2020 by month:				
January	906.0	1,684.0	3,000.0	407.0
February	913.0	1,693.0	2,985.0	409.0
March	945.0	1,666.0	3,064.0	409.0
April	909.0	1,685.0	3,019.0	410.0
May	880.0	1,603.0	2,857.0	404.0
June	1,022.0	1,670.0	2,992.0	396.0
July	989.0	1,696.0	2,890.0	400.0
August	978.0	1,627.0	2,887.0	416.0
September	899.0	1,607.0	2,801.0	416.0
October	991.0	1,601.0	2,861.0	419.0
November	968.0	1,597.0	2,861.0	419.0
December	687.0	1,597.0	2,861.0	419.0

* Prices obtained from a weekly survey of a number of supermarkets' websites each week, with the prices quoted above for the last week of each month.

Source: AHDB

Table 2.19 UK beef and veal balance sheet*

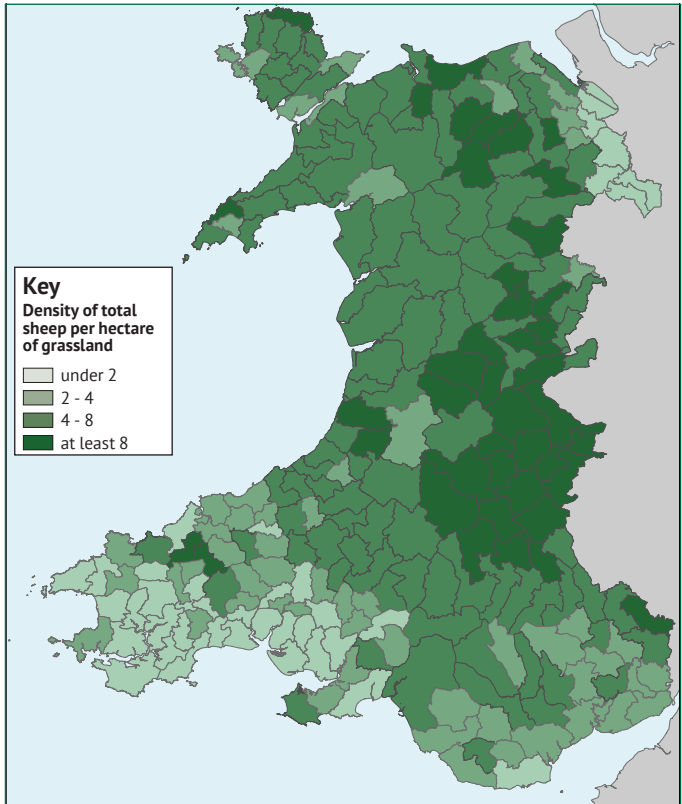
	2018	2019	2020
	(000 tonnes)		
Production	898.4	914.5	932.1
Imports	453.7	381.7	376.9
Exports	147.1	174.3	152.7
Total consumption	1,205.0	1,121.9	1,156.2
Self sufficiency (%)	74.6	81.5	80.6

* Total supplies of meat available for consumption. All weights are carcase weight equivalent.

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

Section 3 – Sheep

Figure 3.1 Sheep and lamb density in Wales, June 2019



Source: GI Services Branch, DEPC, Aberystwyth © Crown copyright

Section 3 – Sheep

Table 3.1 Sheep numbers in Wales by category

(000 head)	June 2018	June 2019	June 2020
Total sheep, over one year	4,946	4,893	4,481
Lambs under one year	4,585	4,640	4,508
Total sheep and lambs	9,531	9,534	8,989

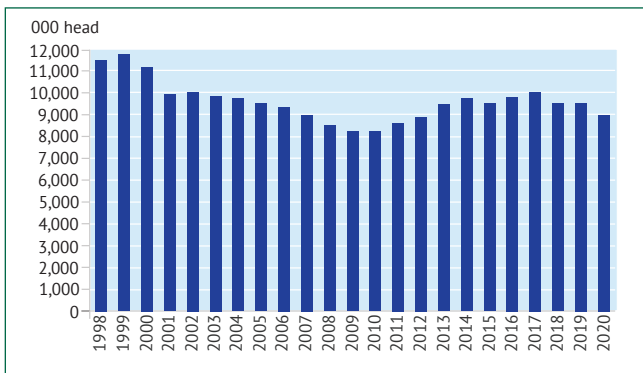
Source: Welsh Government

Table 3.2 Changes in number of holdings in Wales with sheep

	June 2010	June 2020
Number of sheep and lamb holdings	14,398	14,100
Average flock size (head)	573	638

Source: Welsh Government

Figure 3.2 Changes in total sheep and lamb numbers in Wales



Source: Welsh Government

Section 3 – Sheep

Table 3.3 Lamb production costs in Wales, 2019/20*

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	67	82	53
Veterinary & medicines	12	14	9
Other	19	22	17
Total variable costs	98	118	79
Flock replacement	21	23	19
Paid Labour	6	10	3
Power & machinery	46	63	32
Finance & general farm costs	40	53	27
Rent	8	13	7
Total fixed costs	100	139	69
Total costs	218	279	167

* Data relates to financial year ended March 2020. Based on 114 farms. Top third and bottom third rankings are determined by net margin. Total costs comprise variable, fixed and flock replacement costs.

Source: Farm Business Survey in Wales

Section 3 – Sheep

Table 3.4 Throughput of total sheep in Welsh abattoirs

	Slaughterings (000 head)	Production (000 tonnes)
2018	3,282.7	60.8
2019	3,303.2	63.4
2020	3,220.0	62.0
2020 by month:		
January	246.0	4.8
February	182.9	3.6
March	183.9	3.6
April	249.4	5.1
May	279.3	5.5
June	197.0	3.8
July	318.4	6.0
August	280.0	5.3
September	299.4	5.6
October	310.6	5.9
November	384.0	7.4
December	289.2	5.4

Source: Defra

Table 3.5 Total sheep slaughterings by UK country, 2020

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
3,220	9,584	1,228	14,032	462

Source: Defra

Section 3 – Sheep

Table 3.6 Percentage distribution of lamb carcasses in Wales by conformation and fat class, 2020

		Fat class Increasing fatness							
		→							
Conformation class Improving conformation ↑		1	2	3L	3H	4L	4H	5	Overall
	E	0.0	1.2	3.9	1.5	0.4	0.0	0.0	7.1
	U	0.1	4.3	13.7	5.9	1.6	0.2	0.0	25.8
	R	0.5	12.1	24.2	12.6	3.3	0.4	0.1	53.3
	O	0.6	4.8	5.8	2.2	0.4	0.0	0.0	13.8
	P	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Overall	1.3	22.5	47.6	22.2	5.6	0.7	0.2	

Source: AHDB

Table 3.7 Number and throughputs of abattoirs in Wales slaughtering sheep*

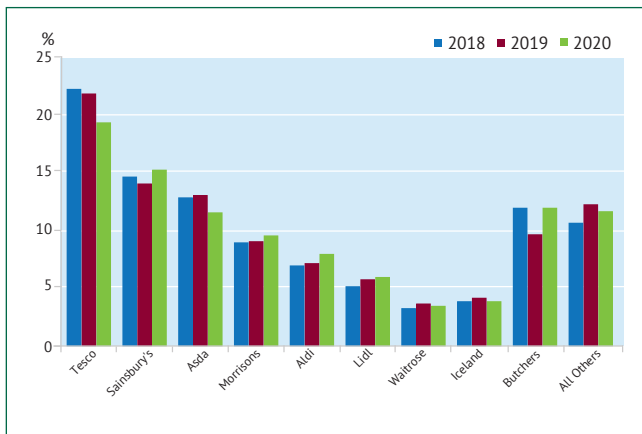
Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2019	2020	2019	2020
0-5,000	6	6	10.8	11.4
5,001-20,000	6	7	81.8	99.6
20,001-50,000	1	0	27.6	0.0
50,001 and over	4	4	3,157.2	2,879.3
Total	17	17	3,277.3	2,990.3

* Figures from Welsh Red Meat Levy returns

Source: HCC

Section 3 – Sheep

Figure 3.3 Retailer volume shares of lamb sales in GB, 2018-2020



Source: Kantar

Table 3.8 Changes in lamb purchases, expenditure and average price in Wales and GB, 2019/20

	Lamb purchases (tonnes)	Lamb purchases (% change)	Lamb expenditure (£ million)	Lamb expenditure (% change)	Lamb average price (£/kg)	Lamb average price (% change)
Wales	3,395	3.1	33.0	10.2	9.7	6.8
GB	65,221	5.4	652.1	10.8	10.0	5.1

Source: Kantar

Section 3 – Sheep

Table 3.9 Volume and value of UK sheep meat imports

	Fresh/frozen sheep meat		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	98.3	382.9	10.0	13.6
2014	92.5	407.4	9.8	14.1
2015	92.8	392.0	7.7	13.3
2016	89.6	345.1	8.5	16.0
2017	80.0	369.3	7.6	11.0
2018	77.6	373.3	8.8	14.2
2019	62.7	311.6	8.3	15.8
2020	58.5	314.5	6.0	13.7

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Table 3.10 Volume and value of UK sheep meat exports

	Fresh/frozen sheep meat		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	103.7	383.7	3.0	4.1
2014	102.0	380.0	3.0	4.4
2015	79.4	302.1	4.1	6.4
2016	78.1	327.1	6.5	9.1
2017	89.8	385.1	5.7	9.4
2018	83.2	367.6	5.2	8.9
2019	95.1	399.4	5.8	8.7
2020	88.2	437.9	5.4	9.0

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Section 3 – Sheep

Table 3.11 UK sheep meat imports

		2018	2019	2020
		(000 tonnes, product weight)		
Total sheep meat		77.6	62.7	58.5
Of which from:	New Zealand	50.9	39.0	38.1
	Australia	9.7	7.1	8.5
	Irish Republic	7.4	9.3	6.2
	Netherlands	3.4	2.5	1.9
	Spain	1.4	1.6	0.9

Source: HM Revenue & Customs (HMRC)

Table 3.12 UK sheep meat exports

		2018	2019	2020
		(000 tonnes, product weight)		
Total sheep meat		83.2	95.0	88.2
Of which to:	France	35.6	37.4	33.5
	Germany	15.2	19.4	15.5
	Irish Republic	9.3	10.9	11.6
	Belgium	7.7	8.5	7.6
	Italy	3.4	4.2	5.3
	Netherlands	5.1	6.4	3.6
	Hong Kong	2.7	1.8	2.7

Source: HM Revenue & Customs (HMRC)

Section 3 – Sheep

Table 3.13 UK monthly sheep meat trade, 2020

	UK sheep meat imports	UK sheep meat exports
	(000 tonnes, product weight)	
January	4.4	7.0
February	3.2	6.2
March	9.4	5.5
April	8.3	6.4
May	4.6	6.3
June	4.5	7.3
July	3.9	8.5
August	3.4	7.8
September	4.0	7.6
October	3.5	8.0
November	4.3	7.3
December	5.1	10.2

Source: HM Revenue & Customs (HMRC)

Section 3 – Sheep

Table 3.14 Deadweight sheep prices in GB*

	Standard Quality Quotation (SQQ)	
	R3L	All grades
	(pence per kilogram deadweight)	
2018	445.1	444.1
2019	415.6	415.8
2020	474.8	475.1
2020 by month:		
January	459.7	457.7
February	522.8	520.4
March	538.3	535.2
April	460.5	458.7
May	510.7	509.7
June	479.3	480.6
July	480.6	481.7
August	460.5	461.2
September	461.7	462.2
October	442.6	441.5
November	462.9	461.8
December	480.8	478.9

* Prices collected from a sample of GB abattoirs. Standard Quality Quotation includes animals weighing 12-21.5kg dw. Old season prices are recorded until the third Monday in May, and new season prices for the remainder of the year.

Source: AHDB

Section 3 – Sheep

Table 3.15 Liveweight sheep prices in Wales*

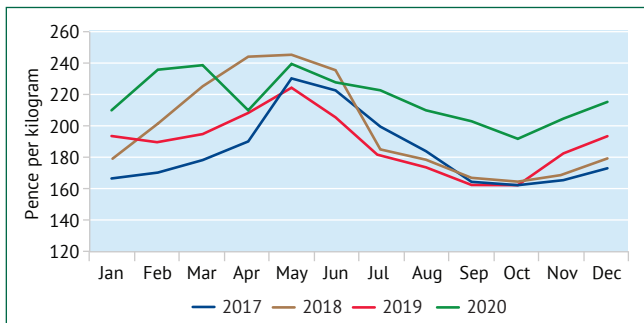
	SQQ Sheep (pence per kilogram liveweight)	Ewes (£ per head)
2018	193.0	51.8
2019	187.5	54.4
2020	215.5	62.9
2020 by month:		
January	209.5	69.1
February	234.3	71.7
March	240.7	85.2
April	211.9	70.4
May	240.6	67.1
June	227.1	61.2
July	222.5	58.8
August	209.2	55.7
September	203.4	54.4
October	193.7	53.1
November	207.3	59.4
December	214.2	65.5

* Prices collected from Welsh auction markets. Standard Quality Quotation includes animals weighing 25.5-45.5 kg lw. Combined prices were reported until third Monday in May. New season prices reported for the remainder of the year.

Source: AHDB, LAA

Section 3 – Sheep

Figure 3.4 Seasonality of lamb liveweight prices, Wales, 2017-2020



Source AHDB, LAA

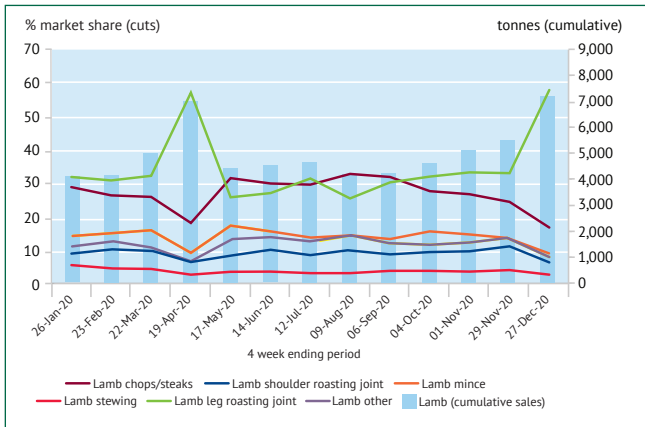
Table 3.16 Store sheep prices in England and Wales

(£/head)	Old season lambs	New season lambs
2018	63.1	54.7
2019	62.9	56.4
2020	72.8	68.0

Source AHDB, LAA

Section 3 – Sheep

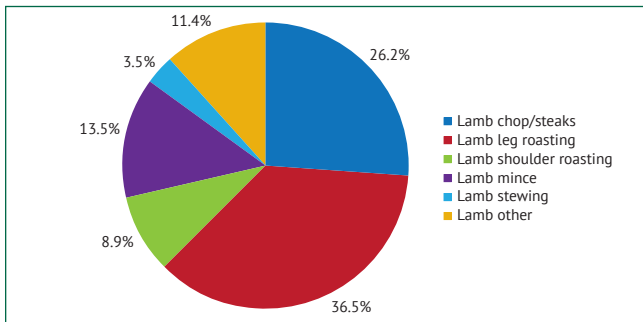
Figure 3.5 Seasonality of lamb sales at GB retail by cut, 2020



Source: Kantar

Section 3 – Sheep

Figure 3.6 Retail lamb cuts sold in GB by volume, 2020



Source: Kantar

Figure 3.7 Percentage of lambs meeting target specification by weight range in Wales, 2020

Old season lambs			New season lambs	
8.5	3.1	<12kg	12.8	1.3
88.5			86.0	
33.1	5.4	12-15.9kg	38.0	9.6
61.5			52.4	
56.4	20.7	16-19.9kg	68.7	20.1
22.9			11.2	
54.7	39.4	20+kg	59.2	38.6
5.9			2.2	
Overall				
60.1		26.1		
13.8				

Target sector – E, U, or R conformation. 1, 2 or 3L fatness
 Too fat – 3H or fatter but of adequate conformation
 Poor conformation – O conformation or worse

Source: AHDB

Section 3 – Sheep

Table 3.17 Retail prices for selected lamb cuts in Great Britain*

	Whole leg	Shoulder (bone-in)	Chops	Standard Diced
	(pence per kilogram)			
2020 by month:				
January	1,016.0	762.0	1,236.0	815.0
February	997.0	782.0	1,296.0	803.0
March	966.0	782.0	1,296.0	796.0
April	1,069.0	751.0	1,271.0	800.0
May	997.0	765.0	1,271.0	799.0
June	1,069.0	782.0	1,296.0	820.0
July	1,069.0	775.0	1,221.0	789.0
August	1,069.0	785.0	1,213.0	840.0
September	973.0	799.0	1,178.0	810.0
October	1,018.0	790.0	1,205.0	796.0
November	932.0	774.0	1,235.0	819.0
December	719.0	799.0	1,205.0	798.0

* Prices obtained from a weekly survey of a number of supermarkets' websites each week, with the prices quoted above for the last week of each month.

Source: AHDB

Table 3.18 UK sheep meat balance sheet*

	2018	2019	2020
	(000 tonnes)		
Production	289.0	307.5	296.1
Imports	92.1	76.0	69.5
Exports	87.4	98.6	91.9
Total consumption	293.7	284.8	273.7
Self sufficiency (%)	98.4	108.0	108.2

* Total supplies of meat available for consumption. All weights are carcase weight equivalent.

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

Section 4 – Pigs

Table 4.1 Pig numbers in Wales by category

(000 head)	2018	2019	2020
Breeding pigs	3.4	3.3	3.0
Fattening pigs	19.8	21.1	25.5
Total pigs	23.2	24.4	28.4

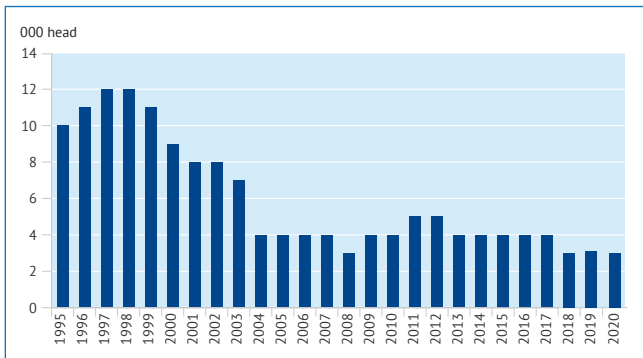
Source: Welsh Government

Table 4.2 Changes in number of holdings in Wales with pigs

	June 2010	June 2020
Number of pig holdings	1,187	1,339
Average herd size (head)	23	21

Source: Welsh Government

Figure 4.1 Changes in breeding pig numbers in Wales



Source: Welsh Government

Section 4 – Pigs

Table 4.3 Throughput of pigs in Welsh abattoirs

	Slaughterings (000 head)	Production (000 tonnes)
2018	28.5	2.3
2019	28.4	2.4
2020	27.9	2.4
2020 by month:		
January	1.8	0.2
February	2.2	0.2
March	2.4	0.2
April	1.9	0.2
May	2.3	0.2
June	2.3	0.2
July	2.4	0.2
August	2.5	0.2
September	2.4	0.2
October	2.5	0.2
November	2.4	0.2
December	2.8	0.2

Source: Defra

Table 4.4 Total pig slaughterings by UK country, 2020

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
28	8,884	371	9,283	1,882

Source: Defra

Section 4 – Pigs

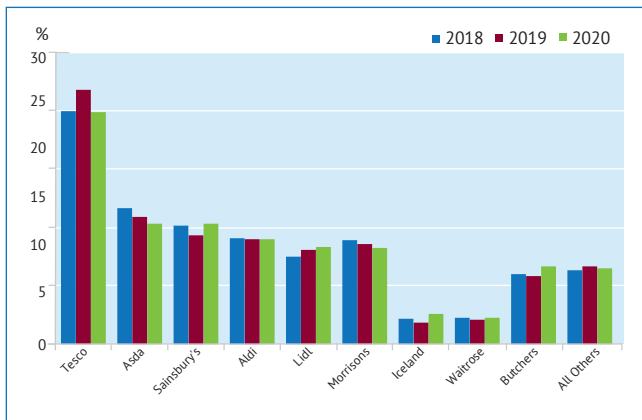
Table 4.5 Numbers and throughputs of abattoirs in Wales slaughtering pigs*

Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2019	2020	2019	2020
0-1,000	6	5	2.8	1.8
1,001 and over	5	6	25.6	25.7
Total	11	11	28.4	27.5

* Figures from Welsh Red Meat Levy returns

Source: HCC

Figure 4.2 Retailer volume shares of pork sales in GB, 2018-2020



Source: Kantar

Section 4 – Pigs

Table 4.6 Changes in pork purchases, expenditure and average price in Wales and GB, 2019/20

	Pork purchases (tonnes)	Pork purchases (% change)	Pork expenditure (£ million)	Pork expenditure (% change)	Pork average price (£/kg)	Pork average price (% change)
Wales	8,962	0.1	44.4	7.0	5.0	6.9
GB	169,480	8.9	844.0	15.8	5.0	6.4

Source: Kantar

Table 4.7 Volume and value of UK pig meat imports

	Fresh/frozen		Processed*		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	351.8	739.8	490.2	1,454.4	14.6	13.7
2014	358.1	699.4	504.4	1,443.8	11.0	11.2
2015	371.8	613.4	514.0	1,343.2	12.4	11.3
2016	439.9	778.2	515.1	1,444.0	16.0	14.3
2017	467.0	943.9	512.6	na	18.1	17.8
2018	457.8	854.4	511.3	na	15.5	15.6
2019	447.9	951.1	451.6	na	17.1	18.4
2020	384.2	881.8	429.9	na	18.2	19.3

* Includes bacon, sausage, hams and canned pig meat.

Source: HM Revenue & Customs (HMRC)

Section 4 – Pigs

Table 4.8 Volume and value of UK pig meat exports

	Fresh/frozen		Processed*		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2013	180.7	218.1	36.4	85.3	41.6	26.1
2014	181.7	209.2	38.3	90.8	45.1	35.0
2015	187.1	197.4	38.3	85.3	58.9	38.5
2016	206.1	252.3	35.4	82.0	77.0	64.4
2017	216.0	293.6	37.2	na	81.5	79.7
2018	217.8	291.8	40.3	na	88.4	79.1
2019	244.5	391.8	39.7	na	94.2	93.0
2020	259.4	421.7	34.2	na	106.4	121.7

* Includes bacon, sausage, hams and canned pig meat.

Source: HM Revenue & Customs (HMRC)

Table 4.9 UK pig meat imports

		2018	2019	2020
		(000 tonnes, product weight)		
Total pork		457.8	447.9	384.3
Of which from:	Denmark	152.5	133.9	122.7
	Germany	95.3	97.7	98.9
	Irish Republic	43.6	46.0	33.7
	Netherlands	47.3	45.4	30.5
	Spain	38.9	38.9	28.6
	Belgium	35.7	33.4	23.5
Bacon and ham		215.0	193.2	169.5
Of which from:	Netherlands	102.4	92.9	84.7
	Denmark	55.2	53.0	49.0

Source: HM Revenue & Customs (HMRC)

Section 4 – Pigs

Table 4.10 UK pig meat exports

		2018	2019	2020
		(000 tonnes, product weight)		
Total pork		217.8	244.5	259.4
Of which to:	China	40.7	81.4	121.0
	Irish Republic	34.1	34.1	27.6
	Germany	33.6	34.1	33.9
	Netherlands	17.5	27.7	20.3
	Denmark	25.0	12.4	10.4
	United States	11.0	9.8	6.2
	Bacon and ham	21.4	19.1	13.6
Of which to:	Irish Republic	16.1	12.6	11.0

Source: HM Revenue & Customs (HMRC)

Table 4.11 UK monthly pork trade, 2020

	UK pork imports	UK pork exports
	(000 tonnes, product weight)	
January	35.4	20.5
February	31.6	18.5
March	34.3	21.6
April	26.8	20.6
May	28.8	22.0
June	31.0	21.1
July	27.5	24.8
August	29.0	21.3
September	33.9	22.6
October	35.4	24.8
November	35.9	19.3
December	34.7	22.3

Source: HM Revenue & Customs (HMRC)

Section 4 – Pigs

Table 4.12 Deadweight pig prices in GB

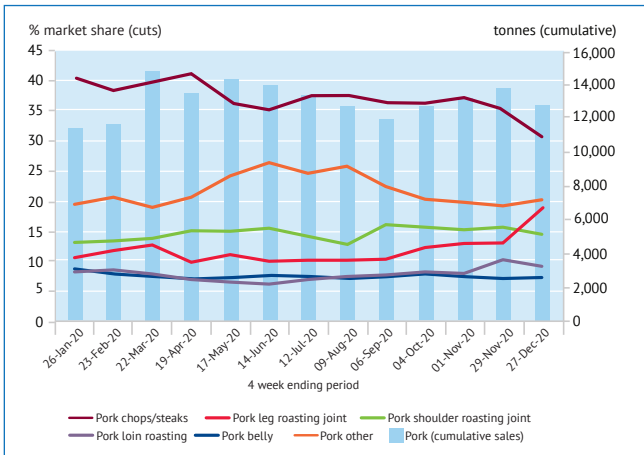
	SPP (EU Spec)	APP (EU Spec)
	(pence per kilogram deadweight)	
2018	146.8	150.0
2019	148.4	151.9
2020	161.0	164.1
2020 by month:		
January	162.5	164.3
February	162.7	164.8
March	163.2	165.5
April	163.9	166.6
May	164.4	167.3
June	164.8	167.4
July	165.3	168.3
August	163.1	166.1
September	160.4	164.1
October	157.3	161.5
November	153.8	158.2
December	149.3	154.0

EU specification excludes flare fat, kidney and diaphragm, the UK specification includes these parts.

Source: AHDB

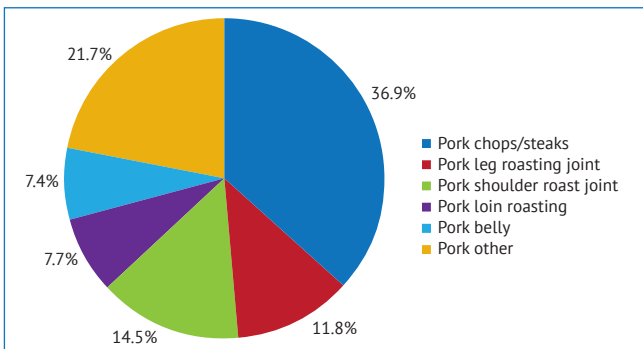
Section 4 – Pigs

Figure 4.3 Seasonality of pork sales at GB retail by cut, 2020



Source: Kantar

Figure 4.4 Retail pork cuts sold in GB by volume, 2020



Source: Kantar

Section 4 – Pigs

Table 4.13 Retail prices for selected pig meat cuts in Great Britain*

	Leg (boneless)	Loin steaks	Chops	Lean Mince
	(pence per kilogram)			
2020 by month:				
January	476.0	522.0	632.0	545.0
February	488.0	522.0	632.0	545.0
March	462.0	528.0	641.0	545.0
April	487.0	523.0	641.0	551.0
May	451.0	513.0	524.0	542.0
June	425.0	523.0	510.0	551.0
July	451.0	523.0	510.0	551.0
August	451.0	523.0	502.0	545.0
September	431.0	544.0	497.0	545.0
October	451.0	544.0	519.0	516.0
November	451.0	532.0	512.0	528.0
December	386.0	520.0	512.0	528.0

* Prices obtained from a weekly survey of a number of supermarkets' websites each week, with the prices quoted above for the last week of each month.

Source: AHDB

Table 4.14 UK pork balance sheet*

	2018	2019	2020
	(000 tonnes)		
Production	927.3	957.4	984.3
Imports	1,063.4	982.4	891.8
Exports	268.2	291.3	300.3
Total consumption	1,723.6	1,648.6	1,575.8
Self sufficiency (%)	53.9	58.1	62.5

* Total supplies of meat available for consumption. All weights are carcase weight equivalent.

Source: AHDB, Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC, Statistics Germany, Agenzia Tributaria, CSO Ireland, ONS.



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