



Hybu Cig Cymru
Meat Promotion Wales

Little Book of Meat Facts

Compendium of Welsh Red Meat
and Livestock Industry Statistics 2023



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 2021/22, this implies the financial year from April 2021 to March 2022. Volume data is shown in tonnes, carcase weight equivalent, unless otherwise specified.

Kantar Worldpanel data for 2022 is for the 52-week period ending 25 December 2022. The Kantar Worldpanel data was reported at the end of May 2023 and is subject to revision.

Data obtained from both Defra and HMRC (HM Revenue & Customs) for 2022 was reported at the end of May 2023 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

Table 1.1 Human population and land area by Welsh region and UK country, 2021

	Human population (000 head)	Land area (sq km)
Carmarthenshire	188	2,372
Ceredigion	71	1,790
North East Wales	501	2,910
North West Wales	186	3,262
Pembrokeshire	124	1,619
Powys	134	5,196
South Wales	1,902	3,630
Wales	3,105	20,780
England	56,536	130,281
Scotland	5,480	77,925
Northern Ireland	1,905	13,576
United Kingdom	67,026	242,562

Note: Data for 2022 was not available at the time of publication.

Source: Welsh Government

Table 1.2 Agricultural holdings by size (hectares) by UK country, 2022

	Wales	England	Scotland	Northern Ireland
Number of holdings (000)	37	104	23	26
Total area (000 ha)	1,766	9,098	5,013	1,042
Average area (ha)	48	87	215	40
% of total numbers				
<20 ha	55.3	38.9	31.9	44.1
20-49.9 ha	17.3	20.5	16.0	32.1
50-99.9 ha	13.6	16.8	15.9	15.5
>100 ha	13.8	23.9	36.2	8.2
% of total area on holdings with 100 hectares and over:				
	60.5	74.7	91.0	36.5

Source: Agriculture in the United Kingdom 2022, Defra.

Section 1 – General Information

Table 1.3 Welsh holdings by farm type, June 2022

	Holdings (number)	Share of total (%)
Cattle and sheep (LFA)	6,138	16.5
Cattle and sheep (lowland)	1,087	2.9
Dairy	1,401	3.8
Mixed (a)	422	1.1
Cereals	365	1.0
Specialist pigs or poultry	160	0.4
Horticulture	127	0.3
General cropping	89	0.2
Other types (b)	115	0.3
Very small (c)	14,805	39.9
Dormant holdings	12,413	33.4
Total number of holdings	37,122	

(a) Combination of cropping with various types of livestock

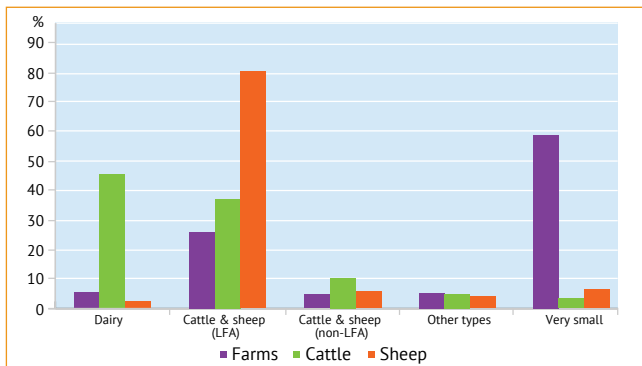
(b) Mainly grass and forage or specialist horses

(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 1.1 Distribution of farms, cattle and sheep by farm type 2022



Source: Welsh Government

Section 1 – General Information

Table 1.4 Value of Welsh agricultural output, 2021 (p)

	Value (£ million)	Share of total value %
Milk & milk products	570	32.4
Finished cattle & calves	342	19.4
Finished sheep & lambs	270	15.3
Poultry & eggs	136	7.7
Store cattle & sheep sales	133	7.6
Finished pigs	7	0.4
Total cereal	31	1.8
Horticulture & potatoes	66	3.8
Other products	19	1.1
Capital formation in livestock (a)	56	3.2
Other agricultural activities	147	8.4
Total Wales	1,760	
United Kingdom	18,524	

(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 2022*, Defra

Section 1 – General Information

Table 1.5 Contribution of agriculture to the regional UK economies, 2022 (p)

	Agricultural gross value added (GVA) at basic prices (£ million)	Total income from farming (£ million)
Wales	811	599
England	10,352	5,670
Scotland	n/a	n/a
Northern Ireland	887	605
United Kingdom	13,859	7,940

(p) Provisional

Note: England data based on commercial holdings only, and derived from other UK economic data. Scottish data has not been updated since 2020

Source: Welsh Government, DAERA, Defra

Table 1.6 Farm business income by country and type of farm

(At current prices)	2019/20	2020/21	2021/22
	(£000/farm)		
Wales:			
Dairy	50.5	60.0	88.0
Grazing livestock (LFA)	22.5	30.0	38.5
Grazing livestock (lowland)	16.5	23.0	26.5
England:			
Dairy	85.0	92.5	140.0
Grazing livestock (LFA)	23.0	33.5	43.0
Grazing livestock (lowland)	9.5	18.5	34.0
Specialist pigs	37.5	48.0	12.0
Scotland:			
Dairy	51.0	101.5	162.0
Grazing livestock (LFA)	15.5	19.5	23.5
Northern Ireland:			
Dairy	52.0	63.0	83.0
Grazing livestock (LFA)	15.0	20.5	23.0

Source: Agriculture in the United Kingdom 2022, Defra

Section 1 – General Information

Table 1.7 Direct payments to farmers in the UK

	2020	2021	2022 (p)
	(£ million)		
Basic/Single Payment Scheme	2,778	2,825	2,603
Agri-environment schemes	433	355	357
LFA support schemes	30	31	117
Animal disease compensation	25	27	68
Other (a)	31	12	20

(a) Includes various one off payments, Advisory Services, and New Entrants.

(p) Provisional

Source: *Agriculture in the United Kingdom 2022* Defra

Table 1.8 Number and throughputs of all Welsh abattoirs

GB Livestock Units*	Abattoirs (number)		Throughputs (%)	
	2021	2022	2021	2022
0-1,000	2	2	0.1	0.2
1,001-10,000	10	9	6.6	6.0
10,001-30,000	2	1	6.3	1.9
30,001-100,000	1	2	10.9	16.0
100,001 and over	3	3	76.2	75.9
Total	18	17		

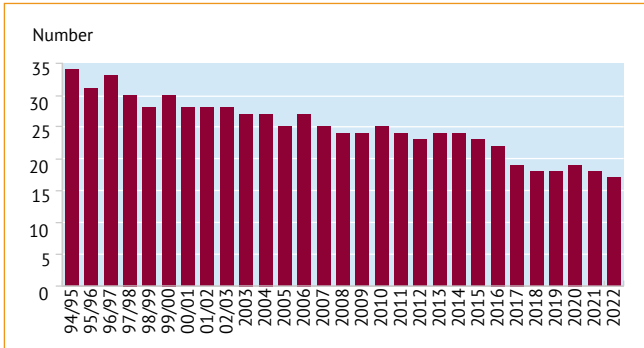
* GB Livestock Unit = 1 cattle beast = 5 sheep = 2 pigs

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

Source: HCC

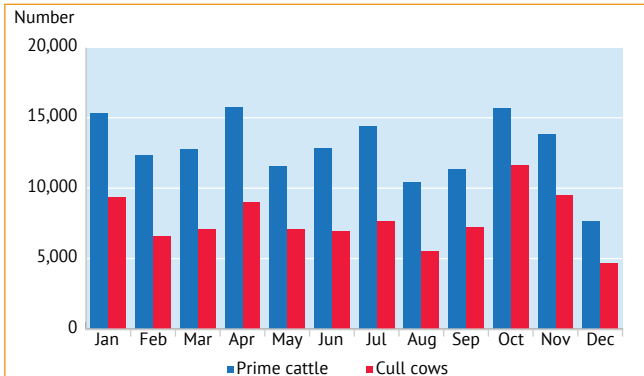
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Figure 1.2 Changes in Welsh abattoir numbers*



* Figures for 2004-2022 are for calendar years; previous figures relate to year ended March.
Source: HCC

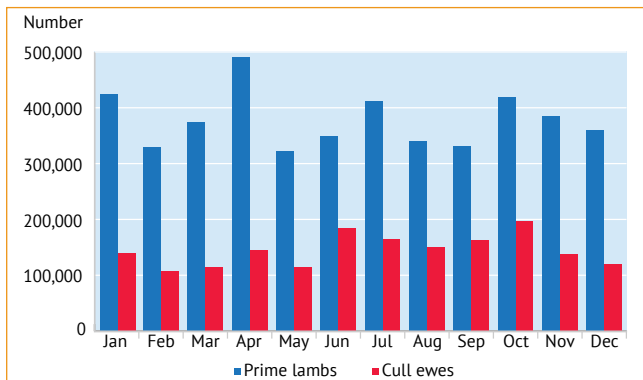
Figure 1.3 Monthly livestock auction market throughputs, cattle, England and Wales, 2022



Source: AHDB, LAA

Section 1 – General Information

Figure 1.4 Monthly livestock auction market throughputs, sheep, England and Wales, 2022



Source: AHDB, LAA

Table 1.9 Auction markets by size of finished stock throughput in Wales, 2022

GB Livestock Units*	Number of markets	Total marketings (GBU)	Average throughput (GBU)	Share of throughput (%)
1-5,000	8	28,585	3,573	8
5,001-10,000	3	25,580	8,527	8
10,001-15,000	7	80,883	11,555	24
15,001-30,000	1	26,947	26,947	8
30,001 and over	4	176,381	44,095	52
Total	23	338,375	14,712	100

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

Source: AHDB, LAA

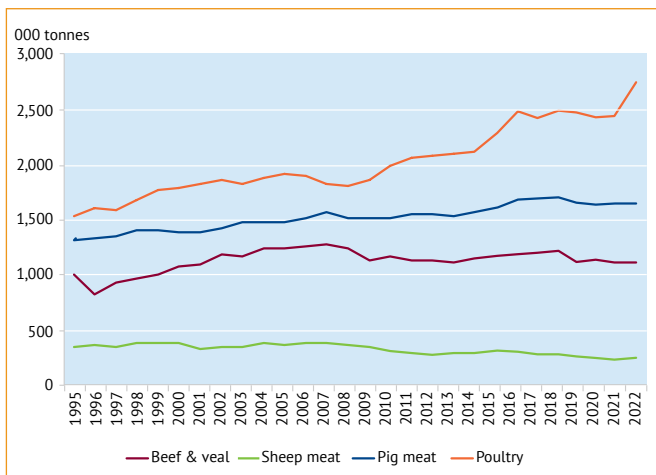
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Table 1.10 Auction market throughputs of finished stock by GB country, 2022

(head)	Wales	England	Scotland	GB
Total prime cattle	9,102	144,665	15,278	169,045
Cull cows	9,791	82,308	30,701	122,800
Total prime sheep	1,150,756	3,381,460	980,988	5,513,204
Cull ewes	446,655	1,286,151	351,753	2,084,559
Clean pigs	0	32,098	0	32,098
Cull sows	0	7,109	0	7,109

Source: AHDB, LAA, IAAS

Figure 1.5 Changes in total UK meat consumption



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

Section 1 – General Information

Table 1.11 Abattoirs in Wales slaughtering cattle, sheep and pigs, March 2023

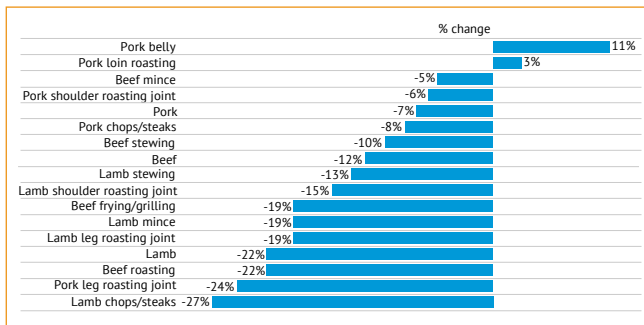
Trading Name	Location	Species Slaughtering		
		Cattle	Sheep	Pigs
Cig Calon Cymru Cyf	Cross Hands	Cattle	Sheep	
Cig Eryri Snowdonia Meats Cyf	Blaenau Ffestiniog	Cattle	Sheep	
Cig Oen Caron	Tregaron	Cattle	Sheep	Pigs
CJ & AJ Butler Ltd T/A Hugh Phillips Gower Butcher	Swansea	Cattle	Sheep	Pigs
Conwy Valley Meats Ltd	Llanrwst	Cattle	Sheep	
D & J Thomas	Wrexham	Cattle	Sheep	Pigs
D T Havard, Caerphilly abattoir	Caerphilly	Cattle	Sheep	
Dunbia (Wales)	Llanybydder	Cattle	Sheep	
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
Pilgrim's UK Lamb Ltd	Llanidloes		Sheep	
St Merryn Meats (Kepak Group Ltd)	Merthyr Tydfil	Cattle	Sheep	
W J George Butchers Ltd	Brecon	Cattle	Sheep	Pigs

Plants listed in alphabetical order.

Source: HCC

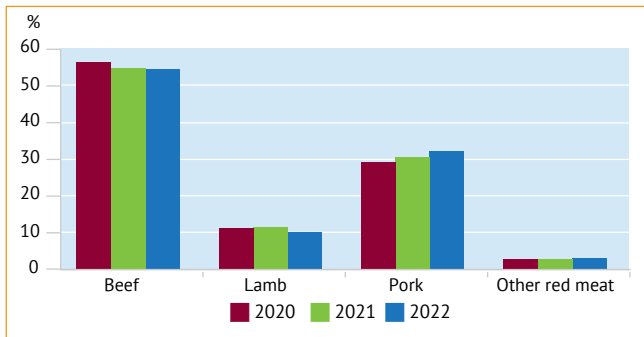
Section 1 – General Information

Figure 1.6 Changes in red meat purchases by product in GB, 2022



Source: Kantar

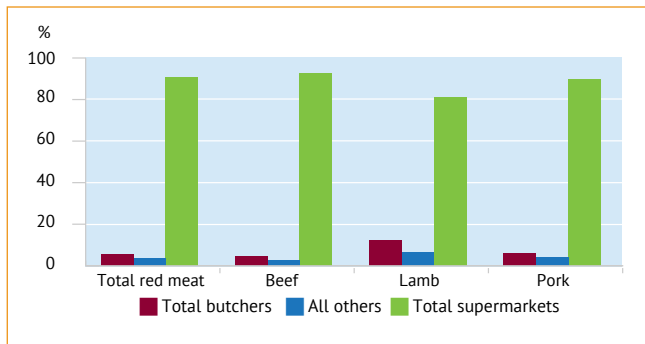
Figure 1.7 Comparison of retail market share by red meat type in GB



Source: Kantar

Section 1 – General Information

Figure 1.8 Retailer volume share of total red meat trade in GB, 2022



Source: Kantar

Section 2 – Cattle

Table 2.1 Welsh cattle numbers by category

(000 head)	June 2020	June 2021	June 2022
Cattle aged 2 years or more	535	523	518
– Female dairy breeds	294	291	289
– Female non-dairy breeds	204	199	196
– Males	37	33	33
Cattle aged 1-2 years	258	262	273
– Female dairy breeds	71	74	81
– Female non-dairy breeds	92	93	94
– Males	94	95	99
Cattle under 1 year	330	344	341
– Female dairy breeds	76	83	87
– Female non-dairy breeds	117	118	116
– Males	137	142	138
Total cattle and calves	1,122	1,129	1,132

Source: Cattle Tracing System

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

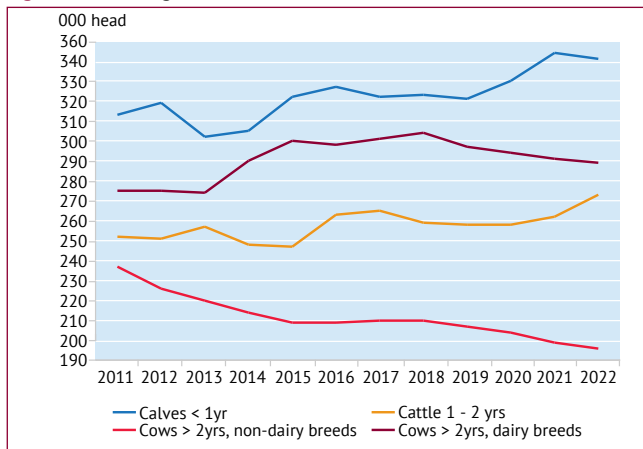
	June 2012	June 2022
Dairy females (a)	223,557	255,921
Number of dairy cow holdings	3,005	2,344
Average dairy herd size (head)	74	109
Beef females (a)	183,351	156,691
Number of beef cow holdings	8,254	6,790
Average beef size herd (head)	22	23
Total number of cattle and calf holdings	11,348	9,842

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

Source: Cattle Tracing System

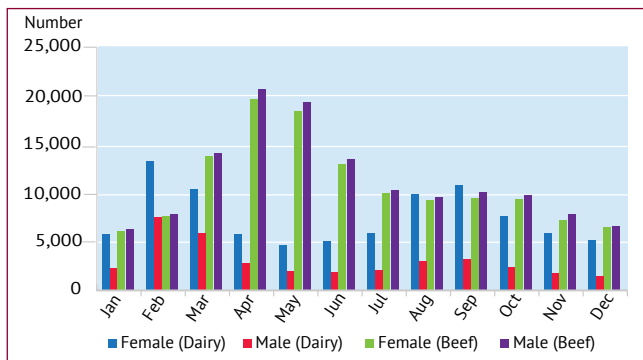
Section 2 – Cattle

Figure 2.1 Changes in cattle numbers in Wales



Source: Cattle Tracing System

Figure 2.2 Calf registrations on holdings in Wales, 2022



Source: Cattle Tracing System

Section 2 – Cattle

Table 2.3 Suckler calf production costs in Wales, 2021/22

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	53	72	40
Veterinary & medicines	16	19	14
Other	23	26	15
Total variable costs	91	117	69
Herd replacement	8	11	8
Labour	7	10	2
Power & machinery	63	83	48
Finance & general farm costs	56	72	41
Rent	7	14	4
Total fixed costs	133	179	95
Total costs	233	307	172

* Data relates to financial year ended March 2022. Based on 29 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)
2020	160.2	52.1
2021	118.1	37.3
2022	121.9	38.3
2022 by month:		
January	8.7	2.8
February	9.3	3.0
March	10.3	3.2
April	9.3	3.0
May	10.4	3.3
June	8.4	2.7
July	9.3	3.0
August	10.6	3.4
September	10.6	3.3
October	12.1	3.8
November	11.9	3.5
December	11.0	3.5

Source: Defra

Table 2.5 Total cattle slaughterings by UK country, 2022

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
122	1,730	457	2,309	507

Source: Defra

Section 2 – Cattle

Table 2.6 Percentage distribution of prime cattle carcasses in GB by conformation and fat class, 2022

		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	1.0	1.8	0.5	0.1	0.0	0.0	3.5
	-U	0.2	1.6	5.8	4.6	0.8	0.1	0.0	13.0
	R	0.3	4.3	19.4	18.6	5.2	0.4	0.0	48.3
	O+	0.2	2.2	10.0	9.2	2.5	0.2	0.0	24.4
	-O	0.2	1.3	4.3	2.0	0.4	0.0	0.0	8.3
	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
	Overall	1.4	11.4	42.3	35.1	9.0	0.8	0.1	

Source: AHDB

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

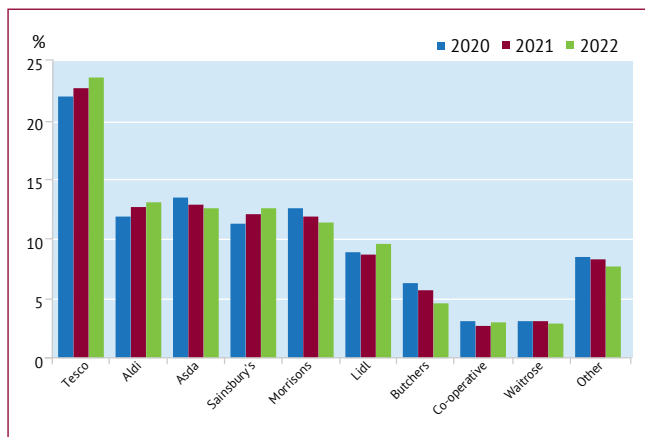
Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2021	2022	2021	2022
0-1,000	7	9	2.0	4.5
1,001-5,000	4	1	5.7	2.0
5,001 and over	3	4	127.3	140.4
Total	14	14	134.9	146.9

* Figures from Welsh Red Meat Levy returns

Source: HCC

Section 2 – Cattle

Figure 2.3 Retailer volume share of beef sales in GB 2020-2022



Source: Kantar

Table 2.8 Changes in beef purchases, expenditure and average price in Wales and GB, 2022

	Beef purchases (tonnes)	Beef purchases (% change)	Beef expenditure (£ million)	Beef expenditure (% change)	Beef average price (£/kg)	Beef average price (% change)
Wales	13,129	-15.7	117.3	-8.4	8.9	8.6
GB	260,704	-12.2	2,246.1	-5.3	8.6	7.8

Source: Kantar

Section 2 – Cattle

Table 2.9 Volume and value of UK beef imports

	Fresh/frozen beef and veal		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2015	269.7	1,032.6	16.8	16.8
2016	263.6	1,016.1	13.2	19
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	232.9	924.0	15.7	16.6
2021	241.9	1,067.0	13.1	22.6
2022	233.3	1,241.2	18.0	37.2

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)
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	116.2	381.9	49.5	68.8
2021	102.9	364.0	26.6	47.2
2022	123.7	540.5	26.6	59.0

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Section 2 – Cattle

Table 2.11 UK beef imports

		2020	2021	2022
		(000 tonnes, product weight)		
Total beef and veal		232.9	241.9	233.3
Of which from:	Irish Republic	186.5	189.5	168.4
	Poland	13.4	15.0	16.8
	Germany	5.2	6.2	14.6
	Netherlands	13.0	13.3	13.3
	Brazil	1.5	2.9	4.4
	Uruguay	1.3	2.7	2.9
	Spain	2.4	2.7	2.4
	Belgium	2.4	1.9	1.9

Source: HM Revenue & Customs (HMRC)

Table 2.12 UK beef exports

		2020	2021	2022
		(000 tonnes, product weight)		
Total beef and veal		116.2	102.9	123.7
Of which to:	Irish Republic	38.3	32.7	36.5
	France	9.7	16.8	30.4
	Netherlands	22.5	13.0	21.9
	Hong Kong	12.5	8.5	4.3
	Germany	1.8	1.4	3.4
	Italy	4.1	2.1	3.1
	Japan	1.5	2.1	3.0
	Belgium	2.7	2.7	2.7

Source: HM Revenue & Customs (HMRC)

Section 2 – Cattle

Table 2.13 UK monthly beef trade, 2022

	UK beef imports	UK beef exports
	(000 tonnes, product weight)	
January	16.5	7.2
February	19.5	11.6
March	22.0	12.9
April	20.3	11.4
May	19.7	11.7
June	19.1	9.9
July	17.4	9.6
August	18.5	9.5
September	18.6	9.4
October	21.1	10.1
November	19.0	10.1
December	21.5	10.3

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	-O4L cows
	(pence per kilogram deadweight)			
2020	359.7	340.3	358.5	255.1
2021	404.7	394.1	404.1	288.9
2022	439.8	433.1	439.3	353.3
2022 by month:				
January	417.6	397.0	416.7	289.8
February	416.4	403.7	416.3	314.2
March	426.5	415.8	425.8	348.7
April	445.0	435.7	445.0	375.6
May	447.8	440.4	447.9	378.4
June	450.7	443.0	449.7	382.2
July	449.1	437.7	447.1	377.9
August	443.0	429.1	441.6	370.8
September	444.6	432.0	444.4	371.5
October	449.1	433.6	447.7	364.4
November	451.7	433.4	450.7	352.8
December	452.2	431.7	450.3	350.5

* 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)			
2020	191.3	185.6	202.8	115.0
2021	222.3	211.4	232.5	130.3
2022	242.2	230.5	251.7	156.0
2022 by month:				
January	230.8	213.0	239.9	129.9
February	234.6	221.5	242.0	145.4
March	237.0	224.7	246.0	157.6
April	246.2	235.7	252.1	172.6
May	240.8	225.7	249.2	173.5
June	247.9	229.1	255.6	174.1
July	244.9	234.0	254.9	164.1
August	242.0	236.2	254.4	159.6
September	243.1	235.0	255.1	155.6
October	242.8	235.2	252.7	149.5
November	248.6	237.5	262.6	147.3
December	251.6	240.7	263.2	153.0

* Prices collected from English and Welsh auction markets.

Source: AHDB, LAA

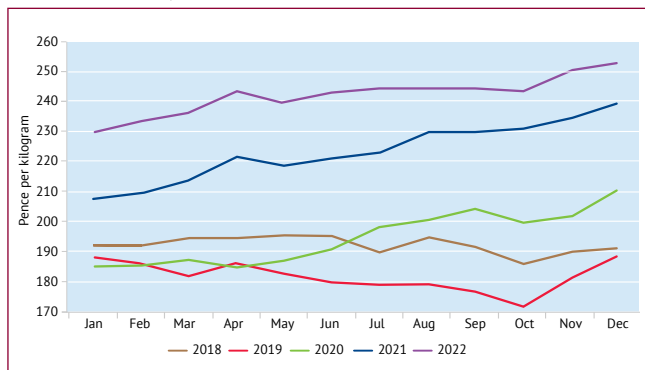
Table 2.16 Rearing calf prices in England and Wales

(£/head)	Holstein / Friesian (X)	Hereford (X)		Continental (X)	
	Bulls	Bulls	Heifers	Bulls	Heifers
2020	37.4	133.0	89.6	203.4	158.2
2021	46.0	160.8	116.1	234.0	185.8
2022	33.3	104.5	71.1	174.6	128.6

Source: AHDB, LAA

Section 2 – Cattle

Figure 2.4 Seasonality of prime cattle liveweight prices, England and Wales, 2018-2022



Source: AHDB, LAA

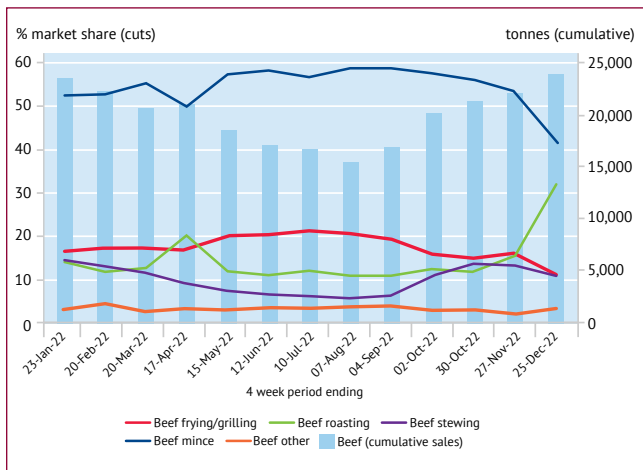
Table 2.17 Store cattle prices in England and Wales

(£/head)	Yearlings		18 months		2 years	
	Steers	Heifers	Steers	Heifers	Steers	Heifers
Friesian/Holstein X						
2020	438.0	417.0	609.7	549.4	751.3	694.3
2021	510.9	499.5	713.0	650.9	890.0	804.6
2022	457.8	418.6	677.9	616.3	870.2	812.6
Hereford X						
2020	624.0	479.0	771.9	630.5	892.9	761.6
2021	728.1	583.6	890.4	743.2	1034.6	883.7
2022	711.4	559.8	891.6	730.3	1064.7	911.8
Continental X						
2020	830.3	730.7	943.0	853.1	1,013.2	925.2
2021	944.1	836.5	1,064.0	964.3	1,163.7	1,060.0
2022	958.9	846.6	1,082.1	970.1	1,209.6	1,094.7

Source: AHDB, LAA

Section 2 – Cattle

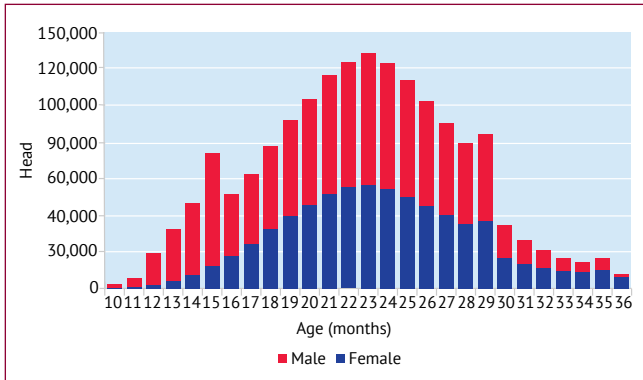
Figure 2.5 Seasonality of beef sales at GB retail by cut, 2022



Source: Kantar

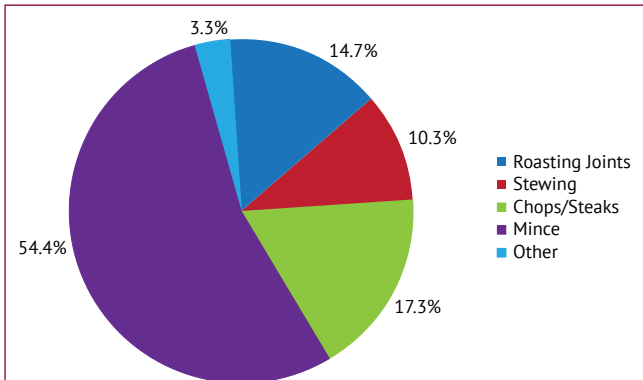
Section 2 – Cattle

Figure 2.6 Age profile of male and female prime cattle at GB abattoirs, 2022



Source: Cattle Tracing System

Figure 2.7 Retail beef cuts sold in GB by volume, 2022



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)			
2022 by month:				
January	987.0	1,818.2	3,011.0	378.7
February	1,015.3	1,820.9	3,005.9	376.9
March	905.9	1,853.8	3,005.9	356.7
April	937.1	1,841.6	3,002.4	369.2
May	1,010.3	1,881.8	3,002.4	371.3
June	1,044.8	1,907.0	3,006.4	375.8
July	1,061.7	1,929.4	3,182.4	360.6
August	1,064.0	1,935.9	3,212.0	361.0
September	1,051.2	1,988.5	3,340.0	383.6
October	1,082.8	2,021.1	3,340.0	360.1
November	1,092.7	2,021.1	3,340.0	360.1
December	996.6	1,999.1	3,340.0	360.1

* 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 (or the latest week available).

Source: AHDB

Table 2.19 UK beef and veal balance sheet*

	2020	2021	2022
	(000 tonnes)		
Production	933.9	906.2	924.6
Imports	376.9	357.3	359.8
Exports	152.7	133.4	157.9
Total consumption	1,158.1	1,130.1	1,126.5
Self sufficiency (%) **	80.6	80.2	82.1

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

** Self-sufficiency is based upon production as a percentage of consumption

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

Section 3 – Sheep

Table 3.1 Sheep numbers in Wales by category

(000 head)	June 2020	June 2021	June 2022
Total sheep, over one year	4,481	4,817	4,789
Lambs under one year	4,508	4,648	4,573
Total sheep and lambs	8,989	9,464	9,362

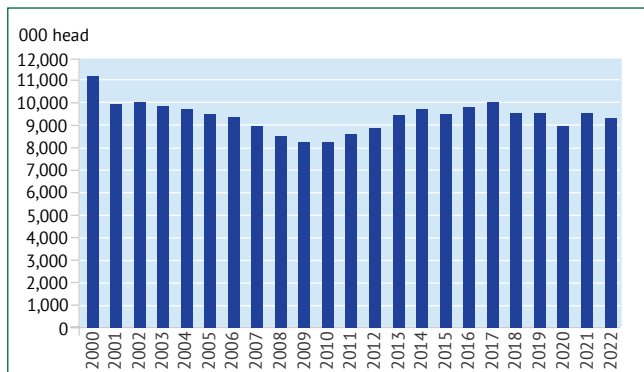
Source: Welsh Government

Table 3.2 Changes in number of holdings in Wales with sheep

	June 2012	June 2022
Number of sheep and lamb holdings	14,693	14,067
Average flock size (head)	606	665

Source: Welsh Government

Figure 3.1 Changes in total sheep and lamb numbers in Wales



Source: Welsh Government

Section 3 – Sheep

Table 3.3 Lamb production costs in Wales, 2021/22*

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	73	85	61
Veterinary & medicines	15	16	13
Other	22	23	20
Total variable costs	110	124	94
Flock replacement	15	16	10
Paid Labour	8	15	4
Power & machinery	52	72	39
Finance & general farm costs	44	61	31
Rent	9	15	5
Total fixed costs	113	161	80
Total costs	237	301	184

* Data relates to financial year ended March 2022. Based on 112 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)
2020	3,215.2	62.1
2021	2,456.7	47.7
2022	2,470.1	47.4
2022 by month:		
January	182.2	3.6
February	181.5	3.6
March	197.3	4.0
April	182.8	3.8
May	174.2	3.5
June	160.4	3.1
July	191.9	3.7
August	213.3	4.0
September	224.0	4.2
October	258.8	4.8
November	248.8	4.6
December	255.1	4.6

Source: Defra

Table 3.5 Total sheep slaughterings by UK country, 2022

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
2,470	9,933	1,073	13,476	477

Source: Defra

Section 3 – Sheep

Table 3.6 Percentage distribution of lamb carcasses in GB by conformation and fat class, 2022

		Fat class Increasing fatness							
		→							
Conformation class Improving conformation ↑		1	2	3L	3H	4L	4H	5	Overall
	E	0.0	0.5	2.0	0.6	0.1	0.0	0.0	3.2
	U	0.1	2.7	12.0	5.7	1.0	0.1	0.0	21.6
	R	0.6	12.4	30.8	12.3	2.0	0.2	0.0	58.2
	O	0.9	6.7	7.1	1.6	0.2	0.0	0.0	16.4
	P	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.6
	Overall	1.9	22.5	51.9	20.2	3.2	0.3	0.0	

Source: AHDB

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

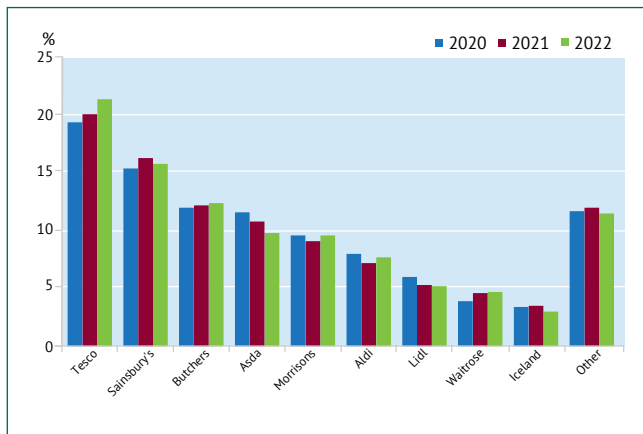
Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2021	2022	2021	2022
0-5,000	5	4	11.2	10.3
5,001-20,000	6	7	74.0	77.7
20,001-50,000	1	1	20.4	26.6
50,001 and over	4	4	2,369.2	2,332.8
Total	16	16	2,474.8	2,447.4

* Figures from Welsh Red Meat Levy returns

Source: HCC

Section 3 – Sheep

Figure 3.2 Retailer volume shares of lamb sales in GB, 2020-2022



Source: Kantar

Table 3.8 Changes in lamb purchases, expenditure and average price in Wales and GB, 2022

	Lamb purchases (tonnes)	Lamb purchases (% change)	Lamb expenditure (£ million)	Lamb expenditure (% change)	Lamb average price (£/kg)	Lamb average price (% change)
Wales	2,872	-14.1	32.0	-7.0	11.3	8.3
GB	49,210	-21.6	573.8	-12.7	11.7	11.3

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)
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	57.1	308.9	5.9	13.7
2021	46.5	260.8	5.9	14.3
2022	54.3	342.0	7.4	20.9

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)
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	87.5	436.4	5.4	8.9
2021	69.9	438.1	2.9	5.6
2022	75.3	494.2	3.2	6.5

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

Section 3 – Sheep

Table 3.11 UK sheep meat imports

		2020	2021	2022
		(000 tonnes, product weight)		
Total sheep meat		57.1	46.5	54.3
Of which from:	New Zealand	37.8	31.1	32.5
	Australia	8.5	9.1	9.6
	Irish Republic	5.7	2.4	9.4
	Spain	0.7	0.6	0.8
	Iceland	0.9	0.7	0.6

Source: HM Revenue & Customs (HMRC)

Table 3.12 UK sheep meat exports

		2020	2021	2022
		(000 tonnes, product weight)		
Total sheep meat		87.5	70.0	75.3
Of which to:	France	33.4	36.4	35.5
	Germany	15.5	12.8	14.1
	Irish Republic	11.3	4.0	8.0
	Belgium	7.5	6.2	7.3
	Italy	5.3	1.9	2.6
	Netherlands	3.5	2.3	1.7

Source: HM Revenue & Customs (HMRC)

Section 3 – Sheep

Table 3.13 UK monthly sheep meat trade, 2022

	UK sheep meat imports	UK sheep meat exports
	(000 tonnes, product weight)	
January	4.4	4.1
February	4.7	6.4
March	7.0	6.8
April	6.2	7.3
May	6.2	5.6
June	6.5	5.4
July	5.5	6.0
August	3.3	6.0
September	3.7	6.4
October	2.4	6.7
November	2.1	7.1
December	2.4	7.6

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)	
2020	474.8	475.1
2021	575.4	576.9
2022	570.7	567.3
2022 by month:		
January	595.5	593.2
February	582.6	579.9
March	572.0	568.6
April	603.7	598.9
May	655.8	653.2
June	657.3	659.2
July	603.1	603.4
August	540.2	539.3
September	527.3	524.5
October	523.3	520.0
November	552.0	548.2
December	547.2	543.5

* 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)
2020	215.5	62.9
2021	259.0	76.2
2022	257.7	79.0
2022 by month:		
January	261.7	79.9
February	260.9	83.0
March	260.2	96.7
April	273.4	97.1
May	320.6	104.8
June	309.1	94.5
July	277.2	81.4
August	234.1	64.6
September	223.3	55.9
October	220.4	52.5
November	236.0	64.5
December	234.7	72.0

* 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

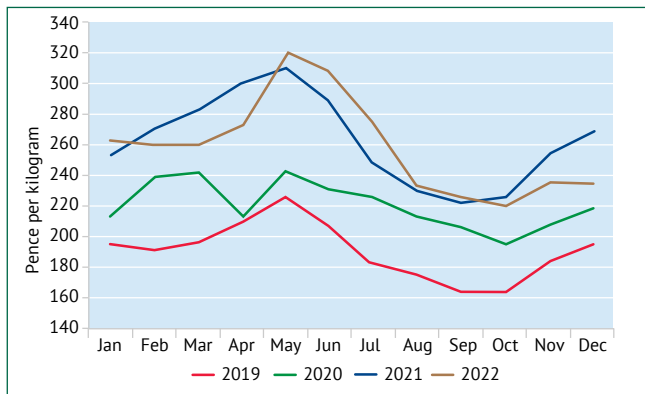
Table 3.16 Store sheep prices in England and Wales

(£/head)	Old season lambs	New season lambs
2020	72.8	68.0
2021	89.7	80.6
2022	85.8	72.9

Source AHDB, LAA

Section 3 – Sheep

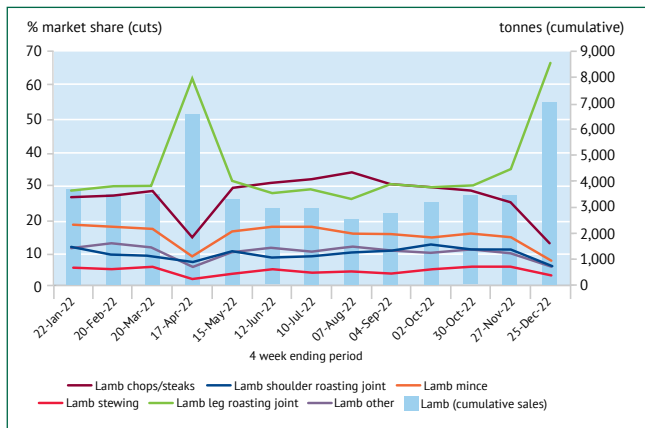
Figure 3.3 Seasonality of lamb liveweight prices, Wales, 2019-2022



Source AHDB, LAA

Section 3 – Sheep

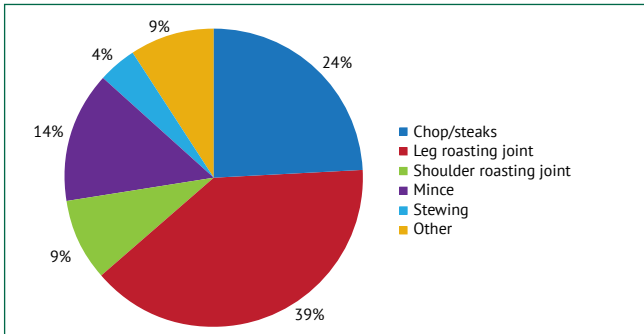
Figure 3.4 Seasonality of lamb sales at GB retail by cut, 2022



Source: Kantar

Section 3 – Sheep

Figure 3.5 Retail lamb cuts sold in GB by volume, 2022



Source: Kantar

Figure 3.6 Percentage of lambs meeting target specification by weight range in GB, 2022

Old season lambs			New season lambs	
5.9	0	<12kg	6.9	0.6
94.1			92.6	
28.2	1.8	12-15.9kg	33.2	2.3
70.0			64.4	
58.9	11.5	16-19.9kg	69.9	10.8
29.7			19.3	
57.5	35.3	20+kg	64.2	31.5
7.2			4.3	
Overall				
61.1			21.9	
17.0				

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)			
2022 by month:				
January	1,218.9	915.9	1,388.1	1,566.3
February	1,227.8	919.0	1,407.9	1,559.2
March	1,271.7	890.1	1,424.9	1,592.9
April	1,280.4	919.0	1,405.5	1,624.1
May	1,282.2	946.1	1,408.3	1,637.6
June	1,263.6	946.1	1,417.3	1,637.6
July	1,291.4	960.4	1,412.3	1,674.4
August	1,291.4	1,020.2	1,426.6	1,674.4
September	1,114.3	985.7	1,456.7	1,657.6
October	1,221.2	1,021.6	1,461.6	1,708.3
November	1,084.2	1,021.6	1,461.6	1,741.2
December	1,239.9	1,021.6	1,461.6	1,767.1

* 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 (or the latest week available).

Source: AHDB

Table 3.18 UK sheep meat balance sheet*

	2020	2021	2022
	(000 tonnes)		
Production	296.1	282.9	291.4
Imports	69.5	55.0	66.9
Exports	91.9	71.5	77.2
Total consumption	273.7	266.3	281.1
Self sufficiency (%) **	108.2	106.2	103.7

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

** Self-sufficiency is based upon production as a percentage of consumption.

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)	2020	2021	2022
Breeding pigs	3.0	3.0	2.6
Fattening pigs	25.5	24.2	24.3
Total pigs	28.4	27.2	26.9

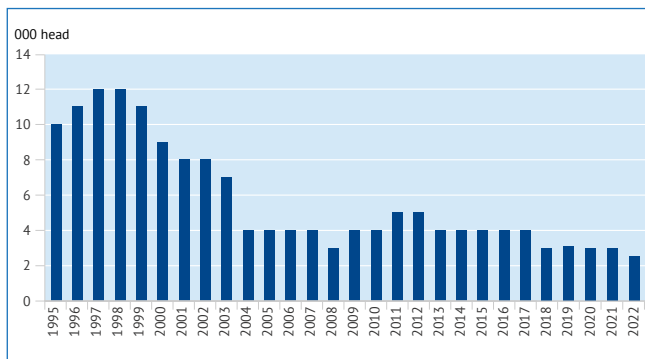
Source: Welsh Government

Table 4.2 Changes in number of holdings in Wales with pigs

	June 2012	June 2022
Number of pig holdings	1,407	1,334
Average herd size (head)	20	20

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)
2020	27.9	2.4
2021	28.3	2.5
2022	25.2	2.3
2022 by month:		
January	1.6	0.2
February	2.0	0.2
March	2.3	0.2
April	2.1	0.2
May	2.2	0.2
June	2.1	0.2
July	2.1	0.2
August	2.1	0.2
September	1.9	0.2
October	2.1	0.2
November	2.2	0.2
December	2.5	0.2

Source: Defra

Table 4.4 Total pig slaughterings by UK country, 2022

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
25	9,206	245	9,476	1,949

Source: Defra

Section 4 – Pigs

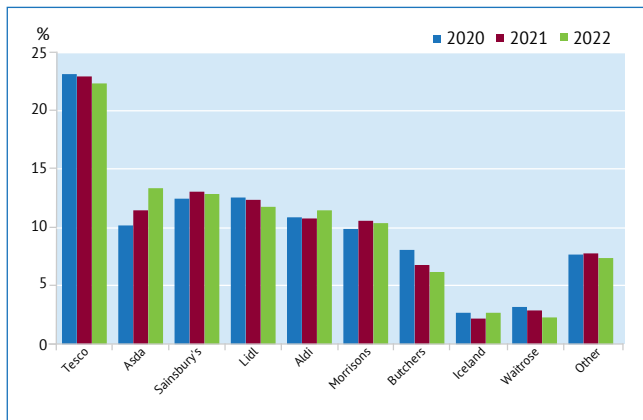
Table 4.5 Numbers and throughputs of abattoirs in Wales slaughtering pigs*

Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2021	2022	2021	2022
0-1,000	3	3	0.9	2.4
1,001 and over	7	5	27.7	23.0
Total	10	8	28.6	25.4

* Figures from Welsh Red Meat Levy returns

Source: HCC

Figure 4.2 Retailer volume shares of pork sales in GB, 2020-2022



Source: Kantar

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Table 4.6 Changes in pork purchases, expenditure and average price in Wales and GB, 2022

	Pork purchases (tonnes)	Pork purchases (% change)	Pork expenditure (£ million)	Pork expenditure (% change)	Pork average price (£/kg)	Pork average price (% change)
Wales	7,735	-13.7	41.2	-7.0	5.3	7.7
GB	153,874	-7.3	819.4	-0.5	5.3	7.3

Source: Kantar

Table 4.7 Volume and value of UK pig meat imports

	Fresh/frozen		Offal		Processed*
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)	(000 tonnes)
2014	358.1	699.4	11.0	11.2	504.4
2015	371.8	613.4	12.4	11.3	514.0
2016	439.9	778.2	16.0	14.3	515.1
2017	467.0	943.9	18.1	17.8	512.6
2018	457.8	854.4	15.5	15.6	511.3
2019	447.9	951.1	17.1	18.4	451.6
2020	367.2	843.8	17.2	18.1	409.2
2021	321.1	661.4	15.3	17.8	395.5
2022	320.5	706.8	16.7	17.6	464.3

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

Source: HM Revenue & Customs (HMRC)

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Table 4.8 Volume and value of UK pig meat exports

	Fresh/frozen		Offal		Processed*
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)	(000 tonnes)
2014	181.7	209.2	45.1	35.0	38.3
2015	187.1	197.4	58.9	38.5	38.3
2016	206.1	252.3	77.0	64.4	35.4
2017	216.0	293.6	81.5	79.7	37.2
2018	217.8	291.8	88.4	79.1	40.3
2019	244.5	391.8	94.2	93.0	39.7
2020	258.4	420.3	106.0	121.5	33.3
2021	192.7	338.8	128.5	146.7	28.4
2022	189.4	333.4	145.6	184.7	37.7

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

Source: HM Revenue & Customs (HMRC)

Table 4.9 UK pig meat imports

		2020	2021	2022
		(000 tonnes, product weight)		
Total pork		367.2	320.1	320.5
Of which from:	Denmark	121.2	99.7	83.9
	Germany	97.9	97.4	81.5
	Spain	25.3	23.9	50.2
	Netherlands	29	29.7	33.6
	Belgium	22.5	22.9	23.6
	France	18.8	17.6	21.3
	Irish Republic	29.8	14.5	13.4
Bacon		162.9	169.0	200.8
Of which from:	Netherlands	82.0	84.5	111.7
	Denmark	49.0	52.5	57.2

Source: HM Revenue & Customs (HMRC)

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Table 4.10 UK pig meat exports

		2020	2021	2022
		(000 tonnes, product weight)		
Fresh/Frozen Pork		258.4	192.7	189.4
Of which to:	China	121.0	83.2	58.1
	Irish Republic	27.4	18.2	22.1
	Germany	33.8	17.1	19.9
	France	3.7	14.6	19.8
	Philippines	2.3	13.8	17.4
	United States	6.2	7.1	7.4
	Bacon	13.2	10.3	16.9
Of which to:	Irish Republic	10.8	7.6	12.8
	France	0.7	1.5	2.6

Source: HM Revenue & Customs (HMRC)

Table 4.11 UK monthly pork trade, 2022

	UK pork imports	UK pork exports
	(000 tonnes, product weight)	
January	32.6	16.6
February	31.7	17.9
March	29.4	22.7
April	22.6	16.4
May	26.4	19.4
June	24.3	13.9
July	25.9	14.4
August	23.2	14.0
September	24.1	14.5
October	27.9	12.3
November	27.9	12.4
December	24.5	15.0

Source: HM Revenue & Customs (HMRC)

Table 4.12 Deadweight pig prices in GB

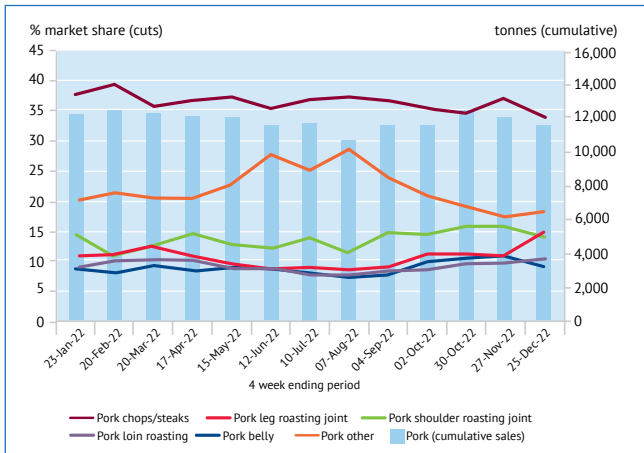
	SPP (EU Spec)	APP (EU Spec)
	(pence per kilogram deadweight)	
2020	161.0	164.1
2021	148.3	153.1
2022	177.5	182.8
2022 by month:		
January	138.7	144.2
February	138.1	143.7
March	144.4	150.1
April	164.5	171.8
May	176.3	184.1
June	185.8	192.0
July	194.1	197.7
August	198.3	201.7
September	200.1	203.2
October	200.3	204.1
November	200.3	205.2
December	200.5	204.9

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

Source: AHDB

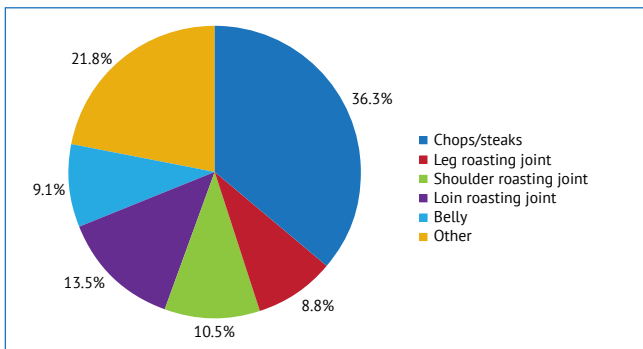
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Figure 4.3 Seasonality of pork sales at GB retail by cut, 2022



Source: Kantar

Figure 4.4 Retail pork cuts sold in GB by volume, 2022



Source: Kantar

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

	Leg (boneless)	Loin steaks	Chops	Lean Mince
	(pence per kilogram)			
2022 by month:				
January	427.4	563.9	543.3	484.5
February	423.3	600.8	547.0	483.7
March	432.6	591.4	547.0	483.7
April	425.0	597.1	547.0	485.4
May	397.8	608.8	561.2	489.3
June	415.8	637.1	586.5	500.5
July	422.1	656.6	602.7	504.1
August	460.3	675.4	618.7	504.1
September	528.5	714.7	625.0	505.9
October	559.5	736.7	632.7	505.9
November	496.7	717.9	663.9	515.6
December	469.4	736.7	667.8	515.6

* 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 (or the latest week available).

Source: AHDB

Table 4.14 UK pork balance sheet*

	2020	2021	2022
	(000 tonnes)		
Production	984.3	1,036.6	1,042.5
Imports	891.9	791.4	857.4
Exports	300.3	221.4	229.3
Total consumption	1,575.9	1,606.5	1,670.6
Self sufficiency**	62.5	64.5	62.4

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

** Self-sufficiency is based upon production as a percentage of consumption.

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

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