



Hybu Cig Cymru  
Meat Promotion Wales

# Little Book of Meat Facts

Compendium of Welsh Red Meat  
and Livestock Industry Statistics 2020



[meatpromotion.wales](http://meatpromotion.wales)

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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 2019/20, this implies the financial year from April 2019 to March 2020. Volume data is shown in tonnes, carcase weight equivalent, unless otherwise specified.

Kantar Worldpanel data for 2019 is for the 52-week period ending 31 December 2019. The Kantar Worldpanel data was reported at the end of May 2020 and is subject to revision.

Data obtained from both Defra (Department for Environment, Food and Rural Affairs) and HMRC (HM Revenue & Customs) for 2019 was reported at the end of May 2020 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

**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

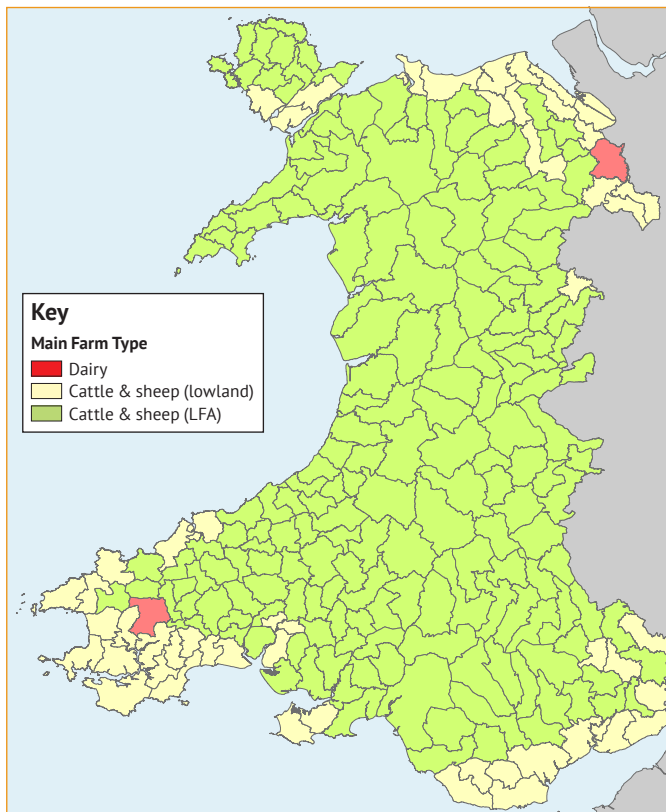
**SPP** Standard Pig Price

- = none

na= not available

# Section 1 – General Information

**Figure 1.1** Most common farm types in Wales, by region, June 2019



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, 2019

	Human population (000 head)	Land area (sq km)
Carmarthenshire	189	2,372
Ceredigion	73	1,790
North East Wales	505	2,910
North West Wales	195	3,262
Pembrokeshire	126	1,619
Powys	132	5,196
South Wales	1,934	3,630
Wales	3,153	20,780
England	56,287	130,281
Scotland	5,463	77,925
Northern Ireland	1,894	13,576
United Kingdom	66,797	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

Source: Agriculture in the United Kingdom 2019, Defra

# Section 1 – General Information

**Table 1.3** Welsh holdings by farm type, June 2019

	Holdings (number)	Share of total (%)
Cattle and sheep (LFA)	6,501	16.3
Cattle and sheep (lowland)	1,176	3.0
Dairy	1,508	3.8
Mixed (a)	396	1.0
Cereals	284	0.7
Specialist pigs or poultry	150	0.4
Horticulture	175	0.4
General cropping	76	0.2
Other types (b)	165	0.4
Very small (c)	14,376	36.1
Dormant holdings	14,996	37.7
Total number of holdings	39,803	

(a) Combination of cropping with various types of livestock

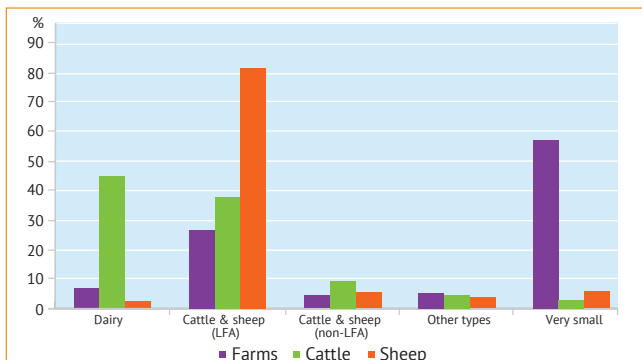
(b) Mainly grass and forage or specialist horses

(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 2019



Source: Welsh Government

# Section 1 – General Information

**Table 1.4** Value of Welsh agricultural output, 2018 (p)

	Value (£ million)	Share of total value %
Milk & milk products	568	33.7
Finished cattle	308	18.3
Finished sheep & lambs	252	14.9
Poultry & eggs	98	5.8
Store cattle & sheep sales	126	7.5
Finished pigs	5	0.3
Total cereal	25	1.5
Horticulture & potatoes	72	4.3
Other products	25	1.5
Capital formation in livestock (a)	74	4.4
Other agricultural activities	133	7.9
<b>Total Wales</b>	<b>1,685</b>	
<b>Total England</b>	<b>19,688</b>	
<b>Total Scotland</b>	<b>3,181</b>	
<b>Total Northern Ireland</b>	<b>2,195</b>	
<b>United Kingdom</b>	<b>26,749</b>	

(p) Provisional

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

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

Source: Welsh Government, *Agriculture in the United Kingdom 2019*, Defra



# Section 1 – General Information

**Table 1.5** Contribution of agriculture to the regional UK economies, 2019 (p)

	Agricultural gross value added (GVA) at basic prices (£ million)	Total income from farming (£ million)	Agriculture's share of total regional workforce (%)
Wales	469	261	3.5
England	8,091	3,981	1.1
Scotland	1,314	746	2.5
Northern Ireland	533	290	5.7
United Kingdom	10,408	5,278	1.5

(p) Provisional

Note: England data based on commercial holdings only.

Source: *Agriculture in the United Kingdom 2019*, Defra

**Table 1.6** Farm business income by country and type of farm

(At current prices)	2016/17	2017/18	2018/19
	(£000/farm)		
<b>Wales:</b>			
Dairy	84.5	82.5	46.5
Grazing livestock (LFA)	27.0	27.0	19.0
Grazing livestock (lowland)	24.0	24.0	17.0
<b>England:</b>			
Dairy	119.5	118.5	79.5
Grazing livestock (LFA)	28.5	27.0	15.5
Grazing livestock (lowland)	22.0	20.5	12.5
Specialist pigs	31.5	30.0	29.5
<b>Scotland:</b>			
Dairy	73.0	76.5	66.0
Grazing livestock (LFA)	24.5	24.5	14.5
<b>Northern Ireland:</b>			
Dairy	68.0	68.0	58.0
Grazing livestock (LFA)	17.5	17.5	14.5

Note: Farm typology based on 2010 standard output coefficients for 2016/17, and then typology based on 2013 standard output coefficients for 2017/18 onwards.

Source: *Agriculture in the United Kingdom 2019*, Defra

# Section 1 – General Information

**Table 1.7** Direct payments to farmers in the UK

	2017	2018	2019 (p)
	(£ million)		
Basic/Single Payment Scheme	2,745	2,743	2,766
Agri-environment schemes	399	441	449
LFA support schemes	83	72	52
Animal disease compensation	24	25	24
Other (a)	4	-	4

(a) Includes one-off payments

(p) Provisional

Source: *Agriculture in the United Kingdom 2019*, Defra

**Table 1.8** Principal grants and subsidies in Wales

	2017	2018	2019
	(£ million)		
Basic Payment Scheme	235.3	235.6	233.4
Glastir Advanced	11.7	14.2	15.1
Glastir Entry	20.1	17.5	15.7
Glastir Commons	5.3	5.2	5.3
Glastir Woodland	3.5	4.4	2.6
Glastir Organic	4.1	4.0	3.7
Glastir Small Grants	1.1	2.1	2.2

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

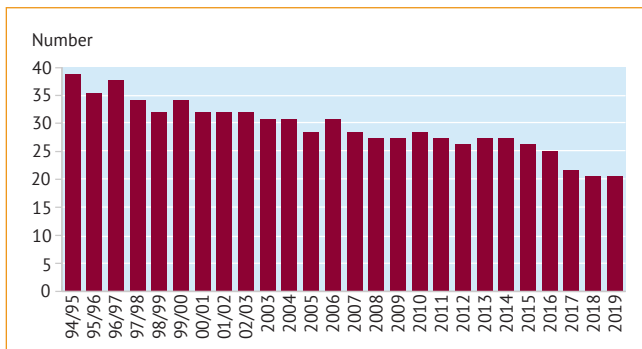
GB Livestock Units*	Abattoirs (number)		Throughputs (%)	
	2018	2019	2018	2019
0-1,000	4	3	0.2	0.1
1,001-10,000	10	10	6.0	5.7
10,001-30,000	1	1	1.6	2.1
30,001-100,000	1	1	10.3	10.8
100,001 and over	3	3	81.8	81.3
<b>Total</b>	<b>19</b>	<b>18</b>		

\* 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\*

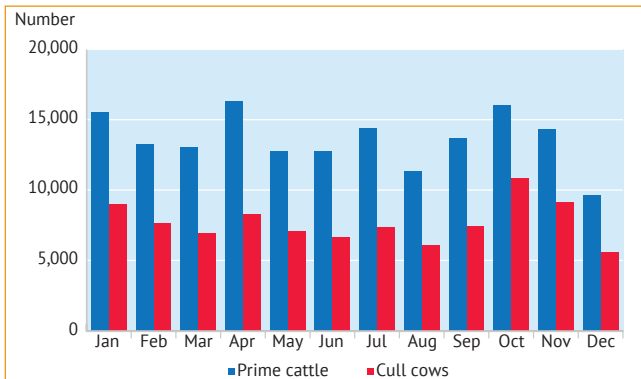


\* Figures for 2004-2019 are for calendar years; previous figures relate to year ended March.

Source: HCC

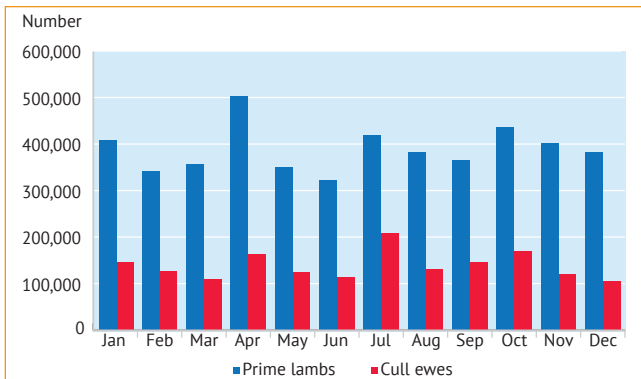
# Section 1 – General Information

**Figure 1.4** Monthly livestock auction market throughputs, Cattle, England and Wales, 2019



Source: AHDB, LAA

**Figure 1.5** Monthly livestock auction market throughputs, Sheep, England and Wales, 2019



Source: AHDB, LAA

# Section 1 – General Information

**Table 1.10** Auction markets by size of finished stock throughput in Wales, 2019

GB Livestock Units*	Number of markets	Total marketings (GBU)	Average throughput (GBU)	Share of throughput (%)
1-5,000	10	28,104	2,810	9.2
5,001-10,000	8	65,734	8,217	21.5
10,001-15,000	2	25,636	12,818	8.4
15,001-30,000	1	15,470	15,470	5.1
30,001 and over	4	170,201	42,550	55.8
Total	25	305,145	12,206	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, 2019

(000 head)	Wales	England	Scotland	GB
Total prime cattle	7	156	16	179
Cull cows	9	83	28	119
Total prime sheep	1,069	3,595	876	5,540
Cull ewes	375	1,284	320	1,979
Clean pigs	-	37	-	37
Cull sows	-	9	-	9

Source: AHDB, LAA, IAAS

# Section 1 – General Information

**Table 1.12** Abattoirs in Wales slaughtering cattle, sheep and pigs, March 2020

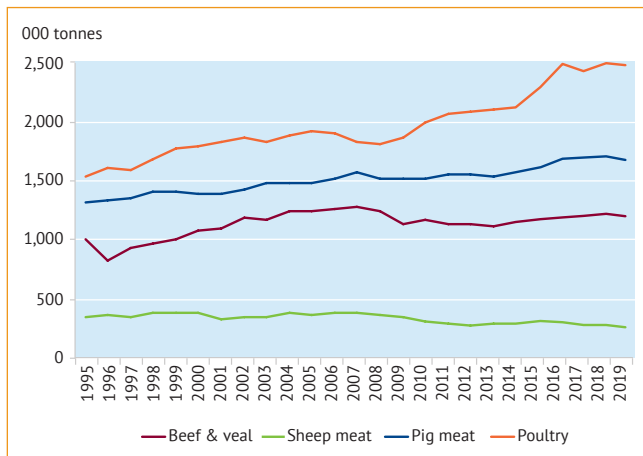
Trading Name	Location	Species Slaughtering		
		Cattle	Sheep	Pigs
Cig Calon Cymru Cyf	Cross Hands	Cattle		
Cig Eryri Snowdonia Meats Cyf	Blaenau Ffestiniog	Cattle	Sheep	
Cig Oen Caron	Tregaron	Cattle	Sheep	Pigs
CJ & AJ Butler Ltd T/A Hugh Phillips Gower Butcher	Swansea	Cattle	Sheep	Pigs
Conwy Valley Meats 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 Bros	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

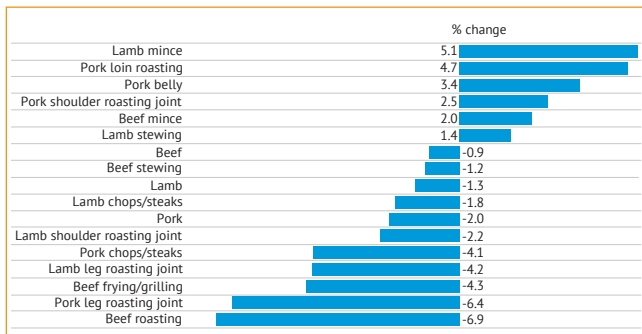


Source: Defra, IHS Maritime & Trade – Global Trade Atlas®/HMRC, AHDB

Note: All figures are carcase weight equivalent

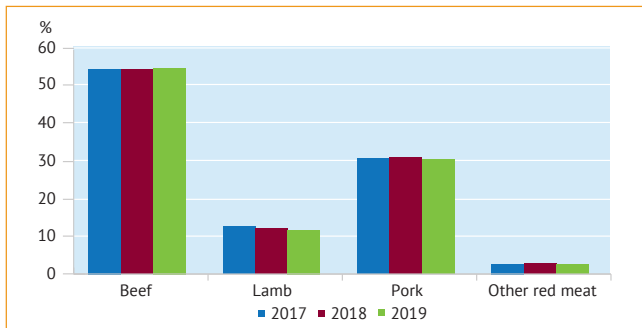
# Section 1 – General Information

**Figure 1.7** Changes in red meat purchases by product in GB, 2018/19



Source: Kantar Worldpanel

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

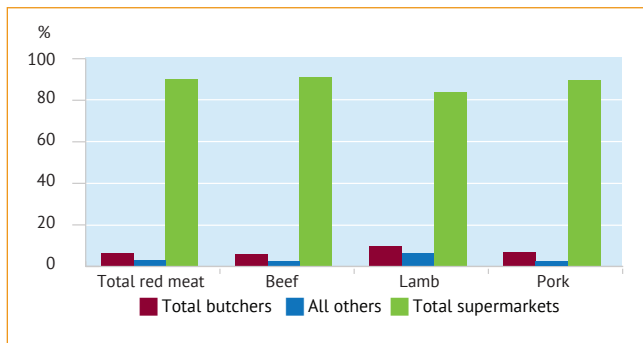


Source: Kantar Worldpanel



# Section 1 – General Information

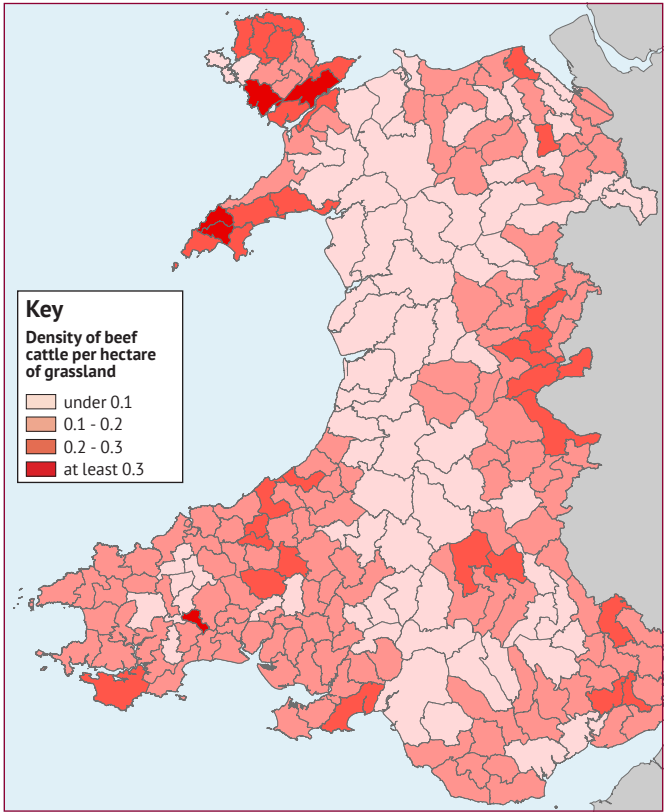
**Figure 1.9** Retailer volume share of total red meat trade in GB, 2019



Source: Kantar Worldpanel

# Section 2 – Cattle

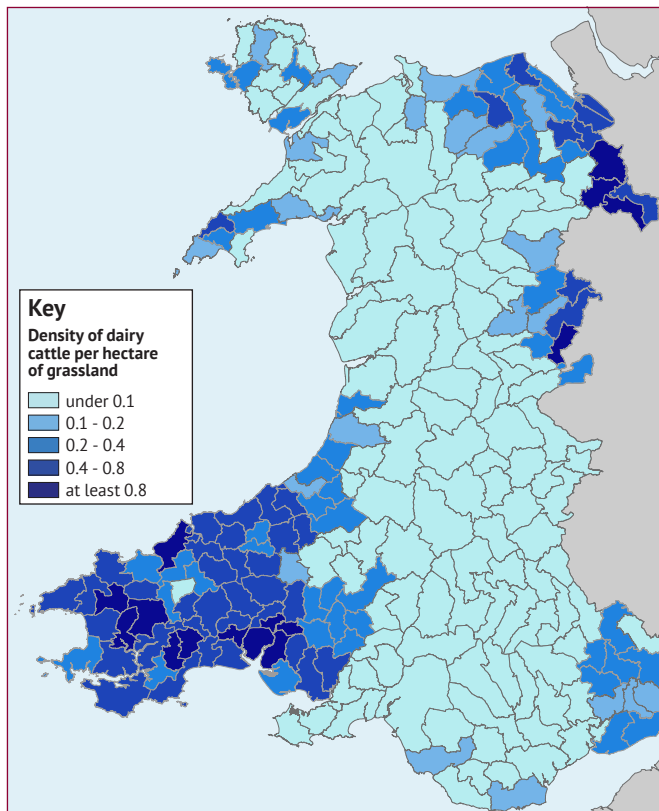
**Figure 2.1** Beef cattle density in Wales, June 2018



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

## Section 2 – Cattle

**Figure 2.2** Dairy cattle density in Wales, June 2018



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

## Section 2 – Cattle

**Table 2.1** Welsh cattle numbers by category

(000 head)	June 2017	June 2018	June 2019
<b>Cattle aged 2 years or more</b>	551	553	541
– Female dairy breeds	301	304	297
– Female non-dairy breeds	210	210	207
– Males	39	39	37
<b>Cattle aged 1-2 years</b>	265	259	258
– Female dairy breeds	76	71	73
– Female non-dairy breeds	90	91	90
– Males	100	96	95
<b>Cattle under 1 year</b>	322	323	321
– Female dairy breeds	73	75	73
– Female non-dairy breeds	113	112	114
– Males	136	136	134
<b>Total cattle and calves</b>	<b>1,137</b>	<b>1,134</b>	<b>1,120</b>

Source: Cattle Tracing System

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

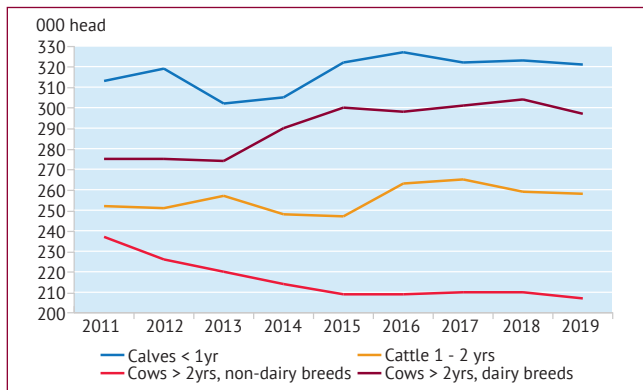
	June 2009	June 2019
Dairy females (a)	221,440	251,592
Number of dairy cow holdings	3,442	2,584
Average dairy herd size (head)	64	97
Beef females (a)	182,564	163,817
Number of beef cow holdings	8,710	7,128
Average beef size herd (head)	21	23
Total number of cattle and calf holdings	12,153	10,237

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

Source: Cattle Tracing System

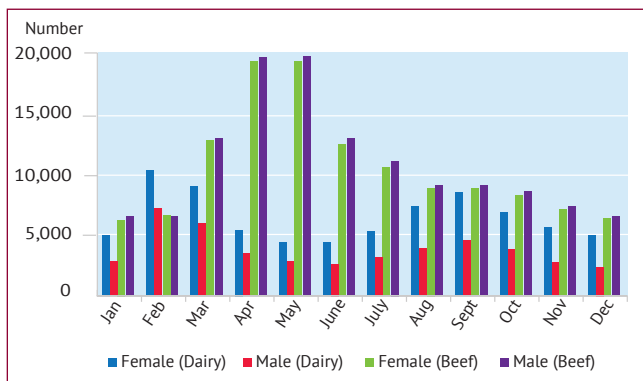
## Section 2 – Cattle

**Figure 2.3** Changes in cattle numbers in Wales



Source: Cattle Tracing System

**Figure 2.4** Calf registrations on holdings in Wales, 2019



Source: Cattle Tracing System

## Section 2 – Cattle

**Table 2.3** Suckler calf production costs in Wales, 2018/19

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	62	75	43
Veterinary & medicines	12	12	11
Other	18	21	18
<b>Total variable costs</b>	<b>93</b>	<b>107</b>	<b>72</b>
<b>Herd replacement</b>	<b>16</b>	<b>20</b>	<b>17</b>
Labour	10	16	1
Power & machinery	74	93	51
Finance & general farm costs	64	74	52
Rent	8	9	5
<b>Total fixed costs</b>	<b>156</b>	<b>193</b>	<b>110</b>
<b>Total costs</b>	<b>265</b>	<b>320</b>	<b>199</b>

\* Data relates to financial year ended March 2019. Based on 39 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)
2017	133.8	39.1
2018	139.4	40.0
2019	147.6	42.9
<b>2019 by month:</b>		
January	13.5	3.9
February	13.2	3.9
March	12.5	3.6
April	12.4	3.6
May	13.0	3.8
June	11.2	3.2
July	11.0	3.2
August	11.9	3.3
September	13.3	3.8
October	12.7	3.4
November	12.6	3.9
December	10.3	3.3

Source: Defra

**Table 2.5** Total cattle slaughterings by UK country, 2019

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
148	1,774	449	2,371	455

Source: Defra

## Section 2 – Cattle

**Table 2.6** Percentage distribution of prime cattle carcasses in GB by conformation and fat class, 2019

		Fat class Increasing fatness →							
		1	2	3	4L	4H	5L	5H	Overall
Conformation class Improving conformation ↑	E	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.5
	U+	0.1	1.0	1.9	0.7	0.1	0.0	0.0	3.8
	-U	0.1	1.7	6.2	5.7	1.1	0.0	0.0	15.0
	R	0.2	3.3	16.8	18.8	5.8	0.4	0.0	45.2
	O+	0.1	1.6	8.6	10.2	3.4	0.3	0.0	24.2
	-O	0.1	1.3	4.8	2.9	0.5	0.0	0.0	9.6
	P+	0.2	0.5	0.6	0.2	0.0	0.0	0.0	1.4
	-P	0.2	0.1	0.1	0.0	0.0	0.0	0.0	0.3
	Overall	1.1	9.7	39.1	38.3	10.9	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)	
	2018	2019	2018	2019
0-1,000	9	8	2.2	1.9
1,001-5,000	4	4	7.1	6.2
5,001 and over	3	3	107.8	117.5
Total	16	15	117.1	125.6

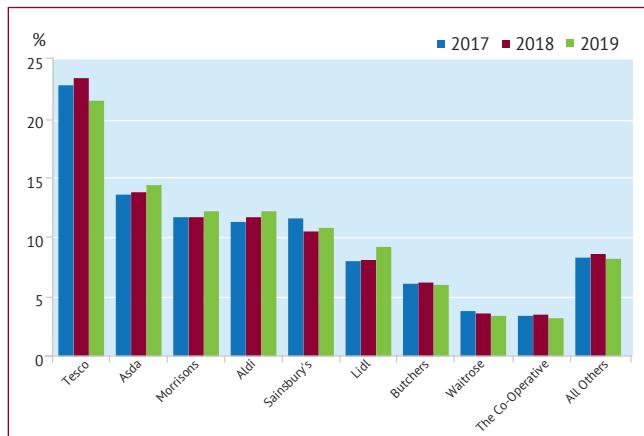
\* Figures from Welsh Red Meat Levy returns

Source: HCC



## Section 2 – Cattle

**Figure 2.5** Retailer volume share of beef sales in GB 2017-2019



Source: Kantar Worldpanel

**Table 2.8** Changes in beef purchases, expenditure and average price in Wales and GB, 2018/19

	Beef purchases (tonnes)	Beef purchases (% change)	Beef expenditure (£ million)	Beef expenditure (% change)	Beef average price (£/kg)	Beef average price (% change)
Wales	14,744	7.2	109.9	3.9	7.5	-3.1
GB	278,958	-0.9	2,156.5	-2.2	7.7	-1.3

Source: Kantar Worldpanel

## 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)
2012	236.3	867.4	26.7	17.6
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	992.0	20.2	17.9

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)
2012	119.8	388.9	32.2	33.3
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	48.6	70.8

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

## Section 2 – Cattle

**Table 2.11** UK beef imports

		2017	2018	2019
		(000 tonnes, product weight)		
Total beef and veal		274.7	290.0	251.0
Of which from:	Irish Republic	194.0	210.5	192.1
	Netherlands	20.7	19.3	17.0
	Poland	19.6	17.2	15.3
	Germany	10.3	8.9	5.0
	Brazil	1.8	3.8	3.0
	Italy	3.4	4.5	2.7
	Uruguay	2.1	2.9	2.6
	Belgium	2.5	3.0	2.6
	Namibia	2.0	1.6	2.1
	Spain	3.2	2.3	2.1
Shares by type:				
	Frozen	79.1	94.6	77.2
	Fresh/chilled	195.6	195.4	173.8

Source: HM Revenue & Customs (HMRC)

## Section 2 – Cattle

**Table 2.12** UK beef exports

		2017	2018	2019
		(000 tonnes, product weight)		
Total beef and veal		105.6	110.5	135.8
Of which to:	Irish Republic	34.2	36.4	40.6
	Netherlands	24.0	27.7	34.9
	France	8.2	9.2	11.6
	Hong Kong	7.1	7.2	11.0
	Italy	5.1	5.4	6.2
	Belgium	3.7	3.8	3.6

Source: HM Revenue & Customs (HMRC)

**Table 2.13** UK monthly beef trade, 2019

	UK beef imports	UK beef exports
	(000 tonnes, product weight)	
January	22.5	9.5
February	21.5	9.5
March	23.7	12.4
April	21.2	9.9
May	19.2	10.0
June	20.0	10.8
July	20.0	10.7
August	17.6	12.3
September	18.5	13.5
October	22.9	14.1
November	20.2	12.9
December	23.7	10.1

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	-O4L cows
	(pence per kilogram deadweight)			
2017	369.8	348.5	368.1	262.0
2018	372.7	352.5	371.2	263.2
2019	344.8	325.3	343.5	241.7
<b>2019 by month:</b>				
January	362.0	332.1	359.5	230.4
February	358.5	328.2	356.0	237.4
March	347.9	324.6	345.8	244.0
April	350.2	336.5	349.9	257.3
May	355.0	341.8	355.3	262.4
June	344.6	329.6	345.4	251.6
July	336.4	317.5	336.5	251.7
August	334.4	311.3	334.4	247.3
September	332.5	309.7	331.5	245.3
October	332.4	310.7	330.0	231.4
November	336.0	315.3	333.1	223.4
December	337.9	314.8	336.4	226.1

\* 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)			
2017	189.8	183.3	202.0	113.4
2018	190.2	184.3	203.1	112.7
2019	178.5	171.2	193.0	105.0
<b>2019 by month:</b>				
January	185.9	177.5	199.2	100.4
February	182.2	175.0	196.0	104.7
March	180.3	173.2	194.0	109.5
April	182.7	176.7	196.8	116.6
May	180.0	172.1	193.8	116.6
June	177.4	169.0	191.1	107.8
July	177.2	167.6	192.7	111.1
August	173.0	170.3	191.3	105.7
September	171.8	168.4	187.4	103.1
October	166.6	163.2	183.6	93.3
November	177.7	168.9	192.6	95.9
December	188.1	176.2	198.5	104.1

\* Prices collected from English and Welsh auction markets.

Source: AHDB, LAA

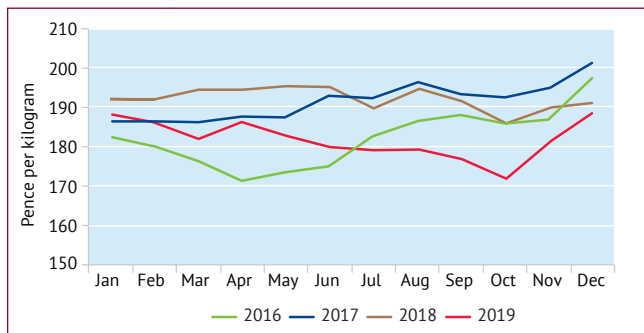
**Table 2.16** Rearing calf prices in England and Wales

(£/head)	Friesian/ Holstein	Hereford X		Continental X	
	Bulls	Bulls	Heifers	Bulls	Heifers
2017	44.8	173.1	129.3	236.9	195.7
2018	39.0	140.5	95.3	207.8	158.1
2019	30.1	108.7	68.8	172.4	125.5

Source: AHDB, LAA

## Section 2 – Cattle

**Figure 2.6** Seasonality of prime cattle liveweight prices, England and Wales, 2016-2019



Source: AHDB Beef and Lamb, LAA

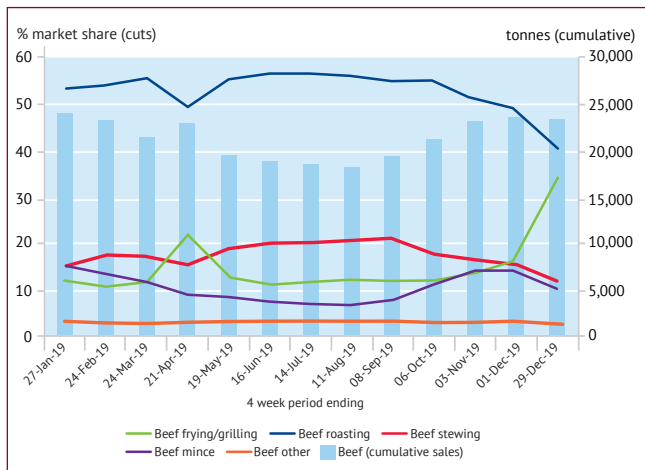
**Table 2.17** Store cattle prices in England and Wales

(£/head)	Yearlings		18 months		2 years	
	Steers	Heifers	Steers	Heifers	Steers	Heifers
Friesian/Holstein X						
2017	403.7	381.0	572.9	499.5	704.2	639.1
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
Hereford X						
2017	668.5	522.8	792.3	648.5	919.1	779.7
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
Continental X						
2017	885.3	769.7	975.3	866.5	1059.2	950.0
2018	862.1	746.2	929.9	824.0	1031.0	921.6
2019	812.7	699.9	883.0	784.3	969.1	869.6

Source: AHDB, LAA

## Section 2 – Cattle

**Figure 2.7** Seasonality of beef sales at GB retail by cut 2019

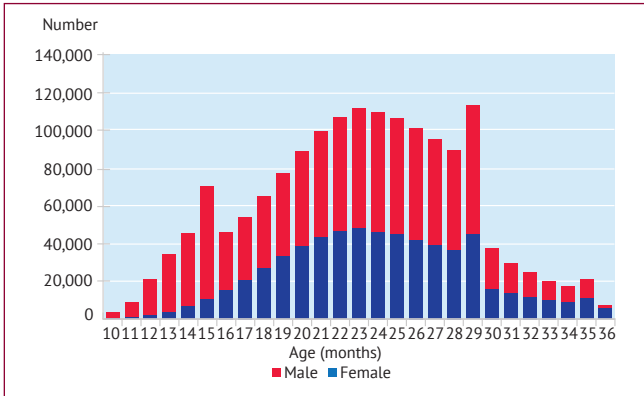


Source: Kantar Worldpanel



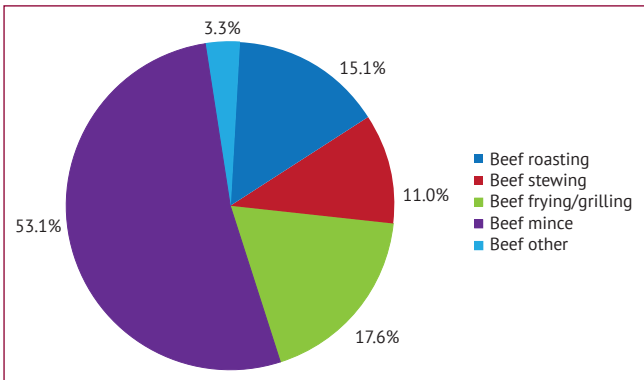
## Section 2 – Cattle

**Figure 2.8** Age profile of male and female prime cattle at GB abattoirs, 2019



Source: Cattle Tracing System

**Figure 2.9** Retail beef cuts sold in GB by volume, 2019



Source: Kantar Worldpanel

## Section 2 – Cattle

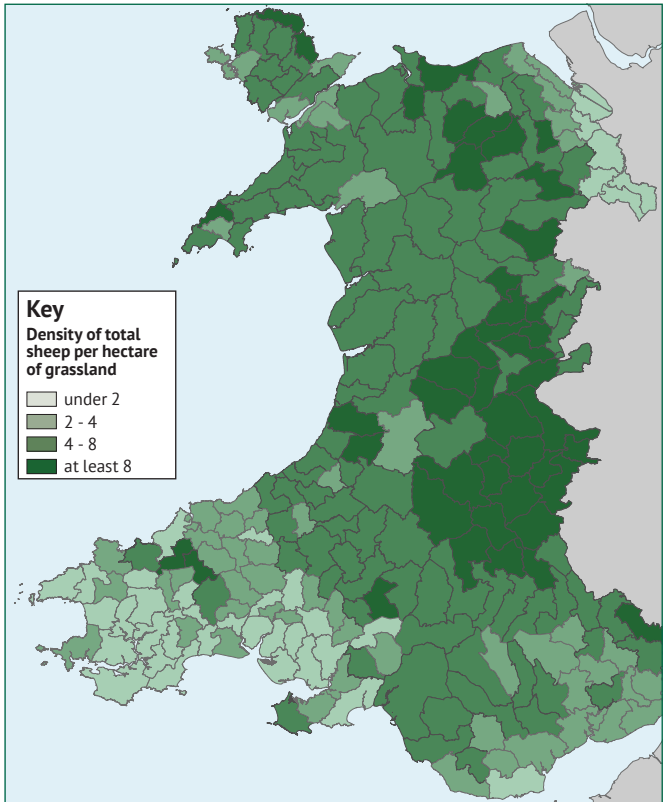
**Table 2.18** UK beef and veal balance sheet\*

	2017	2018	2019
	(000 tonnes)		
Production	904.7	898.4	914.5
Imports	440.8	453.7	384.0
Exports	139.9	147.1	174.3
Total consumption	1,205.7	1,205.0	1,124.2
Self sufficiency (%)	75.0	74.6	81.3

\* 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 2018



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

# Section 3 – Sheep

**Table 3.1** Sheep numbers in Wales by category

(000 head)	June 2017	June 2018	June 2019
Breeding ewes	4,652	4,432	4,424
Other sheep, over one year	78	90	89
Lambs under one year	4,890	4,585	4,640
Total sheep and lambs	10,037	9,531	9,534

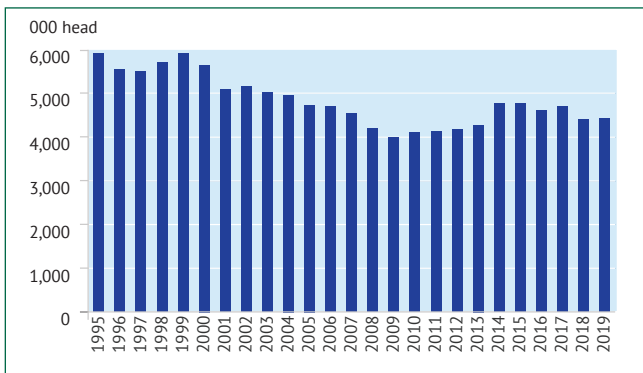
Source: Welsh Government

**Table 3.2** Changes in number of holdings in Wales with sheep

	June 2009	June 2019
Number of sheep and lamb holdings	14,827	14,135
Average flock size (head)	556	674

Source: Welsh Government

**Figure 3.2** Changes in breeding ewe numbers in Wales



Source: Welsh Government

## Section 3 – Sheep

**Table 3.3** Lamb production costs in Wales, 2018/19\*

	All farms (average)	Bottom third (high cost)	Top third (low cost)
	(pence per kg liveweight)		
Feed & forage	73	90	59
Veterinary & medicines	13	14	11
Other	21	24	18
<b>Total variable costs</b>	<b>107</b>	<b>127</b>	<b>88</b>
<b>Flock replacement</b>	<b>23</b>	<b>26</b>	<b>18</b>
Labour	6	8	3
Power & machinery	46	54	34
Finance & general farm costs	41	53	28
Rent	8	11	7
<b>Total fixed costs</b>	<b>100</b>	<b>127</b>	<b>72</b>
<b>Total costs</b>	<b>230</b>	<b>280</b>	<b>179</b>

\* Data relates to financial year ended March 2019. Based on 122 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)
2017	3,369.5	62.9
2018	3,282.7	60.8
2019	3,303.2	63.4
<b>2019 by month:</b>		
January	270.6	5.1
February	225.6	4.6
March	233.0	4.7
April	227.3	4.6
May	199.1	4.0
June	193.3	3.8
July	286.2	5.4
August	322.2	6.0
September	342.3	6.4
October	371.9	7.0
November	337.0	6.3
December	294.8	5.5

Source: Defra

**Table 3.5** Total sheep slaughterings by UK country, 2019

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
3,303	9,869	1,265	14,438	414

Source: Defra

# Section 3 – Sheep

**Table 3.6** Percentage distribution of lamb carcasses in Wales by conformation and fat class, 2019

		Fat class Increasing fatness							
		→							
Conformation class Improving conformation ↑		1	2	3L	3H	4L	4H	5	Overall
	E	0.0	1.5	5.1	2.3	0.8	0.1	0.0	9.9
	U	0.1	4.0	14.7	7.9	2.3	0.3	0.1	29.3
	R	0.5	9.8	21.5	12.7	3.8	0.6	0.2	49.2
	O	0.6	4.2	4.6	1.9	0.3	0.0	0.0	11.6
	P	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Overall	1.2	19.5	45.9	24.8	7.2	1.0	0.3	

Source: AHDB

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

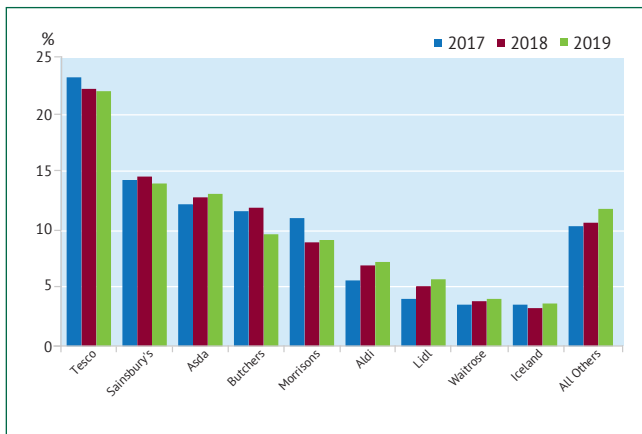
Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2018	2019	2018	2019
0-5,000	7	6	14.8	10.8
5,001-20,000	7	6	82.8	81.8
20,001-50,000	1	1	28.4	27.6
50,001 and over	4	4	3,170.3	3,157.2
Total	19	17	3,296.3	3,277.3

\* Figures from Welsh Red Meat Levy returns

Source: HCC

## Section 3 – Sheep

**Figure 3.3** Retailer volume shares of lamb sales in GB, 2017-2019



Source: Kantar Worldpanel

**Table 3.8** Changes in lamb purchases, expenditure and average price in Wales and GB, 2018/19

	Lamb purchases (tonnes)	Lamb purchases (% change)	Lamb expenditure (£ million)	Lamb expenditure (% change)	Lamb average price (£/kg)	Lamb average price (% change)
Wales	3,246	-0.1	29.7	0.3	9.1	-0.2
GB	61,244	-1.7	581.8	0.2	9.5	2.0

Source: Kantar Worldpanel



## 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)
2011	88.3	411.9	10.9	17.5
2012	86.2	368.9	8.8	12.9
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

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)
2011	96.4	373.9	3.4	3.9
2012	94.7	352.4	3.8	4.7
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

Note: Volumes are shipped product weight.

Source: HM Revenue & Customs (HMRC)

## Section 3 – Sheep

**Table 3.11** UK sheep meat imports

		2017	2018	2019
		(000 tonnes, product weight)		
Total sheep meat		80.0	77.6	62.7
Of which from:	New Zealand	52.0	50.9	39.0
	Irish Republic	9.5	7.4	9.3
	Australia	11.1	9.7	7.1
	Netherlands	2.6	3.4	2.5
Shares by type:				
	Carcases	3.0	3.3	2.0
	Bone-in cuts	50.0	48.0	38.2
	Boneless cuts	27.0	26.3	22.5
	Frozen	45.8	46.3	34.8
	Fresh/chilled	34.1	31.3	27.9

Source: HM Revenue & Customs (HMRC)

## Section 3 – Sheep

**Table 3.12** UK sheep meat exports

		2017	2018	2019
		(000 tonnes, product weight)		
Total sheep meat		89.8	83.2	95.0
Of which to:	France	40.8	35.6	37.4
	Germany	14.1	15.2	19.4
	Irish Republic	9.2	9.3	10.9
	Belgium	7.7	7.7	8.5
	Netherlands	5.3	5.1	6.4
	Italy	3.7	3.4	4.2
	Hong Kong	3.7	2.7	1.8
	Shares by type:			
	Carcases	56.0	52.5	61.6
	Bone-in/boneless cuts	33.8	30.6	33.4

Source: HM Revenue & Customs (HMRC)

**Table 3.13** UK monthly sheep meat trade, 2019

	UK sheep meat imports	UK sheep meat exports
	(000 tonnes, product weight)	
January	5.3	6.4
February	4.5	6.3
March	8.0	8.7
April	8.8	8.5
May	6.2	7.6
June	5.3	6.9
July	4.8	6.5
August	3.5	8.0
September	2.8	9.8
October	3.2	8.8
November	4.7	8.5
December	5.5	9.1

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)	
2017	417.4	415.8
2018	445.1	444.1
2019	415.6	415.8
<b>2019 by month:</b>		
January	432.5	430.6
February	423.8	421.3
March	428.4	425.1
April	469.0	464.9
May	473.9	474.7
June	456.5	455.9
July	411.1	411.2
August	393.0	393.4
September	378.4	378.0
October	374.4	373.5
November	412.5	410.9
December	432.2	430.6

\* 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\*

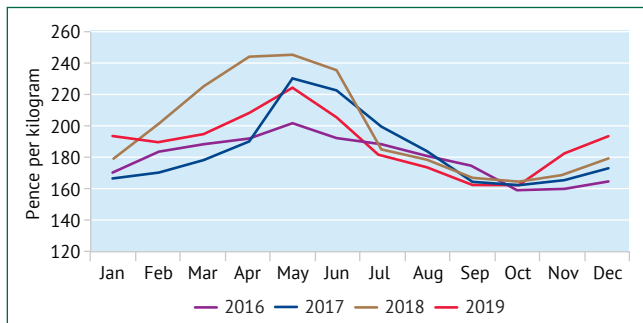
	SQQ Sheep (pence per kilogram liveweight)	Ewes (£ per head)
2017	184.8	50.3
2018	193.0	51.8
2019	187.5	54.4
<b>2019 by month:</b>		
January	193.9	48.8
February	189.3	49.1
March	196.3	60.7
April	208.9	63.7
May	225.8	65.6
June	206.5	59.4
July	181.6	53.4
August	175.9	46.6
September	162.6	47.1
October	163.1	46.5
November	182.5	53.0
December	194.8	62.6

\* 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, 2016-2019



Source AHDB, LAA

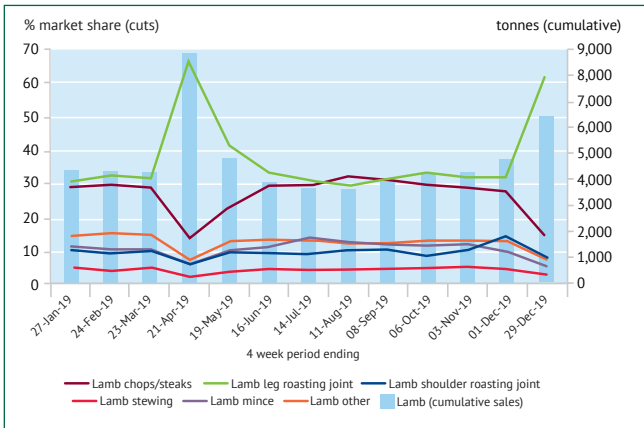
**Table 3.16** Store sheep prices in England and Wales

(£/head)	Old season lambs	New season lambs
2017	54.2	53.4
2018	63.1	54.7
2019	62.9	56.4

Source AHDB, LAA

# Section 3 – Sheep

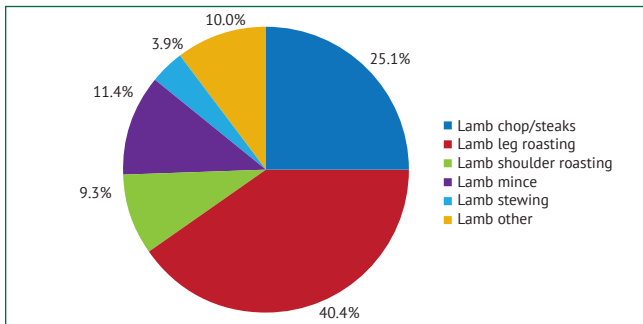
**Figure 3.5** Seasonality of lamb sales at GB retail by cut 2019



Source: Kantar Worldpanel

# Section 3 – Sheep

**Figure 3.6** Retail lamb cuts sold in GB by volume, 2019



Source: Kantar Worldpanel

**Figure 3.7** Percentage of lambs meeting target specification by weight range in Wales, 2019

Old season lambs			New season lambs	
11.6	1.7	<12kg	14.9	4.0
86.6			81.0	
35.9	7.2	12-15.9kg	39.9	13.3
56.9			46.7	
57.4	24.6	16-19.9kg	67.6	23.6
18.0			8.7	
50.6	45.0	20+kg	56.4	41.9
4.4			1.6	
<b>Overall</b>				
57.3		31.1		
11.6				

**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** UK sheep meat balance sheet\*

	2017	2018	2019
	(000 tonnes)		
Production	299.3	289.0	307.5
Imports	94.6	92.1	76.0
Exports	94.2	87.3	98.6
Total consumption	299.8	293.7	284.8
Self sufficiency (%)	99.9	98.4	108.0

\* 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)	2017	2018	2019
Breeding pigs	3.5	3.4	3.3
Fattening pigs	21.0	19.8	21.1
Total pigs	24.5	23.2	24.4

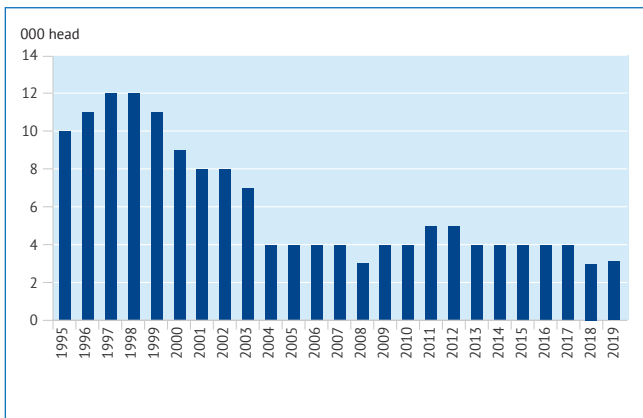
Source: Welsh Government

**Table 4.2** Changes in number of holdings in Wales with pigs

	June 2009	June 2019
Number of pig holdings	860	1,335
Average herd size (head)	26	18

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)
2017	29.2	2.4
2018	28.5	2.3
2019	28.4	2.4
<b>2019 by month:</b>		
January	1.8	0.2
February	1.9	0.2
March	2.3	0.2
April	2.3	0.2
May	2.1	0.2
June	2.4	0.2
July	2.4	0.2
August	2.6	0.2
September	2.4	0.2
October	2.6	0.2
November	2.7	0.2
December	3.0	0.2

Source: Defra

**Table 4.4** Total pig slaughterings by UK country, 2019

Wales	England	Scotland	Great Britain	Northern Ireland
(000 head)				
28	8,929	357	9,314	1,820

Source: Defra

## Section 4 – Pigs

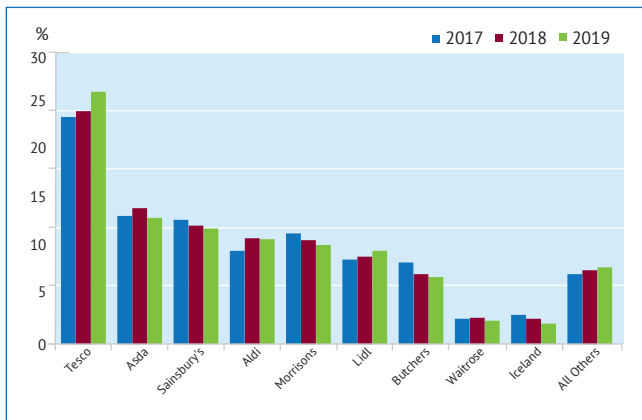
**Table 4.5** Numbers and throughputs of abattoirs in Wales slaughtering pigs\*

Annual throughput:	Abattoirs (number)		Throughputs (000 head)	
	2018	2019	2018	2019
0-1,000	5	6	1.5	2.8
1,001 and over	7	5	27.5	25.6
<b>Total</b>	<b>12</b>	<b>11</b>	<b>29.0</b>	<b>28.4</b>

\* Figures from Welsh Red Meat Levy returns

Source: HCC

**Figure 4.2** Retailer volume shares of pork sales in GB, 2017-2019



Source: Kantar Worldpanel

## Section 4 – Pigs

**Table 4.6** Changes in pork purchases, expenditure and average price in Wales and GB, 2018/19

	Pork purchases (tonnes)	Pork purchases (% change)	Pork expenditure (£ million)	Pork expenditure (% change)	Pork average price (£/kg)	Pork average price (% change)
Wales	8,719	-4.7	41.5	-1.5	4.8	3.3
GB	156,871	-2.0	730.0	-2.7	4.7	-0.7

Source: Kantar Worldpanel

**Table 4.7** Volume and value of UK pig meat imports

	Fresh/frozen		Processed*		Offal	
	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)	(000 tonnes)	(£ million)
2011	372.8	723.8	500.7	1,350.0	12.5	9.3
2012	349.2	690.2	506.6	1,397.9	15.8	13.0
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

\* 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)
2011	144.4	171.3	50.4	100.7	34.9	25.0
2012	154.3	189.3	37.5	87.1	48.5	30.2
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

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

Source: HM Revenue & Customs (HMRC)

**Table 4.9** UK pig meat imports

		2017	2018	2019
		(000 tonnes, product weight)		
Total pork		467.0	457.8	447.9
Of which from:	Denmark	163.6	152.5	133.9
	Germany	88.5	95.3	97.7
	Irish Republic	40.3	43.6	46.0
	Netherlands	55.4	47.3	45.4
	Spain	40.9	38.9	38.9
	Belgium	32.2	35.7	33.4
Bacon and ham		220.1	215.0	193.2
Of which from:	Netherlands	103.2	102.4	92.9
	Denmark	58.2	55.2	53.0

Source: HM Revenue & Customs (HMRC)

## Section 4 – Pigs

**Table 4.10** UK pig meat exports

		2017	2018	2019
		(000 tonnes, product weight)		
Total pork		216.0	217.8	244.5
Of which to:	China	40.4	40.7	81.4
	Irish Republic	31.1	34.1	34.1
	Germany	32.7	33.6	34.1
	Netherlands	16.4	17.5	27.7
	Denmark	30.0	25.0	12.4
	United States	7.7	11.0	9.8
Bacon and ham		19.3	21.4	19.1
Of which to:	Irish Republic	14.0	16.1	12.6

Source: HM Revenue & Customs (HMRC)

**Table 4.11** UK monthly pork trade, 2019

	UK pork imports	UK pork exports
	(000 tonnes, product weight)	
January	40.1	18.6
February	38.0	16.6
March	43.6	20.6
April	39.1	20.2
May	33.4	22.5
June	32.6	18.4
July	33.9	19.1
August	33.9	21.4
September	40.4	21.5
October	40.6	25.2
November	35.9	22.9
December	36.4	17.6

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)	
2017	156.7	160.1
2018	146.8	150.0
2019	148.4	151.9
<b>2019 by month:</b>		
January	139.0	144.4
February	137.5	143.0
March	137.8	142.9
April	139.2	143.8
May	144.8	148.1
June	149.4	152.0
July	152.4	155.0
August	153.1	155.6
September	153.5	155.8
October	156.5	158.5
November	158.6	160.6
December	161.9	163.4

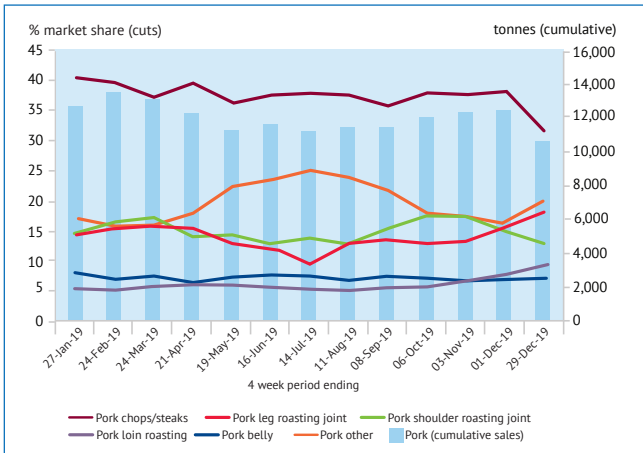
EU specification excludes flare fat, kidney and diaphragm, the UK specification includes these parts.

Source: AHDB



# Section 4 – Pigs

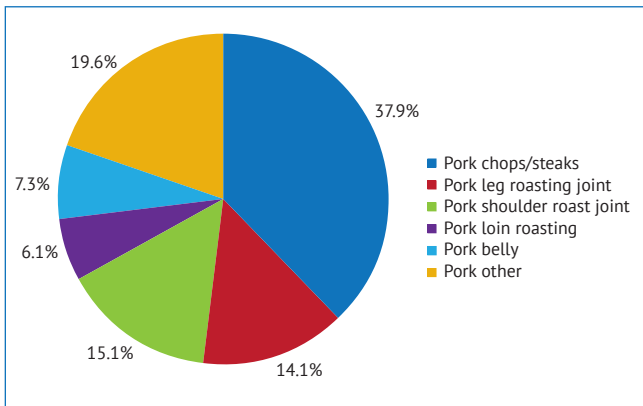
**Figure 4.3** Seasonality of pork sales at GB retail by cut 2019



Source: Kantar Worldpanel

## Section 4 – Pigs

**Figure 4.4** Retail pork cuts sold in GB by volume, 2019



Source: Kantar Worldpanel

**Table 4.13** UK pork balance sheet\*

	2017	2018	2019
	(000 tonnes)		
Production	902.8	926.6	953.6
Imports	1,082.7	1,057.1	943.0
Exports	263.5	266.5	291.3
Total consumption	1,722.0	1,717.2	1,605.3
Self sufficiency (%)	52.4	54.0	59.4

\* 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, Agentia Tributaria, CSO Ireland, ONS.





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