

“ This month’s Market Bulletin takes a look at UK June 2024 survey results which were released mid-December, and how livestock numbers may impact on supply further down the line.

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CATTLE

Data from Defra shows that the total number of cattle and calves in the UK fell slightly in June 2024, from 9.55 million to **9.41 million head** – a decrease of 1.5% (143,555 head) compared to 2023. This continues the ongoing decline in the UK herd. The overall breeding herd* (beef & dairy) contracted by almost 2% to 3.18 million head, driven by a 5% reduction in the **beef breeding herd** to 1.3 million head – this is now the smallest, and 14% lower than in 2014. Meanwhile, the **dairy breeding herd** remained stable at 1.8 million head, consistent with 2014 levels. A 3% increase in “other female cattle,” particularly in the beef category (+5%), could indicate efforts to retain younger females as potential future breeding stock. However, this may not offset the decline in the current breeding herd in the short term.

Cattle aged 1 to 2 years saw a marginal decrease (-1%), however there is stability in beef category, whilst cattle less than 1 year old

show a notable decline, potentially impacting the supply pipeline for beef cattle in subsequent years. The male cattle population decreased by 2%, though a 5% rise in males aged 2 years or more may temporarily support slaughter numbers, but declines in younger male categories (-2% for 1-2 years, -4% for less than 1 year) could restrict beef production in later years.

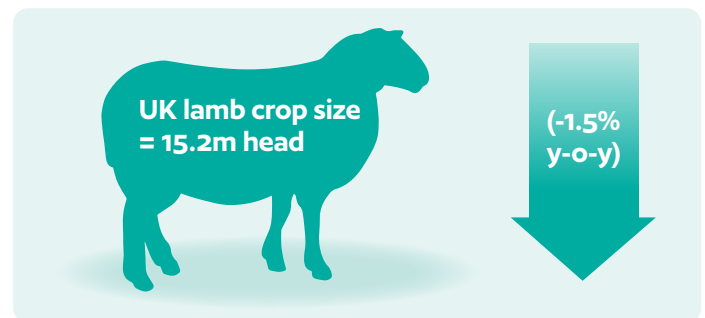
These results would suggest beef production may not decline sharply in the short-term following stability in beef cattle aged 1-2 years, along with the increase in older males. The notable decline in the beef breeding herd, coupled with fewer young calves and declining female cattle under 2 years does however suggest a potential reduction in prime beef supplies and production volumes in the medium- to long-term.

**a breeding cow in the context of this release is defined as a cow that has calved.*

SHEEP

Defra data shows the total sheep and lamb population in the UK fell by 2.5% in June 2024, from **31.8 million** to 31.0 million head. This is a decrease of 2.5% (or 785,800 head) on the year, and marks the smallest flock size recorded in the June survey since 2011. This decline was driven by reductions across most sheep categories. The **female breeding flock** fell by 3.6% to 14.9 million head, with those intended for first time breeding driving this decline – down 9% on the year, which may indicate reduced replacements entering the breeding cycle.

The results indicate the **lamb crop** (aged under one year old) fell by 1.5% to stand at 15.2 million head, the smallest lamb crop recorded in recent decades. This decrease has already impacted slaughter availability for the current lamb crop (May 2024 – April 2025), with the



throughput levels 8% below the previous year. The reduction in the female breeding flock, particularly first-time breeding ewes, will likely result in a smaller lamb crop next year which could tighten supplies of lambs for both breeding and slaughter in subsequent years.

PIGS

As of June 2024, the UK pig population stood at **4.7 million head** - a 0.7% increase from 2023. This growth was driven by a near 40,000 head increase in the number of **fattening pigs**, bringing their total to 4.3 million head. However, the **female breeding herd** declined by 3% to 327,300 head.

Thank you to all who took part in Phase 3 of our ‘Farmer Intentions Survey’. A summary of the headline results can be found on our website here - <https://meatpromotion.wales/en/market-intelligence/market-analysis/>

June 2024 survey results for Wales:

- Total number of cattle & calves = 1.1 million head (-2% on the year)
- Total number of sheep & lambs = 8.8 million head (+1% on the year)
- Total number of pigs = 27,900 head (+12% on the year)

Source: ‘Survey of agriculture and horticulture, June 2024’

Monthly Market Round-Up

CATTLE

Prices – week ending 14th December

The average deadweight prices in England and Wales for steers stood at **542.8p/kg**. This was:

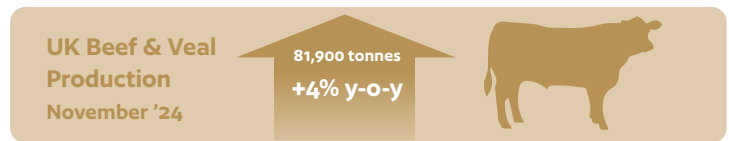
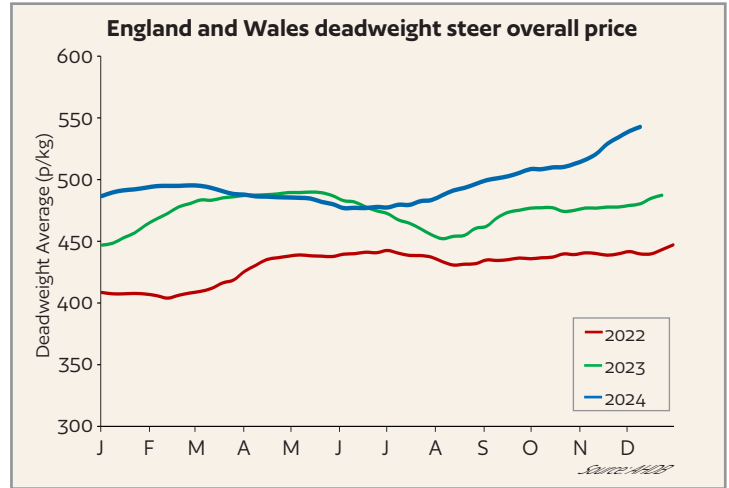
- + 3.5p on the previous week,
- 62.4p above year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 535.9p/kg (+2.6p on the week),
- Young bulls: 522.0p/kg (+2.9p on the week), and
- Cull cows: 363.9p/kg (+2.2p on the week).

Throughput – November 2024

- Total cattle throughput at UK abattoirs = 247,600 head – down 6% on the year.
- Total prime cattle throughput = 177,000 head – down 5% on the year.
 - steers -7%, heifers -3%, and young bulls -9%
- Average prime cattle carcase weights = 337.4kg (-1.1kg on the year).
- Adult cattle throughput = 63,200 head – down 7% on the year.



SHEEP

Prices – week ending 14th December

The deadweight lamb price in GB averaged **689.9p/kg**. This was:

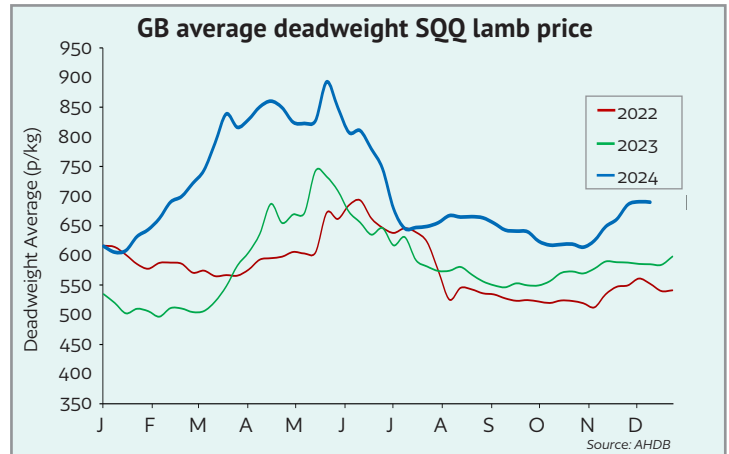
- - 0.8p on the previous week

Numbers coming forward reached 51,330 head. This was:

- + 12% on the previous week, and
- - 10% compared with year-earlier levels.

Throughput - November 2024

- Total sheep throughput at UK abattoirs = 1.1 million head – down 12% on the year.
- Lamb throughput = 1.0 million head – down 11% on the year.
- Average lamb carcase weights = 19.8kg (+0.1kg on the year).
- Cull ewe and ram throughput = 108,900 head – down 16% on the year.



PIGS

Prices – week ending 7th December

The EU-spec All Pig Price (APP) in GB stood at **208.0p/kg**. This was:

- - 1.7p on the previous week,
- - 7.5p compared with year-earlier levels,
- 30.3p higher than the 5-year average (2018-22 average: 177.7p/kg).

Throughput – November 2024

- Total pig throughput at UK abattoirs = 895,300 head – down 4% on the year.
- Clean pig throughput = 878,700 head – down 3% on the year.
- Average clean pig carcase weights = 90.2kg (-0.1kg on the year)
- Sow and boar throughput = 16,600 head – down 19% on the year.

