

“ Herd performance indicators, alongside estimates of cost of production, provide key insight into the productivity and efficiency of the suckler herd in Wales. This Market Bulletin explored the latest British Cattle Movement Service (BCMS) and Farm Business Survey (FBS) data in greater detail.



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## CALVING PERIOD

According to the latest BCMS data, the **average calving interval** for beef dams in Wales was **425 days in 2025**. This represents an increase of almost five days compared to 2024, and is the longest interval recorded since 2020 (427 days). Historical trends show that the interval averaged 428 days in 2015, highlighting that progress towards the industry target of a 365-day calving interval remains limited. Factors such as suboptimal growth rates and unmanaged fertility can contribute to extended intervals, while tighter calving patterns can improve herd profitability by maximising the number of calves produced over a dam's lifetime.

The **average age at first calving** is another key driver of reproductive efficiency, as the calf represents the primary output of the enterprise. In 2025, this stood at **980 days** (32.2 months). While slightly higher than the previous two years, this marks a notable improvement compared to pre-2020 levels, when the average approached 34 months in 2015. Although there remains scope to move closer to the industry target of 24 months (730 days), the long-term trend indicates positive progress. Improved heifer management to achieve earlier calving can enhance profitability and reduce production costs, with evidence suggesting lifetime calf output - and total weaned weight - can be significantly increased.

### Average calving interval for beef dams in Wales, 2025:



### Average age at first calving for beef dams in Wales, 2025:



Reproductive efficiency remains fundamental to profitability across all production systems. Incremental improvements not only support financial performance but can also contribute to lower greenhouse gas emissions per unit of output.

## PROFITABILITY

### SUCKLER BEEF PRODUCTION COSTS IN WALES 2024/25:

p/kg liveweight	Average Performers	Bottom Third	Top Third
<b>Total Costs</b>	256.5	352.5	166.6
<b>Market Returns</b>	247.7	240.8	250.0
<b>% Total Costs Covered by Market Returns</b>	96.6%	68.3%	150.1%

Source: Farm Business Survey

The FBS provides annual **cost of production** data, offering valuable insight into the financial performance of beef enterprises in Wales. For 2024/25, the data highlights that the top-performing herds (top third) recorded a total cost of production of **166.6p/kg**, and achieved higher output, producing 279kg per cow. These herds also maintained lower variable and fixed costs compared to lower-performing groups.

In contrast, the gap in total costs between the top and bottom third of producers reached 186.0p/kg. With market returns broadly similar across performance groups, this suggests that on-farm cost control and efficiency are key drivers of profitability within Welsh suckler herds.

### What does this mean for industry?

Improving reproductive performance will remain central to driving both productivity and environmental efficiency within the Welsh suckler herd. As market returns show limited variation between producers, greater emphasis is likely to be placed on cost control and technical efficiency to maintain margins. Producers who can consistently optimise herd performance are likely to be better positioned to remain resilient in the face of ongoing economic and policy pressures.

# Monthly Market Round-Up

## CATTLE

### Prices – week ending 18<sup>th</sup> April

The average deadweight prices in England and Wales for steers stood at **630.8p/kg**. This was:

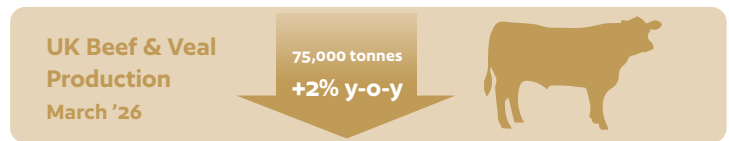
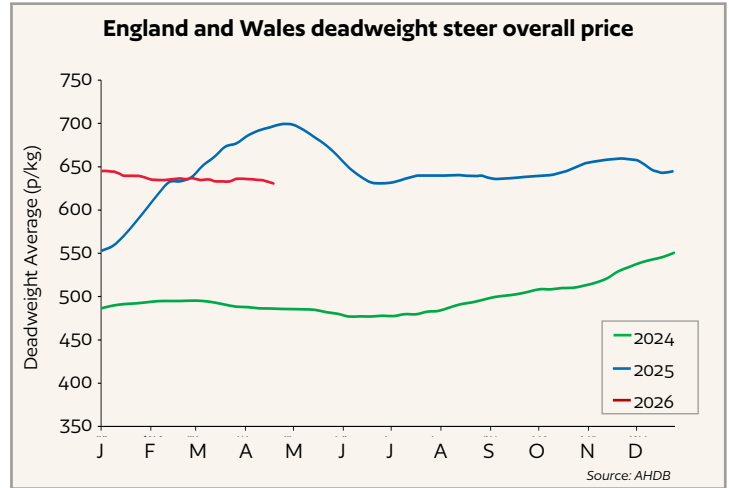
- -3.2p on the previous week,
- 64.7p below year-earlier levels.

The deadweight prices for other cattle categories were as follows -

- Heifers: 629.0p/kg (-3.7p on the week),
- Young bulls: 614.0p/kg (-3.0p on the week), and
- Cull cows: 523.0p/kg (-4.7p on the week).

### Throughput – March 2026

- Total cattle throughput at UK abattoirs = 227,800 head – up 1% on the year.
- Total prime cattle throughput = 172,900 head – down 2% on the year.
  - steers +2%, heifers +0.1%, and young bulls +9%
- Average prime cattle carcass weights = 353.5kg (-0.1kg on the year).
- Adult cattle throughput = 46,800 head – down 0.3% on the year.



## SHEEP

### Prices – week ending 18<sup>th</sup> April

The deadweight\* lamb price in GB averaged **843.0p/kg**. This was:

- -3.7p on the previous week
- +140.1p compared with year-earlier levels,
- 137.9p higher than the 5-year average (2021-25 average: 705.1p/kg).

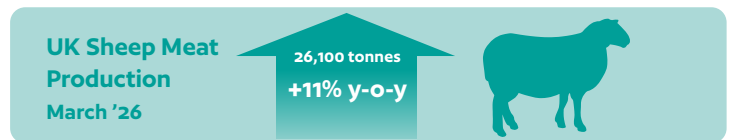
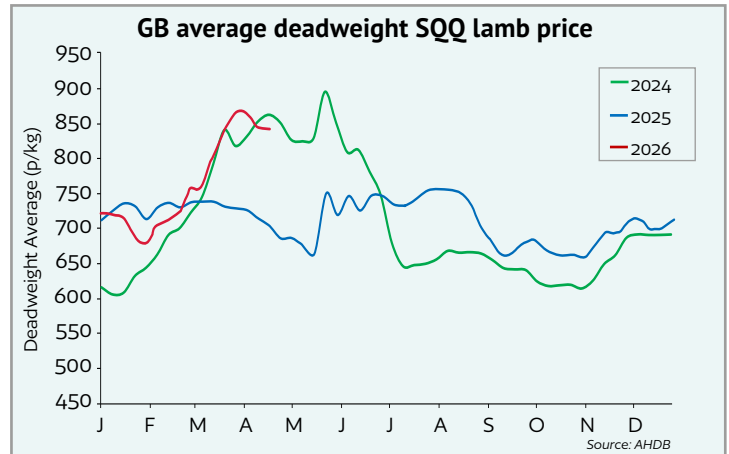
Numbers coming forward reached 30,800 head. This was:

- +6% on the previous week
- +25% compared with year-earlier levels

\*Note: Old season lambs are shown from 1 January to the third Monday in May and new season lambs thereafter.

### Throughput – March 2026

- Total sheep throughput at UK abattoirs = 1.2 million head – up 10% on the year.
- Lamb throughput = 1.1 million head – up 10% on the year.
- Average lamb carcass weights = 21.3kg (+ 0.1kg on the year).
- Cull ewe and ram throughput = 110,400 head – up 9% on the year.



## PIGS

### Prices – week ending 18<sup>th</sup> April

The EU-spec Standard Pig Price (SPP)\* in GB stood at **181.5p/kg**.

This was:

- +0.2p on the previous week,
- - 24.1p compared with year-earlier levels,
- 25.8p higher than the 5-year average (2021-25 average: 179.8p/kg).

\*Note: the APP is currently unavailable as the data does not meet validation thresholds. The SPP (which uses different data sources) is unaffected.

### Throughput – March 2026

- Total pig throughput at UK abattoirs = 942,100 head – up 8% on the year.
- Clean pig throughput = 925,500 head – up 8% on the year.
- Average clean pig carcass weights = 93.7kg (+2.6kg on the year)
- Sow and boar throughput = 16,600 head – up 5% on the year.

