



# **BIRTWISTLES**

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*Market Report*

NOVEMBER 2021

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Welcome to our November edition.

## KEY POINTS TO NOTE & OPEN WITH THIS MONTH

- Christmas/New Year
- Order/delivery Schedule
- Cut off times
- Turkey Update
- Game season calendar
- First detected case of bird flu in England 2021-22 season.

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## Christmas & New Year Trading days & cut off times for ordering

Please see below the dates that we are open this Christmas. Please note that your delivery days will remain the same so bear this in mind when placing your orders.

**Please place orders as soon as possible to avoid disappointment. Please note: For delivery on Tuesday 28th December 2021 orders must be placed no later than 12noon on Friday 24th December 2021.**

Monday 20th December 2021 Normal Deliveries

Tuesday 21st December 2021 Normal Deliveries

Wednesday 22nd December 2021 Normal Deliveries

Thursday 23rd December 2021 Normal Deliveries

Christmas Eve 24th December 2021 Normal Deliveries

**Christmas Day 25th December 2021 CLOSED**

**Boxing Day 26th December 2021 CLOSED**

**Monday 27th December 2021 CLOSED**

Tuesday 28th December 2021 Normal Deliveries

Wednesday 29th December 2021 Normal Deliveries

Thursday 30th December 2021 Normal Deliveries

New Year's Eve 31st December 2021 Normal Deliveries

**New Year's Day 1st January 2022 CLOSED**

**Sunday 2nd January 2022 CLOSED**

**Monday 3rd January 2022 CLOSED**

Tuesday 4th January 2022 Normal Deliveries

To assist us in serving you please wherever possible can you order early, along with any pre-orders that you may already be aware of.

**Please note that due to the extended Christmas closure period of some producers, poultry will be delivered that has been previously frozen.**

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## Turkeys/Turkey Crowns/Turkey Breasts

**UK** product will be available but will be tight in terms of supply and lead times could be up to one week in advance for whole Hens, Stags & Turkey Crowns. Pricing is still yet to be confirmed.

**EU** product is available with preference from producers to send the bulk as double turkey breasts. Although we have secured singles it may be worth looking at taking doubles where possible for example if you require ten single breasts, we can supply five doubles. We have yet to have volumes for single turkey breast confirmed due to ongoing labour constraints. Pricing has been agreed so please do contact us for details.

## Beef Overview

Acute labour shortages remain a key concern for the industry. Some plants continue to send carcasses to the Republic of Ireland for processing before selling back on the UK market, while others are opting to shutter other meat lines to keep up beef production.

Retailers continue to absorb significant fresh and frozen volumes, as demand still outstrips supply. Manufacturing demand is on the up with diced items trending higher as a result.

Over the past few weeks, prime cattle prices have faced some pressure. In general, supply remains tight with fewer animals on the ground. With feed prices high, some farmers are trying to reduce the winter housing period this year which may impact the availability of finished animals. We are now entering the Christmas buying period for cattle which should mean demand increases.

Upwards pressure on Bone in Ribs & associated cuts in the run up to December is nothing unusual but this has been higher than normal in recent months with product needing to be put down for ageing in great demand (Bone in Loins of Beef, Foreribs, Tomahawk's & Sirloins)

In the week ending 16 October, the GB all prime average cattle price stood at 407.7p/kg, down -0.8p week-on-week. Despite having dropped 2.5p in the past three weeks, the measure stands 40p above year-earlier levels.

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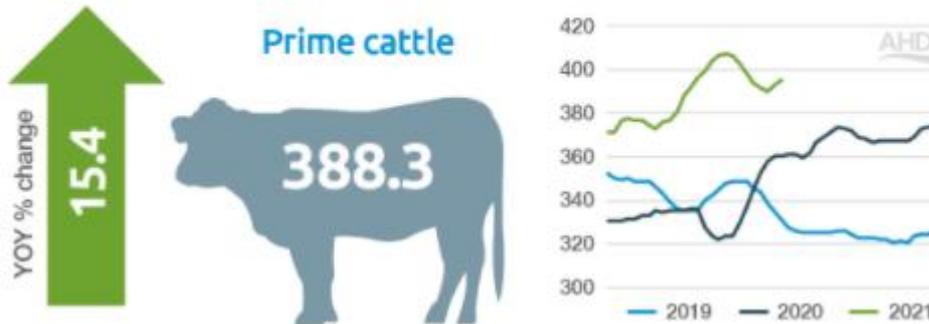
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### GB prices (p/kg deadweight)



### Global beef prices

In addition to burdensome supply and workforce constraints, rising transport costs continue to influence International trade. With cattle prices in Poland now ahead of the Irish cattle market, demand from Europe remains strong particularly for primals and VL's for mince.

While market sentiment is somewhat mixed, China's UK beef ban has not been viewed as a major setback, with negotiators already working to get the market re-opened based on evidence that the BSE incident is no risk to food safety.

While the ban is somewhat disappointing, the quick response to handle the issue is testament to the UK's testing regime. The development will however delay access to the Chinese market.

The average deadweight prices trended slightly lower over the previous week, as plants continue to operate at around 20% below normal capacity. While deadweight prices remain well above levels this time last year, farmers margins remain squeezed partly due to high feed costs.

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## UK/Global Lamb Market Overview

### Is lamb pricing itself of menus?

Lamb prices continue to reflect the tight supplies that have come forward in the season so far. As has been the case for the past couple of months prices have remained at an unusually high level. With a smaller lamb crop in the England this may suggest that trade could continue to see strong prices this season. (Note the UK season will run until 31<sup>st</sup> December).

Arrivals from NZ will not appear until January 2021 keeping UK prices high.

In particular certain cuts are still very much difficult to source in volumes.

We have also been quoted for imported Boneless Lamb Legs upwards of £10 kg so it doesn't take much to figure that the UK market will be far north of this for prime lamb.

### GB prices (p/kg deadweight)



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### Pork Overview

The Standard Pig Price for the week ended 16 October dropped back to 146.35p/kg. This was 4.66p less than a week earlier and about 6p lower than the five-year average for the time of year.

Live pig supplies continue to outstrip available processing capacity. As was the case two weeks ago, low prices paid for batches of pigs destined for markets requiring minimal butchery, have likely weighed on the overall average. Low EU prices also remain a key part of the current price declines.

As with Lamb products that have been under pressure is it time to be innovative and look at what can be done with what's available. Bone in belly's & Loins have both been challenging with the sector still very short of labour. As already stated minimal butchery and getting stock sold is a priority.

### GB Deadweight Prices – Pigs (APP)

Week 40 2021

Source: AHDB MI

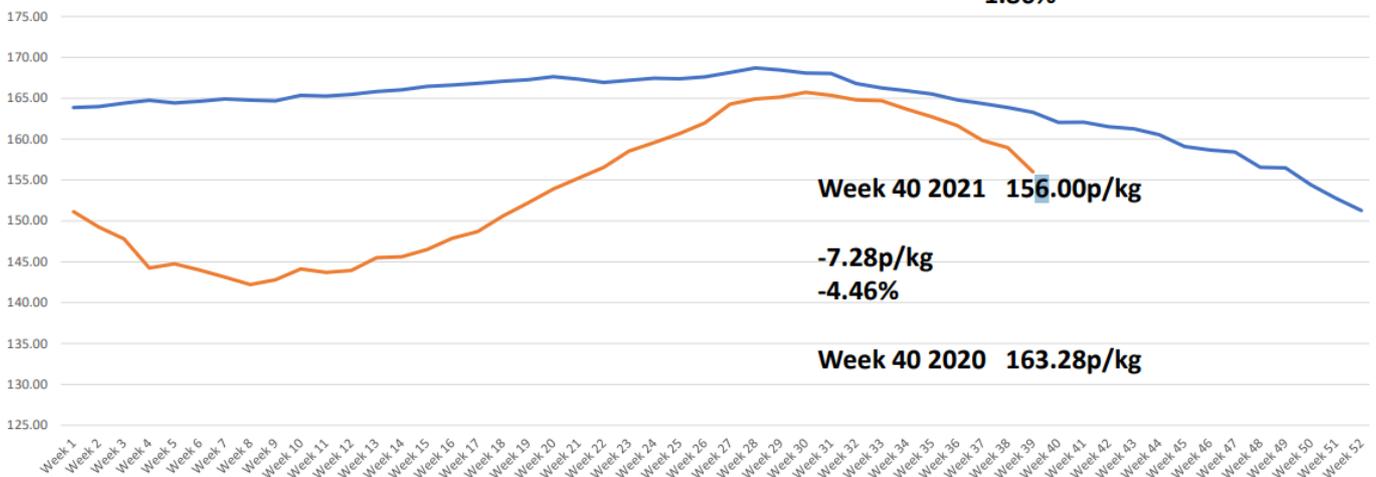
#### Weekly Price Movement

Week 40 2021 156.00p/kg

Week 39 2021 158.95p/kg

-2.95p/kg

-1.86%



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## Poultry overview

### Chicken

#### EU

Pricing has somewhat stabilised but this is a good as it gets currently with no downward movement. Availability remains good from the EU which is filling the gaps in the UK market for customers who are able to use EU product.

#### UK

Thigh meat & wings remain challenging due to labour constraints. UK prices are remaining firm with further upticks expected in the coming month.

## Highly pathogenic' bird flu case confirmed in England

The industry will also have a close eye in which way this goes

Northern Ireland's Department of Agriculture, Environment and Rural Affairs (DAERA) has issued a warning to poultry farmers after confirmation of a 'highly pathogenic' case of bird flu in England.

Northern Ireland's chief veterinary officer (CVO) Dr. Robert Huey is encouraging all poultry keepers to "remain vigilant and take action now, as we enter this high-risk period".

The case of Highly Pathogenic Avian Influenza (HPAI) H5N1 was discovered at a swan rescue centre in Worcestershire in the West Midlands of England.

Wild birds migrating to the UK or Ireland from mainland Europe during the winter months can carry the disease, which can lead to cases in poultry and pet birds.

"This is the time to critically review your biosecurity arrangements to reduce the risk of transmission of avian influenza to poultry or other captive birds," Dr. Huey said.

**This is the first case of bird flu detected in the UK of the 2021-2022 flu season.**

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### UK Game Birds

For those of you maybe looking for an alternative and with Lamb difficult at the moment, why not look at the below and the season calendar dates available. Please do also check with our sales team for availability and lead times for ordering.

#### Pheasant

England, Wales & Scotland – October 1<sup>st</sup> – February 1<sup>st</sup>

#### Partridge

England, Wales & Scotland – September 1<sup>st</sup> – February 1<sup>st</sup>

#### Red Grouse

England, Wales & Scotland – August 12<sup>th</sup> – December

#### Grey Partridge

England, Wales & Scotland – September 1<sup>st</sup> – February 1<sup>st</sup>

For information the UK shooting season is carefully regulated to allow populations to flourish, breed and move to different areas to feed and overwinter.

Game birds and wildfowl can only be shot in certain months and the deer stalking season is also set. The time when species are protected is known as the close-season and during this period it is illegal to shoot game or deer.

The dates are set for practical management and conservation reasons and for the interests of the countryside as a whole.

However, you can shoot rabbit and pigeon all year round – known as an open season

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