



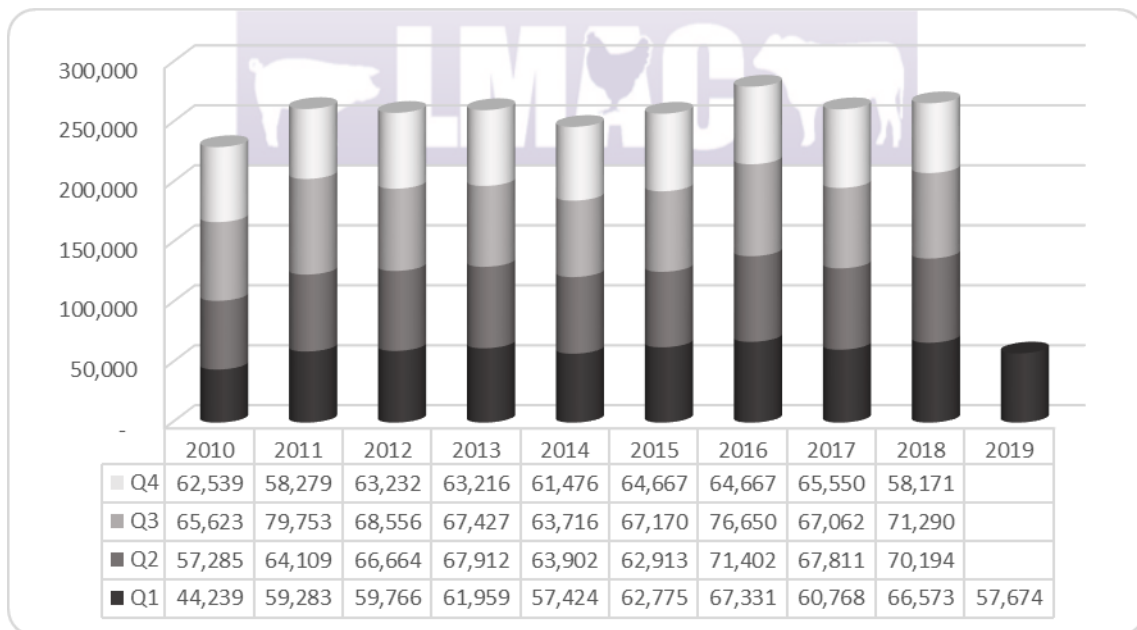
## Livestock & Meat Advisory Council

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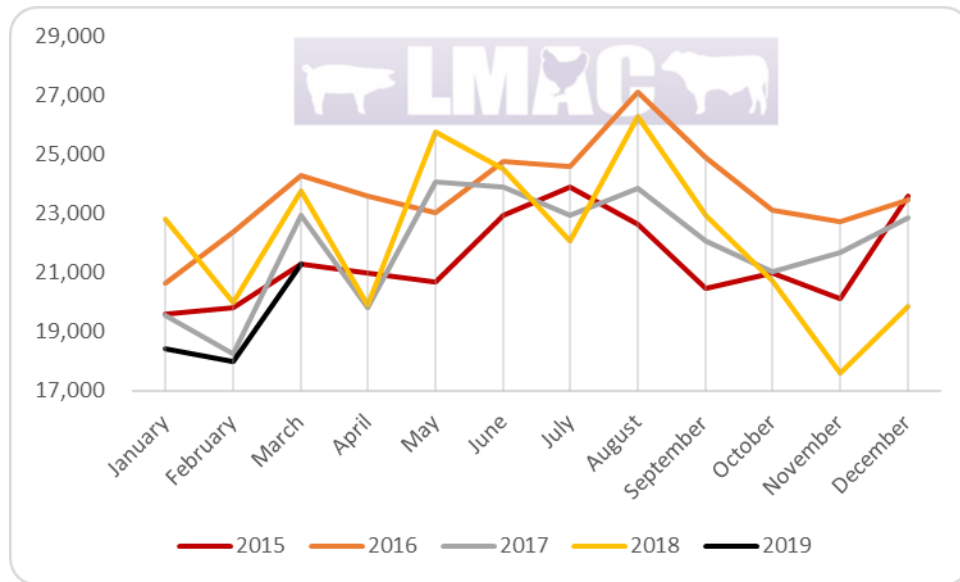
### Market Watch First Quarter 2019

#### Beef Sector

Cumulative slaughters for the first quarter of 2019 were 57,674, a decrease of 13% over the same period in 2018 and caused by a combination of uncertainty and volatility about prices in the small-holder areas and the increased cost of animal protein across the board.

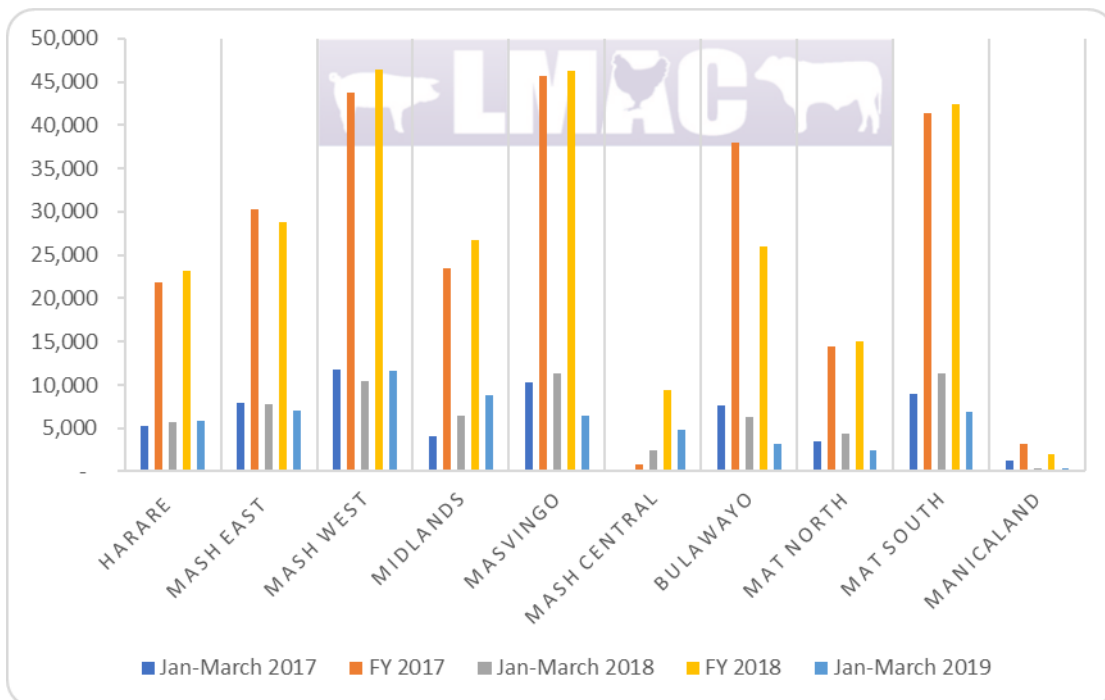


**Annual Cattle Slaughters, 2010 – March 2019**



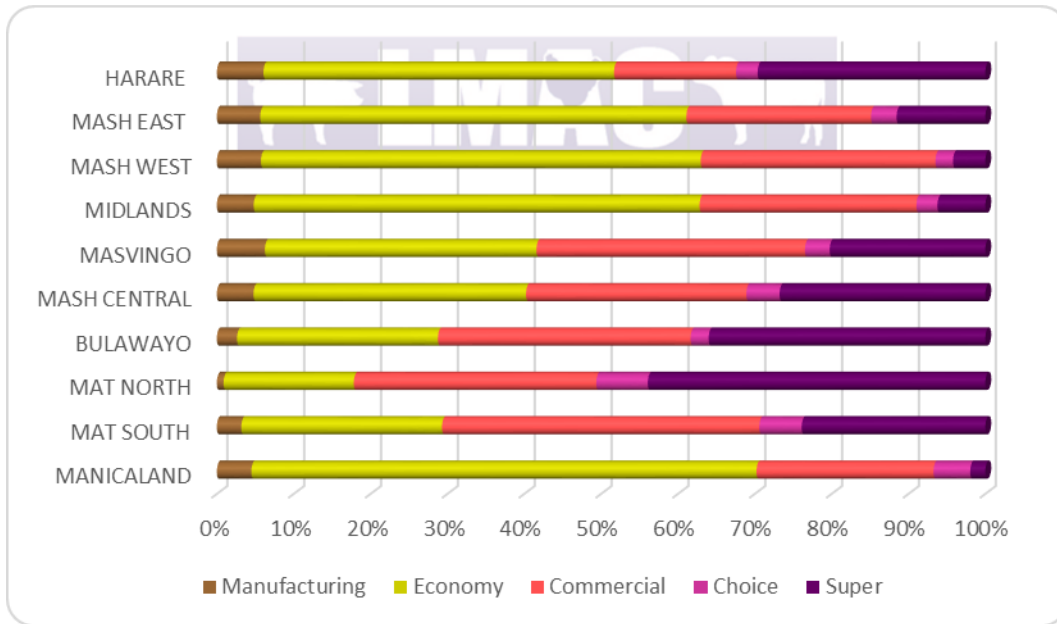
**Monthly Cattle Slaughters, 2015 – March 2019**

The average slaughters per month for the first quarter of 2019 was 19,225 head: the February slaughter figure of 17,962 head was the second lowest on record since January 2015.



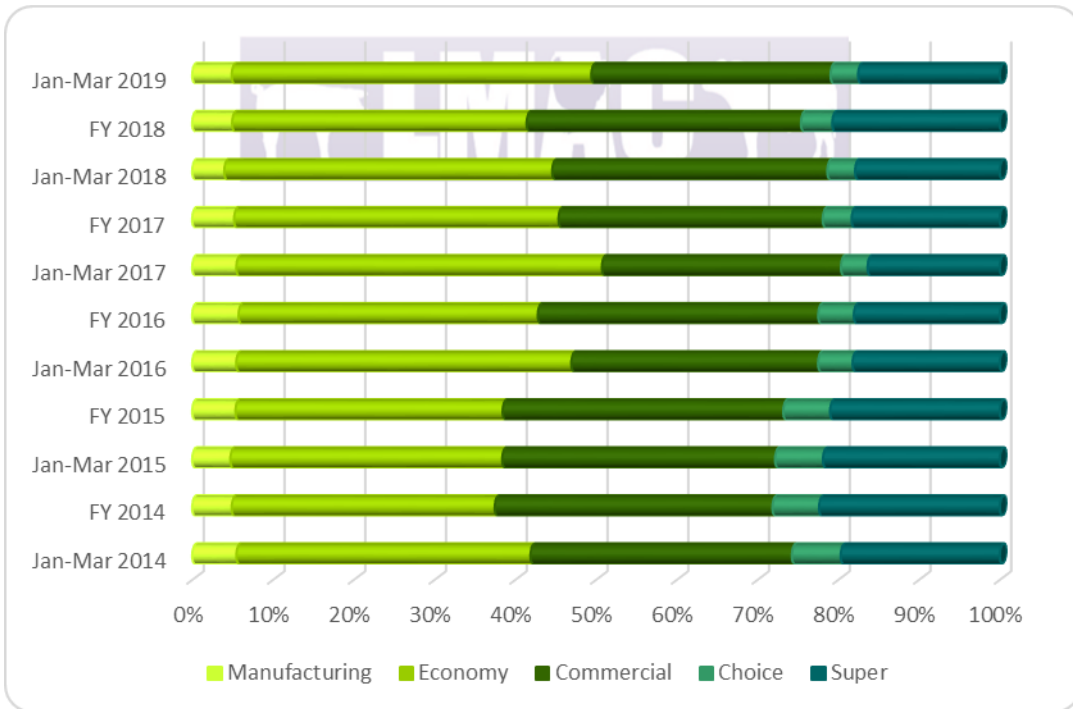
**Annual Cattle Slaughters by Province, 2017 – March 2019**

For the year to March 2019, Mashonaland West recorded the highest number of slaughters at abattoirs monitored by the Department of Livestock Production and Development, accounting for 20% of the national slaughter. Midlands, Mashonaland East and Matebeleland South were second, third and fourth respectively.



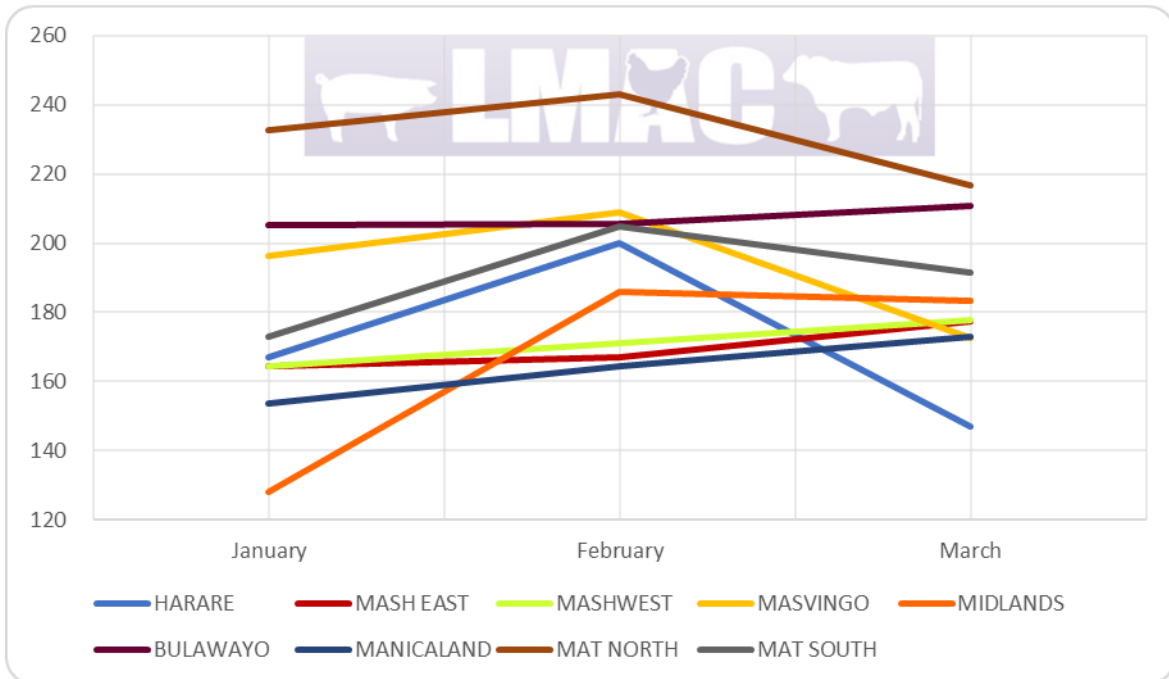
**Grade Classification by Province, First Quarter 2019**

The quality composition continues to deteriorate, a situation expected to be exacerbated following the drought and the increase in the price of stockfeeds. The proportion of super carcasses fell by 3% to 16% over the same period in 2018. Economy grade dominated the slaughter in the period under review, making up 45% of all slaughters and an increase of 9% points over 2018.



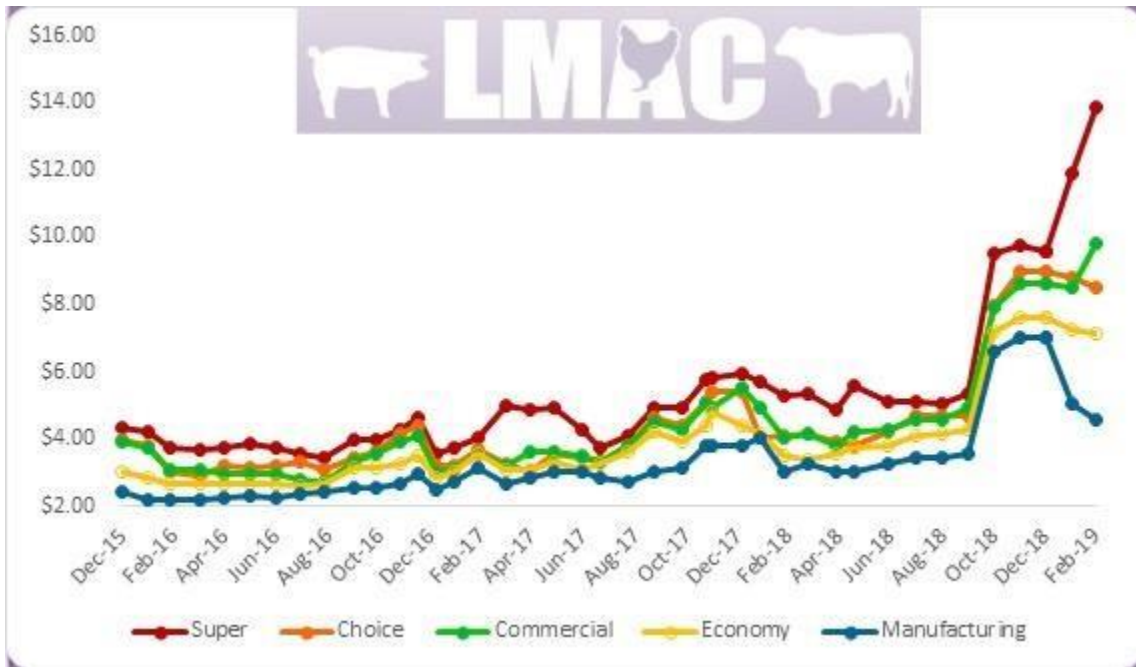
**Quality Composition by Grade, 2014 – March 2019**

Matabeleland North had the highest average carcass size averaging 231kg in the first quarter of 2019. Bulawayo and Masvingo were second and third, 207 and, 193kg respectively. Manicaland had the smallest carcass size of 160kgs.



**Provincial Average Cold Dressed Weight (kgs), First Quarter 2019**

The wholesale price of economy grade increased by 90% between January and March 2019 from \$3.75/kg to \$7.12/kg. The highest increase of 105% was for super grade, rising from \$5.58/kg to \$11.45/kg.



**Prices, 2015 – March 2019**

The rising cost of stockfeed has had a negative impact on feedlot activities which has resulted in supers being in short supply on the market. Destocking is also likely to increase as a drought mitigation strategy. However, given that most communal households have yet to fully recover from such activities during the recent 2015/2016 drought season, beef supply may well be below usual levels.

Buying conditions have been characterised by prices quoted in USD and paid via RTGS at the prevailing rate, a situation that has caused rising prices in RTGS terms.

The ongoing outbreaks of diseases such as Foot and Mouth has resulted in the frequent quarantine of cattle, complicating the marketing of cattle in the affected areas.