Teagasc Fodder Survey Results

National Fodder & Food Security Committee
Wednesday 13th July

Pearse Kelly, Head Drystock Knowledge Transfer
Joe Patton, Head Dairy Knowledge Transfer

Agriculture and Food Development Authority

Teagasc Fodder Survey

- Teagasc dairy & drystock advisors completed feed budgets with a selection of clients
- Clients were categorized based on scale and client type to give a balanced sample
- Results were uploaded on PastureBase Ireland
- Feed budgets were completed in late June – early July (deadline 8th July)
- Figures included projected second cut yields as per July 8th
- 525 valid surveys submitted and analysed

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Fodder Survey Summary by Region

Enterprise	Region	Average % in Stock 8th July	% Farms with deficit more than 10% of planned feed demand
Dairy	South West	116	6
Dairy	South East	113	17
Dairy	North West	109	9
Dairy	Midlands/N East	99	19
Drystock	South West	129	7
Drystock	South East	121	16
Drystock	North West	126	12
Drystock	Midlands/N East	110	22

- Midlands/North East: Cavan, Dublin, Kildare, Laois, Longford, Louth, Meath, Monaghan, Offaly, Westmeath
- South East: Carlow, Kilkenny, Tipperary, Waterford, Wexford, Wicklow
- South West: Clare, Cork, Kerry, Limerick
- North West: Donegal, Galway, Leitrim, Mayo, Roscommon, Sligo

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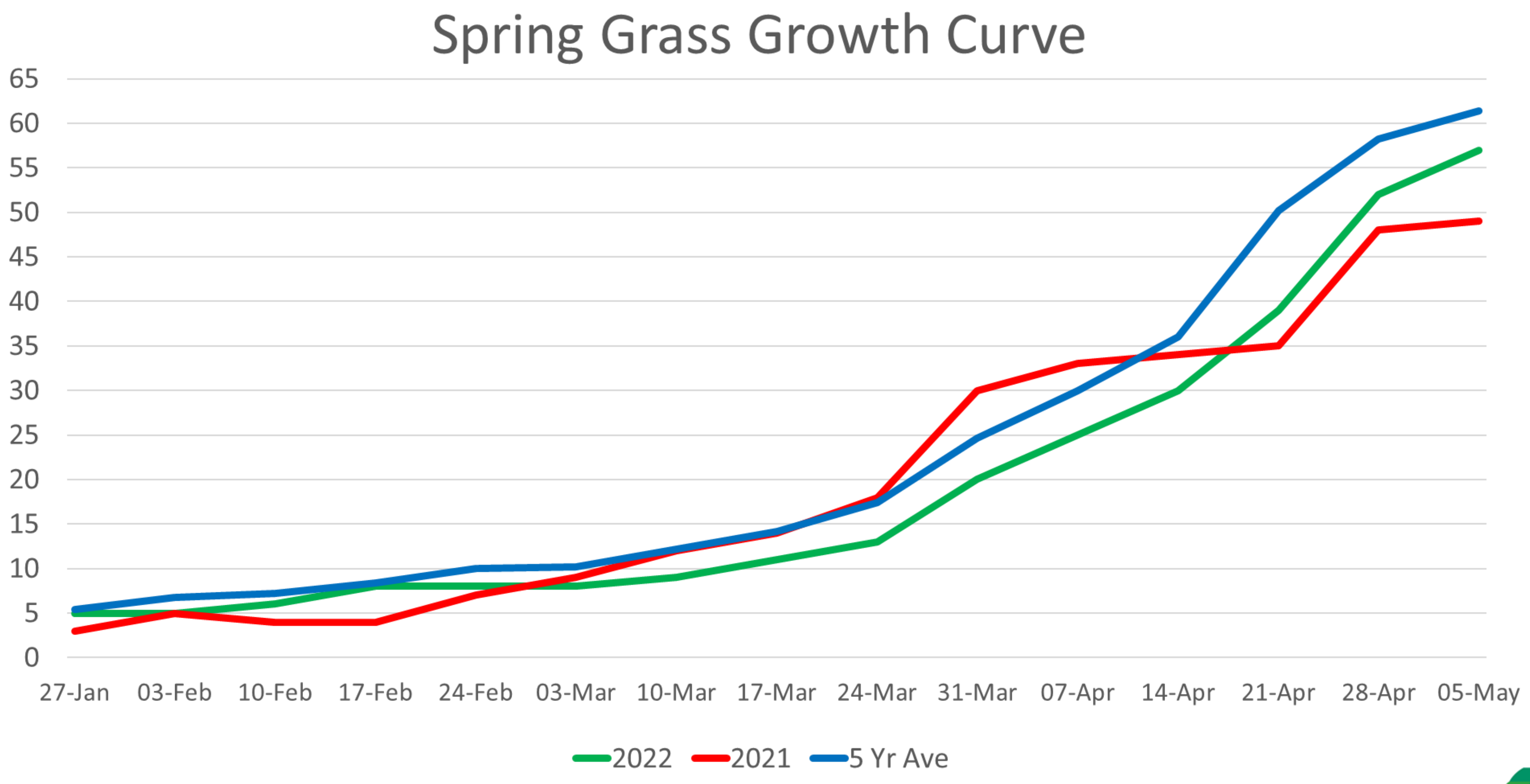
Summary- Commentary

- Feed stocks on drystock and dairy farms are positive overall (119% of demand on average)
  - Dairy farms in Midlands/North East region have no reserve on average
- Approx. 20% dairy farms in Midlands NE and South East are short >10% of planned demand
  - 12% more than 20% short
- 20% of drystock farms in Midland NE in similar situation
  - 11% drystock farms over 20% short
- Drystock farms North West in good position overall
- Dairy and beef farms >10% short are similar scale to sector average

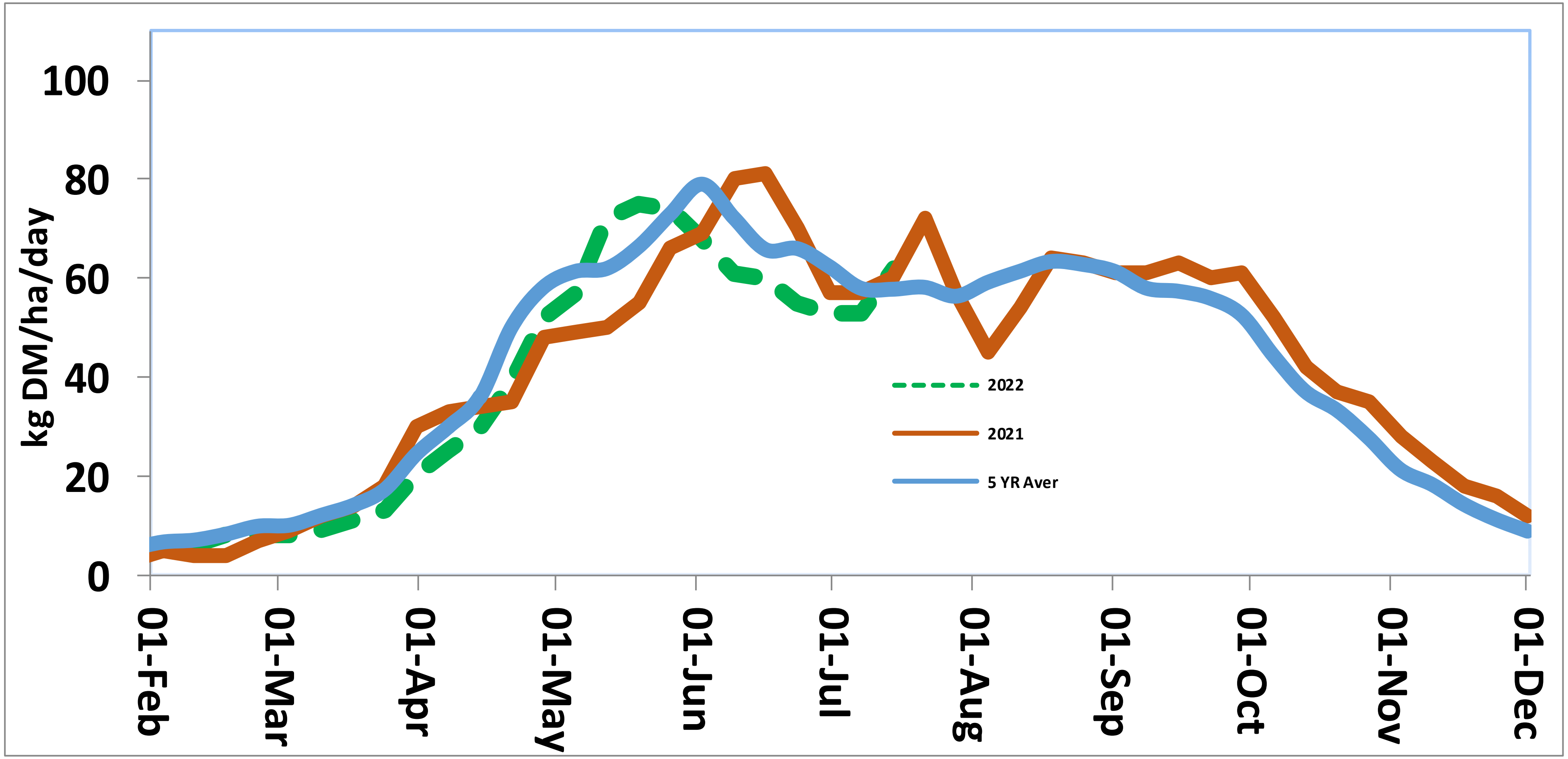
Winter fodder focus over coming weeks

- Scope for additional fodder supplies to be secured in addition to planned second cut
- Strong message required on securing second cut to build 20% fodder reserve
- Focus needs to be on farms (1/8) that are short of planned winter feed demand
- Impact of localised July SMD/grass growth reductions needs to be accounted for

Spring Growth



National Grass Growth Curve



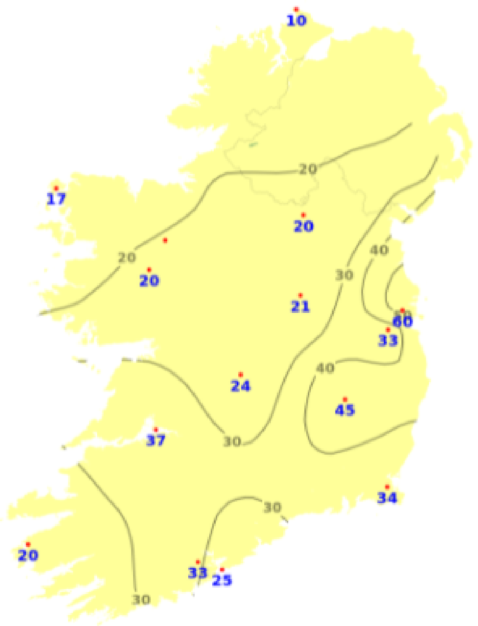
- Nitrogen use in 2022 is back by approx. 20 Kg N/ha compared to 2021
- 200Kg less grown to date in 2022 compared to 2021 (5,800 vs. 6,000 kg/ha)

Dry Conditions in the East

SOIL MOISTURE DEFICITS

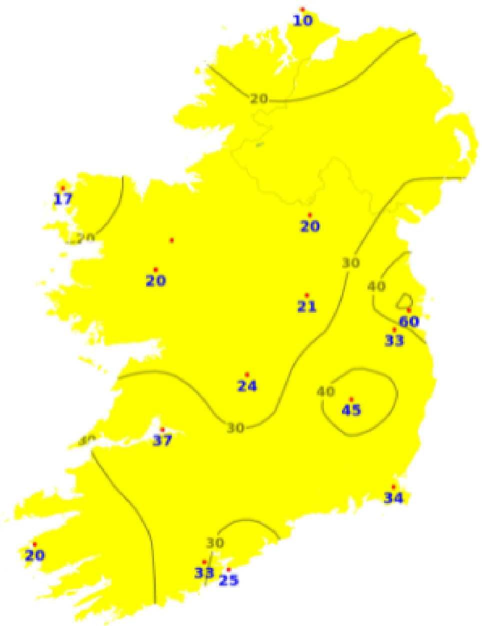
Well Drained Soil Moisture Deficit

Sun 10th Jul



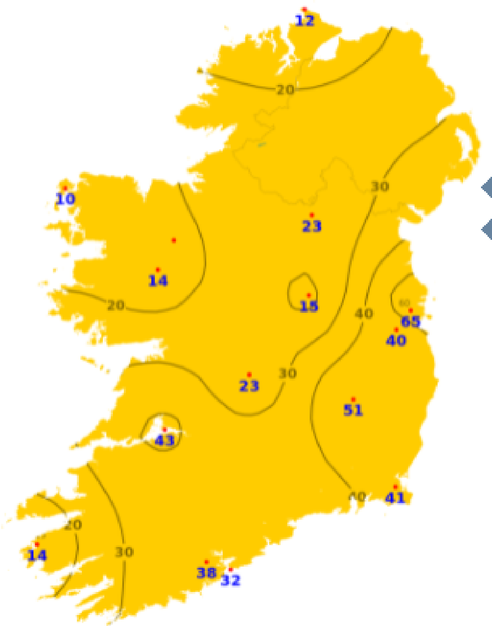
Moderately Drained Soil Moisture Deficit

Sun 10th Jul



Poorly Drained Soil Moisture Deficit

Sun 10th Jul



Soil Moisture Deficits (SMDs) in (mm) are calculated for three classes of soil: well drained, moderately drained and poorly drained. For further information on how Soil Moisture Deficits are calculated, click here.

Regional Messages for Dry Farms

- Watch grass growth, demand and days ahead closely – very little rain forecast for the east of the country over coming weeks
- Reduce demand where possible – e.g. earlier weaning, supplement finishing stock sooner, sell fit cattle earlier.
- Keep topping to a minimum
- Introduce fodder until grass growth exceeds demand and grass covers recover.
- If feeding fodder over summer months complete a winter feed budget and act accordingly

Thank You

Pig & Poultry Sector

Teagasc Pig + Poultry Department
National Fodder & Feed Security Committee

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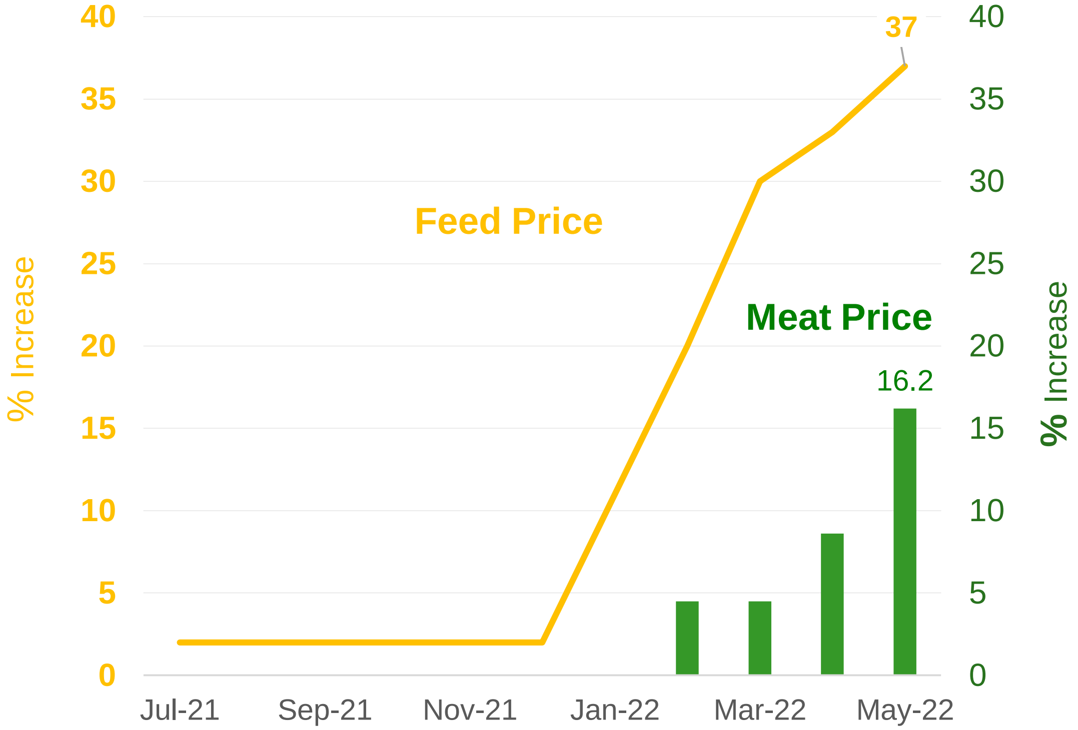
Poultry Sector

Turkeys

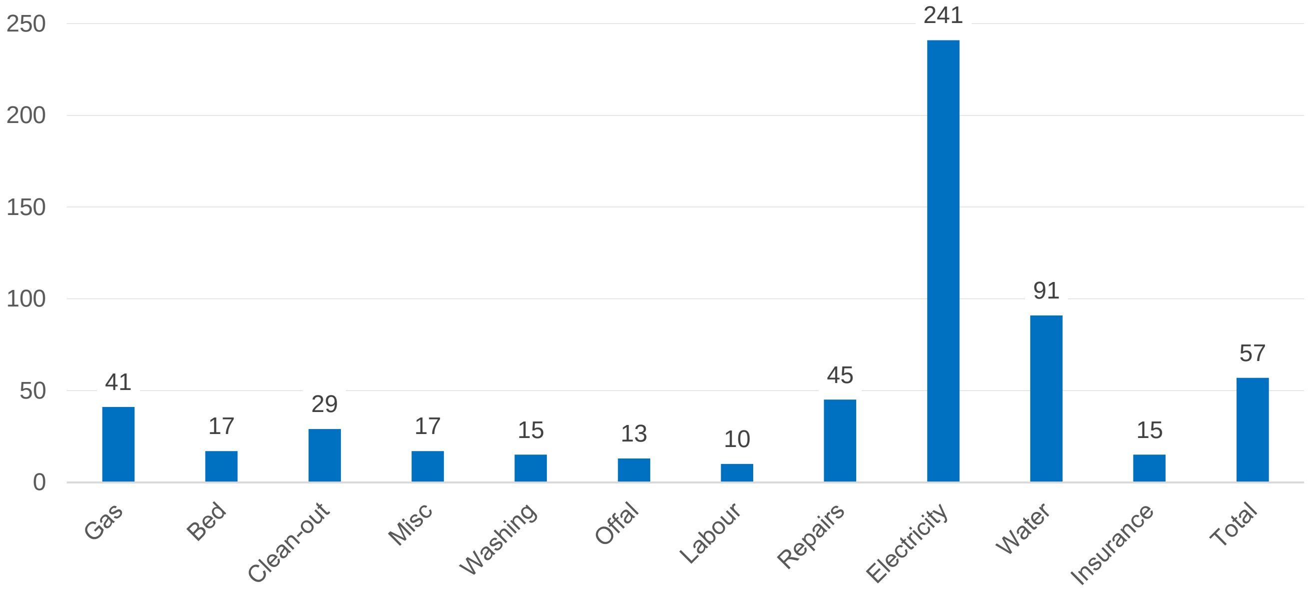
- Feed prices up 37% from July ‘21
- Meat price only 16% recovered from market
- All energy costs increased
- Litter/manure disposal costs also up



Poultry Sector

Broilers

- Feed price up approximately 60% from Jan '21
- Transport & packaging +25%-30%
- Non-feed costs – substantial % increase YOY



Poultry Sector

- **Layers**
- Free range feed prices have increased by 20% since April '21
- Organic feed prices up 74% since April '21

	Feed Costs (€)	Non-Feed Costs (€)	Total Costs (€)	Price Per Dozen (€)
Free Range	0.80	0.74	1.54	1.32
Organic	1.96	1.09	3.05	2.49

- **Pullets**
- 80% increase of POL price
- Further increases for September and December (+10%)

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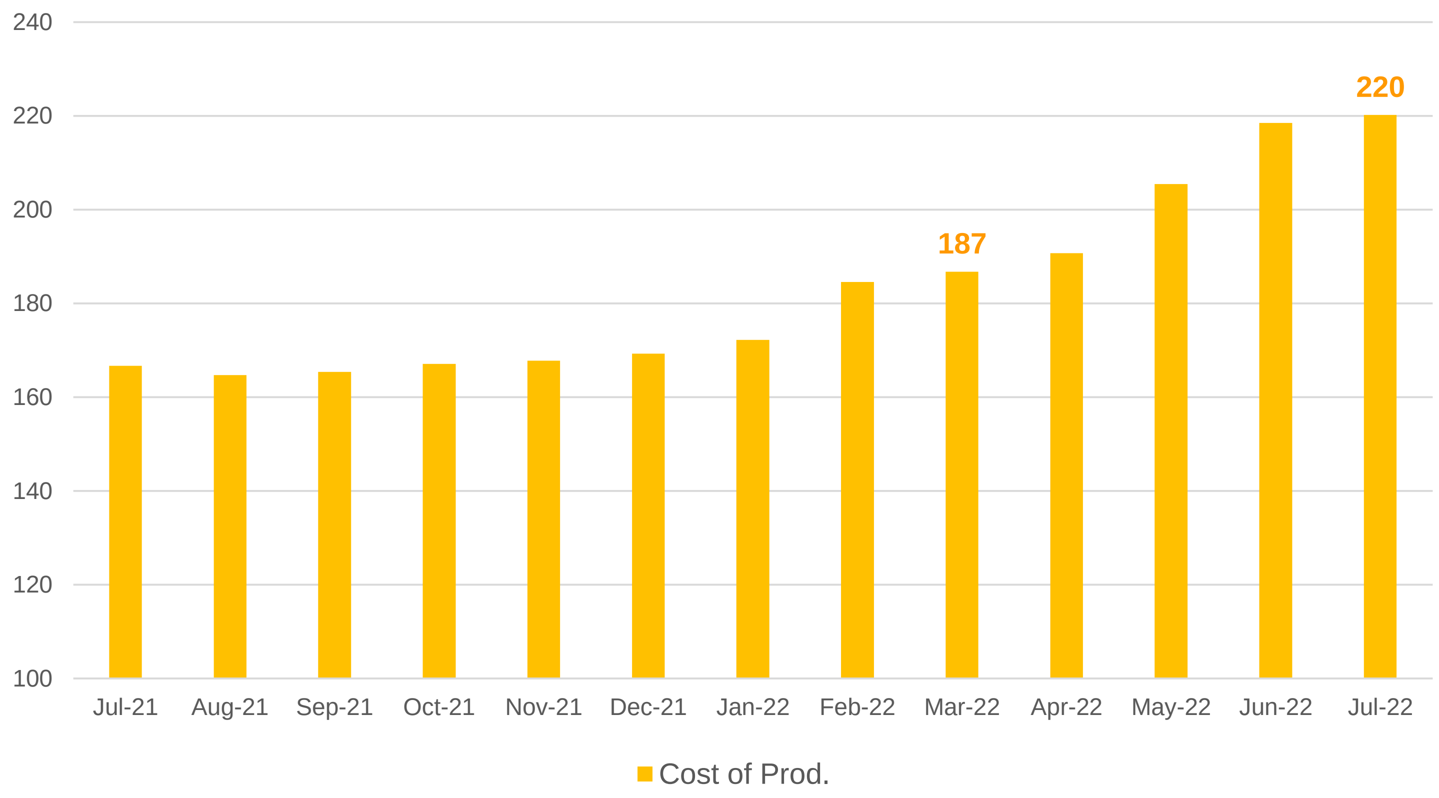
Pig Sector Update

- 2022 to-date average 600 sow pig unit lost est. €336,000. Estimated sector loss €81m year–to-date.
- Pig Exceptional Payment Scheme closed on Monday. Expected the €13m fund will be fully subscribed
- Pig feed price +€76/tonne in April-May, current composite price of €476/tonne (+40% YOY)
- Pig price has increased by 51c/kg since Jan. 2022 - rise negated by feed price rise
- Current pig price €1.94 c/kg,
  - 26c/kg below break-even of €2.20 c/kg

Pig Margin c/kg



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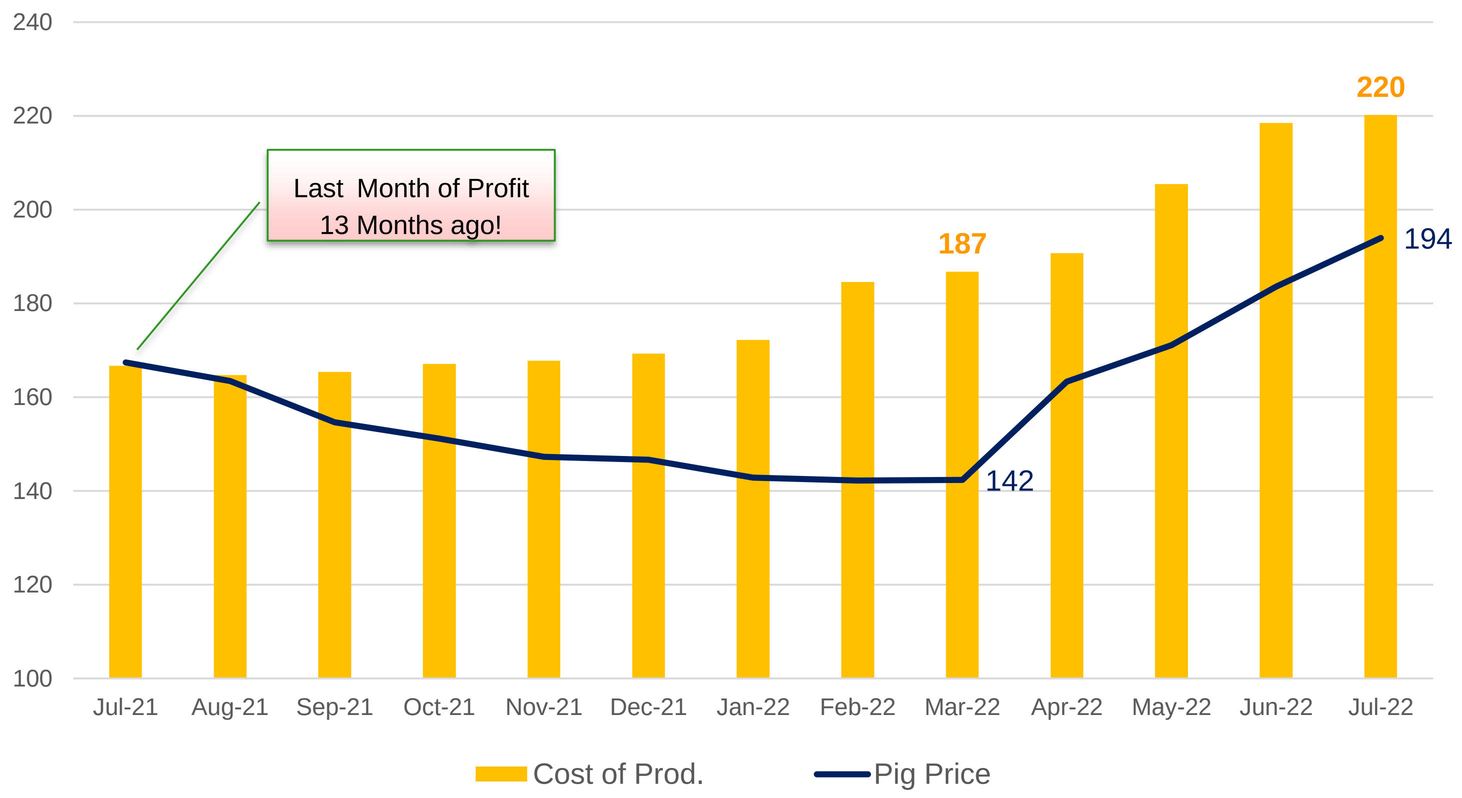
Pig Margin c/kg



Market Update – Wheat

Production (Mt)			
	2021 / 22	**2022 / 23**	**Change**
EU 27	138.16	**131.81**	**-6.35**
China	111	106.78	-4.21
India	105	99.00	-6
Russia	76	85.92	**9.87**
USA	45	46.26	1.47
Canada	22	31.98	**10.33**
Australia	37	29.67	-6.68
Argentina	22.08	20.69	-1.39
Ukraine	**32.15**	**18.54**	**-13.61**
Turkey	15.66	17.08	1.42
United Kingdom	13.99	14.66	0.67
Kazakhstan	11.81	13.70	1.89
Egypt	9.05	9.25	0.2
Algeria	2.79	3.80	1.01
Morocco	7.42	2.55	-4.87
Tunisia	1.19	1.29	0.1
oth. Near East	15.69	18.66	2.97
World	**739.93**	**732.64**	**-7.29**

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Exports (Mt)

	2021 / 22	2022 / 23	Change
Russian Fed.	33.2	35.8	**2.6**
EU	28	30.3	2.3
Australia	25.6	23.7	-1.9
USA	21.3	20	-1.3
Canada	12.3	17.6	**5.3**
Argentina	15.5	14.7	-0.8
Ukraine	18.5	10.1	**-8.4**
Kazakhstan	6.4	5.5	-0.9
Brazil	3.4	1.5	-1.9
Turkey	0.6	0.7	0.1
Serbia	0.9	0.7	-0.2
United Kingdom	0.4	0.4	0
Pakistan	0.2	0.1	-0.1
Others	9.1	6.3	-2.8
Total	**175.3**	**167.5**	**-7.8**

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Total	**175.3**	**167.5**	**-7.8**

Stock to Use %	
20/21	**31.3**
21/22	**31.2**
22/23	**30.9**

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Market Update – Maize

	Production (Mt)		
	21 / 22	**22 / 23**	**Change**
USA	383.9	366.1	**-17.9**
China	234.8	234.4	-0.4
Brazil	113.7	**123.7**	**10.0**
EU 27	69.5	66.8	-2.8
Argentina	49.1	54.5	5.4
India	32.6	31.1	-1.5
Mexico	28.1	28.3	0.2
Ukraine	42.1	**23.9**	**-18.2**
South Africa	15.8	16.5	0.7
Russia	15.3	15.0	-0.3
Canada	14.0	14.2	0.2
Serbia	6.0	6.9	0.9
Paraguay	4.9	4.7	-0.3
United Kingdom	0.1	0.1	0.0
Others	155.7	154.4	-1.3
World	**1165.63**	**1140.5**	**-25.1**

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South Africa	15.8	16.5	0.7
Russia	15.3	15.0	-0.3
Canada	14.0	14.2	0.2
Serbia	6.0	6.9	0.9
Paraguay	4.9	4.7	-0.3
United Kingdom	0.1	0.1	0.0
Others	155.7	154.4	-1.3
World	**1165.63**	**1140.5**	**-25.1**

	Exports (Mt)		
	21 / 22	**22 / 23**	**Change**
USA	65.7	56.2	-9.5
Brazil	29.7	**43.3**	**13.6**
Argentina	37.6	39.9	2.3
Ukraine	21.6	**12.6**	**-9**
Others	6.2	6.7	0.5
EU	5.9	4.9	-1
Russia	3.5	4.6	1.1
South Africa	3.4	3.4	0
Paraguay	2.5	2.7	0.2
Serbia	1.6	2.6	1
India	3.5	2	-1.5
United Kingdom	0.1	0	-0.1
Total	**181.2**	**179**	**-2.2**

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EU 27	69.5	66.8	-2.8
Argentina	49.1	54.5	5.4
India	32.6	31.1	-1.5
Mexico	28.1	28.3	0.2
Ukraine	42.1	**23.9**	**-18.2**
South Africa	15.8	16.5	0.7
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Stock to Use %	
20/21	**22**
21/22	**23**
22/23	**22**

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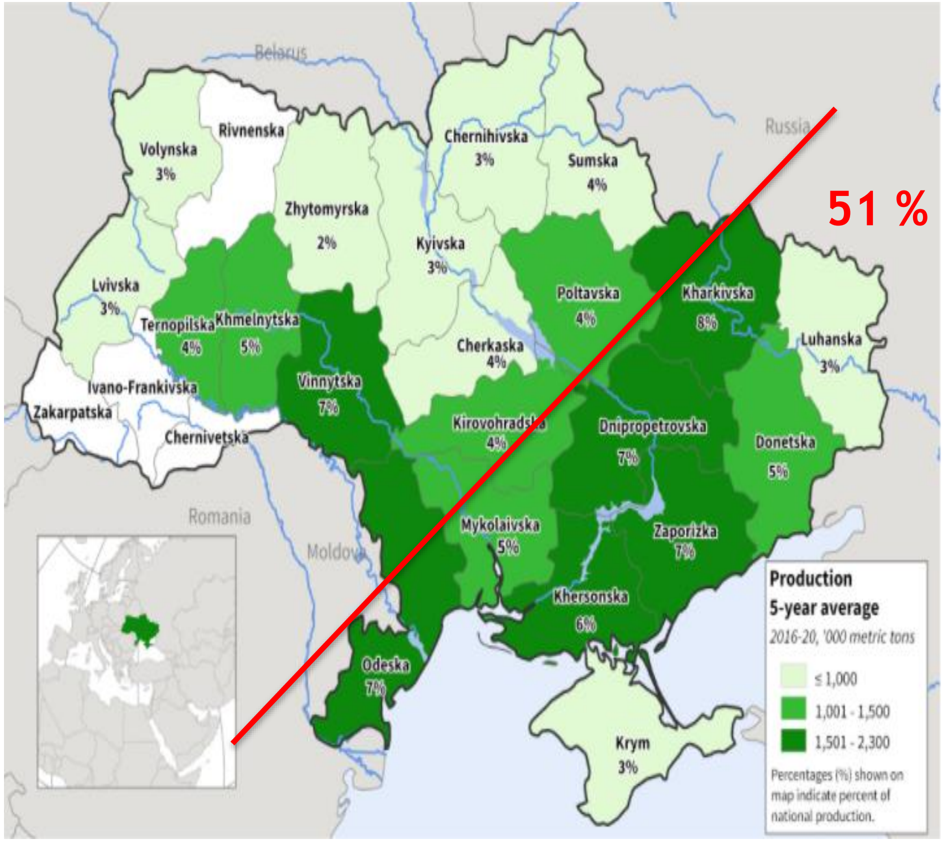
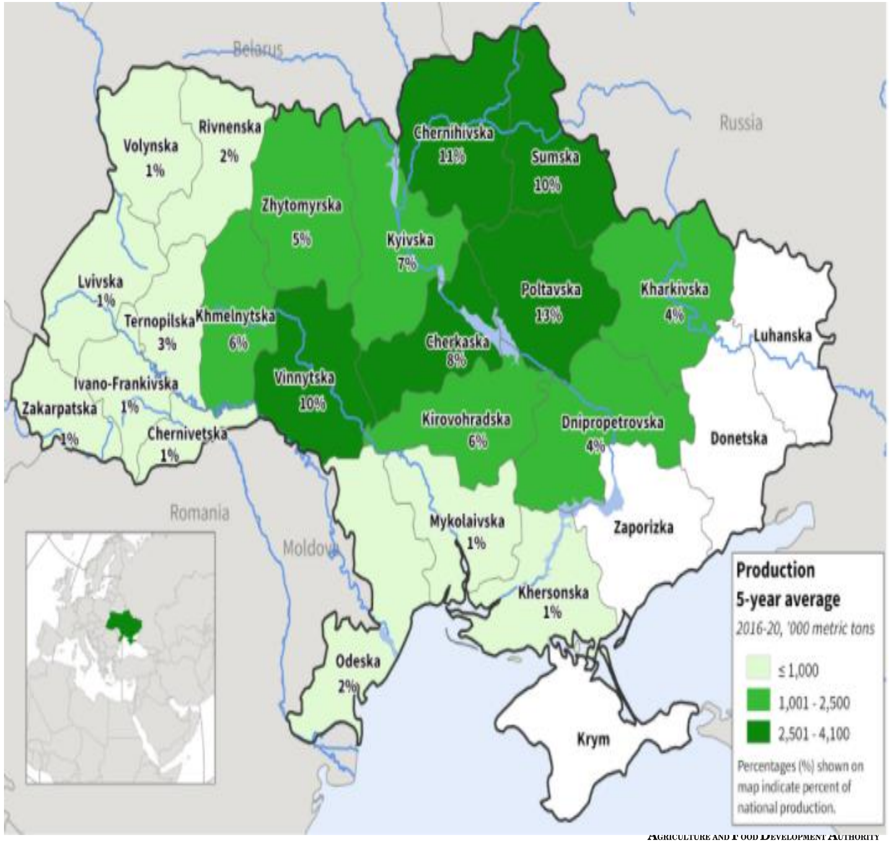
Ukraine Harvest

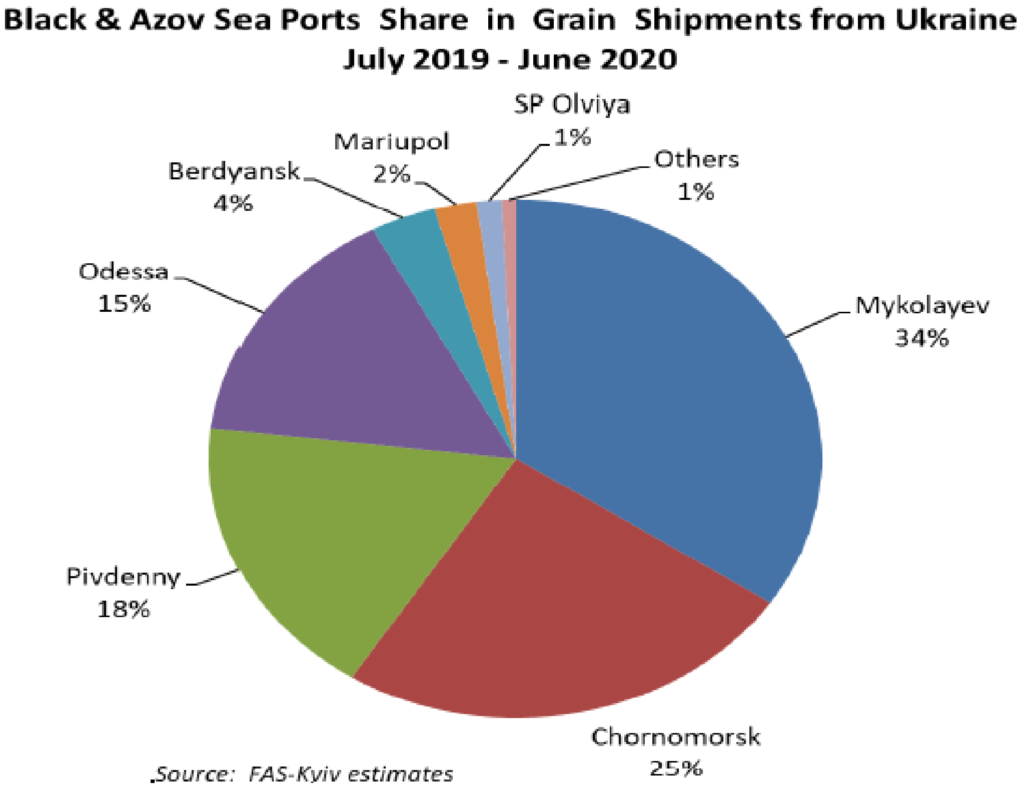
Wheat



Maize



Ukraine Transport



Export
Mode of Transport

- 55% by Port
- 35% by Rail
- 15% by Road

Volatility – MATIF Wheat Sept. Delivery €/t

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Futures – MATIF & CBOT as per 11th July 2022

Wheat (€/t)	
Sep-22	357
Dec-22	345
Mar-23	341
May-23	340
Sep-23	304

Corn (€/t)	
Aug-22	327
Nov-22	315
Mar-23	314
Jun-23	302

Soy meal ($/st)	
Jul-22	487
Sept-22	415
Dec-22	404
Mar-23	400
May-23	397

Sept 22 vs Sept 23
- 15%

Aug 22 vs Jun 23
- 8%

Jul 22 vs May 23
- 18%

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Tillage Update

Fodder and Food Committee

July 2022 update

Tillage area

- Tillage crops 2022
  - » Total area ~6% increased
    - Winter crop plantings 11% increase
    - Spring barley < 1% increase over 2021
  - » Protein crops slight increase 1,100 ha
    - 410 ha extra of winter beans
  - » Protein/Cereal mix 279 ha
  - » Maize area increased by 1,281 ha (9%)
  - » Fodder beet in increased by 3 %

Harvest Progress

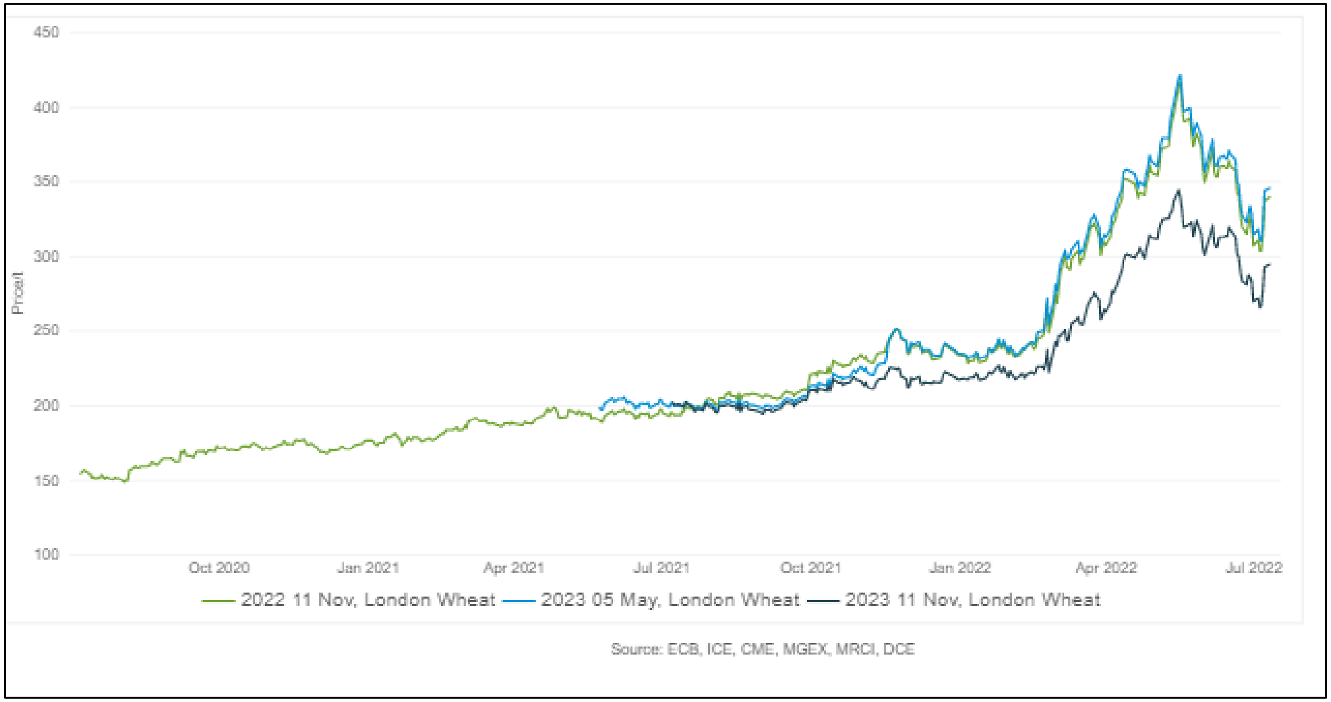
- Winter barley less than 10% harvested
  - Mixed yields – early harvested disease issues
- Spring barley – BYDV – impact??
- Winter wheat crops look good
- Straw incorporation scheme increased
- Prediction of 2.3 m tonnes of cereals

Harvest outlook

- Price drop in last month by €60-70/t
  - Some grain forward sold €250 - 350/t
- Profitability will be driven by prices
  - Grain sold & price of fertiliser
- Cost of harvest approx. 20%
- Nervousness about harvest 2023
  - Exposure of grain farmers high input costs
  - Availability of fertilisers??

Wheat Markets

Ukraine war impact – price has doubled since 2020



Source; AHDB July 2022

Autumn work & catch crops

- New nitrates regulations;
  - Stubble cultivations
- Availability of catch crop seed
- Legacy of weed issues from 2018 fodder scheme
- Fertiliser value of straw will increase price

Value of Straw – P & K

Crop Type	Crop Yield (t/ha)	P kg/ha	K kg/ha	Value €/ha
Spring Barley	7.5	3	50	€98
Winter Barley	10.0	4	51	€104
Winter Wheat	11.0	4.4	56	€115
Winter Oats	9.0	3.6	87	€163
OSR	5.0	2.4	27	€57
Values for P - €4.55kg & K- €1.69kg				

Mark Plunkett, April, 22 2022

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Summary

- Grain price has slipped in recent weeks
  - Wheat €270/t, barley €260/t
- Harvest prospects for 2022 look good
- Busy autumn period with extra work
- Nervousness about next seasons crops

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