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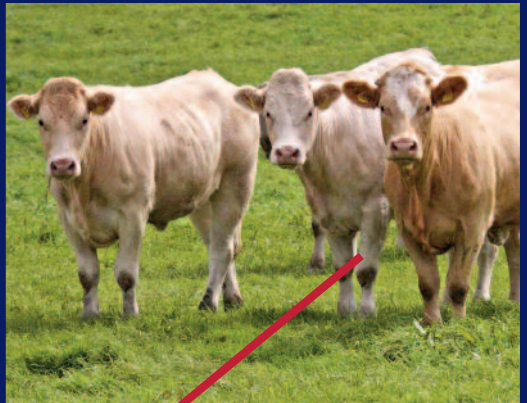
POLICY AND ECONOMICS DIVISION

Northern Ireland Agri-Food Sector

Key Statistics June 2012



Agriculture, Fishing & Forestry



Northern Ireland Agri-Food Sector
Key Statistics
June 2012

Key Facts on
Agriculture,
Fishing,
and Forestry

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Table 1: General economic data

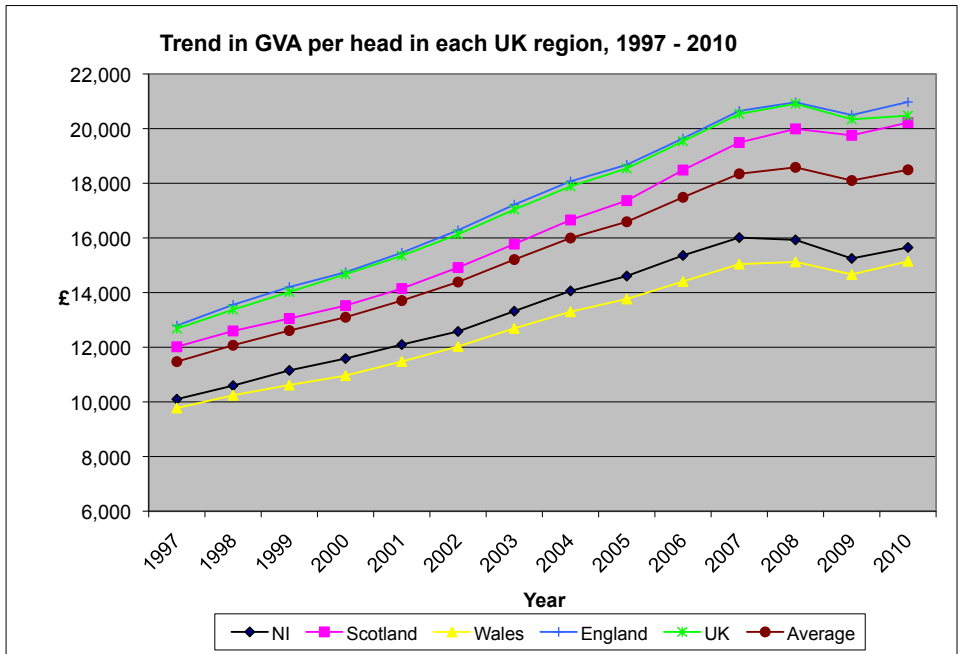
	NI	Scotland	Wales	England	UK	EU 27
GVA per head (£, 2010)	15,651	20,220	15,145	20,974	20,476	N/A
Population ('000, 2009)	1,789	5,194	2,999	51,810	61,792	499,795
Area (sq. km, 2009)	13,576	77,925	20,732	130,281	242,514	4,454,237
Population Density (per sq. km, 2009)	132	67	145	398	255	112
Bank Base interest rate (% , June 2012)					0.5	
RPI (% change, April 2011 - April 2012)					3.5	
Unemployment rate (% , Quarter 1 2012)	6.7	8.2	9.0	8.3	8.2	10.2

Unemployment rates are seasonally adjusted and taken from the Labour Force Survey (LFS). EU27 figure from Eurostat, Feb. 2012

GVA - Gross Value Added (at basic prices)

RPI - Retail Price Index

Figure 1 - Trend in GVA per head in each UK region, 1997 - 2010



Note: GVA is in basic prices

Figure 2 - Population per 100 ha of Utilised Agricultural Area (UAA), 2009

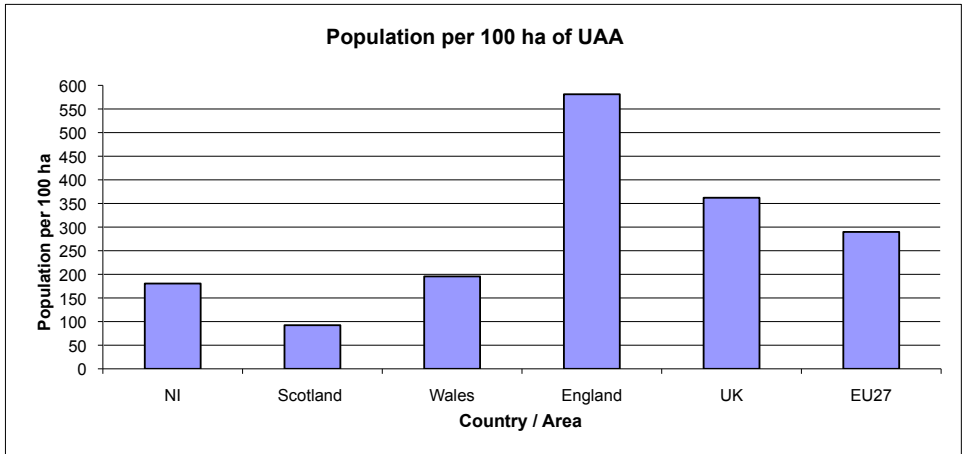


Table 2: Agriculture: general data, 2011

	NI	Scot	Wales	Eng	UK	ROI	EU27
Share of total GVA (%)	1.6	0.7 ¹	0.5 ¹	0.5 ¹	0.6 ¹	2.5 ¹	1.7 ¹
No. employed in agriculture forestry & fishing ('000)	25	41	35	271	371	80 ³	N/A
Share of employment (%)	3.1	1.6	2.6	1.1	1.3	4.5 ³	N/A
Number of farms ('000)	24	53	41	105 ⁴	223	140 ¹	13,449 ²
Average farm size (Ha)	41	118	37	85	77	33 ¹	13 ²
LFA (% Agricultural area)	70	86	80	17	48	75 ²	N/A

1. 2010, 2. 2007

3. CSO Quarterly National Household Survey, 4th quarter, 2011

4. Relates to commercial holdings only as defined by EU regulation.

Due to National Accounting principles, GVA figures do not include Single Farm Payment

Source for UK employment data (SIC 2007, main job) - Labour force survey (Quarter 1, 2012)

Table 3: Agriculture in NI: structural adjustment, 1991, 2001 and 2009-2011

	1991	2001	2009	2010	2011
Number of farms	34,781	29,818	25,264	24,471	24,436
Average farm size (Ha)	31.2	35.8	39.9	40.6	40.6
Total farmers and workers	59,812	56,362	48,031	46,948	46,848

Table 4: Agri - food sector GVA and employment, 2011

	NI		UK	
	£m	% of GVA	£m	% of GVA
Gross value added¹				
Agriculture	437	1.6	8,845	0.6
Food and drink processing	686 ²	2.4 ²	21,158 ³	1.7 ³
Employment	'000 persons	% of total employment	'000 persons	% of total employment
Agriculture, forestry and fishing	25 ⁴	3.1 ⁴	371 ⁵	1.3 ⁵
Food and drink processing ⁶	27 ⁴	3.4 ⁴	388 ⁵	1.3 ⁵

1. GVA figures are at basic prices

2. DARD Size and Performance of the NI Food and Drinks Processing Sector, Subsector Statistics, 2010 Provisional estimate. (This includes an estimate of the value added of those food and drinks processing businesses with a turnover of less than £250,000.)

3. UK 2009 figures

4. % of total LFS employment (802,000 in NI at Q1, 2012)

5. % of total LFS employment (29,147,000 in UK at Q1 2012).

6. Includes SIC 2007 10.11 - 11.07

Table 5: NI food and drink processing sector - gross turnover, value added, employment by subsector, external and export sales, (Provisional 2010)

Subsector	Gross turnover	Value added	Employees ¹	External ² Sales	Export Sales ³
	£m	£m		£m	£m
Animal by-products	21	8	114	19	4
Bakeries	274	92	3,473	110	65
Beef and sheepmeat	940	123	3,540	761	197
Drinks	371	77	1,163	219	186
Eggs	75	13	215	45	11
Fish	71	15	546	54	28
Fruit and vegetables	196	55	1,770	114	38
Milk and milk products	851	107	2,277	604	343
Pigmeat	253	40	1,378	151	48
Poultrymeat	629	145	5,211	506	126
Total	3,680	676	19,685	2,584	1,047

1. Full - time equivalents

2. Sales outside NI.

3. Sales outside UK.

Source: DARD Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics, 2010 provisional estimates. These figures exclude an estimate of those food and drinks processing businesses with a turnover of less than £250,000. Provisional estimates for 2010 have been estimated by adjusting the 2009 baseline largely on the basis of information available within DARD. Provisional estimates for 2010 will be updated in the next version of the publication 'Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics', which will be published in October 2012.

Figure 3 - Gross turnover and full time equivalent (FTE) workforce by food processing subsector, NI (Provisional 2010)

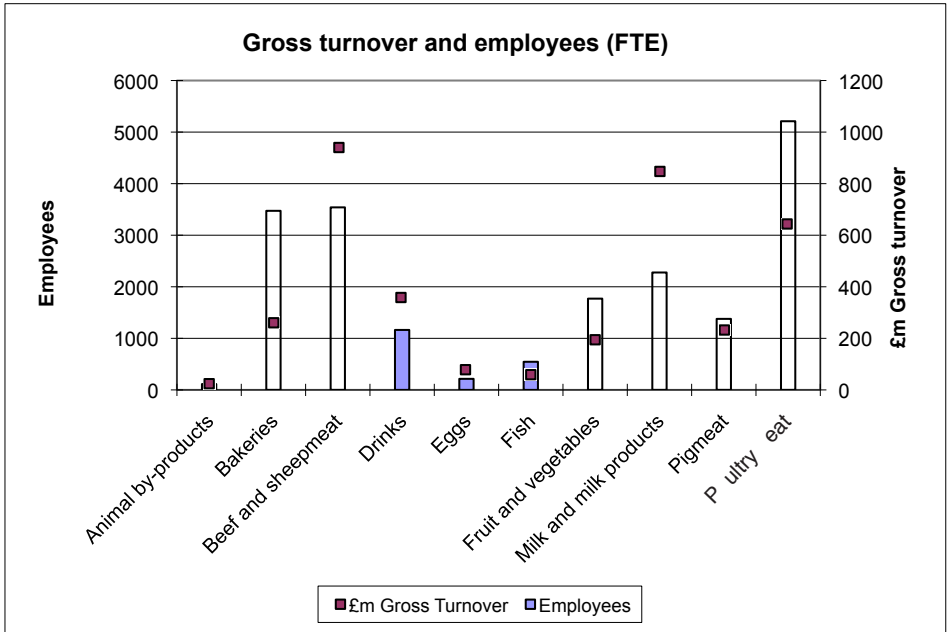


Figure 4 - Proportion of gross turnover by subsector, NI (Provisional 2010)

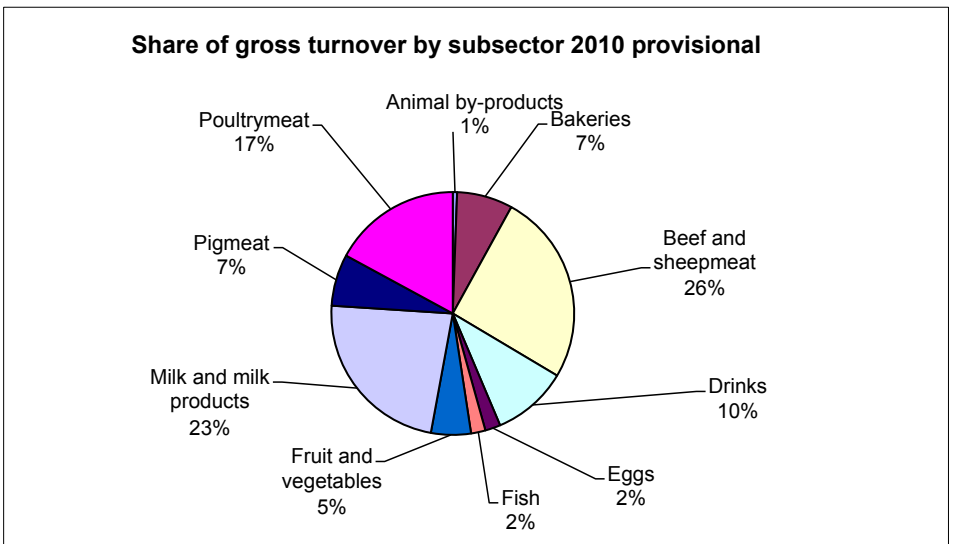


Figure 5 - Proportion of employee jobs by Industry section, December 2011

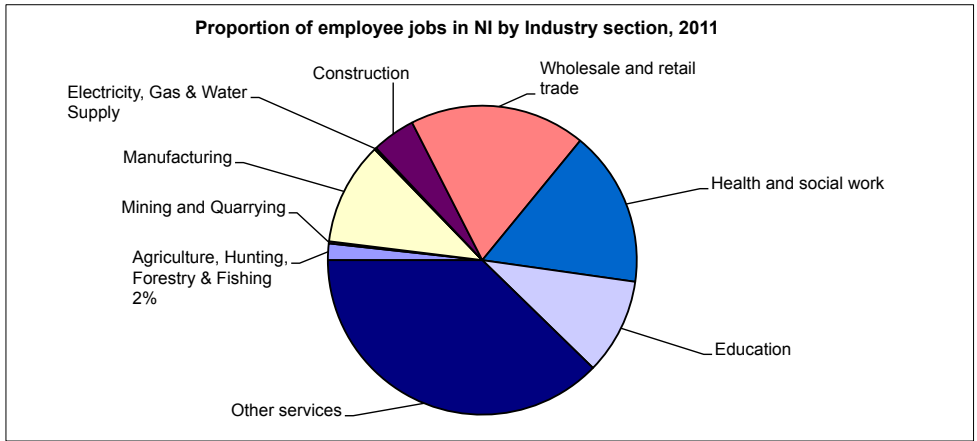


Table 6: Distribution of farm outputs in NI and share of UK totals, 2011

	% of NI total			NI output as % of UK output
	Gross output	Gross Margin	On farm employment	%
Enterprise	%	%	%	%
Dairy	31.8	54.3	21	14.5
Cattle	22.0	15.7	52	14.5
Sheep & wool	3.4	2.4	14	4.9
Pigs	6.1	2.5	} 4	9.7
Poultry & eggs	17.3	8.0		12.0
Cereals & oilseed rape	3.3	5.7	} 9	1.0
Potatoes	1.4	2.3		3.3
Horticulture	3.2	5.1		1.9
Others	11.6	3.9		5.4
Total	100.0	100.0	100	7.2

Source: Aggregate Agricultural Account. Employment data from June 2011 Agricultural Survey.

Table 7: Total income from farming, NI and UK, 2011

	NI	UK
Total income from farming (£)	£308m	£5,693m
% change on previous year :		
Current prices	21%	31%
Real terms	15%	25%

Source: Aggregate Agricultural Account.

Note: For an explanation of the change in TIFF in NI and UK see Chapter 1 of the Statistical Review of NI Agriculture 2011.

Table 8: Average income¹ by type of farm, NI, 2009/10 and 2010/11

	Net farm income ²		Farm Business Income ³		Cash income ⁴	
	2009/10	2010/11	2009/10	2010/11	2009/10	2010/11
Type of farm:						
Cereals	1,446	27,992	10,105	35,942	29,413	63,337
Dairy	13,834	48,808	17,847	51,555	41,221	77,682
Cattle & sheep (LFA)	13,700	10,709	22,992	19,257	31,522	27,102
Cattle & sheep (Lowland)	8,779	-359	18,660	9,354	26,192	17,529
Mixed	17,818	28,497	33,675	43,925	51,977	61,064

Source: Farm Business Survey in Northern Ireland 2009/10 and 2010/11

1. Based on information gathered from farms over 0.5 Standard Labour Requirements

2. The calculation of net farm income assumes that all farms are tenanted: net farm income therefore represents the return to the principal farmer and spouse for their manual and managerial labour and on the tenant-style capital of the business.

3. Farm Business income is the return to all unpaid labour and to their capital invested (inc land and buildings) in the business

4. Cash income is the difference between total receipts and total expenditure.

Note: Farm typing methodology has changed from 2011 and is now based on Standard Outputs. Further information can be found in the farm income publication. www.dardni.gov.uk/index/publications/pubs-dard-statistics/farm-incomes-in-nireland-2010-2011.htm

Table 9: Net farm Income, Farm Business Income and Cash Income for dairy, LFA cattle & sheep, and mixed farms throughout the UK, 2009/10 and 2010/11

	Dairy		LFA Cattle & Sheep		Mixed	
	2009/10	2010/11	2009/10	2010/11	2009/10	2010/11
Net farm income						
England	43,100	49,600	17,900	13,300	19,300	37,400
Wales	37,500	44,700	25,300	16,400	-	-
Scotland	42,803	59,591	32,341	34,359	24,978	34,238
NI	13,834	48,808	13,700	10,709	17,818	28,497
Farm Business Income						
England	59,000	66,000	26,000	21,500	33,000	51,000
Wales	49,700	57,100	34,500	27,100	-	-
Scotland	58,853	73,632	44,544	42,942	39,678	47,812
NI	17,847	51,555	22,992	19,257	33,675	43,925
Cash income						
England	78,300	91,300	32,500	31,300	56,800	68,800
Wales	63,200	72,600	40,300	35,300	-	-
Scotland	63,937	76,821	53,136	47,327	51,158	55,388
NI	41,221	77,682	31,522	27,102	51,977	61,064

Source: Farm Business Survey 2009/10 and 2010/11

Note: Scotland income figures typed using Standard Gross Margin co-efficients. Other regions typed using Standard Outputs.

Table 10: Number of farms in the UK by size & country - June 2011

	Business size (SLR)¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms					
NI	18,563	3,094	1,261	1,518	24,436
England ²	64,556	16,239	8,569	16,085	105,449
Scotland	42,631	3,405	2,090	4,417	52,543
Wales	32,131	3,473	2,075	3,221	40,900
Total	157,881	26,211	13,995	25,241	223,328

1. Standard Labour Requirements

2. 2010 figures which relate to commercial holdings only as defined by EU regulation.

Table 11: Percentage distribution of farms in the UK by size & country - June 2011

	Business size (SLR)				Total
	Very small	Small	Medium	Large / Very Large	
Farms (%)					
NI	76	13	5	6	100
England	61	15	8	15	100
Scotland	81	6	4	8	100
Wales	79	8	5	8	100
Total	71	12	6	11	100

Table 12: Number of farms in NI by size and type - June 2011

Business type	Business size (SLR)					All sizes
	Very small	Small	Medium	Large		
Cereals	252	41	9	8		310
General cropping	190	44	30	54		318
Horticulture	112	55	30	95		292
Pigs	63	33	31	57		184
Poultry	271	204	76	62		613
Dairy	370	826	622	935		2,753
Cattle and sheep (LFA)	12,682	1,203	248	126		14,259
Cattle and sheep (Lowland)	3,825	509	125	70		4,529
Mixed	401	110	59	93		663
Others	397	69	31	18		515
All types	18,563	3,094	1,261	1,518		24,436

Source: June 2011 Agricultural Survey

Note: Farm Business type methodology has changed from 2011 and is now based on Standard Outputs. Further information can be found in the Census publication. www.dardni.gov.uk/index/dard-statistics/statistical-reports/agricultural-census.htm

Table 13: Crop areas and livestock numbers, NI, 1991, 2001 and 2009 - 2011

	1991	2001	2009	2010	2011
Livestock ('000 head)					
Cattle					
Dairy cows	274.1	295.0	284.7	281.0	282.5
Beef cows	285.5	311.8	256.8	257.6	269.5
Total cattle	1,655.7	1,679.1	1,599.0	1,604.4	1,590.5
Sheep					
Breeding ewes	1,395.8	1,232.3	892.4	875.9	895.2
Total sheep	2,889.4	2,525.6	1,896.7	1,847.7	1,887.6
Pigs					
Female Breeding pigs	71.5	40.6	38.2	38.5	38.0
Total pigs	684.2	385.6	433.5	424.6	425.3
Poultry					
Laying flock	2,859.7	2,142.6	2,315.7	2,099.4	2,429.7
Broilers	6,747.8	8,863.6	11,418.3	11,915.1	14,069.4
Crops ('000 hectares)					
Cereals	46.9	39.5	39.2	37.8	37.9
Potatoes	10.9	6.7	5.1	4.9	4.8
Horticultural crops	3.4	3.1	3.0	2.9	3.0

Source: June Agricultural Survey

Notes: From 2005 onwards, cattle figures were derived from APHIS

From 2007 onwards, poultry figures were taken from the Northern Ireland Bird Register Update.

Figure 6 - Trend in dairy and beef cow numbers, NI, 1996 - 2011

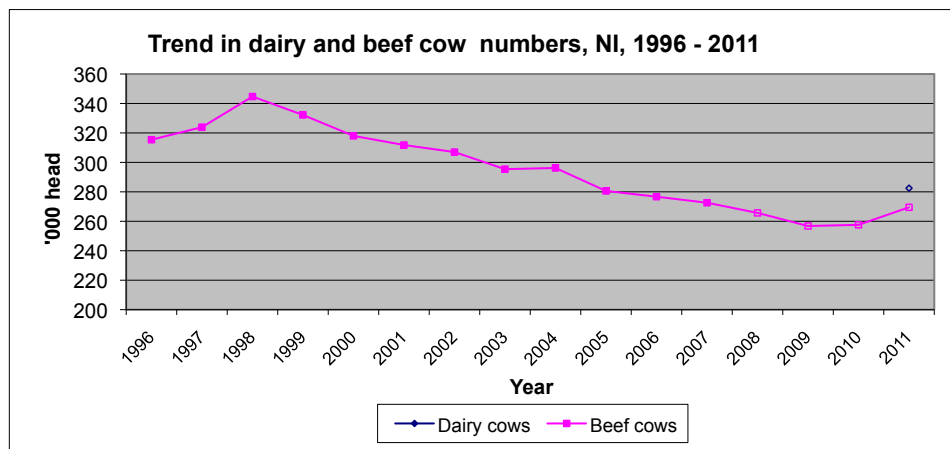


Table 14: Average size of enterprise, NI, 1991, 2001 and 2009 - 2011

	1991	2001	2009	2010	2011
Average livestock numbers (per herd/flock)					
Dairy cows	41	58	75	77	80
Beef cows	15	19	16	17	18
Total cattle	55	67	75	79	78
Ewes	109	119	106	105	106
Total sheep	215	240	220	216	218
Sows	23	68	95	92	90
Total pigs	205	568	843	757	750
Total poultry (farms with more than 500 birds)	20,529	23,931	29,256	29,829	28,928
Average cropping areas (ha)					
Cereals	8	10	13	13	13
Potatoes	4	6	8	7	7

Source: June Agricultural Survey

Notes: From 2005 onwards, cattle figures were derived from APHIS

From 2007 onwards, poultry figures were taken from the Northern Ireland Bird Register Update.

Figure 7 - Average size of selected livestock enterprises, NI, 1996 - 2011

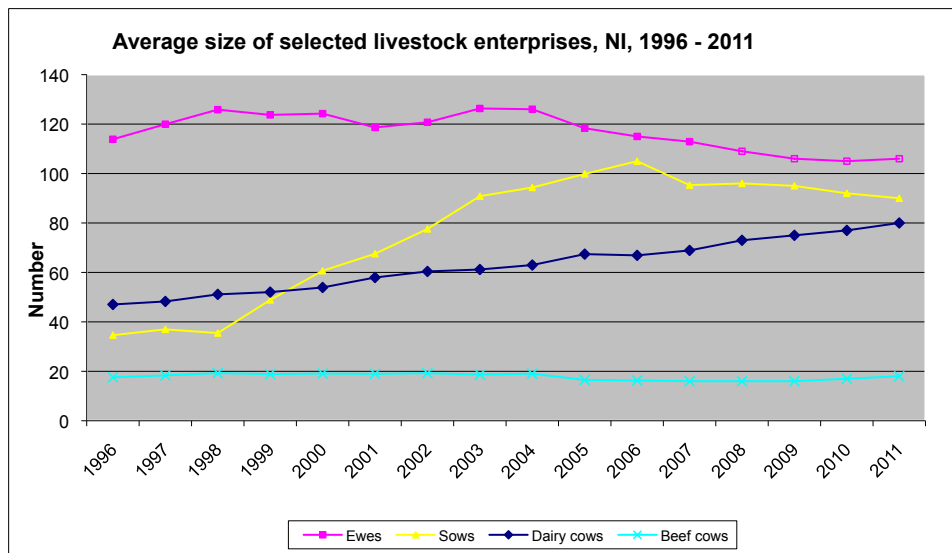


Table 15: Number of farmers and workers, NI, 1991, 2001 and 2009 - 2011

	1991	2001	2009	2010	2011
Farmers, partners & directors:					
Full-time	26,030	20,169	16,437	15,965	15,823
Part-time	16,057	15,786	13,830	13,596	13,320
Total	42,087	35,955	30,267	29,561	29,143
Spouses	5,160	6,520	6,221	6,206	6,263
Other workers					
Full-time	4,895	2,797	3,106	3,109	3,249
Part-time	3,454	2,691	3,220	3,187	3,436
Casual/Seasonal	8,000	8,308	5,217	4,885	4,757
Total other workers	16,349	13,796	11,543	11,181	11,442
Total agricultural labour force	63,596	56,271	48,031	46,948	46,848

Source: June Agricultural Survey

Figure 8 - Full - time labour on NI farms, 1991, 2001 and 2009 - 2011

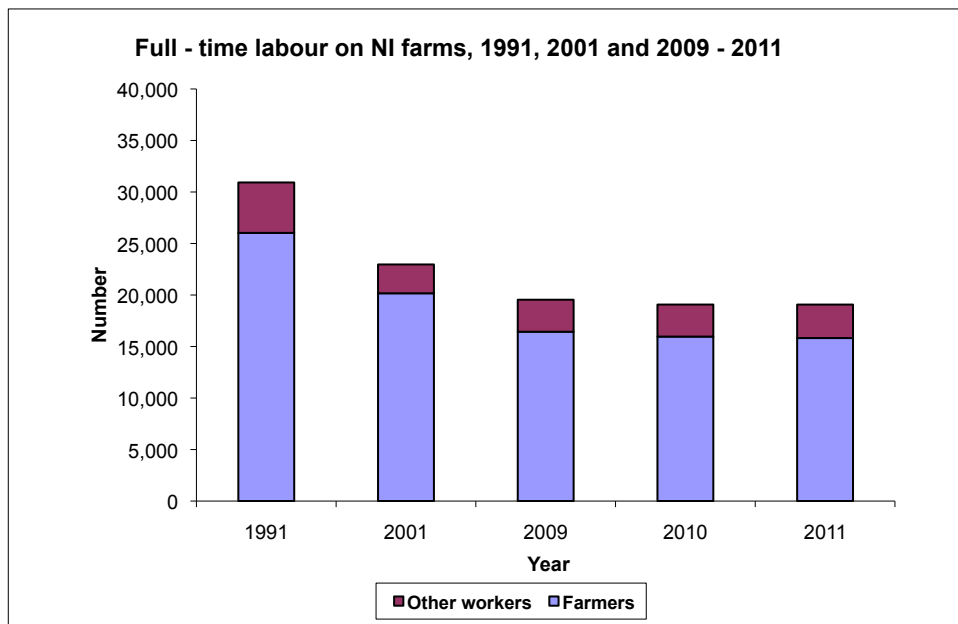


Table 16: Liveweight and estimated value of recorded landings of fish into NI, 2008 - 2011

	2008		2009		2010		2011	
	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)
Total wet fish	10,103	6,404	10,406	6,426	9,572	5,881	8,663	6,472
Total shell fish	10,844	18,569	9,758	17,025	11,776	14,704	11,950	19,593
Total fish	20,947	24,973	20,164	23,451	21,348	20,585	20,613	26,065

Source: Fisheries Division, DARD

Figure 9 - Estimated value of recorded landings of fish into NI 2003 - 2011

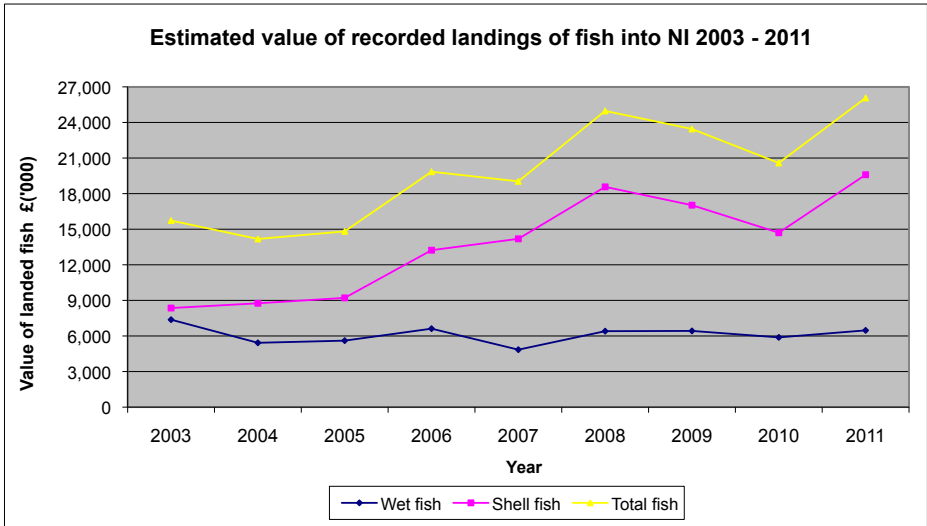


Table 17: Employment in NI fishing industry, 2008 - 2011

	2008		2009		2010		2011	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Catching	532	93	541	113	535	113	578	110
Processing and marketing	515	172	485	157	404	121	412	127
Others	102	14	166	39	110	41	110	30
Total	1,149	279	1,192	309	1,049	275	1,100	267

Source: Fisheries Division, DARD

Table 18: Area of woodland throughout the U.K. by forest type, 2011

	Conifers ('000 HA)	Broadleaves ('000 HA)	Total ('000 HA)	% of total farmed area in forestry ¹
United Kingdom	1,724	1,355	3,078	18.0%
England	411	886	1,297	14.5%
Scotland	1,081	309	1,390	24.7%
Wales	167	137	304	19.8%
Northern Ireland	66	22	88	8.9%

Source: Forestry Commission

¹ Total land area used in calculation equals area farmed from June Survey, 2011

Table 19: Number of farms using agricultural contractors in 2010

	Very Small	Small	Med/Large	All
Hay/Silage Making	7,117	6,543	3,127	16,787
Crop Harvesting	380	761	791	1,932
Spreading slurry/fertilisers etc	3,549	4,368	2,340	10,257
Other field work	1,082	1,461	1,070	3,613
Milking	5	58	380	443
Sheep shearing	1,481	1,852	544	3,877
Other livestock work	415	508	255	1,178
Hedge cutting	5,725	5,494	2,686	13,905

Source: EU Farm Structure Survey 2010, NI

Table 20: Percentage of farms using agricultural contractors by business size in 2010

	Very Small	Small	Med/Large	All
Hay/Silage Making	60	76	78	69
Crop Harvesting	3	9	20	8
Spreading slurry/fertilisers etc	30	51	59	42
Other field work	9	17	27	15
Milking	0	1	10	2
Sheep shearing	12	22	14	16
Other livestock work	3	6	6	5
Hedge cutting	48	64	67	57

Source: EU Farm Structure Survey 2010, NI

Table 21: Number of farms using agricultural contractors from 2003-2010

	2003	2005	2007	2010
Hay/Silage Making	19,028	18,849	18,015	16,787
Crop Harvesting	2,398	2,300	1,979	1,932
Spreading slurry/fertilisers etc	11,623	11,004	10,500	10,257
Other field work	4,228	3,953	3,749	3,613
Milking	635	653	599	443
Sheep shearing	4,679	4,551	4,432	3,877
Other livestock work	1,701	1,554	1,474	1,178
Hedge cutting	14,874	14,840	14,705	13,905

Source: EU Farm Structure Survey 2010, NI

Further information

1. Northern Ireland

Department of Agriculture and Rural Development (DARD), www.dardni.gov.uk or DARD library

<http://www.dardni.gov.uk/index/dard-statistics/>

Agricultural Census in N.I. 2011 publication (ISBN no. 978-1-84807-284-8)

Statistical Review of N.I. Agriculture 2011 publication (ISBN no. 978-1-84807-273-2)

Size and performance of the N.I. Food and Drinks Processing Sector publication 2009 (ISBN no. 978-1-84807-238-1)

EU Farm Structure Survey 2010 (ISBN no. 978-1-84807-212-1)

Farm Incomes in N.I. publication

Food consumption and expenditure information

Fisheries statistics

Forestry statistics

2. United Kingdom

Department of Environment, Food and Rural Affairs (DEFRA), www.defra.gov.uk

<http://www.defra.gov.uk/statistics/foodfarm/cross-cutting/auk/>

UK National Statistics Publication Hub

<http://www.statistics.gov.uk>

3. Republic of Ireland

Department of Agriculture, Food and the Marine, www.agriculture.gov.ie

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Central statistics office Ireland, www.cso.ie

<http://www.cso.ie/en/statistics/agricultureandfishing/>

Official Statistics Ireland, www.statcentral.ie

<http://www.statcentral.ie/viewstats.asp?type=Agriculture%20and%20Fishing>

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Eurostat, epp.eurostat.ec.europa.eu

<http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/introduction>

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