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POLICY AND ECONOMICS DIVISION

Northern Ireland Agri-Food Sector

Key Statistics June 2009



Agriculture, Fishing & Forestry





Northern Ireland Agri-Food Sector
Key Statistics
June 2009

Key Facts on
Agriculture,
Fishing,
and Forestry

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Table 1: General economic data

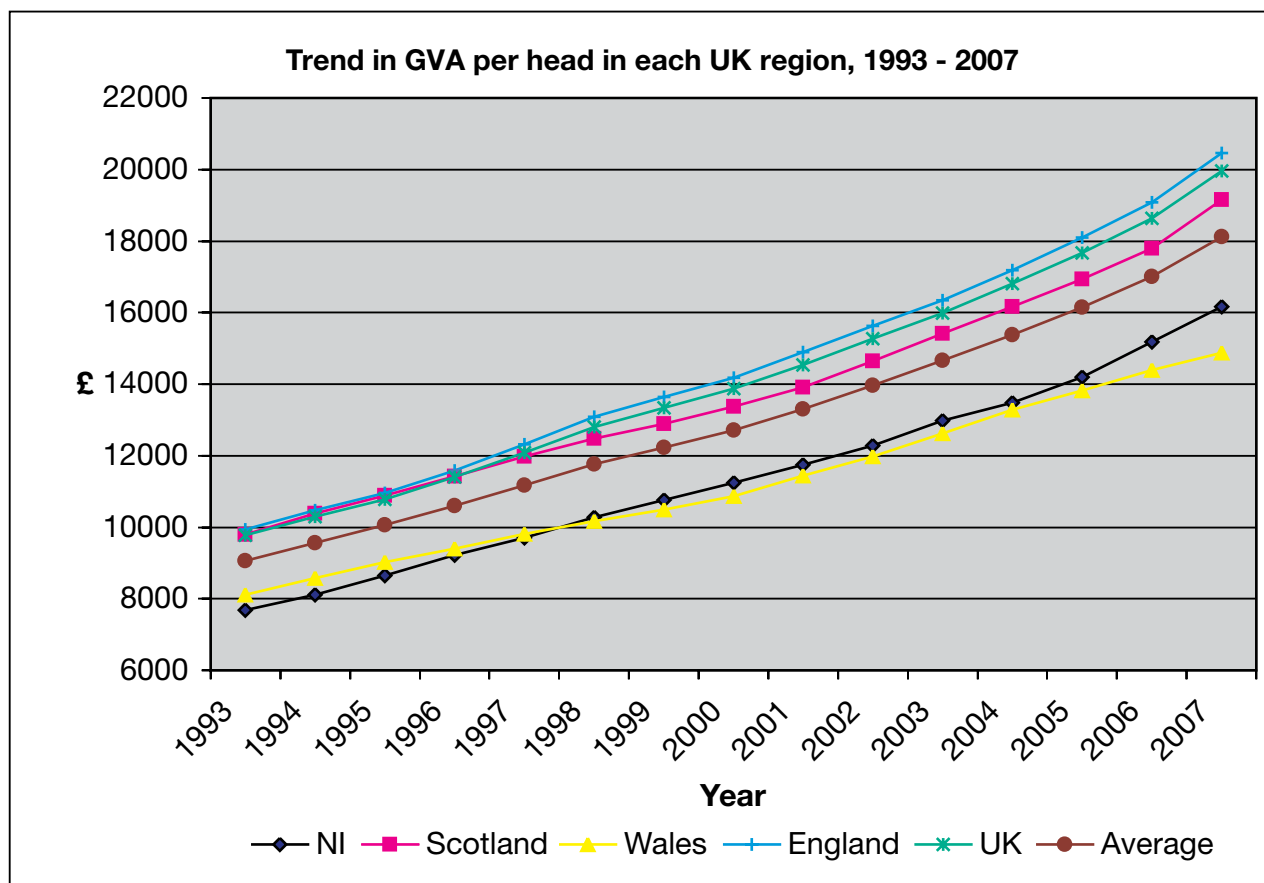
	NI	Scotland	Wales	England	UK	EU 27
GVA per head (£, 2007)	16,170	19,152	14,877	20,463	19,956	N/A
Population ('000, 2007)	1,759	5,144	2,980	51,092	60,975	495,090
Area (sq. km, 2007)	13,576	77,925	20,732	130,281	242,514	4,454,237
Population Density (per sq. km, 2007)	130	66	144	392	251	111
Bank Base interest rate (% , May 2009)					0.5	
RPI (% change, April 2008 - April 2009)					-1.2	
Unemployment rate (% , Quarter 1 2009)	6.1	5.9	7.7	7.2	7.1	7.9

Unemployment rates are unadjusted and taken from the Labour Force Survey (LFS). EU27 figure from InfoBase Europe.

GVA - Gross Value Added (at basic prices)

RPI - Retail Price Index

Figure 1 - Trend in GVA per head in each UK region, 1993 - 2007



Note: GVA is in basic prices

Figure 2 - Population per 100 ha of Utilised Agricultural Area (UAA), 2007

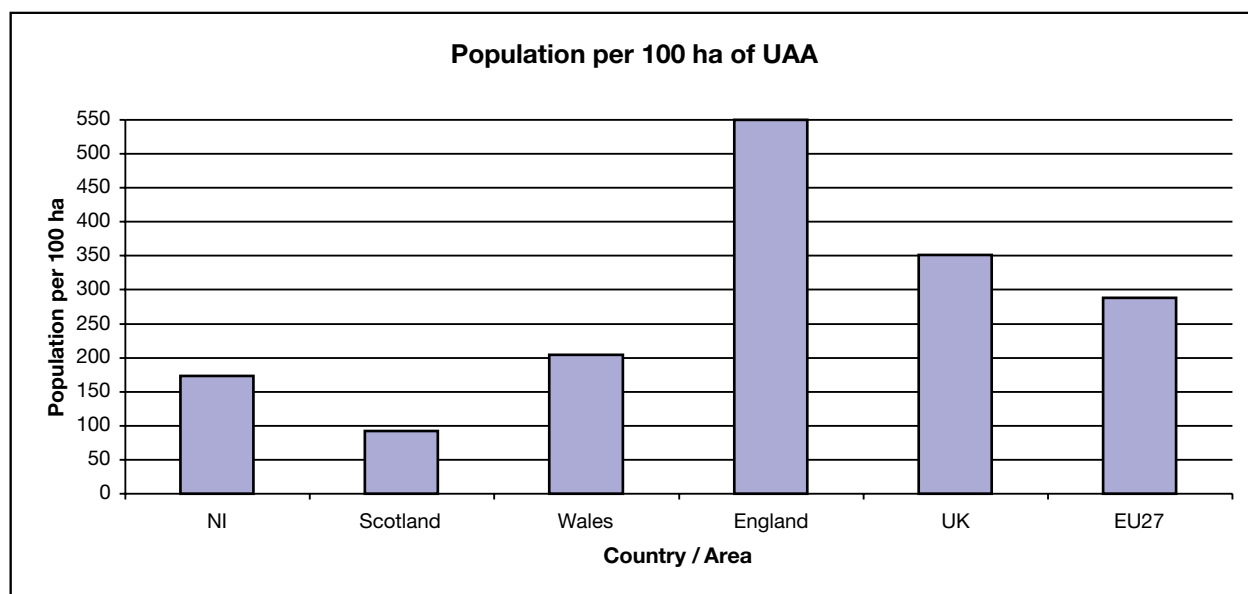


Table 2: Agriculture: general data, 2008

	NI	Scot	Wales	Eng	UK	ROI	EU27
Share of total GVA (%)	1.3	0.8 ¹	0.3 ¹	0.4 ¹	0.5 ¹	2.5 ¹	N/A
No. employed in agriculture forestry & fishing ('000)	24	45	28	311	408	117.1 ²	N/A
Share of employment (%)	3.1	1.8	2.1	1.3	1.4	5.8 ²	N/A
Number of farms ('000)	26	51	39	211	327	128 ¹	14,479 ³
Average farm size (Ha)	39	121	37	44	60	32 ¹	12 ³
LFA (% Agricultural area)	70	86	81	16	49	75	N/A

1. 2007

2. CSO Quarterly National Household Survey, 2nd quarter, 2008

3. 2006

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

Source for UK employment data - Labour force survey (Quarter 4 2008)

Table 3: Agriculture in NI: structural adjustment, 1988, 1998 and 2006-2008

	1988	1998	2006	2007	2008
Number of farms	36,534	31,817	26,739	26,146	25,952
Average farm size (Ha)	29.7	33.6	38.5	38.8	39.2
Total farmers and workers	66,312	61,096	49,952	48,974	48,964



Table 4: Agri - food sector GVA and employment, 2008

	NI		UK	
	£m	% of GVA	£m	% of GVA
Gross value added ¹				
Agriculture	348	1.2	6,816	0.5
Food and drink processing	530 ²	1.9 ²	21,101 ³	1.8 ³
Employment	'000 persons	% of total employment	'000 persons	% of total employment
Agriculture, forestry and fishing	24	3.1 ⁴	408	1.4 ⁵
Food and drink processing	18.4 ²	2.4 ⁴	386	1.3 ⁵

1. GVA figures are at basic prices

2. Source: DARD Size and Performance of the Northern Ireland Food and Drinks Processing Sector, 2007 Provisional estimate.

3. UK 2006 figures

4. % of total LFS employment (771,000 in NI at Q4 2008).

5. % of total LFS employment (29,443,000 in UK at Q4 2008).

Table 5: NI food and drink processing sector - gross turnover, value added, employment by subsector, external and export sales, (Provisional 2007)

Subsector	Gross turnover	Value added	Employees ¹	External Sales	Export Sales ³
	£m	£m		£m	£m
Animal by-products	17	5	161	15	5
Bakeries	187	65	3,141	60	30
Beef and sheepmeat	672	95	3,025	405	50
Drinks	284	70	1,203	145	130
Eggs	38	5	188	30	5
Fish	69	15	728	50	25
Fruit and vegetables	169	50	1,808	95	30
Milk and milk products	692	95	2,342	475	280
Pigmeat	170	30	1,306	90	30
Poultrymeat	425	100	4,503	335	60
Total	2,724	530	18,403	1,700	645

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, 2007 Provisional estimate.

Provisional estimates for 2007 have been estimated by adjusting the 2006 baseline, largely on the basis of information available within DARD. Provisional estimates for 2007 will be updated in the next version of the publication 'Size and Performance of the Northern Ireland Food and Drinks Processing sector', which will be published in July 2009.

Figure 3 - Gross turnover and full time equivalent (FTE) workforce by food processing subsector, NI (Provisional 2007)

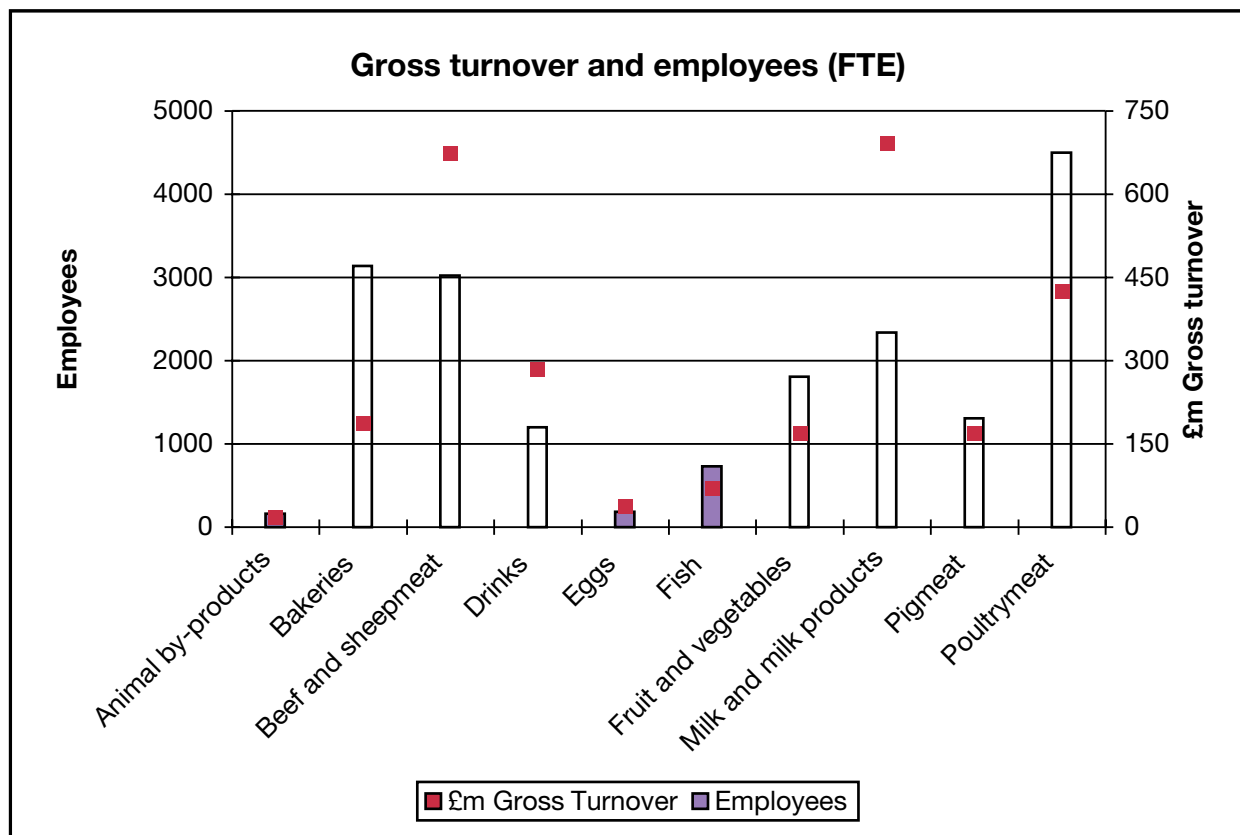


Figure 4 - Proportion of gross turnover by subsector, NI (Provisional 2007)

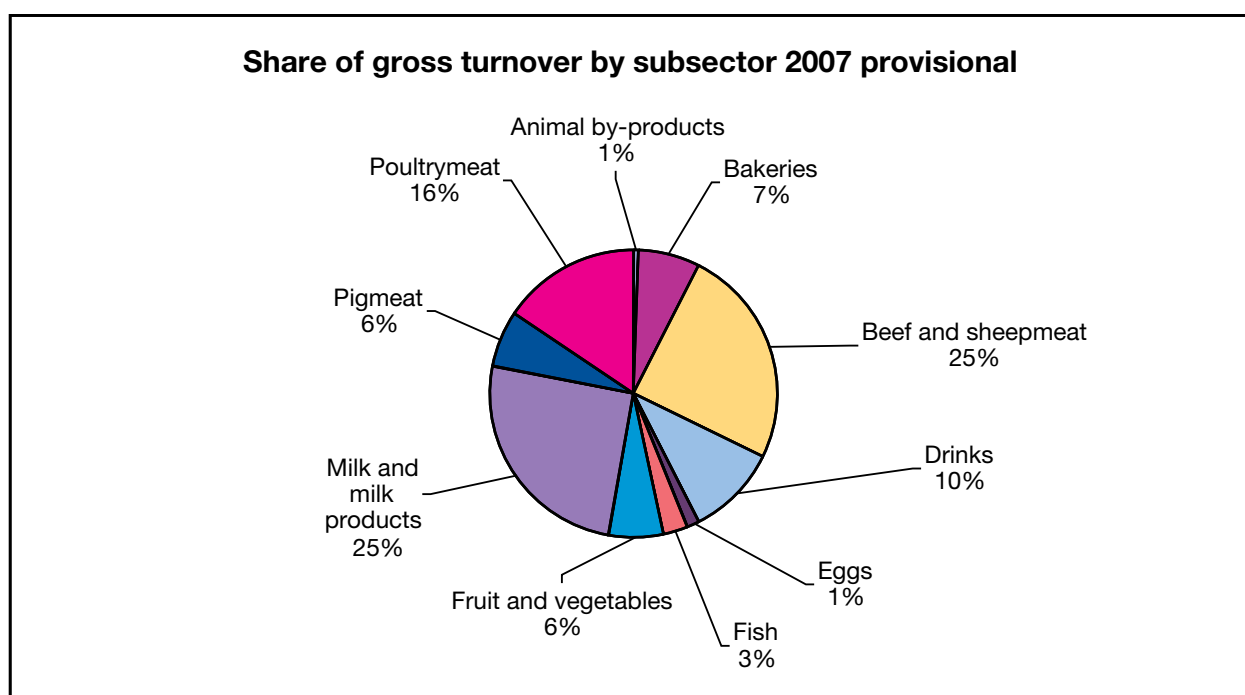


Figure 5 - Proportion of employee jobs by Industry section, September 2008

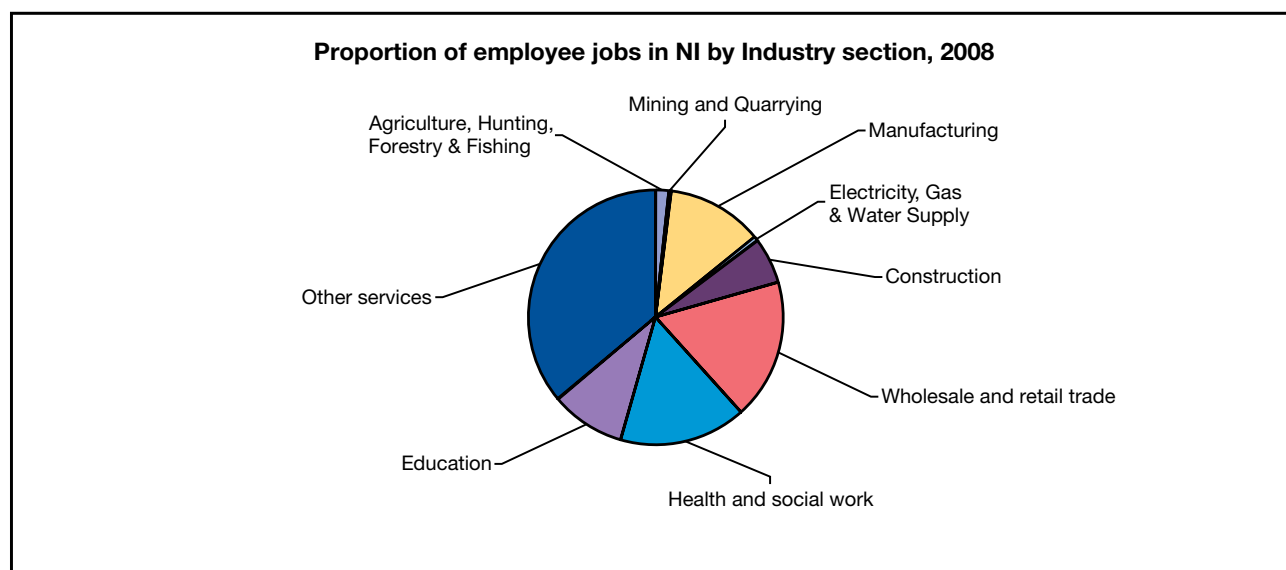


Table 6: Distribution of farm outputs in NI and share of UK totals, 2008

	% of NI total			NI output as % of UK output
	Gross output	Gross Margin	On farm employment	
Enterprise	%	%	%	%
Dairy	31.7	56.4	22	12.9
Cattle	22.8	13.1	51	15.5
Sheep & wool	3.5	2.8	14	5.9
Pigs	5.5	2.8	3	9.0
Poultry & eggs	15.5	4.8		10.8
Cereals & oilseed rape	3.3	5.2	10	1.0
Potatoes	1.5	2.9		2.7
Horticulture	4.4	7.7		2.5
Others	11.9	4.3		5.9
Total	100.0	100.0	100	7.1

Source: Aggregate Agricultural Account. Employment data from June 2008 Agricultural Survey.

Table 7: Total income from farming, NI and UK, 2008

	NI	UK
Total income from farming (£)	£233m	£3,457m
% change on previous year :		
Current prices	-1%	42%
Real terms	-6%	36%

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 2008.



Table 8: Average income¹ by type of farm, NI, 2006/07 and 2007/08

	Net farm income ²		Farm Business Income ³		Cash income ⁴	
	2006/07	2007/08	2006/07	2007/08	2006/07	2007/08
Type of farm:						
Cereals	19,885	28,753	25,746	37,159	40,509	50,949
General cropping	91,865	56,300	98,797	64,564	122,624	91,585
Dairy	22,893	52,268	30,435	58,737	44,751	71,827
Cattle & sheep (LFA)	4,124	5,990	11,213	13,371	19,955	22,575
Cattle & sheep (Lowland)	1,398	5,188	9,338	14,630	16,275	23,306
Mixed	8,893	9,122	21,655	21,674	26,883	23,522

Source: Farm Business Survey in Northern Ireland 2006/07 and 2007/08

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.

Table 9: Net farm Income, Farm Business Income and Cash Income for dairy, LFA cattle & sheep, and mixed farms throughout the UK, 2006/07 and 2007/08

	Dairy		LFA Cattle & Sheep		Mixed	
	2006/07	2007/08	2006/07	2007/08	2006/07	2007/08
Net farm income						
England	22,900	46,700	6,100	5,000	17,600	27,600
Wales	22,300	41,900	8,100	12,200	14,500	21,600
Scotland	32,662	52,698	12,668	18,397	20,777	24,626
NI	22,893	52,268	4,124	5,990	8,893	9,122
Farm Business Income						
England	30,800	55,100	10,500	10,400	27,200	37,300
Wales	30,500	51,300	17,500	19,800	21,800	31,300
Scotland	n/a	n/a	n/a	n/a	n/a	n/a
NI	30,435	58,737	11,213	13,371	21,655	21,674
Cash income						
England	45,000	64,500	20,300	16,400	37,400	45,300
Wales	45,200	62,600	29,400	28,800	37,100	40,200
Scotland	54,775	69,969	26,095	34,875	38,472	40,503
NI	44,751	71,827	19,955	22,575	26,883	23,522

Source: Farm Business Survey 2006/07 and 2007/08



Table 10: Number of farms in the UK by size & country - June 2008

	Business size (SLR) ¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms					
NI	19,984	3,188	1,289	1,491	25,952
England	164,833	20,870	9,872	14,945	210,520
Scotland	41,326	3,531	2,103	4,486	51,446
Wales	29,708	3,693	2,282	3,186	38,869
Total	255,851	31,282	15,546	24,108	326,787

1. Standard Labour Requirements

Table 11: Percentage distribution of farms in the UK by size & country - June 2008

	Business size (SLR) ¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms (%)					
NI	77	12	5	6	100
England	78	10	5	7	100
Scotland	80	7	4	9	100
Wales	76	10	6	8	100
Total	78	10	5	7	100

1. Standard Labour Requirements

Table 12: Number of farms in NI by size and type - June 2008

Business type	Business size (SLR) ¹				All sizes
	Very small	Small	Medium	Large	
Cereals	495	60	17	14	586
General cropping	132	42	31	40	245
Horticulture	125	64	31	77	297
Pigs and poultry	298	164	55	69	586
Dairy	621	1,093	728	1,015	3,457
Cattle and sheep (LFA)	13,201	1,065	218	107	14,591
Cattle and sheep (Lowland)	3,757	447	103	48	4,355
Mixed	512	208	69	73	862
Others	843	45	37	48	973
All types	19,984	3,188	1,289	1,491	25,952

Source: June 2008 Agricultural Survey

1. Standard Labour Requirements

Table 13: Crop areas and livestock numbers, NI, 1988, 1998 and 2006 - 2008

	1988	1998	2006	2007	2008
Livestock ('000 head)					
Cattle					
Dairy cows	278.9	287.7	284.7	286.1	289.2
Beef cows	231.1	344.7	276.7	272.6	265.7
Total cattle	1,550.8	1,767.3	1,689.3	1,643.5	1,622.5
Sheep					
Breeding ewes	1,141.2	1,449.8	991.1	957.3	935.4
Total sheep	2,333.9	2,986.6	2,070.5	2,024.0	1,973.6
Pigs					
Female Breeding pigs	75.4	66.9	37.4	37.0	35.5
Total pigs	720.2	653.4	386.6	410.5	402.4
Poultry					
Laying flock	3,323.4	2,562.1	2,187.7	2,394.0	2,398.5
Broilers	5,715.6	8,854.1	13,367.1	11,861.3	11,543.5
Crops ('000 hectares)					
Cereals	51.6	44.7	33.6	34.2	40.4
Potatoes	12.1	7.5	4.7	4.8	5.1
Horticultural crops	3.6	3.2	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 - Trends in dairy and beef cow numbers, NI, 1994 - 2008

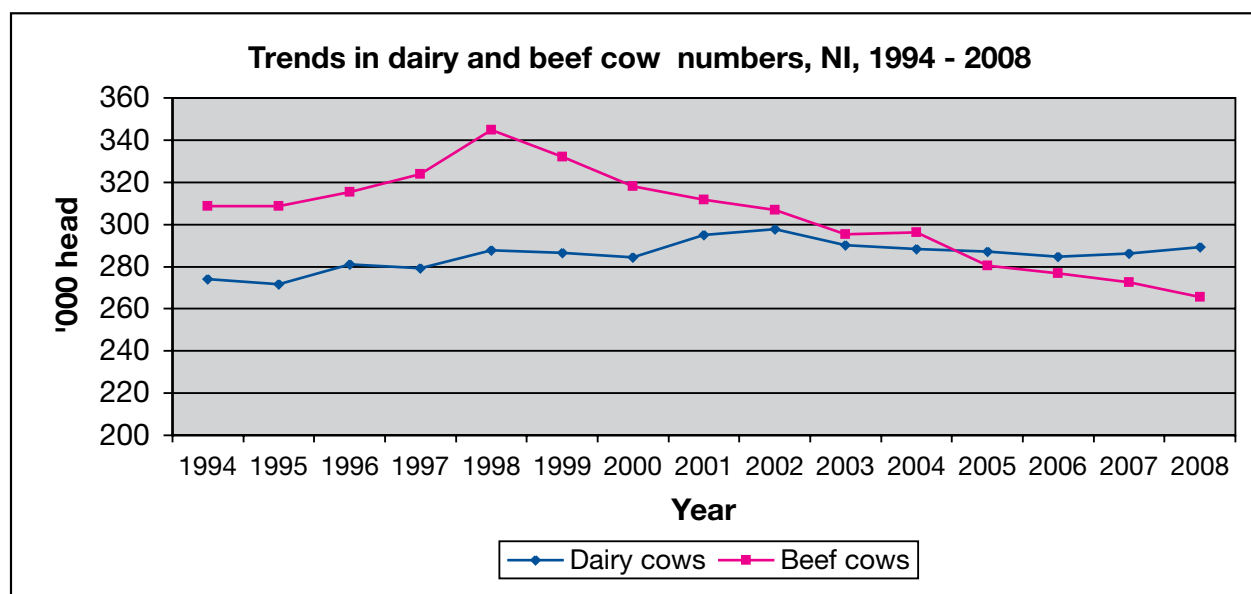


Table 14: Average size of enterprise, NI, 1988, 1998 and 2006 - 2008

	1988	1998	2006	2007	2008
Average livestock numbers (per herd/flock)					
Dairy cows	39	51	69	69	73
Beef cows	12	19	17	16	16
Total cattle	49	66	73	74	77
Ewes	96	126	115	113	109
Total sheep	186	256	237	234	225
Sows	19	36	105	95	96
Total pigs	166	306	855	838	825
Total poultry (farms with more than 500 birds)	18,712	21,645	29,079	28,281	26,786
Average cropping areas (ha)					
Cereals	8	10	12	13	13
Potatoes	3	5	7	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, 1994 - 2008

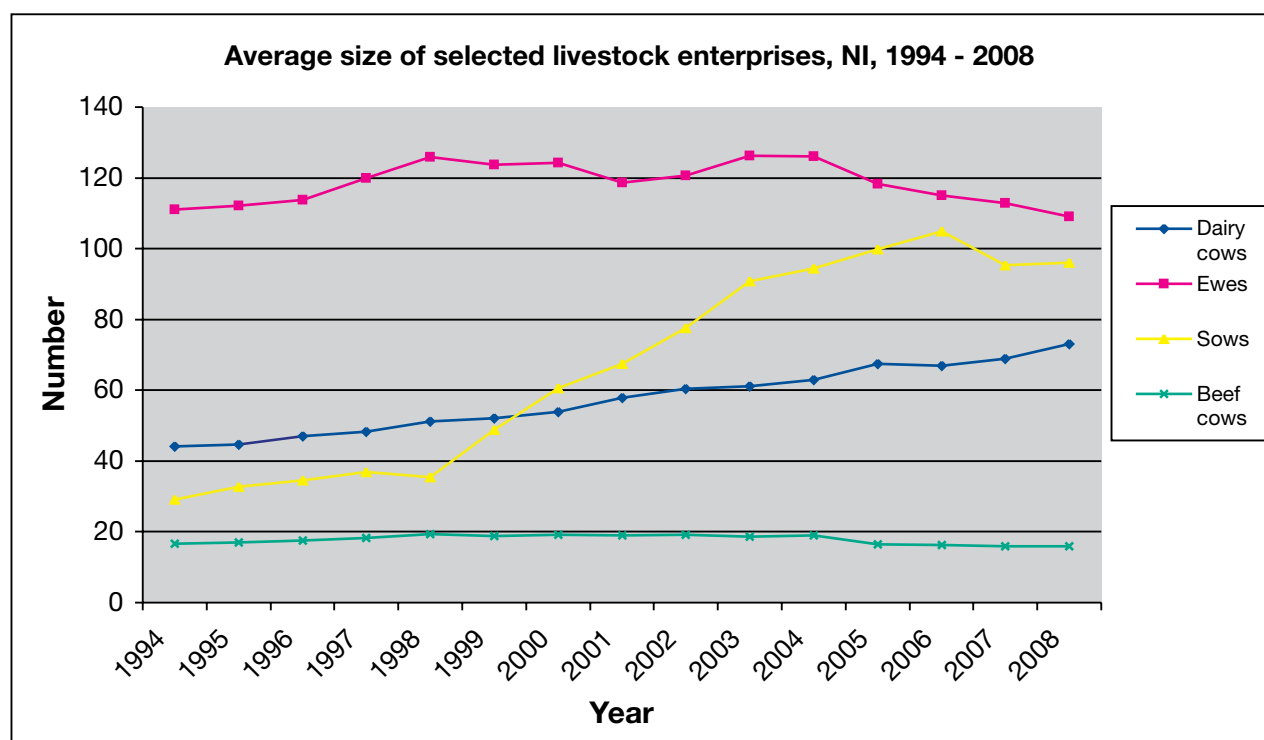


Table 15: Number of farmers and workers, NI, 1988, 1998 and 2006 - 2008

	1988	1998	2006	2007	2008
Farmers, partners & directors:					
Full-time	28,811	22,502	17,981	17,185	16,931
Part-time	15,031	16,330	14,013	14,022	14,166
Total	43,842	38,832	31,994	31,207	31,097
Spouses	5,664	7,042	6,285	6,345	6,229
Other workers					
Full-time	5,547	2,929	2,531	2,946	3,089
Part-time	3,253	2,933	2,347	2,696	2,803
Casual/Seasonal	8,006	9,360	6,795	5,780	5,746
Total other workers	16,806	15,222	11,673	11,422	11,638
Total agricultural labour force	66,312	61,096	49,952	48,974	48,964

Source: June Agricultural Survey

Figure 8 - Full - time labour on NI farms, 1988, 1998 and 2006 - 2008

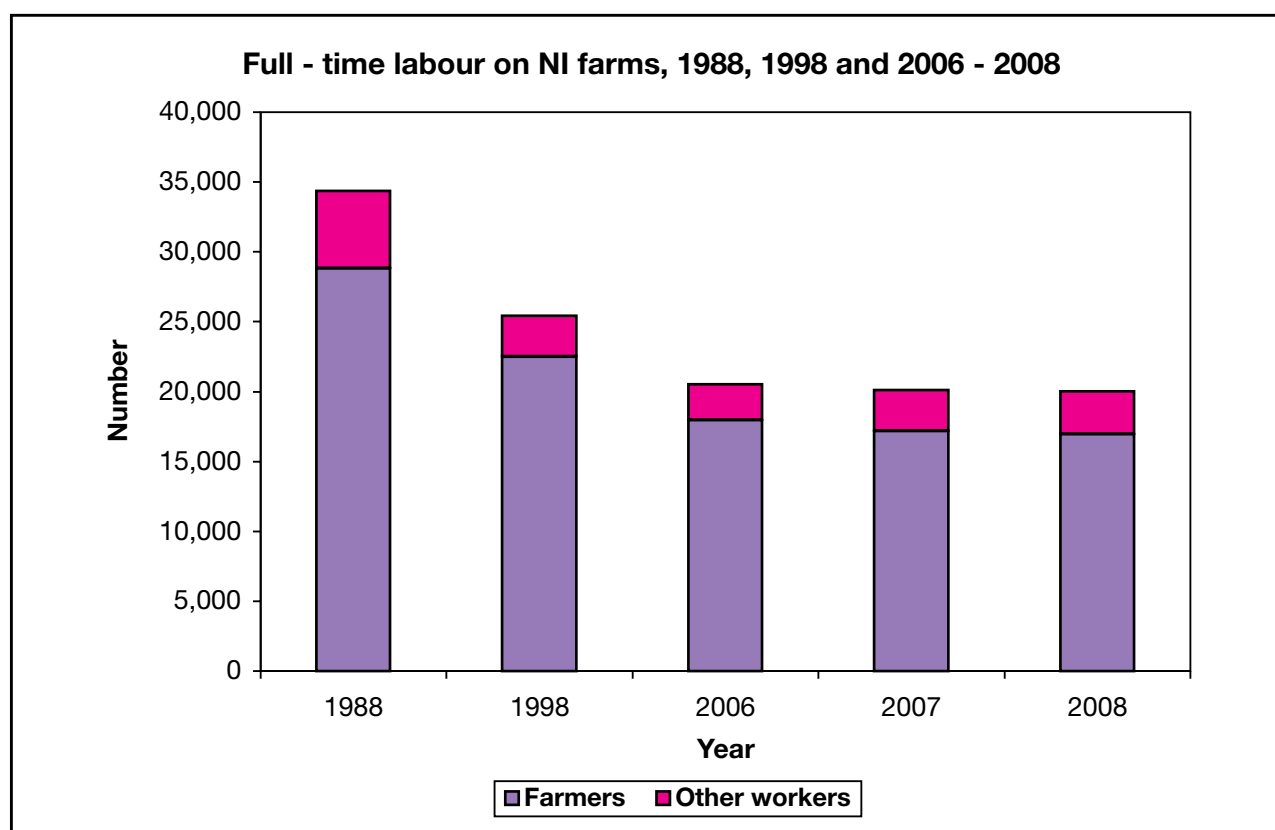


Table 16: Liveweight and estimated value of recorded landings of fish into NI, 2005 - 2008

	2005		2006		2007		2008	
	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)
Total wet fish	8,956	5,606	9,041	6,615	8,216	4,844	10,103	6,404
Total shell fish	5,991	9,212	8,109	13,231	8,792	14,190	10,844	18,569
Total fish	14,947	14,818	17,150	19,846	17,008	19,034	20,947	24,973

Source: Fisheries Division, DARD

Figure 9 - Estimated value of recorded landings of fish into NI 2003 - 2008

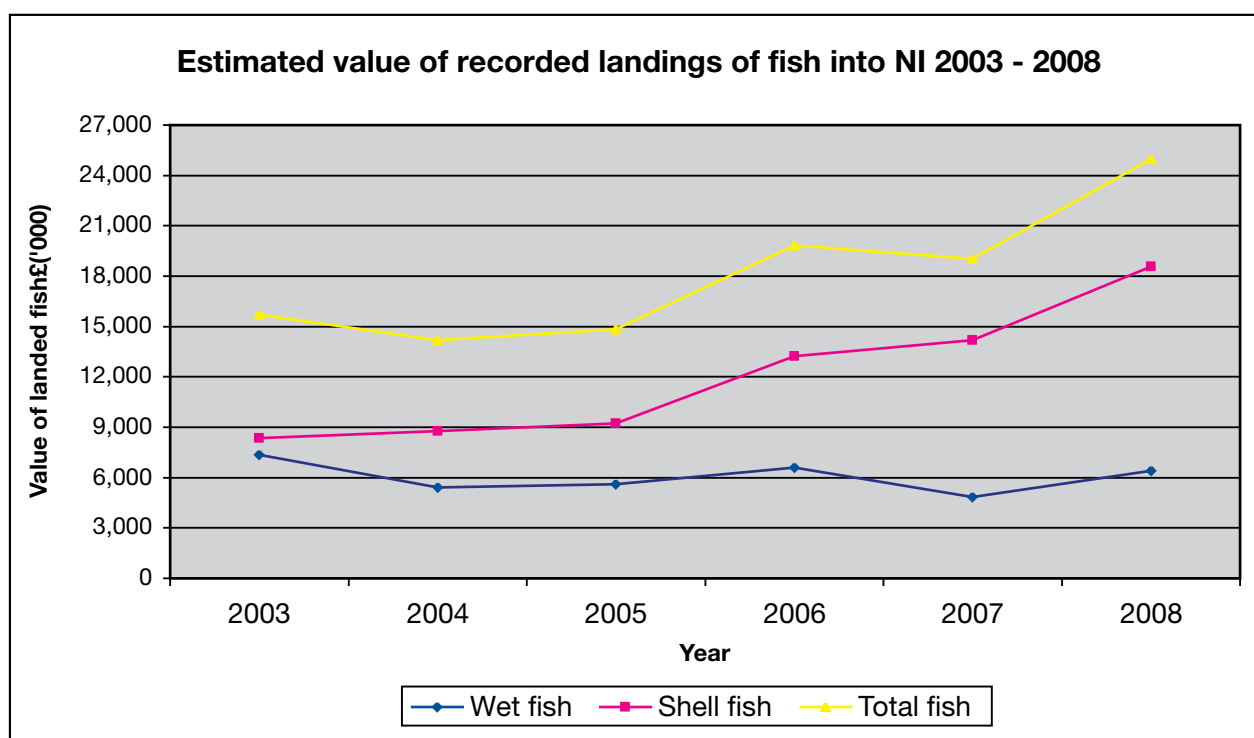


Table 17: Employment in NI fishing industry, 2005 - 2008

	2005		2006		2007		2008	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Catching	514	55	547	66	557	101	532	93
Processing and marketing	754	193	634	192	530	165	515	172
Others	133	19	138	24	116	20	102	14
Total	1,401	267	1,319	282	1,203	286	1,149	279

Source: Fisheries Division, DARD

Table 18: Area of woodland throughout the U.K. by forest type, 2008

	Conifers ('000 HA)	Broadleaves ('000 HA)	Total ('000 HA)	% of total farmed area in forestry ¹
United Kingdom	1,635	1,207	2,841	16.4%
England	366	761	1,127	12.1%
Scotland	1,045	297	1,342	24.0%
Wales	157	128	285	19.5%
Northern Ireland	66	21	87	8.6%

Source: Forestry Commission

¹ Total land area used in calculation is area farmed from June Survey, 2007



Table 19: Number of farms using agricultural contractors in 2007

	Very Small	Small	Med/Large	All
Hay/Silage Making	8,538	6,681	2,796	18,015
Crop Harvesting	334	808	837	1,979
Spreading slurry/fertilisers etc	4,611	3,798	2,091	10,500
Other field work	1,499	1,426	824	3,749
Milking	42	103	454	599
Sheep shearing	1,588	2,246	598	4,432
Other livestock work	683	572	219	1,474
Hedge cutting	6,503	5,617	2,585	14,705

Source: EU Farm Structure Survey 2007, NI

Table 20: Percentage of farms using agricultural contractors by business size in 2007

	Very Small	Small	Med/Large	All
Hay/Silage Making	67	72	67	69
Crop Harvesting	3	9	20	8
Spreading slurry/fertilisers etc	36	41	50	40
Other field work	12	15	20	14
Milking	0	1	11	2
Sheep shearing	12	24	14	17
Other livestock work	5	6	5	6
Hedge cutting	51	61	62	56

Source: EU Farm Structure Survey 2007, NI

Table 21: Number of farms using agricultural contractors from 2000-2007

	2000	2003	2005	2007
Hay/Silage Making	19,566	19,028	18,849	18,015
Crop Harvesting	2,227	2,398	2,300	1,979
Spreading slurry/fertilisers etc	10,854	11,623	11,004	10,500
Other field work	3,035	4,228	3,953	3,749
Milking	519	635	653	599
Sheep shearing	4,345	4,679	4,551	4,432
Other livestock work	1,362	1,701	1,554	1,474
Hedge cutting	10,724	14,874	14,840	14,705

Source: EU Farm Structure Survey 2007, NI



Sources of more detailed information

1. DARD website, www.dardni.gov.uk or DARD library

Statistical reports main page

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

Agricultural Census in N.I. 2008 publication (ISBN no. 978-1-84807-095-0)

Statistical Review of N.I. Agriculture 2008 publication (ISBN no. 978-1-84807-09-6)

Size and performance of the N.I. Food and Drinks Processing Sector publication 2006 (ISBN no. 978-1-84807-044-8)

EU Farm Structure Survey 2007 (ISBN no. 978-1-84807-039-4)

Farm Incomes in N.I. publication

Food consumption and expenditure information

Fisheries statistics

Forestry statistics

2. DEFRA website, www.defra.gov.uk

Agriculture in the U.K publication

<http://statistics.defra.gov.uk/esg/publications/auk/default.asp>

3. Central statistics office Ireland website, www.cso.ie

R.O.I. Agricultural data

<http://www.cso.ie/statistics/Agricultureandfishing.htm>

4. Department of Agriculture and Food (ROI) website, www.agriculture.gov.ie

Compendium of Irish Agricultural statistics, 2008

<http://www.agriculture.gov.ie/publications/2008/compendiumofirishagriculturalstatistics2008/>

5. Eurostat website, www.ec.europa.eu/eurostat

EU Agriculture and fisheries information

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

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