A Government Statistical Publication

Statistical Review of Northern Ireland Agriculture 1999

Department of Agriculture and Rural Development

Economics and Statistics Division

ISBN 1 85527 431 0

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PREFACE

The *Statistical Review of Northern Ireland Agriculture* is the main compendium of statistics on agriculture in Northern Ireland and contains a wide range of information on the industry at aggregate level. A companion publication, *Farm Incomes in Northern Ireland 1998/99,* provides more detailed information on farm business performance.

Apart from Section 5, the contents of this year's edition of the *Statistical Review* are similar to the 1998 edition, which contained a new series of the Aggregate Agricultural Account. The changes to the series, and the reasons for them, are explained in the Appendix to the current edition. Readers of Section 2 should again exercise caution if using the revised output, input or income figures from the Aggregate Agricultural Account alongside those in pre-1998 editions of the *Statistical Review.*

The contents of Section 5, Incomes at Farm Level, have been streamlined this year to eliminate duplication with the contents of *Farm Incomes in Northern Ireland.*

Details of other publications and statistical releases available from Economics and Statistics Division are given on Page 64.

Readers' comments on the contents of the *Statistical Review* are always welcome; these may be made directly to me or to the Editor, Ivan Hunter, at the address given below.

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KEY FACTS

	NI	UK	ROI	EU15
GROSS VALUE ADDED (GVA)				
Agriculture as % of total GVA	2.4[1]	0.9[1]	3.9[1]	…
EMPLOYMENT				
Agricultural* employment ('000)	40[1]	615[2]	136[1]	7,514[3]
As % of total civil employment	5.7[1]	2.1[2]	8.5[1]	5.1[3]
**Agriculture, forestry & fishing*				
LAND USE				
Agricultural area ('000 ha)	1073[1]	17,376[1]	4,419[2]	137,348[4]
As % of total area	79.3[1]	71.1[1]	62.8[2]	42.4[4]
LESS FAVOURED AREAS (LFA)				
LFA as % of agricultural area	69.9[2]	44.5[2]	66.8[4]	54.3[4]
FARMS				
Number ('000)	31.1[1]	240[1]	144[1]	6,989[4]
Average agricultural area (ha)	34.5[1]	66.6[1]	29.3[1]	18.4[4]
ENTERPRISES				
Average enterprise size:				
Dairy cows	52[1]	69[2]	33[4]	25[4]
Beef cows	19[1]	27[2]	11[5]	14[5]
Sheep	253[1]	504[2]	182[4]	138[4]
Pigs	426[1]	567[2]	694[4]	114[4]
Laying hens	1,581[1]	1,488[2]	128[4]	189[4]
Broilers	30,233[1]	45,427[2]	6,324[4]	595[4]
Cereals (ha)	9.7[1]	48.2[2]	16.3[4]	13.0[4]
Potatoes (ha)	5.8[1]	9.7[2]	2.1[4]	1.4[4]

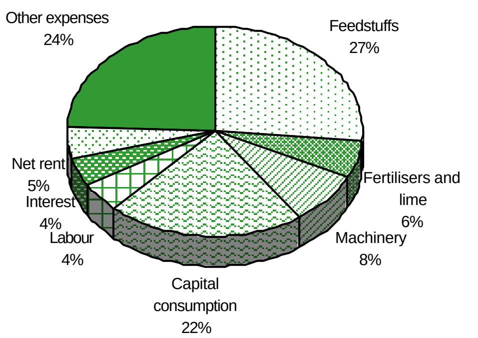
1. 1999 2. 1998 3. 1996 4. 1997 5. 1995

Note 1. NI = Northern Ireland; UK = United Kingdom; ROI = Republic of Ireland; EU15 = Austria, Belgium, Denmark, Finland, France, Germany, Greece, Republic of Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and United Kingdom.

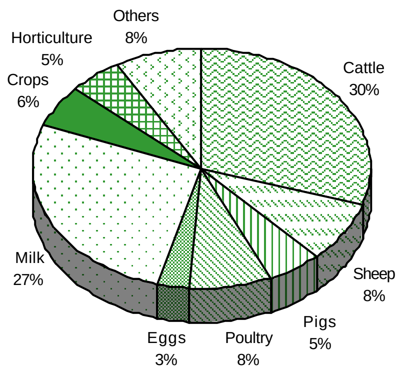
Note 2. In general, figures relate to the latest year for which statistics are available.

COMPARISONS OF NI AND UK AGRICULTURE

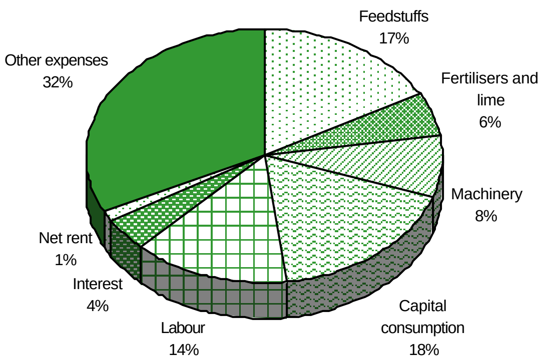
Total expenses of NI agriculture, 1999



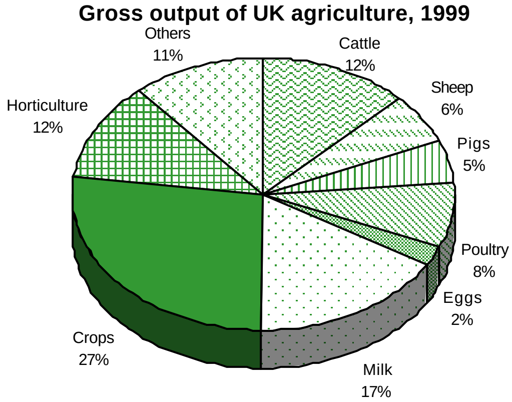
Gross output of NI agriculture, 1999



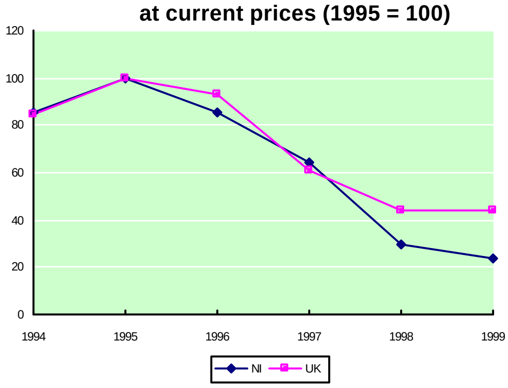
Total expenses of UK agriculture, 1999



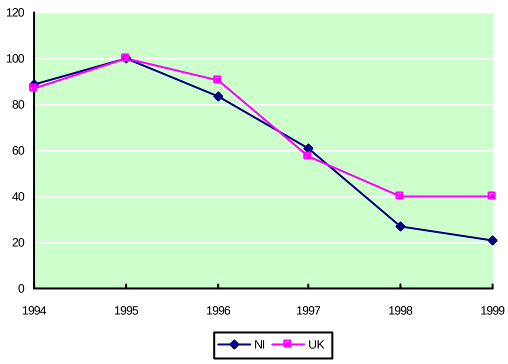
Gross output of UK agriculture, 1999



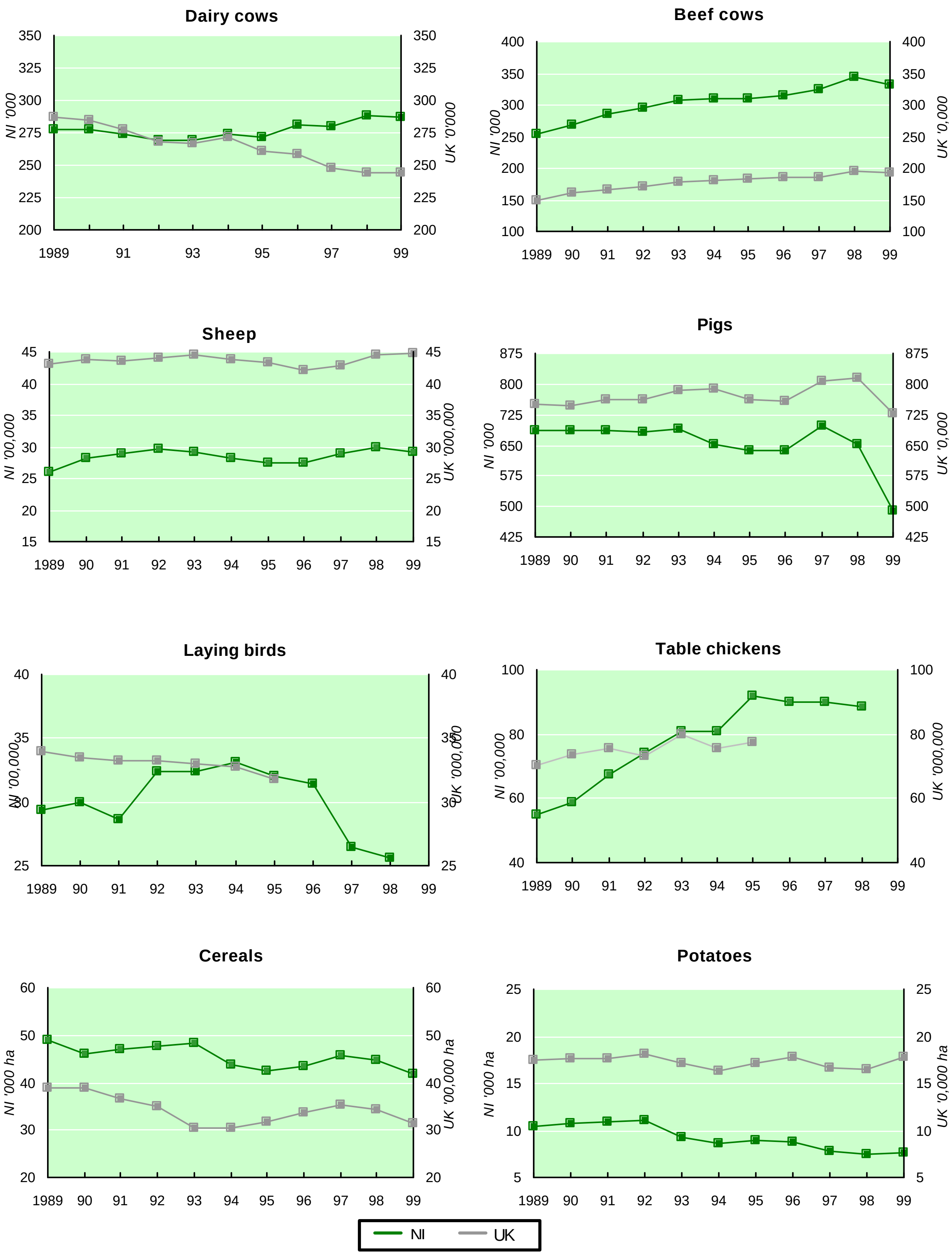
NI and UK Total Income from Farming at current prices (1995 = 100)



NI and UK Total Income from Farming in real terms (1995 = 100)



TRENDS IN NI AND UK LIVESTOCK NUMBERS AND CROP AREAS



1. EXECUTIVE SUMMARY

Note	***The output, input and income figures below are based on a new series of the Aggregate Agricultural Account introduced last year - see Appendix***

Aggregate income (Tables 2.1 - 2.3)

- There was a further substantial decline in the income of Northern Ireland agriculture in 1999.
- **Total income from farming (TIFF)** - which measures the return to farmers and all members of their families working on farms - fell by 22 per cent (23 per cent in real terms) to £70.9 million.
- Following consecutive declines from 1996 to 1998, and despite starting from the highest income level for 22 years, the 1999 fall is estimated to have taken TIFF to its lowest level in real terms since 1980.
- The underlying reason for the low incomes continues to be a combination of weak international markets, the strength of sterling and the consequences of the BSE crisis and the ban on beef exports.
- There was virtually no change in TIFF at United Kingdom level, but very considerable variation among the countries. TIFF increased in current prices in England and Scotland, by 4 per cent and 2 per cent respectively, but fell steeply in Wales, by 57 per cent.
- The main reason for the much bigger income decline in Northern Ireland than in the United Kingdom as a whole in 1999 was the unfavourable weather in the winter of 1998/99, which led to depleted stocks of fodder and the need for increased purchases of feed and fertilisers.

Output, input and value added (Tables 2.1 - 2.3)

- **Gross output** of Northern Ireland agriculture fell by 2 per cent, to £1,085 million, due to small declines in both the volume of output and the average producer return.
- **Gross input** increased by one per cent to £660 million, the combination of a 3½ per cent rise in the volume of inputs used and a 2½ per cent reduction in unit costs.
- **Gross value added**, therefore, fell in 1999 by 6 per cent to £425 million. **Net value added** - gross value added less consumption of fixed capital (or 'depreciation') - declined even more steeply, by 11 per cent, to £210 million. This was because of a 9 per cent reduction in the *volume* of net value added and a 2 per cent fall in unit value.

Cash flow (Table 2.4)

- **Cash available to farm families from farming** fell by 23 per cent to £209 million, representing a decline of 24 per cent in real terms.

Farm level incomes (Table 5.1)

- **Cereals**, **pigs and poultry, lowland cattle and sheep, LFA cattle and sheep** and **mixed** farms are forecast to have had negative net farm incomes in 1999/2000, following falls in income on all of the main types of farm. The largest falls are expected to have been on **pigs and poultry** and **general cropping** farms.

Subsidies (Table 2.10)

- There was little change in the value of **direct payments** to farmers in 1999. These totalled £204 million, less than one per cent lower than in 1998. However, they were 36 per cent higher than in 1995, mainly because of BSE-related payments and agrimoney compensation.

Labour (Table 2.14)

- Between June 1998 and 1999 the total agricultural labour force declined by 3 per cent, to 59,300 persons. The number of farmers (37,600) was 3 per cent lower but the number of spouses working on farms (7,000) remained unchanged. There were 3% more full-time workers (3,000) but the number of part-time (2,800) and casual workers (8,800) declined by 5 and 6 per cent respectively.

Livestock numbers (Table 3.3)

- Cattle numbers fell by 3 per cent, to 1.72 million in June 1999. There were 4 per cent fewer beef cows and a 15 per cent decline in the number of beef heifers but virtually no change in the number of dairy cows and only a 1 per cent fall in dairy heifer numbers. The numbers of non-breeding cattle declined in most categories.

- The breeding ewe flock decreased by 3 per cent to 1.40 million ewes in 1999, following a 5 per cent increase in 1998. Total sheep numbers also fell by 3 per cent to 2.91 million head.

- The problems in the pigs sector were reflected in a 25 per cent drop in total pig numbers between June 1998 and 1999, to just 490,000 head, the lowest figure for 50 years. The female breeding herd contracted by 30 per cent to 47,100 sows, while the number of farms with pigs fell by 46 per cent over the year.

- The commercial laying flock also contracted sharply in 1999, falling by 16 per cent to 2.14 million birds. The number of table fowl, however, increased by 6 per cent, to 9.34 million birds.

Crops and grass areas (Table 3.2)

- There was a 6 per cent reduction, to 41,900 hectares, in the cereals area in 1999. The areas of winter barley and wheat fell by 34 and 54 per cent respectively because of the extremely unfavourable planting conditions in the autumn of 1998; this was only partially offset by an increase of 13 per cent in the area of spring barley.

- The potato area was virtually unchanged at 7500 hectares.

- The total area under grass increased by one per cent to 838,000 hectares, despite a 9 per cent decline in the area of grass under 5 years old, the area of grass over 5 years increasing by 3 per cent.

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2. THE AGRICULTURAL ECONOMY

A. AGGREGATE OUTPUT, INPUT AND INCOME

Methodological note

The Aggregate Agricultural Account (AAA) - the calculation of the output, input and income of the agricultural industry - was substantially revised in 1998 to bring it into line with the 1997 EU Manual on the Economic Accounts for Agriculture. The changes are documented in detail in the Appendix. All of the figures quoted in this section are on the basis of the new AAA series.

Summary

There was a further substantial decline in the aggregate income of Northern Ireland agriculture in 1999. **Total income from farming** is estimated to have declined by 22 per cent in money terms or by 23 per cent in real terms (see Tables 2.1-2.3). This latest fall is estimated to have taken income to its lowest level in real terms since 1980.

Output

The value of **gross output** fell by 2.0 per cent to £1,085 million in 1999. This was the result of a 1.3 per cent decline in the volume of gross output and a 0.6 per cent fall in the average producer return.

There were falls in the output values of most of the main commodities. Of the major commodities, the largest proportionate fall (13 per cent) was in the value of output of pigs, followed by eggs (10 per cent) and sheep and wool (9.5 per cent). The output of poultry declined in value by 6.3 and horticulture by 3.7 per cent. The value of cattle output, however, increased by 1.9 per cent, higher average prices in 1999 more than offsetting a fall in the volume of output. The value of milk output also rose, by 1.5 per cent, in this case an increase in production outweighing a fall in price. The value of output of crops increased by 11 per cent, largely because of a 30 per cent rise in the value of potato production. The output value of cereals decreased, by 5.0 per cent, on account of a 54 per cent fall in the value of wheat output. Details of trends in individual outputs and inputs are given in Section 2B.

Inputs (or 'intermediate consumption')

The value of **gross input** increased in 1999, by 0.7 per cent, to £660 million, with a 3.4 per cent increase in the volume used more than offsetting a 2.7 per cent fall in the unit cost. The rise in gross input was largely attributable to a 8.1 per cent increase, to £60.4 million, in expenditure on fertilisers and lime, due mainly to increased quantities purchased in the spring of 1999 to compensate for adverse weather in the winter of 1998/99. The latter also depleted fodder supplies and, therefore, led to an increased need for purchased feedstuffs. However, expenditure on feedstuffs fell, by 2.6 per cent, to £268 million, as the increase in the volume purchased was more than offset by a fall in the average price. Expenditures on imported livestock and inter-farm expenses increased by 14 per cent, to £25.4 million, and on machinery expenses by 4.3 per cent to £82.4 million.

Gross and net value added

Gross value added - gross output less gross input - fell in 1999 by 5.8 per cent to £425 million, the volume decreasing by 6.4 per cent and the unit value increasing by 0.7 per cent. **Net value added** (at factor cost) - gross value added minus consumption of fixed capital plus subsidies not paid on products - fell more steeply, by 11 per cent, to £210 million. This was because of a 9.1 per cent fall in volume and a 2.0 per cent drop in unit value.

Net value added is the sum of all 'incomes' arising in the industry, namely the earnings of paid labour, interest on borrowed capital, rent on 'conacre' land (taken from non-farming persons) and the residual 'total income from farming'. The cost of paid labour increased by 4.0 per cent to £45.3 million. Interest payments decreased significantly, by 14 per cent, to £45.2 million, due to the reduction in interest rates and despite a some rise in the level of borrowings. Rent paid on conacre land taken from non-farmers fell, by 1.3 per cent, to £48.9 million.

Total income from farming

Total income from farming (TIFF) fell by 22 per cent to £70.9 million in 1999, a decline of 23 per cent after allowing for inflation. This follows decreases of 15, 25 and 54 per cent in 1996, 1997 and 1998 respectively. Although these declines started after income had reached its highest real level in 22 years, the 1999 fall has taken TIFF to its lowest level in real terms for 19 years. TIFF represents the return to farmers, their spouses and other family workers, i.e. all those with an entrepreneurial interest in farming.

Cash flow

TIFF is calculated according to internationally agreed practices which require the inclusion of 'book' items such as stock change and capital formation and consumption. TIFF may not, therefore, realistically portray the cash available from farming. In the estimates shown in Table 2.4, TIFF is adjusted to remove these 'book' items and to take account of investment and change in borrowings. (The derivation is given in the footnotes to Table 2.4.) **Cash available to farm families from farming** is estimated to have fallen by 23 per cent, to £209 million in 1999, a decline of 24 per cent in real terms. The figures indicate that farmers have again responded to the fall in their income by reducing investment in capital items and breeding livestock and by further increasing their borrowings, though in both cases by less than in 1998.

Subsidies

There was little change in the value of **direct payments** to farmers in 1999. These totalled £204 million, just 0.6 per cent lower than in 1998. The 1999 total, however, was 36 per cent higher than in 1995, mainly because of continuing BSE-related payments (particularly the Over Thirty Months Scheme) and payment of agrimoney compensation. £158 million, 78 per cent of the total, were payments on cattle (mainly Suckler Cow Premium, Beef Special Premium and OTMS payments). Subsidies on sheep and arable crops accounted for 16 and 4 per cent respectively. (Direct payments exclude the value of market support such as intervention purchases and export refunds.)

Investment

Gross annual capital investment fell in 1999 for the fifth consecutive year, by 26 per cent to £79.6 million. There were declines in all categories. Investment in buildings and works fell by 46 per cent to £25 million, with a 78 per cent reduction in the value of work conducted under the Sub-programme for Agricultural and Rural Development (SPARD). Investment in plant and machinery fell by 12 per cent to £40.7 million and purchases of vehicles by 11 per cent to £13.9 million, each figure being the lowest for 8 years, even without adjusting for inflation. Total investment in 1999 was more than 60 per cent below the 1994 level.

Revisions to previous years' figures

The figures for 1998 and earlier years have been revised from the provisional figures published a year ago, primarily to take account of more complete or up-to-date data. Net value added in 1998 (previously £226 million) is now estimated at £236 million, while total income from farming (previously £81.9 million) is now calculated at £90.5 million.

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Table 2.1 Aggregate Agricultural Account: estimated output, input, value added and income of agriculture (new series)[1]

£ million

	1995	1996	1997	1998	1999 (Provisional)
OUTPUT[2]					
Livestock and livestock products[3]					
Finished cattle and calves[4]	425.0	416.3	379.5	318.6	324.8
Finished sheep and lambs[5]	107.6	107.7	99.3	95.9	87.4
Finished pigs[6]	102.2	123.6	99.1	67.0	58.1
Poultry[7]	81.4	97.1	95.9	89.3	83.7
Eggs[8]	37.8	45.6	39.0	37.2	33.6
Milk	341.3	342.8	308.6	286.5	290.9
Other livestock and livestock products[9]	13.1	15.1	15.9	14.5	13.5
Total livestock and livestock products	**1,108.4**	**1,148.1**	**1,037.3**	**909.0**	**892.0**
Field crops					
Potatoes	43.2	22.0	14.6	22.0	28.6
Cereals[10]	35.7	36.0	30.7	26.6	25.2
of which: barley[10]	26.4	26.8	22.8	19.2	20.9
wheat[10]	7.6	7.6	6.3	5.9	2.7
oats[10]	1.6	1.5	1.5	1.4	1.6
Other crops[10,11]	9.5	7.2	5.0	7.4	8.3
Total field crops	**88.3**	**65.2**	**50.3**	**55.9**	**62.1**
Horticultural products					
Fruit	7.1	6.1	9.8	6.0	5.2
Vegetables	8.8	10.1	10.2	10.8	10.1
Mushrooms	27.8	32.0	30.4	29.9	29.1
Flowers	8.2	8.6	10.1	10.3	10.4
Total horticultural products	**51.9**	**56.8**	**60.5**	**56.9**	**54.8**
Capital formation (breeding livestock)	56.6	49.5	79.9	42.4	34.9
Agricultural contract work[12]	25.2	28.6	30.2	30.1	30.0
Milk quota leasing	10.9	12.9	10.2	8.8	7.2
Inseparable non-agricultural activities[13]	3.1	3.6	3.7	3.7	4.0
A Gross output	**1,344.4**	**1,364.8**	**1,272.2**	**1,106.7**	**1,085.0**
of which:					
subsidies (less taxes) on products[14]	139.3	253.8	222.7	196.4	199.3

1. A description of the main differences between the old and new series, and the derivation of the main aggregates, is given in the Appendix.
2. Output represents the estimated value of home-produced sales, including the value of inter-farm transfers and on-farm use (see Appendix). It includes the value of subsidies on products, the sale value of store animals imported from the Republic of Ireland and Great Britain and finished in Northern Ireland and the value of produce used in farm households. Stock change estimates are included within the individual output and input items.
3. Includes finished and store animals exported to the Republic of Ireland and shipped to Great Britain.
4. Includes Suckler Cow Premium, Hill Livestock Compensatory Allowance, Beef Special Premium, Beef Deseasonalisation Premium, Extensification Supplement, Beef Marketing Payment Schemes (parts 1, 2 and 2a), Agrimoney Compensation, Flagged Suckler Herd Payments, BSE related supplements, receipts from the Over Thirty Months Scheme and Calf Processing Aid Scheme.
5. Includes Sheep Annual Premium, Hill Livestock Compensatory Allowance and Agrimoney Compensation.
6. Includes Pig Welfare Slaughter Scheme.
7. Includes shipments and exports of non-breeding birds.
8. Includes eggs for processing, duck eggs and shipments and exports of non-breeding hatching eggs.

Table 2.1 contd.

£ million

		1995	1996	1997	1998	1999 (Provisional)
A	**Gross output**	**1,344.4**	**1,364.8**	**1,272.2**	**1,106.7**	**1,085.0**
	INPUT (also known as 'intermediate consumption')					
	Expenditure					
	Feedstuffs[15]	308.1	344.5	308.4	275.0	267.8
	Seeds[16]	13.2	13.3	9.0	8.4	9.3
	Imported livestock and inter-farm expenses	41.4	29.8	32.7	22.3	25.4
	Fertilisers and lime	75.7	78.9	68.6	55.9	60.4
	Total machinery expenses (excl. depreciatio	73.4	80.1	86.1	79.0	82.4
	Farm maintenance	30.5	32.2	29.9	27.9	27.0
	Veterinary expenses and medicines	28.3	31.3	32.8	30.8	30.3
	Miscellaneous expenses	105.0	113.5	117.7	117.5	119.3
	Agricultural contract work	25.2	28.6	30.2	30.1	30.0
	Milk quota leasing	14.9	15.5	10.5	8.6	7.8
B	**Gross input**	**715.7**	**767.9**	**725.9**	**655.4**	**659.7**
C	**Gross value added (A-B)**	**628.7**	**596.9**	**546.3**	**451.3**	**425.3**
	Consumption of fixed capital					
	- livestock	44.7	40.0	49.2	45.4	43.8
	- plant, machinery and vehicles	73.5	77.5	79.5	80.4	79.8
	- buildings and works	87.1	92.5	91.2	92.9	95.6
D	**Total consumption of fixed capital**	**205.3**	**210.0**	**219.8**	**218.7**	**219.2**
E	Other subsidies (not paid on products)[17]	1.3	2.9	3.9	3.4	4.1
F	**Net value added (at factor cost) (C-D+E)**	**424.7**	**389.8**	**330.3**	**236.0**	**210.2**
G	Paid labour	41.9	45.3	41.9	43.5	45.3
H	Interest	34.5	37.1	44.5	52.5	45.2
I	Net rent[18]	43.2	47.5	48.7	49.5	48.9
J	**Total income from farming[19] (F-G-H-I)**	**305.1**	**259.9**	**195.2**	**90.5**	**70.9**

9. Includes breeding livestock shipped and exported, horses, wool, deer and minor livestock products.
10. Includes Arable Area Payments but excludes set-aside payments,which are included in 'other subsidies'.
11. Hay, straw, flax, linseed, oilseed rape, mixed corn, protein crops, lawn turf and associated Arable Area Payments.
12. Receipts to both farmer contractors and specialist contractors.
13. Receipts from non-agricultural activities which use farm resources.
14. See Table 2.10 for details of the individual items included within this item.
15. Includes home-fed cereals, proteins and stockfeed potatoes.
16. Includes home-saved seed.
17. Includes set-aside payments and payments for the non-capital element of the Environmentally Sensitive Area Scheme, Newcastle Disease Compensation and other minor grants and subsidies.
18. Conacre payments to non-producing landowners.
19. This estimate should be regarded only as an indicator of trend. The income estimate, being a residual, is subject to cumulative errors in the estimation of input and output items (see Appendix).

Table 2.2 Summary income indicators[1] at current prices and in real terms[2]

Indices: 1995 = 100

	1994	1995	1996	1997	1998	1999 (Provisional)
Index at current prices						
Net value added	86.9	100.0	91.8	77.8	55.6	49.5
Total income from farming	85.7	100.0	85.2	64.0	29.7	23.2
Index in real terms						
Net value added	89.8	100.0	89.6	73.6	50.9	44.6
Total income from farming	88.6	100.0	83.1	60.6	27.1	21.0

1. For definitions see Appendix.
2. Deflated by the Retail Prices Index.

Table 2.3 Gross output, gross input, gross value added and net value added at constant 1995 prices[1]

Indices: 1995 = 100

	1994	1995	1996	1997	1998	1999 (Provisional)
Gross output	99.2	100.0	100.8	101.6	99.8	98.5
Gross input	96.1	100.0	101.0	99.9	97.5	100.8
Gross value added	102.8	100.0	100.6	103.5	102.5	95.9
Net value added	104.2	100.0	99.6	106.4	102.5	93.1

1. Calculated by applying 1995 output and input prices to the volume of each item of output and input in every year. The resulting series, therefore, represent volume changes.

Table 2.4 Estimated cash flow for agriculture

£ million

	1995	1996	1997	1998	1999 (Provisional)
Total income from farming	**305.1**	**259.9**	**195.2**	**90.5**	**70.9**
Less:					
output stock change	-4.0	-10.0	+1.8	-12.3	-2.2
gross fixed capital formation (breeding livestock)	56.6	49.5	79.9	42.4	34.9
capital investment[1]	131.0	126.8	112.7	79.1	75.4
Plus:					
input stock change	+1.7	-0.3	-0.4	+1.4	-0.4
capital consumption	205.3	210.0	219.8	218.7	219.2
capital grants paid in year[2]	13.7	14.9	15.0	17.4	6.2
change in borrowings	30.5	49.1	55.0	51.5	21.0
Cash available to farm families from farming	**372.8**	**367.3**	**290.2**	**270.4**	**208.7**

1. The capital investment figures used are those given in Table 2.12 but with a deduction made for the value of work done by principal farmers and spouses. The figures for buildings and works in Table 2.12 are estimated from grant statistics (with an addition for non grant-aided investment) and are shown in that table as investment in the year in which grant was paid. Since there is known to be a delay between work being done and grant being paid, the investment estimates have been included in the 'cash flow' one year earlier.
2. These estimates are entered in the year in which they are paid. The grants are mostly in respect of capital investments made in previous years.

Table 2.5 Aggregate gross margin estimates for the main agricultural sectors [1]

1998 (Revised)

Form of production	Adjusted outputs [2]	Estimated specific costs [3]: Feedstuffs	Fertilisers, seeds & sprays	Others	Total	Sector gross margins [4]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	323.7	61.8	14.7	2.4	78.9	244.9	44.3
Beef cattle, rearing and fattening	204.2	58.5	29.5	13.6	101.6	102.6	18.5
Sheep and wool	92.5	12.0	11.2	3.8	26.9	65.5	11.8
Total grazing livestock	**620.3**	**132.2**	**55.4**	**19.7**	**207.3**	**413.0**	**74.6**
Pigs	58.6	58.1	-	0.3	58.5	0.1	-
Poultry	127.8	92.0	-	1.5	93.5	34.2	6.2
Total pigs and poultry	**186.4**	**150.2**	**-**	**1.8**	**152.0**	**34.4**	**6.2**
Cereals and oilseed rape	42.7	-	8.8	-	8.8	34.0	6.1
Potatoes	35.4	-	4.6	0.1	4.6	30.8	5.6
Total field crops	**78.2**	**-**	**13.3**	**0.1**	**13.4**	**64.7**	**11.7**
Horticulture [5]	55.3	-	17.7	2.0	19.7	35.6	6.4
Other items	8.4	2.3	0.3	-	2.7	5.7	1.0
Total	**948.5**	**284.7**	**86.7**	**23.7**	**395.1**	**553.4**	**100.0**

1999 (Provisional)

Form of production	Adjusted outputs [2]	Estimated specific costs [3]: Feedstuffs	Fertilisers, seeds & sprays	Others	Total	Sector gross margins [4]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	324.5	58.0	15.8	2.7	76.5	248.0	38.0
Beef cattle, rearing and fattening	320.2	61.0	31.6	14.4	107.0	213.3	32.7
Sheep and wool	87.9	13.6	11.8	3.8	29.1	58.8	9.0
Total grazing livestock	**732.7**	**132.5**	**59.2**	**20.8**	**212.6**	**520.1**	**79.7**
Pigs	59.7	52.7	-	0.3	53.0	6.7	1.0
Poultry	119.5	86.8	-	1.4	88.2	31.2	4.8
Total pigs and poultry	**179.1**	**139.5**	**-**	**1.7**	**141.2**	**37.9**	**5.8**
Cereals and oilseed rape	40.8	-	6.9	-	6.9	33.9	5.2
Potatoes	30.0	-	6.3	-	6.3	23.7	3.6
Total field crops	**70.8**	**-**	**13.2**	**0.1**	**13.2**	**57.6**	**8.8**
Horticulture [5]	50.7	-	17.1	2.2	19.3	31.3	4.8
Other items	8.8	2.7	0.4	-	3.1	5.7	0.9
Total	**1,042.1**	**274.7**	**90.0**	**24.8**	**389.5**	**652.6**	**100.0**

1. Owing to changes in methodology, these estimates are not comparable with those for years prior to 1997.
2. The items making up total gross output (as shown in Table 2.1) have been regrouped into the above enterprises and adjusted as follows:-
   (i) Expenditure on imported livestock has been deducted from the appropriate outputs;
   (ii) Outputs have been adjusted for changes in the beginning and end-of-year valuations. In the case of breeding livestock, stock appreciation has been excluded;
   (iii) Outputs of crops include the market values of crops used on farms as livestock feed, bedding and seed;
   (iv) Outputs include production subsidies and compensation payments.
3. Estimates of the costs of the inputs of seed, fertiliser, spray, purchased feedstuffs and home grown cereals have been allocated amongst the various enterprises on the basis of results obtained from analysis of the Farm Business Survey. Other variable costs have been allocated as appropriate. No attempt has been made to allocate fuel, machinery or other overhead expenses.
4. 'Sector gross margins' represent the value of products remaining after deducting most of the variable costs and give a useful measure of the contribution of each enterprise to the earnings of the agricultural industry.
5. Comprises fruit, vegetables, mushrooms, flowers and hardy nursery stock.

Table 2.6 Quantities of the main products in output[1]

	Units of quantity	1995	1996	1997	1998	1999 (Provisional)
Livestock and livestock products						
Cattle and calves[2]	tonnes dcw	152,351	109,903	118,907	119,649	115,597
Over Thirty Months Scheme[3]	tonnes carcase wt	-	50,729	24,794	29,761	32,082
Sheep and lambs	tonnes dcw	36,602	36,259	32,799	36,710	35,394
Pigs[4]	,,	93,978	94,367	95,591	96,178	87,970
Cattle and calves[2]	'000 head	497	345	379	393	396
Calf Processing Aid Scheme	,,	-	28	54	67	36
Sheep and lambs	,,	1,679	1,669	1,538	1,779	1,727
Pigs[4]	,,	1,309	1,286	1,343	1,345	1,217
Poultry[5]	'000 tonnes lwt	141.4	158.4	158.8	163.2	162.6
Eggs[6]	m. doz	75.6	77.6	77.2	80.6	72.6
Milk	m. litres	1,381	1,445	1,501	1,510	1,573
Field crops						
Wheat	'000 tonnes	55.3	46.6	46.3	48.0	35.1
Barley	,,	168.0	179.1	176.6	168.0	159.3
Oats	,,	11.3	10.8	11.4	12.2	11.7
Potatoes	,,	259.6	262.1	260.2	243.6	235.7
Horticultural crops						
Fruit	'000 tonnes	41.8	40.2	31.4	28.0	28.0
Vegetables	,,	39.4	40.7	37.4	35.6	37.5
Mushrooms	,,	23.0	27.5	26.5	26.0	25.0

1. Estimated home-produced sales, on-farm use and household consumption. See Footnote 2 to Table 2.1.
2. Excludes cattle slaughtered under the Over Thirty Months Scheme and Calf Processing Aid Scheme.
3. Cattle processed under the Over Thirty Months Scheme are not dressed to a normal carcase specification. Therefore, care must be taken when comparing the weight of beef processed under this Scheme with the weight of beef sold for human consumption.
4. Includes pigs slaughtered under the 1998 Pig Welfare Slaughter Scheme.
5. Excludes shipments and exports of non-breeding birds.
6. Includes eggs for processing, duck eggs and shipments and exports of non-breeding hatching eggs.

Table 2.7 Average producer prices[1] of agricultural products

£ per unit

	Unit	1995	1996	1997	1998	1999 (Provisional)
Finished steers, heifers and young bulls[2,3]	head	718	615	509	418	429
Finished steers, heifers and young bulls[2,3]	kg dwt	2.22	1.86	1.61	1.37	1.46
Calves slaughtered or exported[2]	head	154	89	69	62	46
Culled cows and bulls[3]	head	518	442	331	247	238
Culled cows and bulls[3]	kg dwt	1.77	1.62	1.34	1.10	1.07
Store cattle exported	head	528	456	417	327	336
Finished sheep and lambs	head	42.75	53.52	50.25	38.82	34.57
Finished sheep and lambs	kg dwt	2.04	2.56	2.45	1.96	1.75
Finished clean pigs[4]	head	78.92	95.27	73.75	50.52	49.70
Finished clean pigs[4]	kg dwt	1.11	1.31	1.03	0.71	0.69
Culled sows and boars	head	119	130	100	49	50
Milk[5]	litre	0.254	0.240	0.206	0.193	0.185
Eggs for consumption	dozen	0.397	0.476	0.349	0.294	0.306
Broilers	kg lwt	0.549	0.585	0.574	0.531	0.508
Potatoes:						
Ware maincrop[6]	tonne	173	76	63	111	122
Seed	tonne	212	157	69	102	163
Barley	tonne	119	113	90	83	83
Wheat	tonne	124	119	96	87	84
Mushrooms	tonne	1,210	1,165	1,146	1,150	1,164
Apples	tonne	138	158	214	248	103

1. After deduction of marketing charges, commissions and levies, where applicable.
2. Includes calves processed under the Calf Processing Aid Scheme.
3. Includes cattle slaughtered under the Over Thirty Months Scheme.
4. Includes pigs slaughtered under the 1998 Pig Welfare Slaughter Scheme.
5. Before deduction of superlevy, if applicable.
6. Does not include early potatoes. Therefore, the price differs from that quoted in Table 2.26.

Table 2.8 Indices of producer prices[1] of agricultural output

Indices: 1995 = 100

	Weights[2]	1995	1996	1997	1998	1999 (Provisional)
Finished steers and heifers[3]	248	100	84	73	62	66
Culled cows and bulls[3]	43	100	92	76	62	61
Store cattle exported	4	100	86	79	62	64
Finished sheep and lambs	57	100	125	120	96	86
Finished clean pigs	92	100	118	93	64	62
Culled sows and boars	2	100	107	80	41	44
Milk	309	100	95	81	76	73
Eggs for consumption	25	100	120	88	74	77
Broilers	60	100	107	105	97	92
Potatoes:						
Ware maincrop	25	100	44	36	64	70
Seed	11	100	74	33	48	77
Barley	18	100	95	76	70	70
Wheat	6	100	96	78	71	68
Mushrooms	25	100	96	95	95	96
Apples	5	100	115	155	180	75
Total products index[2]	**932**	**100**	**96**	**83**	**73**	**72**

1. The indices relate to prices from which marketing expenses have been deducted.
2. The total products index is calculated by taking into account the significance of each item in the base period (1995). This is shown in the column of weights. Since only the main items of output are included, the total of their weights does not add to 1,000. Also, since the price index does not cover items such as production grants, compensation payments and gross fixed capital formation, it should not be regarded as a 'deflator' to be used in estimating the volume of output. (A volume series of gross output is given in Table 2.3).
3. Includes cattle slaughtered under the Over Thirty Months Scheme.

Table 2.9 Average market prices of breeding and store livestock[1]

£ per head

	1995	1996	1997	1998	1999
CATTLE					
Breeding cattle					
Dairy cows/heifers in milk	818	698	665	552	561
Dairy cows in calf	775	626	624	487	446
Dairy springing heifers				480	475
Beef cows/heifers with calf at foot	773	617	618	452	425
Beef cows in calf	663	534	558	357	328
Beef springing heifers				409	389
Store cattle					
150-300 kg steers	420	371	355	258	241
300-400 kg steers	509	437	418	329	326
400-500 kg steers	658	532	493	379	394
Over 500 kg steers				452	486
150-300 kg heifers	327	280	253	178	144
300-400 kg heifers	433	361	331	247	242
400-500 kg heifers	558	454	424	331	349
Over 500 kg heifers				419	433
Suckled calves					
Under 200 kg steers	371	280	281	174	175
Over 200 kg steers	496	393	381	272	297
Under 200 kg heifers	247	167	157	81	76
Over 200 kg heifers	347	242	240	146	151
Dropped calves					
For rearing	157	127	130	84	50
For Calf Processing Aid Scheme (dairy type)	-	-	-	67	40
For Calf Processing Aid Scheme (beef type)	-	-	-	66	39
Cull cows	464	427	360	291	275
SHEEP					
Breeding ewes/hoggets					
Blackface				32.63	26.87
Blackface Cross	26.92	37.26	35.92	41.41	29.81
Other breeds				45.37	34.48
Breeding ewe lambs					
Blackface				16.79	19.58
Blackface Cross	41.33	44.08	56.61	22.66	21.56
Other breeds				27.48	22.31
Breeding ewes/hoggets with lamb(s) at foot					
Blackface	-	-	-	38.82	35.47
Blackface Cross	-	-	-	43.45	13.81
Other breeds	-	-	-	59.67	50.59
Cull ewes					
Blackface				10.01	6.93
Blackface Cross	14.50	22.08	29.64	15.81	11.19
Other breeds				16.68	12.61
Cull rams	-	-	-	23.29	16.83
Store lambs	39.91	43.66	42.20	20.61	18.17
PIGS					
Breeding pigs					
Sows in pig	254	284	156	81	67
Springing gilts	254	263	172	100	53
Weaner/store pigs					
Under 15kg	8	31.98	22.68	10.18	11.51
15-30kg				15.82	15.70
30-45kg	0	52.87	40.73	22.21	23.16
Over 45kg				31.88	36.15
Cull sows	119.87	131.41	100.72	47.65	52.12
Cull boars	-	-	-	51.33	50.33

1. Average prices calculated from returns made by auction marts.

Table 2.10 Direct payments and levies included in the Aggregate Agricultural Account [1,2]

£ million [3]

	1995	1996	1997	1998	1999 (Provisional)
DIRECT PAYMENTS [4]					
Cereals					
Arable Area Payments Scheme	7.5	8.2	8.8	8.3	7.1
Arable Area Payments Scheme Agrimoney Compensation	-	-	-	-	1.1
Total cereals	**7.5**	**8.2**	**8.8**	**8.3**	**8.2**
Other crops					
Oilseed rape	0.1	0.1	0.2	0.2	0.1
Linseed, flax, protein and forage crops	0.1	0.1	0.1	0.2	0.2
Total other crops	**0.2**	**0.1**	**0.2**	**0.4**	**0.3**
Cattle					
Beef Special Premium	36.4	40.3	39.1	37.3	34.0
Beef Special Premium - BSE Top-up	-	8.3	-	-	-
Beef Special Premium Agrimoney Compensation	-	-	-	-	4.6
Suckler Cow Premium	38.7	43.5	42.7	41.4	38.1
Suckler Cow Premium - BSE Top-up	-	6.7	7.7	-	-
Suckler Cow Premium - Agrimoney Compensation	-	-	13.2	8.6	5.5
Flagged Suckler Herd Payments	-	-	1.6	0.5	-
Extensification Supplement	16.4	18.3	21.3	21.2	19.5
Extensification Supplement Agrimoney Compensation	-	-	-	-	2.3
Deseasonalisation Premium	-	-	6.0	5.6	2.6
Deseasonalisation Premium Agrimoney Compensation	-	-	-	-	0.5
Hill Livestock Compensatory Allowance	10.4	10.5	24.2	11.9	18.5
Beef Marketing Payment Scheme no.1	-	4.6	-	-	-
Beef Marketing Payment Scheme no.2	-	3.8	-	-	-
Beef Marketing Payment Scheme no.2a	-	1.1	-	-	-
Over Thirty Months Scheme [5]	-	83.0	29.9	30.1	31.4
Calf Processing Aid Scheme [5]	-	2.3	3.7	4.0	1.4
Total cattle	**101.9**	**222.3**	**189.4**	**160.6**	**158.4**
Sheep					
Sheep Annual Premium	36.0	24.0	20.9	25.9	26.3
Hill Livestock Compensatory Allowance	3.5	3.7	3.7	3.8	5.8
Agrimoney Compensation	-	-	0.9	2.3	0.8
Total sheep	**39.6**	**27.7**	**25.5**	**32.0**	**33.0**
Pigs					
Pig Welfare Slaughter Scheme	-	-	-	0.5	-
Total pigs	**-**	**-**	**-**	**0.5**	**-**
Other direct payments					
Set-aside (Arable Area Payments Scheme)	0.5	0.4	0.3	0.4	0.7
Environmentally Sensitive Areas (non-capital)	0.6	2.4	3.5	3.0	3.4
Others [6]	0.1	0.1	0.1	0.1	0.1
Total other direct payments	**1.3**	**2.9**	**3.9**	**3.4**	**4.1**
Total direct payments	**150.4**	**261.1**	**227.8**	**205.1**	**203.9**
LEVIES [7]					
Milk					
Superlevy	9.9	4.4	1.2	5.3	0.5
Total levies	**9.9**	**4.4**	**1.2**	**5.3**	**0.5**

1. Table 2.1
2. These data relate to monies due rather than monies actually received (ie. they are on an accruals basis).
3. Dashes (-) indicate payments of nil or less than £50,000.
4. Exclude expenditure on market regulation (such as intervention purchases and export refunds) by the UK Intervention Board Executive Agency.
5. Net producer receipts after marketing expenses.
6. Includes Sheep Compensation Scheme, Farm Woodlands Scheme and other miscellaneous payments.
7. Excludes non-government levies.

Table 2.11 Capital grants and other direct payments not included in the Aggregate Agricultural Account[1]

£ million[2]

	1995	1996	1997	1998	1999 (Provisional)
CAPITAL GRANTS					
Farm and Conservation Grant Scheme	2.8	1.8	1.0	0.5	0.1
Agriculture Improvement Scheme	0.1	-	-	-	-
Sub-programme for Agricultural and Rural Development	10.0	11.5	16.1	3.7	0.2
Farm and Countryside Enhancement Scheme	-	-	4.4	-	-
Environmentally Sensitive Areas[3]	0.5	1.6	2.0	3.0	2.9
Miscellaneous grants	0.1	-	-	-	-
Total capital grants	**13.5**	**15.0**	**23.5**	**7.3**	**3.2**
OTHER DIRECT PAYMENTS					
Milk quota cut compensation	2.2	2.3	-	-	-
Cattle disease compensation[4]	2.5	2.5	5.5	7.0	14.8
Other animal disease compensation[5]	0.3	0.4	4.1	0.2	0.1
Other miscellaneous payments	-	-	-	-	-
Total other direct payments	**5.0**	**5.2**	**9.6**	**7.3**	**14.9**

1. These data relate to monies due rather than monies actually received (ie. they are on an accruals basis).
2. Dashes (-) indicate payments of nil or less than £50,000.
3. Non-capital element is included in the Aggregate Agricultural Account.
4. Comprises tuberculosis, brucellosis, and BSE reactor compensation payments.
5. Comprises salmonella and the capital element of Newcastle Disease payments.

Table 2.12 Estimated gross annual capital investment in fixed assets and equipment [1]

£ million

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999 (Provisional)
Agriculture and Horticulture Grant Scheme[2]	1.2	-	-	-	-	-	-	-	-	-	-
Agriculture and Horticulture Development Scheme[2]	19.8	13.8	11.2	9.7	5.9	2.3	1.2	-	-	-	-
Agricultural Development Operational Programme[3]	10.3	22.3	14.4	23.5	29.1	101.4	4.4	-	-	-	-
Sub-programme for Agricultural and Rural Development	-	-	-	-	-	-	17.5	33.7	41.5	34.1	7.4
Agriculture Improvement Scheme (EC)	32.1	25.8	12.3	6.1	2.9	0.7	0.8	0.2	-	-	-
Agriculture Improvement Scheme (National)	5.4	0.3	-	-	-	-	-	-	-	-	-
Farm and Conservation Grant Scheme (EC)	-	1.5	2.2	2.4	3.1	2.9	5.8	5.8	3.9	2.4	1.3
Farm and Conservation Grant Scheme (National)	3.0	12.7	10.3	8.5	12.1	9.1	6.8	2.0	1.5	-	-
Farm and Conservation Enhancement Scheme	-	-	-	-	-	-	-	-	-	6.8	-
Non-aided investment	5.0	5.4	3.5	3.5	3.7	8.1	2.6	2.9	3.3	3.1	16.3
Total buildings and works[4]	**76.9**	**81.8**	**54.0**	**53.6**	**56.9**	**124.5**	**39.1**	**44.6**	**50.1**	**46.4**	**25.0**
Plant and machinery[5]	42.4	36.7	37.0	45.3	52.1	61.0	70.1	60.2	56.0	46.0	40.7
Vehicles[6,7]	15.0	14.0	10.8	16.7	25.4	20.2	23.2	24.4	19.2	15.6	13.9
Total plant, machinery and vehicles	**57.4**	**50.7**	**47.8**	**62.0**	**77.5**	**81.2**	**93.3**	**84.6**	**75.2**	**61.6**	**54.6**
Total investment	**134.3**	**132.5**	**101.8**	**115.7**	**134.4**	**205.6**	**132.4**	**129.2**	**125.3**	**108.0**	**79.6**

1. Excluding investment in forestry and arterial drainage.
2. Replaced by the Agriculture Improvement Scheme.
3. Includes Agricultural Development Programme.
4. From 1999, estimated from the Farm Business Survey.
5. This item was previously shown as two separate items, tractors and equipment .
6. Estimated from the Farm Business Survey.
7. Vehicles shown at 'farm share'.

Table 2.13 Total quotas and other subsidy ceilings

	1995	1996	1997	1998	1999 (provisional)
Milk quota (million litres):					
Owned[1]	1,344.9	1,397.8	1,448.4	1,510.4	1549.5
Leased[2]	-4.7	23.2	17.0	2.6	-5.4
Total	1,340.2	1,421.0	1,465.4	1,513.0	1544.1
Suckler Cow Premium:					
Quota (no. of units)[3]	305,186	310,896	320,032	322,054	322,054
Premia paid (no. of cows)	289,847	300,350	307,616	315,725	317,000
Sheep Annual Premium:					
Quota (no. of units)[3]	1,347,622	1,361,561	1,321,306	1,425,965	1,425,965
Premia paid (no. of ewes)	1,336,706	1,314,807	1,303,136	1,349,283	1,374,689
Beef Special Premium:					
Reference herd (no. of steers)	234,683	234,683	236,507	234,683	234,683
Premia paid (no. of animals)					
steers: first age premium[4]	232,504	233,584	223,749	213,861	...
second age premium	191,490	199,382	216,827	215,443	...
bulls	-	-	9,869	10,845	...
Arable Area Payments:					
Base area (ha)	52,900	52,900	52,900	52,900	52,900
Area paid: crops (ha)	32,467	35,367	39,113	39,899	36,879
set-aside (ha)	1,727	1,493	1,078	1,316	2305

1. Permanent wholesale and direct sale quota as at 31 March each year.
2. Quota leased-in to, less quota leased-out from Northern Ireland as at 31 March each year.
3. Quota shown is that allocated under the automatic entitlement process **plus** reserve allocations **less** quota siphoned off **into the** reserve or withdrawn under usage rules.
4. Figures for first age premium are based on number of premia paid after scale back for the regional ceiling being exceeded.

Table 2.14 Number of persons working on farms

number of persons

	1995 [1]	1996 [1]	1997	1998	1999
AGRICULTURAL LABOUR FORCE					
Farmers and partners					
Full time	23,468	22,710	22,409	22,502	21,536
Part time	16,337	17,204	16,828	16,330	16,073
Total	**39,805**	**39,914**	**39,237**	**38,832**	**37,609**
Spouses of farmers	**6,807**	**6,810**	**7,001**	**7,042**	**7,034**
Other workers					
Full time	3,554	3,432	2,981	2,929	3,030
Part time	3,223	3,110	3,088	2,933	2,793
Casual/seasonal	9,564	9,228	9,570	9,360	8,785
Total other workers	16,341	15,770	15,639	15,222	14,608
Total agricultural labour force	**62,953**	**62,494**	**61,877**	**61,096**	**59,251**

1. Revised estimates, see Appendix, page 55.
2. Two changes were made to the labour section of census forms in 1997. Full-time work was more precisely defined as involving 30 hours per week or more and casual work as covering less than 20 weeks per year. Also the categories of workers changed from 'family' and 'hired' to 'paid' and 'unpaid'. Consequently trends in individual categories should be interpreted with care. For example, these changes are believed to have resulted in some workers previously returned as 'family' being recorded as partners in the new format.

Table 2.15 Agricultural manpower [1]

number of persons

	1995 [2]	1996 [2]	1997 [2]	1998	1999
MANPOWER STATISTICS [1]					
Self-employed					
Male	21,630	20,918	20,791	20,834	20,006
Female	1,838	1,792	1,618	1,668	1,530
Total	**23,468**	**22,710**	**22,409**	**22,502**	**21,536**
Employees					
Male	14,417	13,729	13,730	13,440	12,962
Female	1,924	2,041	1,909	1,782	1,646
Total	**16,341**	**15,770**	**15,639**	**15,222**	**14,608**
Total agricultural manpower	**39,809**	**38,480**	**38,048**	**37,724**	**36,144**

1. Agricultural manpower statistics refer to the count of employees and self-employed workers in agriculture, as used by the Department of Enterprise, Trade and Investment in aggregate labour statistics. The count of self-employed includes farmers and partners who work full-time on their farms (see Appendix); the count of employees includes all other workers except part-time farmers and partners and farmers' spouses.
2. Figures for 1997 and earlier years have been revised as a consequence of a change in the register used for the agricultural census (see Appendix).

Table 2.16 Estimated employment in the food and drinks processing and input suppl

full-time equivalents

	1993	1994	1995	1996	1997	1998 (Provisional)
Processing of products [2]						
Animal by-products	190	200	230	250	260	250
Bakeries	3,300	3,450	3,440	3,710	3,560	3,460
Beef and sheepmeat	2,790	2,850	2,630	2,440	2,210	2,150
Drinks	1,650	1,900	1,830	1,740	1,810	1,850
Eggs	440	460	390	390	330	330
Fish	1,000	1,010	970	1,010	980	1,000
Fruit and vegetables	1,190	1,120	1,050	1,190	1,280	1,300
Milk and milk products	3,190	3,190	3,100	2,800	2,620	2,500
Pigmeat	2,220	2,300	2,230	2,310	2,390	2,300
Poultrymeat	4,350	4,350	4,330	4,240	4,310	4,350
Total processing sector	**20,320**	**20,830**	**20,200**	**20,080**	**19,750**	**19,490**
Manufacture and supply of inputs [3]						
Animal feed	1,000	900	850	830	830	820
Fertilisers and lime	410	400	440	500	520	530
Other requisites (incl. medicines)	730	830	830	850	820	820
Farm machinery (incl. servicing)	880	950	950	920	920	920
Services [4]	1,280	1,310	1,570	1,600	1,450	1,470
Total supply sector	**4,300**	**4,390**	**4,640**	**4,700**	**4,540**	**4,560**
Total ancillary employment	**24,620**	**25,220**	**24,840**	**24,780**	**24,290**	**24,050**

1. Owing to changes in coverage, sources and methodology, these estimates are not comparable with those published in pre- 1993 issues of the *Statistical Review of Northern Ireland Agriculture* . All figures are rounded to the nearest ten employees.
2. For a description of how the data for processing have been estimated, see the publication " *Size and Performance of the Northern Ireland Food and Drinks Processing Sector', Economics and* Statistics Division, Department of Agriculture and Rural development (DARD). Figures for 1998 have been estimated by adjusting the 1997 baseline, largely on the basis of information abvailable within DARD.
3. Estimated from the Census of Employment and other (mainly DARD) sources .
4. Includes contractors, veterinary surgeons, workers in auction marts, employees of farming and marketing associations and artificial insemination workers.

Table 2.17 External sales of the food and drinks processing sector [1]

£ million

	1993	1994	1995	1996	1997	1998 (Provisional)
Animal by-products	13	13	16	17	18	15
Bakeries	16	21	26	24	26	25
Beef and sheepmeat	346	346	363	313	264	230
Drinks	65	62	58	64	74	65
Eggs	32	31	32	43	34	30
Fish	41	47	53	53	60	65
Fruit and vegetables	47	47	47	54	64	70
Milk and milk products	293	326	347	408	307	280
Pigmeat	103	109	106	132	140	110
Poultrymeat	147	159	163	222	211	210
Total processing sector	**1,103**	**1,160**	**1,212**	**1,330**	**1,198**	**1,100**

1. These figures are not comparable with the export statistics published in pre-1996 issues of the *Statistical Review of Northern Ireland Agriculture.* The term 'external sales' refers to sales to Great Britain, foreign countries and intervention. For a description of how the data have been estimated, see the publication *Size and Performance of the Northern Ireland Food and Drinks Processing Sector,* Economics and Statistics Division, DARD. Figures for 1998 have been estimated by adjusting the 1997 baseline, largely on the basis of information available within DARD.

B. COMMODITIES AND INPUTS

Cattle and calves

Marketings of finished clean cattle decreased by 0.6 per cent in 1999, to 389,000 head. As in 1997 and 1998, 98 per cent of these animals were destined for human consumption, the remainder being destroyed under the Over Thirty Months Scheme (OTMS). The decrease in marketings comprised a 9 per cent fall in the number of steers slaughtered and a 14 per cent rise in the number of heifers slaughtered. The average carcase weight fell by 3.2 per cent, leading to a 3.8 per cent reduction, to 115,000 tonnes, in the volume of clean beef output. The average deadweight price rose by 5.4 per cent, although it was still 11 per cent lower than the 1997 level. The overall effect of these changes was a rise of 2.0 per cent in the total sales value of finished clean cattle, to £167 million.

Disposals of culled cows and bulls increased by 8.0 per cent in 1999 to 127,000 head. Ninety-eight per cent of these animals were destroyed under the OTMS. The average carcase weight of animals going through the OTMS rose slightly (by 0.5 per cent) while the price realised per kilogram deadweight rose by 5.6 per cent. Total receipts from cull cattle disposals increased by 4.1 per cent to £30.3 million.

Sales of calves fell by 40 per cent in 1999, to 42,000 head, mainly due to the ending of the Calf Processing Aid Scheme (CPAS) on 31 July 1999. The revenue generated fell by 55 per cent to £1.9 million.

Overall, the total sales value of cattle and calves in 1999 (including those sold into the OTMS and CPAS) rose by 1.5 per cent to £201 million.

The total value of direct headage payments fell by less than 1 per cent to £126 million. Within this, Suckler Cow Premium (SCP) payments declined by 8.0 per cent and Extensification Supplement payments by 8.2 per cent (to £38.1 million and £19.5 million respectively). There was a decrease of 53 per cent in Deseasonalisation Premium payments to £2.6 million. Receipts from the Beef Special Premium (BSP) scheme fell by 9 per cent to £34 million. These decreases were offset by agrimoney compensation which rose by 50 per cent to £12.9 million. The value of Hill Livestock Compensatory Allowance (HLCA) receipts also rose (by 56 per cent) to £18.5 million.

Combining the sales value of cattle sold for human consumption with the receipts from the OTMS, CPAS, direct headage payments and year-end stock changes, returns from cattle production in 1999 totalled £325 million. In real terms this was 31 per cent below the 1995 level, the last year before the BSE crisis and sterling's recovery in value against other currencies.

Milk

The annual average dairy cow population was virtually unchanged in 1999 while the average gross milk yield per cow rose by 4.3 per cent to 5,640 litres.

Sales of milk off-farm continued to rise in 1999. The increase of 4.2 per cent brought total sales to 1,565 million litres, their highest level ever.

However, the average producer price for milk continued to decline in 1999, falling by 4.1 per cent compared with 1998, but the 'superlevy' bill fell by 90 per cent to £502,000. Together, these changes led to an overall increase of 1.5 per cent, to £291 million, in the value of milk output.

Sheep and lambs

Marketings of clean sheep and lambs in 1999 remained at a relatively high level, despite showing a decrease of 3.0 per cent to 1.52 million head. Average dressed carcase weight was virtually unchanged from 1998, declining by just 0.1 kilograms to 19.7 kilograms per head. Hence, the volume of clean sheepmeat produced fell by 3.4 per cent to 30,000 tonnes. Producer prices declined by almost 11 per cent, leading to an overall reduction in market returns from clean sheep and lambs of 14 per cent to £52.4 million.

In line with a reduction in the breeding flock, marketings of culled ewes and rams decreased by 2.7 per cent to 210,000 head. However, a fall of 30 per cent in price was the main cause of a decline in the overall value of market receipts of 32 per cent, to £2.2 million.

Total market returns from sheep production fell by 15 per cent to £54.6 million.

As market prices throughout the European Union remained low in 1999, Sheep Annual Premium (SAP) payments were broadly unchanged from 1998 levels. HLCA receipts increased by over 50 per cent to £5.8 million, as a result of higher rates of headage payments. Overall, total subsidies increased by 3.0 per cent to £33.0 million. These represented 38 per cent of the total value of sheep output in 1999, which declined by 8.8 per cent to £87.4 million.

Pigs

As a result of a sharp reduction in the breeding herd, the number of clean pigs marketed during 1999 decreased by 9.0 per cent to 1.20 million head. This decrease, although partly offset by an increase of 1.2 per cent in average dressed carcase weight, resulted in a decline of 8.0 per cent, to 86,000 tonnes, in the quantity of pigmeat produced. Producer prices remained consistently low in 1999, with an average price of 69.3 pence per kilogram deadweight, representing a reduction of 2.8 per cent on the 1998 average. Together with reduced marketings, this caused market returns from clean pig production to fall by 10 per cent to £59.4 million.

Reflecting the decrease in the breeding herd, the number of marketings of cull sows and boars declined by 22 per cent to 18,000 head. The average price per head increased by 3.2 per cent compared with 1998 but the larger reduction in the number of marketings caused market returns from cull sow and boar sales to fall by 19 per cent, to £0.9 million.

Overall, the value of pig output in 1999 (including a negative stock change of £2.3 million) fell by over 13 per cent, to £58.1 million.

Poultry

The total volume of poultrymeat production, at 163,000 tonnes liveweight, was very similar to the record 1998 level. Broiler meat production increased by 2.6 per cent to 138,100 tonnes liveweight but this was offset by decreases in other poultrymeats, especially duck (-49 per cent) and turkey (-17 per cent). Average producer prices decreased by 7.3 per cent, resulting in a decline in the value of poultrymeat output of 7.6 per cent to £80.9 million. The total value of poultry output (including the export of live non-breeding birds and a small negative stock change) fell by 6.3 per cent to £83.7 million. Within this total, the value of broiler output fell by 1.9 per cent to £70.1 million.

Eggs

Packing station throughput of graded eggs in 1999 decreased by 10 per cent to 62.7 million dozen eggs. The average producer price increased by 4.7 per cent from last year's very low level. However, given the larger drop in throughput, the total value of recorded sales for human consumption declined by 5.5 per cent to £19.5 million. The value of non-breeding, hatching egg shipments and exports also declined in 1999 due to a reduction in volume. Therefore the value of overall egg output (including eggs for processing, unrecorded sales for human consumption and duck eggs) fell by 9.6 per cent to £33.6 million.

Potatoes

The area of potatoes planted in 1999 was virtually unchanged from 1998, at 7,540 hectares. The average yield rose by 13 per cent, leading to a rise of 14 per cent, to 280,000 tonnes, in the total potential quantity of potatoes harvested.

Marketings of ware potatoes in 1999 fell by 1.2 per cent to 170,000 tonnes. This comprised a year-on-year reduction of 9.9 per cent in sales during the first half of the year and a 9.3 per cent rise in sales during the second half of the year. The volume of seed potato output for the year (including home-saved seed) fell by 11 per cent, declining to 39,500 tonnes. In total, the volume of potato output (including ware, seed and stockfeed potatoes) in 1999 fell by 3.2 per cent to 236,000 tonnes.

Producer prices differed significantly in the first and second halves of the year, with the average price per tonne from January to June being more than double that from July to December. Over the year as a whole, the average price increased by 15 per cent compared with 1998. The fall in the volume of output and the rise in price resulted in the total value of potato output (including a £1.6 million stock change) increasing by 30 per cent to £28.6 million. This was the highest value since 1995, when the value of output was £43.2 million.

Cereals

The area of wheat in 1999 was 54 per cent lower than in 1998. Coupled with a 2.6 per cent fall in yield, this resulted in a decrease of 56 per cent in production to 22,000 tonnes. Production of spring barley rose by 23 per cent while that of winter barley fell by 29 per cent, resulting in an overall rise of 9.4 per cent in barley production to 168,000 tonnes. Yields of both spring and winter barley rose (by 9.1 per cent and 7.8 per cent respectively). The fall in winter barley production was as a result of a lower planted area of 5,080 hectares (a fall of 34 per cent on 1998). The area of spring barley planted, however, rose by 13 per cent. A 2.6 per cent fall in the yield of oats and a 7.0 per cent rise in the area planted resulted in a 4.1 per cent increase in the production of oats, to 12,000 tonnes.

In total, the production of cereals in 1999 fell by 5.9 per cent, to 202,000 tonnes.

The total volume of barley sold or used on-farm in 1999 declined by 5.2 per cent compared with the previous year. The average producer price remained virtually unchanged, leading to a 5.3 per cent fall in total market returns, to £13.2 million. The value of Arable Area Payments and agrimoney compensation rose in 1999 by 8.6 per cent to £7.0 million. Overall, the value of barley output (including a £690,000 stock change) rose by 8.6 per cent, to £20.9 million.

In 1999, the volume of wheat output fell by 27 per cent. Coupled with a 4.0 per cent fall in the average producer price, this resulted in a decrease of 30 per cent in total market returns, to £3.0 million. The value of Arable Area Payments and agrimoney compensation was lower than in 1998, declining by almost 47 per cent to £811,000. As a result, the total value of wheat output (including a negative stock change adjustment of £1.1 million) fell by 54 per cent to £2.7 million.

The volume of oats output fell by 4.2 per cent in 1999. However, the average producer price rose by 7.7 per cent resulting in total market returns of £1.2 million, a rise of 3.2 per cent. Arable Area Aid Payments and agrimoney compensation rose by 18 per cent, to £397,000, resulting in the total value of oats output rising by 13 per cent, to £1.6 million (including a small positive stock change).

Horticulture

The total value of horticultural output fell by 3.7 per cent, to £54.8 million, in 1999. Returns from sales of fruit (mainly apples) declined by 49 per cent to £3.9 million, largely due to a fall of 59 per cent in the average price of apples. The value of output of mushrooms decreased by 2.7 per cent to £29.1 million and receipts from the sale of vegetables fell by 9.1 per cent to £9.96 million. The value of flowers and nursery stock rose slightly (by less than 1 per cent) to £10.4 million.

Feedstuffs

The total volume of compound feedstuffs purchased during 1999 rose by 8.4 per cent to 1.38 million tonnes. Purchases of cattle and calf compounds increased by 21 per cent and sheep compounds by 31 per cent. There was a rise of 5.1 per cent in the volume of poultry compounds purchased. However, purchases of pig compounds fell by 20 per cent.

Inputs of straights (including home-fed cereals) declined in 1999, by 9.5 per cent, to 333,000 tonnes. The combined effect of the increase in the volume of compounds and the decrease in straights led to a 4.3 per cent increase, to 1.74 million tonnes, in the total volume of feed purchased.

However, the average price of feedstuffs declined by 6.0 per cent in 1999. Average prices for compounds fell by 8.1 per cent while average straights prices fell by 1.1 per cent. As a result, the cost of all purchased feedstuffs (including a small negative stock change) fell by 2.6 per cent, to £268 million.

Fertilisers and lime

The quantity of fertilisers purchased in 1999 increased by 5.4 cent to 470,000 tonnes product weight. The average price rose by 1.8 per cent leading to an increase of 7.3 per cent, to £58.8 million, in the total fertiliser bill.

The total lime bill rose by 47 per cent to £1.6 million. This was due to an increase of 47 per cent in the volume of lime purchases, while the average price remained unchanged.

Imported livestock

Expenditure on imported livestock in 1999 increased by £3.0 million to £10.1 million, a rise of 43 per cent. This was due mainly to substantial increases in the numbers of store and breeding cattle imported.

Machinery expenses

Machinery expenses increased by 4.3 per cent in 1999, to £82.4 million. Within this total, expenditure on repairs increased by 2.2 per cent and that on fuel and oil by 6.6 per cent. Other machinery expenses rose by 4.4 per cent.

Interest

Bank advances for current farming purposes continued to rise in 1999. However, a decrease in the rate of interest charged, by 1.9 percentage points to 8.3 per cent, resulted in a reduction of 14 per cent, to £45.2 million, in the total interest bill.

Labour

In 1999, the volume of paid labour input fell by 2.6 per cent to 9.6 million hours. However, the average hourly labour cost increased by 6.5 per cent, resulting in an increase of 4.0 per cent, to £45.3 million, in the paid labour bill.

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Table 2.18 Output of cattle and calves

	1995	1996	1997	1998	1999 (Provisional)
Steers, heifers and young bulls					
Sales (inc. to the OTMS) ('000 head)	382.0	383.4	380.4	391.2	389.0
Average producer price (p per kg dwt) [1]	221.9	186.3	167.2	140.4	148.0
Average dressed carcase weight (kg) [2]	323.3	329.7	315.2	304.5	294.6
Quantity of output ('000 tonnes) [2]	123.5	126.4	119.9	119.1	114.6
Value of output (inc. sales to OTMS) (£m)	274.1	235.6	193.5	163.4	166.7
Cows and bulls					
Sales (inc. to the OTMS) ('000 head)	90.9	106.0	84.4	117.7	127.1
Average producer price (p per kg dwt) [1]	176.5	161.8	109.1	126.4	133.7
Average dressed carcase weight (kg) [2]	293.4	273.2	247.4	224.7	223.2
Quantity of output ('000 tonnes) [2]	26.7	29.0	20.9	26.4	28.4
Value of output (inc. sales to OTMS) (£m)	47.1	46.9	27.9	29.1	30.3
Calves					
Sales (inc. to the CPAS) ('000 head)	15.3	31.5	55.8	69.7	41.6
Average producer price (£ per head) [1]	154	89	69	62	46
Value of output (inc. sales to CPAS) (£m)	2.4	2.8	3.8	4.3	1.9
Store cattle shipped and exported					
Marketings ('000 head)	8.4	3.6	2.9	4.5	6.8
Average producer price (£ per head) [1]	528	456	417	327	336
Value of output (£m)	4.5	1.6	1.2	1.5	2.3
Other receipts (£m) [3]	101.9	137.0	155.8	126.5	125.6
Total value of output (inc. OTMS and CPAS) (£m)	**425.0**	**416.3**	**379.5**	**318.6**	**324.8**
of which:					
stock change due to volume	-4.9	-7.6	-2.8	-6.2	-2.1
Net receipts from non-food outlets (included above)					
Over Thirty Months Scheme (£m)	-	83.0	29.9	30.1	31.4
Calf Processing Aid Scheme (£m)	-	2.3	3.7	4.0	1.4

1. Average realised return net of marketing expenses for cattle for human consumption and for destruction under the Over Thirty Months Scheme or Calf Processing Aid Scheme, if applicable.
2. Including animals sold under the Over Thirty Months Scheme.
3. Includes Suckler Cow Premium, Hill Livestock Compensatory Allowance, Beef Special Premium, Beef Deseasonalisation Premium, Extensification Supplement, Beef Marketing Payment Schemes (parts 1, 2 and 2a), Agrimoney Compensation, Flagged Suckler Herd Payments, BSE related supplements and receipts from the Over Thirty Months Scheme and Calf Processing Aid Scheme.

Table 2.19 Sources of home-fed finished cattle marketed [1]

per cent

	1995	1996	1997	1998	1999 (Provisional)
Cows and bulls	19	22	18	23	24
Steers and heifers originating from:					
- the dairy herd;	33	31	35	30	27
- the beef herd;	44	42	44	42	48
- calves and stores imported from the Republic of Ireland or shipped from Great Britain	4	5	2	4	1
Total [2]	**100**	**100**	**100**	**100**	**100**
Total number marketed ('000 head)	**473**	**490**	**467**	**509**	**516**

1. Includes cattle slaughtered under the Over Thirty Months Scheme and the BSE Selective Cull.
2. Individual items may not add to 100 due to roundings.

Table 2.20 Output of milk

	1995	1996	1997	1998	1999 (Provisional)
Annual average number of dairy cows ('000 head)[1]	272.1	278.2	279.9	286.3	286.2
Average gross yield per cow (to nearest 10 litres per annum)[1,2]	5,240	5,350	5,510	5,410	5,630
Total output of milk for human consumption (million litres)	1,381	1,445	1,501	1,510	1,573
of which:					
sales off farms	1,373	1,437	1,493	1,503	1,565
used in farm households	8	8	8	7	7
Average producer price (pence per litre)[3]	25.42	24.03	20.63	19.32	18.53
Value of output (£m)[4]	**341.3**	**342.8**	**308.6**	**286.5**	**290.9**

1. The average yield and population data for 1996 were probably affected by the backlog of cattle awaiting slaughter under the Over Thirty Months Scheme.
2. Comprising sales off farms, milk consumed in farm households and milk fed to other livestock.
3. After deduction of marketing charges, except superlevy, where applicable.
4. After all deductions, including superlevy.

Table 2.21 Output of sheep

	1995	1996	1997	1998	1999 (Provisional)
Marketings ('000 head)[1]					
Finished sheep and lambs	1,462	1,460	1,335	1,563	1,517
Culled ewes and rams	217.0	209.3	203.8	215.6	209.8
Average price (p per kg deadweight)[2]					
Finished sheep and lambs	203.8	255.6	245.4	196	175.3
Average dressed carcase weight (kg)					
Finished sheep and lambs	21.0	20.9	20.5	19.8	19.7
Output of all sheep and lambs					
Quantity ('000 tonnes)	36.6	36.3	32.8	36.7	35.4
Market value (£m)	66.5	83.0	71.6	63.9	54.6
Other receipts (£m)[3]	39.6	27.7	25.5	32.0	33.0
Value of output (£m)	**107.6**	**107.7**	**99.3**	**95.9**	**87.4**
of which:					
stock change due to volume	+1.6	-3.0	+2.3	0.0	-0.2

1. Estimated home-produced marketings, including unrecorded exports.
2. Average realised return net of marketing expenses.
3. Comprising Hill Livestock Compensatory Allowance, Sheep Annual Premium and Agrimoney Compensation.

Table 2.22 Output of pigs

	1995	1996	1997	1998	1999 (Provisional)
Marketings ('000 head)[1]					
Finished clean pigs	1,282.7	1,259.0	1,286.2	1,314.3	1,195.9
Culled sows and boars	21.9	22.7	24.6	22.4	17.5
Average price (p per kg deadweight)[2]					
Finished clean pigs[3]	111.09	131.29	103.48	71.27	69.31
Culled sows and boars	94.73	101.47	75.57	38.52	41.36
Average dressed carcase weight (kg)					
Finished clean pigs[3]	71.1	72.6	71.3	70.9	71.7
Quantity of output ('000 tonnes)[4]	94.0	94.4	95.6	96.2	88.0
Value of output (£m)	**102.2**	**123.6**	**99.1**	**67.0**	**58.1**
of which:					
stock change due to volume	-1.8	+0.5	+0.7	-0.6	-2.3

1. Estimated home-produced marketings, including unrecorded exports and pigs slaughtered under the 1998 Pig Welfare Slaughter Scheme.
2. Average realised return net of marketing expenses, including receipts from the 1998 Pig Welfare Slaughter Scheme.
3. Clean pig producer prices and carcase weights changed from a UK to an EU carcase dressing specification from 1997. This change increased the average price per kilogram by approximately 1.6% and reduced the average carcase weight by a similar amount.
4. Includes store pigs exported.

Table 2.23 Output of poultry

	1995	1996	1997	1998	1999 (Provisional)
Poultrymeat production ('000 tonnes liveweight)					
All poultrymeat (including broilers)	141.4	158.4	158.8	163.2	162.6
Broilers	121.4	134.7	132.2	134.6	138.1
Average producer price (p per kg liveweight)					
All poultrymeat (including broilers)	55.1	58.7	58.1	53.7	49.8
Broilers	54.9	58.5	57.4	53.1	50.8
Value of output (£m)[1]					
All poultry (including broilers)	**81.4**	**97.1**	**95.9**	**89.3**	**83.7**
of which:					
stock change due to volume	+0.3	+0.4	-0.3	-0.1	-0.2
Broilers	66.7	78.8	75.9	71.4	70.1

1. Includes shipments and exports of non-breeding birds.

Table 2.24 Output of eggs

	1995	1996	1997	1998	1999 (Provisional)
Graded packing station throughput (million dozen)	67.6	69.0	66.7	69.7	62.7
Average producer price (p per dozen)[1]	39.96	47.93	35.09	29.53	30.91
Value of output (£m)[2]	**37.8**	**45.6**	**39.0**	**37.2**	**33.6**

1. Relates to graded eggs sold through packing stations.
2. Includes eggs for processing, duck eggs, unrecorded sales and exports of non-breeding hatching eggs.

Table 2.25 Crop production

harvest years

	1995	1996	1997	1998	1999 (Provisional)
Potatoes[1]					
Area ('000 hectares)	9.0	8.8	7.8	7.5	7.5
Harvestable yield (tonnes per hectare)	31.9	32.4	35.1	32.7	37.1
Production ('000 tonnes)	287.1	284.2	272.2	245.6	279.8
of which:					
saleable potatoes	249.2	254.6	242.4	219.7	251.6
chats[2] and waste	37.9	29.6	29.8	25.8	28.1
Barley[3,4]					
Area ('000 hectares)	33.5	34.3	36.5	34.8	35.7
Yield (tonnes per hectare)	5.16	5.27	4.88	4.41	4.70
Production ('000 tonnes)	173.0	180.6	178.0	153.5	168.0
Wheat[4]					
Area ('000 hectares)	6.6	6.9	6.9	7.1	3.3
Yield (tonnes per hectare)	7.78	7.54	7.02	6.94	6.76
Production ('000 tonnes)	51.2	51.7	48.5	49.6	22.0
Oats[3,4]					
Area ('000 hectares)	2.3	2.2	2.4	2.6	2.8
Yield (tonnes per hectare)	4.84	4.86	5.16	4.53	4.41
Production ('000 tonnes)	11.0	10.8	12.3	11.8	12.3
Oilseed rape[5]					
Area ('000 hectares)	0.3	0.3	0.5	0.9	0.5
Yield (tonnes per hectare)	2.93	2.96	3.13	2.84	2.96
Production ('000 tonnes)	1.0	0.8	1.6	2.5	1.6
Hay					
Area ('000 hectares)	39.5	37.3	31.4	13.9	20.3
Yield (tonnes per hectare)	7.10	7.18	7.42	6.8	6.98
Production ('000 tonnes)	280.0	267.6	233.2	94.4	141.9
Grass silage					
Area ('000 hectares)	265.2	283.7	277.8	289.6	285.6
Yield (tonnes per hectare)	29.87	30.06	29.47	27.07	29.33
Production ('000 tonnes)	7,921.7	8,528.9	8,186.1	7,837.4	8,374.5

1. Includes early, maincrop ware and seed crops.
2. Under 40 mm.
3. Comprises spring and winter varieties.
4. Yield and production estimates are standardised to 15% moisture content.
5. Area and production estimates include industrial-use oilseed rape grown on set-aside land. Areas are taken from the Arable Area Payments Scheme. Yield and production estimates are standardised to 9% moisture content.

Table 2.26 Output[1] of potatoes, barley and wheat

	1995	1996	1997	1998	1999 (Provisional)
POTATOES[2]					
Quantity of output ('000 tonnes)					
Ware	170.6	178.7	174.4	171.9	169.9
Seed	59.3	50.1	55.4	44.4	39.5
Stockfeed	29.7	33.3	30.4	27.2	26.2
Total	**259.6**	**262.1**	**260.2**	**243.6**	**235.7**
Average producer price (£ per tonne)					
Ware	171.85	77.37	64.25	114.07	120.24
Seed	212.18	156.51	69.21	101.63	162.86
Value of output (£m)					
Ware	29.3	13.8	11.2	19.6	20.4
Seed	12.6	7.8	3.8	4.5	6.4
Stockfeed	0.4	0.5	0.3	0.3	0.3
Total	**43.2**	**22.0**	**14.6**	**22.0**	**28.6**
of which:					
stock change due to volume	+1.0	0.0	-0.6	-2.3	+1.6
BARLEY[3,4]					
Quantity of output ('000 tonnes)	168.0	179.1	176.6	168.0	159.3
Average producer price (£ per tonne)[5]	118.98	113.02	90.33	83.24	83.16
Value of output (£m)	**26.4**	**26.8**	**22.8**	**19.2**	**20.9**
of which:					
stock change due to volume	+0.6	+0.2	+0.1	-1.2	+0.7
WHEAT[3,4]					
Quantity of output ('000 tonnes)	55.3	46.6	46.3	48.0	35.1
Average producer price (£ per tonne)[5]	123.8	118.86	96.18	87.48	84.01
Value of output (£m)	**7.6**	**7.6**	**6.3**	**5.9**	**2.7**
of which:					
stock change due to volume	-0.5	+0.6	+0.2	+0.1	-1.1

1. Output data are for calendar years and reflect the influence of two crop years.
2. Includes ware consumed in farm households and seed retentions.
3. Includes cereals retained on the farm of origin or sold farm-to-farm.
4. Includes Arable Area Payments but excludes set-aside payments.
5. Average realised return net of marketing expenses.

Table 2.27 Output of apples and mushrooms

	1995	1996	1997	1998	1999 (Provisional)
APPLES[1]					
Quantity of output ('000 tonnes)	41.3	39.7	31.0	27.6	27.5
Average producer price (£ per tonne)	138	158	214	248	103
Value of output (£m)	**6.1**	**5.2**	**9.0**	**5.2**	**4.1**
of which:					
stock change due to volume	+0.4	-1.1	+2.3	-1.7	+1.3
MUSHROOMS					
Quantity of output ('000 tonnes)	23.0	27.5	26.5	26.0	25.0
Average producer price (£ per tonne)	1,210	1,165	1,146	1,150	1,164
Value of output (£m)	**27.8**	**32.0**	**30.4**	**29.9**	**29.1**

1. Output data are for calendar years and reflect the influences of two crop years.

Table 2.28 Quantity and cost of the main items of expenditure (including interest and labour)

	1995	1996	1997	1998	1999 (Provisional)
FEEDSTUFFS [1]					
Quantity purchased ('000 tonnes concentrate equivalent)	1,753	1,799	1,715	1,669	1,741
Average cost (£ per tonne concentrate equivalent)	175	192	180	164	154
Value of feed consumed (£m)	**308.1**	**344.5**	**308.4**	**275.0**	**267.8**
of which:					
stock change due to volume	+1.5	-0.3	-0.3	+1.5	-0.2
FERTILISERS					
Quantity purchased ('000 tonnes product)	512	485	445	446	470
Nutrient content ('000 tonnes)	191	182	164	158	173
of which:					
Nitrogen	127	122	112	110	121
Phosphate	29	27	23	22	24
Potash	34	33	29	26	28
Average cost (£ per tonne of nutrient)	385	421	403	347	339
Value of purchases (£m)	**73.3**	**76.7**	**66.3**	**54.8**	**58.8**
LIME					
Quantity purchased ('000 tonnes)	214	167	172	78	115
Average cost (£ per tonne)	11.35	13.33	13.50	14.00	14.00
Value of purchases (£m)	**2.4**	**2.2**	**2.3**	**1.1**	**1.6**
IMPORTED LIVESTOCK AND INTER-FARM EXPENSES [2]					
Total imported livestock (£m)	**23.4**	**12.4**	**16.6**	**7.1**	**10.1**
of which:					
cattle: number ('000 head)	29.1	13.1	24.3	6.5	14.3
average price (£ per head)	641	586	476	468	466
value (£m)	18.7	7.7	11.7	3.1	6.7
Inter-farm expenses (£m)	**18.0**	**17.4**	**16.1**	**15.2**	**15.4**
INTEREST					
Bank base lending rate (%)	6.7	6.0	6.6	7.2	5.4
Total interest charges (£m) [3]	**34.5**	**37.1**	**44.5**	**52.5**	**45.2**
LABOUR					
Average weekly hours of full-time paid male workers	43.67	45.26	42.05	43.05	40.75
Average earnings of full-time paid male workers (£ per hour) [4]	3.80	4.21	4.27	4.43	4.72
Average earnings of full-time paid male workers (£ per week) [4]	166.07	190.69	179.52	190.75	192.34
Volume of paid labour (million hours) [5]	10.78	10.61	9.84	9.81	9.56
Value of paid labour (£m) [5]	**41.9**	**45.3**	**41.9**	**43.5**	**45.3**

1. Includes home-fed cereals, proteins and stockfeed potatoes.
2. Includes imports and shipments of stores and breeding livestock. Excludes finished animals for immediate slaughter.
3. Includes interest on hire purchase and leasing agreements and trade credit.
4. Gross wage before deduction of tax and national insurance, and including the value of perks.
5. Excludes labour used on capital projects.

3. CROP AREAS AND LIVESTOCK NUMBERS

Land use

Just over 80 per cent of the Northern Ireland land area of 1.35 million hectares is used for agriculture, including common rough grazing, and a further 6 per cent for forestry (Table 3.1). The greater part of the forested area (81,000 hectares) is managed by the Forest Service of the Department of Agriculture and Rural Development (see *Forest Service Annual Report, 1998/99*).

Most farmland is under grass. Only 5,600 farms (18 per cent) have arable crops. These crops occupy 56,500 hectares and make up only 5 per cent of the area of farms. Barley (35,700 hectares) is the main crop grown followed by potatoes with 7,500 hectares. In 1999, the cropped area also included 3,300 hectares of horticultural crops, mainly apple orchards (1,600 hectares) and vegetables (1,500 hectares). There was a 6 per cent reduction in the total area of cereals in 1999 and the area of potatoes was virtually unchanged compared with 1998. Over the 10 year period since 1989, cereals have declined by 14 per cent and potatoes by 28 per cent resulting in an overall decline in the cropped area of 15 per cent.

Grazing livestock

All but 6 per cent of Northern Ireland farms have cattle or sheep. In 1999, cattle were found on 26,400 farms (85 per cent), sheep on 11,500 farms (37 per cent) and cattle and/or sheep on 29,100 farms (94 per cent).

The total number of cattle recorded in the June 1999 census (1.72 million) was 3 per cent less than in 1998. At June 1999, there were 286,400 dairy cows and 332,200 beef cows, representing no change compared with 1998 for the former but a 4 per cent reduction for the latter. Over the last 10 years, the numbers of cattle, dairy cows and beef cows have increased by 9, 3 and 32 per cent respectively.

With 1.40 million ewes in 1999, the sheep breeding flock was 3 per cent smaller than in 1998; including lambs and other sheep the flock totalled 2.91 million. There are now 10 per cent more ewes than in 1989.

Intensive livestock

Pigs and/or poultry are found on 10 per cent of Northern Ireland's farms. This proportion falls to 6 per cent if farms with fewer than 50 birds are excluded.

The number of pigs in Northern Ireland at June 1999 was estimated at 490,300, 25 per cent fewer than in the previous June, while the number of pig herds fell by 46 per cent to 1,151. Numbers of sows and breeding herds fell by 30 and 49 per cent respectively.

From almost 700,000 at June 1997, the highest level since 1988, pig numbers fell to 653,000 at June 1998, then to around 600,000 in December 1998 and 490,000 at June 1999.

With 15.0 million birds in June 1999, the Northern Ireland poultry flock was 1 per cent smaller than in 1998. The number of laying birds (2.1 million) and broilers (9.3 million) were, respectively, 16 per cent lower and 6 per cent higher, than the figures for 1998.

Total numbers of poultry at June 1999 were over 40 per cent higher than 10 years previously. During this period the commercial laying flock contracted by almost 30 per cent while there were increases of around 70 and 250 per cent for broilers and the breeding flock respectively.

Less Favoured Areas

The term **Less Favoured Areas (LFA)** is used to describe those parts of the country which, because of their relatively poor agricultural conditions, have been so designated under EU legislation. These areas, which include developed land as well as that used for agriculture and forestry, extend to 826,000 hectares. Further details are given in the Appendix.

Farms classed as **LFA farms** occupy 70 per cent of farmed land in Northern Ireland (Table 3.4). Crops are grown mainly on **lowland farms,** on which they occupy 13 per cent of farm land compared with 2 per cent elsewhere. There are also significant differences in the patterns of livestock farming. Beef cows (269,000) predominate on **LFA farms**, where they are more important than dairy cows (145,000), whereas, on **lowland farms**, there were 63,000 beef cows and 141,000 dairy cows in 1999. **LFA farms** account for 39 and 50 per cent of the Province's pigs and poultry respectively.

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Table 3.1 Land use, 1999

thousand hectares

	Crops	Grass and rough grazing	Woodland	Other land	Total land area
Agricultural holdings	56	997	8	12	**1,073**
Common grazing	-	34	-	-	**34**
NI Forest Service[1]	-	-	61	12	**73**
Other areas	-	-	12	154	**166**
All land	**56**	**1,031**	**81**	**179**	**1,347**

1. Excludes 2,700 ha let to farmers; these areas are included in the area of agricultural holdings.

Table 3.2 Areas of crops, grass, rough grazing and other land, June 1995 - 1999

thousand hectares

	1995[1]	1996[1]	1997	1998	1999
Oats	2.3	2.2	2.4	2.6	2.8
Wheat	6.6	6.9	6.9	7.1	3.3
Barley: Winter	6.8	7.3	7.7	7.7	5.1
Spring	26.7	26.9	28.7	27.1	30.6
Mixed corn	0.1	0.1	0.1	0.1	0.2
Potatoes	9.0	8.8	7.8	7.5	7.5
Arable crop silage	2.0	1.6	1.7	2.0	2.4
Other field crops	1.4	1.1	1.2	1.7	1.3
Total agricultural crops	**54.9**	**55.0**	**56.6**	**55.9**	**53.2**
Fruit	1.7	1.7	1.6	1.7	1.7
Vegetables	1.3	1.4	1.4	1.4	1.5
Other horticultural crops	0.1	0.1	0.1	0.2	0.1
Total horticultural crops	**3.2**	**3.2**	**3.1**	**3.2**	**3.3**
Grass: Under 5 years old	195.0	190.6	181.9	155.6	140.9
5 years old and over	622.4	628.7	643.1	675.0	697.2
Total grass	**817.4**	**819.3**	**825.1**	**830.6**	**838.1**
Total crops and grass	**875.5**	**877.5**	**884.8**	**889.8**	**894.6**
Rough grazing[2]	170.9	169.0	164.1	159.1	158.7
Woods and plantations	8.1	8.2	8.2	8.2	8.2
Other land[3]	13.2	12.9	11.8	11.3	11.5
Total area of agricultural holdings	**1,067.8**	**1,067.6**	**1,068.9**	**1,068.4**	**1,073.0**

1. Revised estimates; see Appendix.
2. Excludes common rough grazing (34,500 ha).
3. Includes set aside.

Table 3.3 Livestock numbers, June 1995 - 1999

thousand head

	1995 [1]	1996 [1]	1997	1998	1999
CATTLE					
Dairy cows					
In milk	251.8	260.1	259.4	266.8	267.1
In calf	19.7	21.0	19.8	20.8	19.3
Total dairy cows	**271.5**	**281.1**	**279.2**	**287.7**	**286.4**
Dairy heifers in calf	55.9	62.1	62.6	60.9	60.0
Beef cows					
In milk	260.8	266.9	272.1	287.1	274.2
In calf	47.7	48.5	51.8	57.6	58.0
Total beef cows	**308.6**	**315.4**	**323.9**	**344.7**	**332.2**
Beef heifers in calf	32.9	35.4	46.5	40.9	34.6
Total cows	**580.1**	**596.5**	**603.1**	**632.4**	**618.6**
Total heifers in calf	**88.8**	**97.5**	**109.1**	**101.8**	**94.6**
Bulls for service	14.8	15.6	16.5	17.1	16.9
Other cattle					
Over 2 years	141.4	151.3	101.2	108.6	105.7
1-2 years	389.9	402.2	417.3	409.6	402.1
Under 1 year	484.1	496.2	483.8	497.8	480.7
Total cattle	**1,699.1**	**1,759.4**	**1,731.0**	**1,767.3**	**1,718.6**
SHEEP					
Breeding ewes	1,345.3	1,341.6	1,384.1	1,449.8	1,404.9
Other sheep	1,408.3	1,411.6	1,496.0	1,536.8	1,504.0
Total sheep	**2,753.5**	**2,753.1**	**2,880.1**	**2,986.6**	**2,908.9**
PIGS [2]					
Sows and gilts	68.4	68.8	72.2	66.9	47.1
Other pigs	568.6	569.3	624.5	586.5	443.1
Total pigs	**636.9**	**638.1**	**696.7**	**653.4**	**490.2**
POULTRY					
Laying birds	3,206.3	3,136.4	2,648.9	2,562.1	2,140.1
Growing pullets	1,344.3	1,240.9	1,266.2	845.7	781.3
Breeding flock	1,748.8	1,968.5	2,138.2	2,334.5	2,266.1
Table chickens	9,170.0	9,006.2	8,994.9	8,854.1	9,342.0
Total ordinary fowl	**15,469.4**	**15,352.0**	**15,048.2**	**14,596.4**	**14,529.5**
Turkeys, geese and ducks	533.9	547.4	559.6	574.2	518.4
Total poultry	**16,003.3**	**15,899.5**	**15,607.8**	**15,170.6**	**15,047.9**
HORSES & PONIES	**9.6**	**9.8**	**9.9**	**9.8**	**9.9**
GOATS	**3.8**	**3.6**	**3.5**	**3.6**	**3.5**

1. Revised estimates; see Appendix.
2. Revised estimates for 1994-1997; see Appendix.

Table 3.4 Areas of crops, grass, rough grazing and other land by Less Favoured Area (LFA) category[1] of farm, June 1999

thousand hectares

	Areas on farms wholly or mainly in:				
	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Cereals	2	7	10	32	23.5
Potatoes	1	2	2	5	29.0
Other agricultural crops	1	1	2	2	53.1
Horticultural crops	0	1	1	3	21.8
Total crops	**4**	**11**	**15**	**42**	**26.0**
Grass: Under 5 years old	43	42	85	56	60.5
5 years and over	281	208	489	208	70.2
Total grass	**324**	**250**	**574**	**264**	**68.5**
Rough grazing[2]	136	14	151	8	94.9
Woods/other land	6	5	11	8	57.7
Total area	**471**	**280**	**751**	**322**	**70.0**

1. For statistical purposes, farms classified as LFA farms have all or most of their land (after adjustment for conacre) within the LFA and are further classified as SDA or DA according to where the greater part of their LFA land lies. Lowland farms have most or all of their land outside the LFA.
2. Excludes common rough grazing.

Table 3.5 Livestock numbers by Less Favoured Area (LFA) category[1] of farm, June 1999

thousand head

	Numbers on farms wholly or mainly in:				
	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
CATTLE					
Dairy cows	48	96	145	141	50.6
Beef cows	177	92	269	63	81.1
Heifers in calf	25	29	54	41	56.7
Bulls for service	7	5	12	5	70.3
Other cattle					
Over 2 years	20	36	57	49	53.8
1-2 years	102	135	237	165	58.9
Under 1 year	184	145	328	152	68.3
Total cattle	**563**	**539**	**1,102**	**616**	**64.1**
SHEEP					
Breeding ewes	768	333	1,102	303	78.4
Other sheep	796	375	1,172	333	77.9
Total sheep	**1,564**	**709**	**2,273**	**636**	**78.1**
PIGS					
Sows and gilts	6	14	19	28	41.1
Other pigs	46	128	174	269	39.3
Total pigs	**52**	**142**	**193**	**297**	**39.4**
POULTRY					
Laying birds	503	645	1,148	992	53.6
Table fowl	945	3,932	4,877	4,465	52.2
Other poultry	431	1,072	1,503	2,063	42.1
Total poultry	**1,879**	**5,649**	**7,528**	**7,520**	**50.0**
HORSES AND PONIES	**2**	**3**	**5**	**5**	**49.8**
GOATS	**2**	**1**	**2**	**1**	**70.1**

1. See Note 1, Table 3.4.

4. FARM STRUCTURE

Methodological notes

In the agricultural census, the statistical definition of a farm[1] is the same as that applied under the Integrated Administration and Control System (IACS), i.e it is based on the concept of separate businesses. Until 1997, the definition was based on land ownership. The current definition is in keeping with that adopted for European Union surveys on the structure of agricultural holdings, according to which a farm is:

> *'a single unit, both technically and economically, which has a single management and which produces agricultural products'*

but it differs from that used elsewhere in the UK.

The agricultural census in Northern Ireland covers all active farm businesses having one hectare or more of farmed land, whether owned, leased or taken in conacre, and those with under one hectare having any cattle, sheep or pigs or with significant poultry or horticultural activity.

Because of the change introduced in 1997, the numbers and types of farms, and of individual enterprises, from 1997 onwards are not comparable with those for earlier years. Unlike the statistics for crop areas and numbers of livestock presented in Section 3, statistics for the numbers of farms in earlier years have not been revised; they are presented in Tables 4.2, 4.4 and 4.7 to give general indications of trends. Full details of the change in the definition of a farm are given in the Appendix.

Farms[1]

The number of farms at June 1999 was 31,132, a fall of 685 (2 per cent) compared with 1998. The average size of farm in 1999 was 34.5 hectares (Table 4.2). Almost 30 per cent of all farms have less than 10 hectares of crops and grass while just over 1,000 farms (3 per cent) have 100 hectares or more; these latter occupy 17 per cent of the crops and grass area.

Business size

Since quite large businesses can be operated on small areas (e.g. those with intensive livestock or horticultural crops), area alone does not accurately reflect the level of business activity. Standard Gross Margins (SGM) are used throughout the EU to measure farm business size. This concept has been adapted for use in the UK where, for statistical purposes, farms are classed as **very small, small, medium** or **large** according to their total SGM (see Appendix, page 55).

Over half of all farm businesses in Northern Ireland are classified as **very small**. In 1999 there were 16,500 farms in this category (Table 4.3), almost half of which had less than 10 hectares. These farms are unlikely to provide full-time employment or an adequate income solely from farming activities. They contribute 10 per cent of the industry's total SGM but account for 23 per cent of the farmed area (Table 4.15). Their main activities are cattle rearing and fattening and they have 24 per cent of beef cows and 27 per cent of fattening cattle over one year old. Almost 24,000 persons are engaged in the work of these farms (Table 4.13).

[1] In UK agricultural statistics publications, the terms 'holding' and 'farm' are used synonymously but, in Northern Ireland, where the owners of a significant proportion of holdings let out all of their land and take no part in agriculture, the former term refers to the areas under single ownership and the latter to the areas farmed in separate units, i.e. after adjustment for land let out or taken in conacre. This definition of 'farm' excludes holdings on which there is no farming activity.

There are 10,800 **small** farms, generally involving one person full-time with, in some cases, part-time or seasonal help. These farms make important contributions to all sectors, from 24 per cent of pigs to 57 per cent of sheep; they cover 45 per cent of the agricultural area and involve 44 per cent of the full-time agricultural labour force (Table 4.15).

The 3,900 **medium** and **large** farms (together representing 12 per cent of the total number) contribute over half of the total SGM but from just a third of the land area (Table 4.15). They are particularly dominant in the dairy, pigs and poultry sectors with, respectively, 77, 73 and 56 per cent shares of the livestock numbers.

Over 70 per cent of the **very small** and **small** farms are mainly in the LFA whereas, for **medium** and **large** farms, the proportions are 54 and 36 per cent respectively (Table 4.5).

Farm type

Eighty-six per cent of Northern Ireland farms derive two-thirds or more of their total SGM from cattle and/or sheep (Table 4.6), including 16 per cent classified as **dairy** farms and 70 per cent as **cattle and sheep**. Relatively few farms depend predominantly on cropping, 531 (2 per cent) being classed as **cereals** farms, 372 (1 per cent) as **general cropping** and 370 (1 per cent) as **horticulture**. These exclude specialist mushroom growers who, for statistical purposes, are included along with specialists in horses or goats, in the **other types** category. Specialist **pigs and poultry** farms (591) and **mixed** farms (1,305) make up 2 and 4 per cent of the total respectively.

Farm tenure

Around half of the farms in Northern Ireland are based entirely on owned land, the other half having a mixture of owned and rented land (44 per cent) or solely rented land (7 per cent) (Table 4.9). Much of the rented land is taken under the conacre system of short-term lettings which is a particular feature of land tenure throughout Ireland. By renting conacre land, farmers may expand their businesses to grow more crops or keep more stock than would be possible on the area they own. Landowners who are unable or unwilling to farm all or part of their land may let it in conacre, i.e. on a seasonal basis, (nominally for 11 months or 364 days) without entering into a long-term commitment.

Enterprises

Tables 4.16 to 4.24 show the numbers of farms in 1999 having each enterprise and the distribution of enterprise sizes. They show that, in 1999 5,503 farms (18 per cent) had dairy cows, 17,598 (57 per cent) had beef cows and 26,429 (85 per cent) had cattle of some type. The average number of dairy cows per herd was 52.0 compared with an average herd size for beef breeding herds of 18.9 cows. Almost 40 per cent of beef cow herds had fewer than 10 cows.

Over 11,300 farms had breeding sheep, with an average of 124 ewes per flock. There are relatively few large flocks in Northern Ireland, only 63 having 1,000 ewes or more.

Pigs were recorded on 1,151 farms, 45 per cent fewer than in 1998. Most of the pig herds (964 in 1999) had sows, averaging 48.9 sows per herd. Almost half (466) had fewer than 10 sows and 130 had 100 or more. The 1999 figures reflect major changes compared with 1998; while the number of pig herds almost halved, the average herd size rose from 305 to 426.

Although 1,354 farms recorded laying hens on their June census return, for the most part these were very small flocks. Only 131 farms had 1000 or more birds (Table 4.21). A similar situation occurs with broiler flocks, where over three-quarters of the birds were in 119 farm businesses (Table 4.21).

The number of farms growing cereals in 1999 was 4,318, the average cereal enterprise consisting of 9.7 hectares. While almost half (2,026) the farms with cereals had under 5 hectares, the 103 farms which grew 50 hectares or more accounted for almost a quarter of the cereals area. Some 1,303 farms, 4 per cent of the total, grew potatoes in 1999; of these, 200 had 10 hectares or more of the crop.

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Table 4.1 Number and area of farms by area farmed[1], June 1999

Size group (hectares)	By crops and grass area		By total area	
	Farms	Hectares	Farms	Hectares
Nil	483	-	-	-
0.1 - 9.9	8,118	45,453	7,265	40,235
10.0 - 19.9	7,419	107,582	7,020	102,274
20.0 - 29.9	4,843	118,728	4,818	118,779
30.0 - 49.9	5,194	200,375	5,607	217,014
50.0 - 99.9	4,036	273,723	4,758	325,635
100.0 - 199.9	928	119,734	1,383	181,877
200.0 +	111	28,958	281	87,209
Total	**31,132**	**894,553**	**31,132**	**1,073,023**

1. The area farmed is after adjustment for conacre taken or let.

Table 4.2 Number of farms, average area and distribution of area by area farmed, June 1995 - 1999

	Old series		New series[1]		
	1995	**1996**	**1997**	**1998**	**1999**
Number of farms	27,937	27,547	32,118	31,817	31,132
Average area per farm (ha):					
Crops and grass	29.2	29.6	27.5	28.0	28.7
Total area	35.9	36.3	33.3	33.6	34.5
Per cent of crops and grass area farmed in units of :					
(hectares)					
0.1 - 9.9	4.7	4.5	5.5	5.3	5.1
10.0 - 19.9	12.5	12.4	12.5	12.1	12.0
20.0 - 29.9	13.9	13.6	13.6	13.5	13.3
30.0 - 49.9	23.1	23.2	22.9	23.0	22.4
50.0 - 99.9	29.9	30.6	30.0	30.0	30.6
100.0 +	15.8	15.7	15.6	16.1	16.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

1. See page 36.

Table 4.3 Number of farms by business size and area farmed, June 1999

number

Area of crops and grass farmed (hectares)	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Under 10	7,970	555	58	18	8,601
10.0 - 19.9	5,732	1,620	65	2	7,419
20.0 - 29.9	1,911	2,776	152	4	4,843
30.0 - 49.9	719	3,554	908	13	5,194
50.0 - 99.9	154	2,033	1,620	229	4,036
100.0 +	7	228	454	350	1,039
Total	**16,493**	**10,766**	**3,257**	**616**	**31,132**

1. For a description of how business size is measured, see Appendix.

Table 4.4 Number of farms by business size, June 1995 - 1999

number

	Old series		New series[2]		
Business size[1]	1995	1996	1997	1998	1999
Very small	13,889	13,435	16,859	16,470	16,493
Small	10,467	10,359	11,386	11,362	10,766
Medium	3,094	3,215	3,322	3,377	3,257
Large	487	538	551	608	616
Total	**27,937**	**27,547**	**32,118**	**31,817**	**31,132**

1. See Note 1, Table 4.3.
2. See page 36 .

Table 4.5 Number of farms by business size and Less Favoured Area (LFA) category[1], June 1999

number

Business size[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Very small	6,409	5,403	11,812	4,681	71.6
Small	4,649	3,205	7,854	2,912	73.0
Medium	731	1,029	1,760	1,497	54.0
Large	64	155	219	397	35.6
Total	**11,853**	**9,792**	**21,645**	**9,487**	**69.5**

1. For statistical purposes, farms classified as LFA farms have all or most of their land (after adjustment for conacre) within the LFA and are further classified as SDA or DA according to where the greater part of their LFA land lies. Lowland farms have most or all of their land outside the LFA.
2. See Note 1, Table 4.3.

Table 4.6 Number of farms by business size and type, June 1999

number

Business type[1]	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Cereals	341	159	27	4	531
General cropping	113	157	68	34	372
Horticulture	151	150	51	18	370
Pigs & poultry	268	224	74	25	591
Dairy	131	2,249	2,205	454	5,039
Cattle & sheep (LFA)[2]	10,668	5,707	475	41	16,891
Cattle & sheep (lowland)[2]	3,406	1,447	125	7	4,985
Mixed	481	610	184	30	1,305
Others	934	63	48	3	1,048
All types	**16,493**	**10,766**	**3,257**	**616**	**31,132**

1. For a description of how business size and type are measured, see Appendix.
2. See Note 1, Table 4.5.

Table 4.7 Number of farms by business type, June 1995 - 1999

number

Business type[1]	Old series 1995	Old series 1996	New series[2] 1997	New series[2] 1998	New series[2] 1999
Cereals	495	484	544	517	531
General cropping	517	499	443	389	372
Horticulture	402	398	402	389	370
Pigs & poultry	609	598	846	940	591
Dairy	5,409	5,343	5,233	5,121	5,039
Cattle & sheep (LFA)[3]	14,138	14,018	16,955	16,983	16,891
Cattle & sheep (lowland)[3]	4,011	3,823	4,860	4,942	4,985
Mixed	1,448	1,429	1,567	1,524	1,305
Others	908	955	1,268	1,012	1,048
All types	**27,937**	**27,547**	**32,118**	**31,817**	**31,132**

1. See Note 1, Table 4.6 .
2. See page 36.
3. See Note 1, Table 4.5.

Table 4.8 Number of farms by business type and Less Favoured Area (LFA) category[1], June 1999

number

Business type[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Cereals	19	102	121	410	22.8
General cropping	22	94	116	256	31.2
Horticulture	15	93	108	262	29.2
Pigs & poultry	99	193	292	299	49.4
Dairy	1,209	1,832	3,041	1,998	60.3
Cattle & sheep	10,166	6,725	16,891	4,985	77.2
Mixed	119	386	505	800	38.7
Others	204	367	571	477	54.5
All types	**11,853**	**9,792**	**21,645**	**9,487**	**69.5**

1. See Note 1, Table 4.5 .
2. See Note 1, Table 4.6.

Table 4.9 Number of farms by business size and proportion of area owner occupied, June 1999

farms

Owned land as percentage of farmed area	Business size[1]				
	Very small	Small	Medium	Large	All sizes
All owner occupied	10,823	3,854	648	85	15,410
50-<100%	2,596	4,344	1,868	361	9,169
0-<50%	1,539	2,084	712	164	4,499
None owner occupied	1,535	484	29	6	2,054
All farms	**16,493**	**10,766**	**3,257**	**616**	**31,132**
Av. percentage of owned land	**79**	**70**	**67**	**63**	**71**

1. For a description of how business size is measured, see Appendix.

Table 4.10 Average conacre rents by type of use, 1994-1998

£/hectare

Use	1994	1995	1996	1997	1998
Grass	184	195	211	212	201
Potatoes	425	517	524	472	453
Cereals	200	228	299	257	242
Rough grazing	28	30	42	46	59
All uses	182	195	217	210	205

Source: Farm Business Survey.

Table 4.11 Distribution of sales of agricultural land by price paid per hectare, 1998

	Under £2,500	£2,500 - £4,999	£5,000 - £7,499	£7,500 - £9,999	£10,000 & over	All Sales
Number of sales	22	35	38	37	91	223
Area (hectares)	229	477	308	376	761	2,151
Percentage of area	11	22	14	17	35	100
Value (£ '000)	369	1,791	1,954	3,251	11,448	18,813
Percentage of value	2	10	10	17	61	100

Source: Valuation and Lands Agency.

Table 4.12 Number of sales and average price of agricultural land by area sold, 1993 - 1998

	1993	1994	1995	1996	1997	1998
Number of sales	467	420	355	223	257	223
Area (hectares)	4,721	4,605	4,050	3,425	2,912	2,151
Value (£ '000)	20,442	23,285	24,097	18,561	22,879	18,813
Average price (£ per ha) by hectare size group						
2 - 9.9	4,859	5,474	6,339	8,516	9,369	9,946
10 - 19.9	4,216	4,957	7,389	8,407	7,464	9,299
20 and over	3,887	4,791	5,081	3,468	7,019	7,976
All sizes (unweighted)	4,330	5,056	5,950	5,419	7,858	9,618

Source: Valuation and Lands Agency.

Notes:
1. Figures have been revised to exclude land sold as development or building land.
2. The figures are lagged by three months to reflect the delay between the date at which the sale is agreed and the date at which it is included in the analysis.
3. Land sales of less than two hectares are not included in this return.

Table 4.15 Distribution of numbers of livestock, hectares of crops, full-time labour and output by business size, June 1999

A. Number of farms having the item
B. Total for each item ('000)
C. Percentage of Northern Ireland total of each item

Item	Very small			Small			Medium			Large			All farms		
	A	B	C	A	B	C	A	B	C	A	B	C	A	B	C
Cattle															
Total	13,002	305	*18*	9,766	742	*43*	3,095	494	*29*	566	178	*10*	26,429	1,719	*100*
Dairy cows	174	1	*0*	2,480	65	*23*	2,350	152	*53*	499	69	*24*	5,503	286	*100*
Beef cows	8,868	78	*24*	7,367	195	*59*	1,210	51	*15*	153	8	*3*	17,598	332	*100*
Slaughter cattle >1year	8,859	116	*27*	7,242	196	*46*	2,325	90	*21*	396	23	*5*	18,822	426	*100*
Sheep															
Total	4,610	467	*16*	5,451	1,657	*57*	1,235	641	*22*	184	144	*5*	11,480	2,909	*100*
Ewes	4,513	224	*16*	5,432	803	*57*	1,227	310	*22*	183	68	*5*	11,355	1,405	*100*
Pigs															
Total	405	15	*3*	466	118	*24*	226	182	*37*	54	174	*36*	1,151	490	*100*
Sows	335	2	*4*	381	12	*24*	198	17	*36*	50	17	*36*	964	47	*100*
Other pigs over 20 kg	185	8	*3*	338	76	*24*	203	120	*38*	51	110	*35*	777	314	*100*
Poultry															
Total	1,071	569	*4*	856	6,138	*41*	299	5,705	*38*	34	2,635	*18*	2,260	15,048	*100*
Layers	774	156	*7*	467	788	*37*	100	667	*31*	13	529	*25*	1,354	2,140	*100*
Crops															
Oats	163	0	*15*	258	1	*43*	114	1	*30*	34	0	*12*	569	3	*100*
Wheat	44	0	*3*	161	1	*27*	162	1	*40*	94	1	*30*	461	3	*100*
Barley	980	4	*11*	1,787	14	*40*	931	12	*33*	262	6	*17*	3,960	36	*100*
Potatoes	293	0	*4*	658	2	*29*	265	3	*34*	87	2	*33*	1,303	8	*100*
Crops & grass	16,141	2,064	*23*	10,662	3,962	*44*	3,238	2,173	*24*	608	748	*8*	30,649	8,946	*100*
Rough grazing	3,477	30	*19*	3,782	83	*53*	971	38	*24*	152	8	*5*	8,382	159	*100*
Total area	**16,493**	**241**	*23*	**10,766**	**486**	*45*	**3,257**	**260**	*24*	**616**	**85**	*8*	**31,132**	**1,073**	*100*
Labour															
Full-time labour force[2]	5,929	7	*26*	9,072	12	*44*	3,212	6	*22*	614	2	*8*	18,827	27	*100*
Output															
SGM[3]	16,493	66	*10*	10,766	244	*38*	3,257	235	*36*	616	105	*16*	31,132	650	*100*

Business size[1]

1. For a description of how business size is measured, see Appendix.
2. The full-time labour force includes full-time farmers, partners, spouses and other full-time workers.
3. Figures in Column B are in million euros; for a definition of Standard Gross Margins, see Appendix.

Table 4.16 Distribution of (a) dairy cows and (b) beef cows by herd size, June 1999

	Dairy cows				Beef cows			
Number per farm	Numbers of Farms	Numbers of Cows	Percentages of Farms	Percentages of Cows	Numbers of Farms	Numbers of Cows	Percentages of Farms	Percentages of Cows
1 - 2	57	86	1.0	0.0	1,637	2,523	9.3	0.8
3 - 4	40	140	0.7	0.0	1,557	5,441	8.8	1.6
5 - 9	181	1,307	3.3	0.5	3,730	25,672	21.2	7.7
10 - 14	302	3,643	5.5	1.3	2,820	33,143	16.0	10.0
15 - 19	341	5,793	6.2	2.0	1,987	33,208	11.3	10.0
20 - 29	792	19,112	14.4	6.7	2,615	61,989	14.9	18.7
30 - 39	745	25,531	13.5	8.9	1,315	44,340	7.5	13.3
40 - 49	731	32,123	13.3	11.2	722	31,545	4.1	9.5
50 - 59	538	28,840	9.8	10.1	441	23,505	2.5	7.1
60 - 69	410	26,120	7.5	9.1	248	15,832	1.4	4.8
70 - 99	778	63,677	14.1	22.2	323	26,275	1.8	7.9
100 - 199	543	69,427	9.9	24.2	181	23,227	1.0	7.0
200 & over	45	10,551	0.8	3.7	22	5,462	0.1	1.6
Total	**5,503**	**286,350**	**100.0**	**100.0**	**17,598**	**332,162**	**100.0**	**100.0**
Total 1998	***5,627***	***287,661***			***17,874***	***344,704***		
Average		**52.0**				**18.9**		
Average 1998		***51.1***				***19.3***		

Table 4.17 Distribution of (a) slaughter cattle one year-old and over and (b) total cattle by herd size, June 1999

	Cattle one year old and over, intended for slaughter				Total cattle			
Number per farm	Numbers of Farms	Numbers of Cattle	Percentages of Farms	Percentages of Cattle	Numbers of Farms	Numbers of Cattle	Percentages of Farms	Percentages of Cattle
1 - 4	3,738	8,942	19.9	2.1	1,066	3,111	4.0	0.2
5 - 9	3,510	24,024	18.6	5.6	1,983	13,861	7.5	0.8
10 - 19	4,482	62,218	23.8	14.6	3,922	56,059	14.8	3.3
20 - 29	2,552	61,252	13.6	14.4	3,296	80,215	12.5	4.7
30 - 39	1,496	50,763	7.9	11.9	2,525	86,659	9.6	5.0
40 - 49	933	41,086	5.0	9.7	2,140	94,963	8.1	5.5
50 - 69	1,027	59,489	5.5	14.0	3,138	184,436	11.9	10.7
70 - 99	619	50,653	3.3	11.9	3,046	253,690	11.5	14.8
100 - 199	417	54,668	2.2	12.8	3,879	533,961	14.7	31.1
200 - 299	37	8,607	0.2	2.0	1,002	237,523	3.8	13.8
300 & over	11	3,853	0.1	0.9	432	174,057	1.6	10.1
Total	**18,822**	**425,555**	**100.0**	**100.0**	**26,429**	**1,718,535**	**100.0**	**100.0**
Total 1998	***19,294***	***435,013***			***26,955***	***1,767,343***		
Average		**22.6**				**65.0**		
Average 1998		***22.5***				***65.6***		

Table 4.18 Distribution of (a) ewes and (b) total sheep by flock size, June 1999

	Ewes				Total sheep			
Number	**Numbers of**		**Percentages of**		**Numbers of**		**Percentages of**	
per farm	**Farms**	**Ewes**	**Farms**	**Ewes**	**Farms**	**Sheep**	**Farms**	**Sheep**
1 - 24	1,683	24,427	309.9	35.2	793	10,960	438.1	47.2
25 - 49	2,220	80,681	408.8	116.2	1,166	42,724	644.2	183.9
50 - 99	2,872	202,988	528.9	292.4	2,103	154,870	1161.9	666.8
100 - 199	2,589	357,105	476.8	514.4	2,744	393,738	1516.0	1695.2
200 - 299	1,006	239,770	185.3	345.4	1,659	406,863	916.6	1751.7
300 - 399	446	151,458	82.1	218.2	967	334,201	534.3	1438.8
400 - 499	200	87,782	36.8	126.4	594	264,689	328.2	1139.6
500 - 699	199	114,489	36.6	164.9	677	397,584	374.0	1711.7
700 - 999	77	61,599	14.2	88.7	405	332,226	223.8	1430.3
1,000 - 1,499	49	57,229	9.0	82.4	242	284,276	133.7	1223.9
1,500 & over	14	27,334	2.6	39.4	130	286,747	71.8	1234.5
Total	**11,355**	**1,404,862**	**2091.2**	**2023.5**	**11,480**	**2,908,878**	**6342.5**	**12523.7**
Total 1998	***11,521***	***1,449,824***			***11,660***	***2,986,612***		
Average		**123.7**				**253.4**		
Average 1998		***125.8***				***256.1***		

Table 4.19 Distribution of breeding sows by herd size, June 1999

	Sows (including gilts)			
Number	**Numbers of**		**Percentages of**	
per farm	**Farms**	**Sows**	**Farms**	**Sows**
1 - 4	308	705	12.1	1.2
5 - 9	158	1,025	6.2	1.7
10 - 19	122	1,576	4.8	2.6
20 - 29	60	1,401	2.4	2.3
30 - 49	91	3,544	3.6	5.8
50 - 99	95	6,808	3.7	11.1
100 - 199	85	11,773	3.3	19.2
200 - 299	15	3,474	0.6	5.7
300 & over	30	16,807	1.2	27.4
Total	**964**	**47,113**	**37.8**	**76.9**
Average		**48.9**		
Average 1998		***35.5***		

Table 4.20 Distribution of (a) fattening pigs 20kg and over and (b) total pigs by herd size, June 1999

	Fattening pigs 20kg & over				Total pigs			
Number	**Numbers of**		**Percentages of**		**Numbers of**		**Percentages of**	
per farm	**Farms**	**Pigs**	**Farms**	**Pigs**	**Farms**	**Pigs**	**Farms**	**Pigs**
1 - 9	93	372	5.5	1.5	260	843	32.8	7.7
10 - 19	84	1,130	5.0	4.6	131	1,803	16.5	16.5
20 - 49	123	3,854	7.3	15.8	178	5,927	22.4	54.1
50 - 99	80	5,581	4.8	22.8	110	7,692	13.9	70.2
100 - 199	93	12,938	5.5	53.0	103	14,426	13.0	131.6
200 - 399	98	27,575	5.8	112.9	101	28,784	12.7	262.6
400 - 999	121	75,113	7.2	307.5	134	90,050	16.9	821.6
1,000 - 1,999	48	61,327	2.9	251.1	82	111,108	10.3	1013.8
2,000 & over	37	125,978	2.2	515.7	52	229,641	6.6	2095.3
Total	**777**	**313,868**	**46.2**	**1284.9**	**1,151**	**490,274**	**145.1**	**4473.3**
Average		**403.9**				**426.0**		
Average 1998		***324.5***				***305.5***		

Table 4.21 Distribution of (a) laying hens and (b) broilers by flock size, June 1999

Number per farm	Laying hens				Broilers			
	Numbers of		Percentages of		Numbers of		Percentages of	
	Farms	Hens ('000)	Farms	Hens	Farms	Broilers ('000)	Farms	Broilers
1 - 999	1,223	22	227.3	0.1	58	1	13.2	0.0
1,000 - 4,999	32	97	5.9	0.3	5	15	1.1	0.1
5,000 - 9,999	40	261	7.4	0.9	18	130	4.1	0.6
10,000 - 19,999	31	409	5.8	1.4	57	856	12.9	3.6
20,000 - 29,999	11	246	2.0	0.9	52	1,116	11.8	4.7
30,000 - 49,999	12	481	2.2	1.7	67	2,628	15.2	11.2
50,000 & over	5	623	0.9	2.2	52	4,596	11.8	19.6
Total	**1,354**	**2,140**	**251.7**	**7.4**	**309**	**9,342**	**70.1**	**39.7**
Total 1998	***1,435***	***2,561***			***317***	***8,855***		
Average		**1,581**				**30,233**		
Average 1998		***1,785***				***27,934***		

Table 4.22 Distribution of total poultry by flock size, June 1999

Number per farm	Total poultry			
	Numbers of		Percentages of	
	Farms	Birds ('000)	Farms	Birds
1 - 999	1,616	47	68.0	0.3
1,000 - 4,999	103	311	4.3	2.0
5,000 - 9,999	175	1,194	7.4	7.6
10,000 - 19,999	150	2,124	6.3	13.6
20,000 - 29,999	70	1,530	2.9	9.8
30,000 - 49,999	81	3,152	3.4	20.2
50,000 & over	65	6,690	2.7	42.9
Total	**2,260**	**15,048**	**64.4**	**62.6**
Total 1998	***2,357***	***15,172***		
Average		**6,658**		
Average 1998		***6,437***		

Table 4.23 Distribution of (a) barley and (b) wheat by area of crop, June 1999

Area per farm (ha)	Barley				Wheat			
	Number of Farms	Area of Barley (ha)	Percentages of Farms	Percentages of Barley	Number of Farms	Area of Wheat (ha)	Percentages of Farms	Percentages of Wheat
under 1	118	77	21.9	0.3	34	26	7.7	0.1
1 - 4.9	1,750	4,851	325.3	16.8	234	606	53.1	2.6
5 - 9.9	995	6,995	184.9	24.3	101	707	22.9	3.0
10 - 19.9	737	10,223	137.0	35.4	64	845	14.5	3.6
20 - 29.9	184	4,329	34.2	15.0	16	409	3.6	1.7
30 - 39.9	67	2,292	12.5	7.9	4	145	0.9	0.6
40 - 49.9	36	1,626	6.7	5.6	1	40	0.2	0.2
50 & over	73	5,319	13.6	18.4	7	475	1.6	2.0
Total	**3,960**	**35,712**	**736.1**	**123.8**	**461**	**3,252**	**104.5**	**13.8**
Total 1998	***4,036***	***34,822***			***663***	***7,146***		
Average		**9.0**				**7.1**		
Average 1998		***8.6***				***10.8***		

Table 4.24 Distribution of total cereals by area of crop, June 1999

Area per farm (ha)	Total cereals			
	Number of Farms	Area of Cereals (ha)	Percentages of Farms	Percentages of Cereals
under 1	137	89	3.2	0.2
1 - 4.9	1,889	5,212	43.7	12.4
5 - 9.9	1,031	7,215	23.9	17.2
10 - 19.9	817	11,391	18.9	27.2
20 - 29.9	213	5,050	4.9	12.0
30 - 39.9	81	2,750	1.9	6.6
40 - 49.9	47	2,119	1.1	5.1
50 & over	103	8,117	2.4	19.4
Total	**4,318**	**41,942**	**100.0**	**100.0**
Total 1998	***4,467***	***44,696***		
Average		**9.7**		
Average 1998		***10.0***		

Table 4.25 Distribution of potatoes by area of crop, June 1999

Area per farm (ha)	Potatoes			
	Number of Farms	Area of Potatoes (ha)	Percentages of Farms	Percentages of Potatoes
under 1	353	151	27.1	2.0
1 - 4.9	574	1,363	44.1	18.1
5 - 9.9	176	1,227	13.5	16.3
10 - 19.9	112	1,508	8.6	20.0
20 - 29.9	41	975	3.1	12.9
30 - 39.9	19	631	1.5	8.4
40 - 49.9	12	534	0.9	7.1
50 & over	16	1,153	1.2	15.3
Total	**1,303**	**7,541**	**100.0**	**100.0**
Total 1998	***1,395***	***7,513***		
Average		**5.8**		
Average 1998		***5.4***		

5. INCOMES AT FARM LEVEL

Methodological notes

This section contains information, collected in the Farm Business Survey (FBS), on average incomes for the main types and sizes of farm business in Northern Ireland. A full analysis of FBS results is published in 'Farm Incomes in Northern Ireland 1998/99'

Farms in the FBS are classified by type and size according to the EU farm classification system. Details of the typology system are set out in the Commission Decision 86/377/EEC and an abbreviated description appears in the Appendix.

The accounting concepts and practices used in compiling income data from FBS information differ from those on which the aggregate calculation, presented in Section 2, are based. The income measures derived from the two sources are not, therefore, directly comparable. It should be noted that the latest year for which FBS data are available is 1998/99, i.e. broadly equivalent to the 1998 calendar year. However, provisional income estimates are also presented below for the 1999/2000 year.

Income measures

The main farm level income indicator is **net farm income**, in which all farms are treated as though they were tenanted. This enables comparisons to be made among farms of different tenure across the United Kingdom.

Trends in net farm income since 1993/94 are presented in Table 5.1 and show the deterioration which has occurred in farm incomes since 1995/96. The net farm incomes presented in Table 5.2 are for farms which were in the FBS sample in both the 1997/98 and 1998/99 account years. These constitute an identical sample of 346 farm businesses in the size range 8-99.9 ESUs; they are representative of 98 per cent of the farms in this size range in Northern Ireland. The only significant type of farm business excluded from the FBS in Northern Ireland is horticulture.

Income changes by farm type in 1998/99

In 1998/99, the average net farm income across all farm types fell by almost 80 per cent. This was the third consecutive year that the average net income for all farm types in the FBS had fallen and followed declines of 66 per cent in 1997/98 and 30 per cent in 1996/97. The severity of the downturn in incomes was emphasised by the fact that negative net farm incomes were recorded on four farm types, namely **lowland cattle and sheep, pigs and poultry, cereals** and **mixed**.

In 1998/99, the average value of farm output fell by 11 per cent with the largest declines on **pigs and poultry** and **lowland cattle and sheep** farms. The main factors contributing to the fall in the value of output were lower producer prices for cattle, pigs, sheep, milk and cereals and a sharp drop in pig numbers. Total costs also fell across all farm types, by 6 per cent on average. In the main, these savings were due to lower prices for feed, fertiliser and fuel and oil for machinery. Depreciation provisions for machinery and buildings also declined, reflecting a continued reduction in capital expenditure.

Provisional estimates of income in 1999/2000

The income estimates described below relate to an account year which is broadly equivalent to the 1999 calendar year. These estimates were prepared in mid-January 2000. They are based on the most recent information on prices, animal populations and marketings, and crop areas and yields. They should be regarded only as broad indications of the levels of income in 1999/2000, as a small change between the expected and actual out-turn value for either output or input can lead to a large change in income.

The strength of sterling continued to exert downward pressure on producer prices in 1999/2000 and also had a negative impact on some market support measures, notably Sheep Annual Premium. Average producer prices for milk, lambs, pigs, cereals and potatoes fell. In contrast, average prices for beef and store cattle improved. However, values of breeding livestock declined. Feed prices eased during the year, though this saving was offset to some extent by a greater use of cattle concentrates which resulted from the late turnout in 1999. The continuing squeeze on incomes led to reductions in capital expenditure on land and buildings and machinery.

The value of farm output is forecast to have fallen by about 3 per cent across all types. The cost of inputs is expected to have decreased on each farm type, with an average reduction of about 2 per cent across all farms. These changes are expected to have led to a reduction in net farm income on each farm type and the average net farm income across all farm types is expected to have been negative in 1999/2000. It is anticipated that only two farm types, **dairy** and **general cropping**, will have achieved positive net farm incomes. **Pigs and poultry**, **mixed**, **lowland cattle and sheep, LFA cattle and sheep** and **cereals** types are all expected to have recorded negative net farm incomes.

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Table 5.1 Indices of average net farm income in real terms by farm type, 1993/94 to 1999/2000

Indices: 1989/90 - 1991/92 = 100

Business type	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/2000 (Provisional)
Cereals	95	128	194	66	-75	-9	-10
General cropping	248	949	499	-120	317	969	630
Pigs and poultry	20	29	58	52	21	-112	-140
Dairy	126	126	169	107	55	36	20
Cattle and sheep (LFA)	166	126	145	145	74	4	-
Cattle and sheep (lowland)	137	83	-31	-39	-93	-125	-150
Mixed	78	118	117	62	-17	-8	-10

Table 5.2 Net farm income by business size and type, 1997/98 and 1998/99

£'000 per farm

Business type	Small (8-39.9 ESU)		Medium (40-99.9 ESU)		All sizes (8-99.9 ESU)	
	1997/98	1998/99	1997/98	1998/99	1997/98	1998/99
Cereals	-6.2	-0.2	-0.7	-3.4	-5.4	-0.7
General cropping	14.5	11.0	6.0	50.8	10.0	31.7
Pigs and poultry	0.1	-16.1	15.6	-34.2	3.6	-20.1
Dairy	3.1	-0.7	13.3	12.0	8.1	5.5
Cattle and sheep (LFA)	2.3	0.4	12.8	-1.9	3.1	0.2
Cattle and sheep (lowland)	-5.9	-7.3	15.9	10.8	-4.3	-6.0
Mixed	-7.2	-3.4	-2.3	-0.7	-6.1	-2.8

Table 5.3 Distribution of farms by net farm income and by farm type, 1998/99

per cent

	Dairy	Cattle and sheep (LFA)	Mixed	All types
Net farm income (£'s)				
Less than 0	31	49	57	46
1 - 2,499	6	11	5	9
2,500 - 4,999	11	7	6	8
5,000 - 7,499	10	12	5	10
7,500 - 9,999	8	9	2	6
10,000 - 14,999	15	9	13	11
15,000 - 19,999	6	2	9	4
20,000 - 29,999	6	1	-	3
> 30,000	7	-	3	3
Total	**100**	**100**	**100**	**100**
Number of farms in sample	142	127	29	346

Table 5.4 Average tenant's capital by farm type, 1998/99

£'000 per farm

	Cereals	General cropping	Pigs and poultry	Dairy	Cattle and sheep (LFA)	Cattle and sheep (lowland)	Mixed
Farm size (ESU)	23.5	43.9	25.3	43.4	21.3	20.1	28.2
Total farm area (ha)	51.2	59.1	23.5	46.7	87.0	48.8	58.8
Net farm income	-0.7	31.7	-20.1	5.5	0.2	-6.0	-2.8
Total tenant's capital	**41.4**	**84.1**	**72.4**	**67.8**	**49.3**	**57.9**	**71.5**
of which:							
Short term (working) capital							
trading livestock	6.3	18.6	42.2	12.0	15.1	23.5	33.3
crops	5.5	6.8	4.1	3.8	2.8	3.3	5.9
other	0.8	2.1	0.7	0.4	0.4	0.5	0.8
Medium term capital							
breeding livestock	2.0	1.9	10.0	29.9	17.6	15.6	9.4
machinery	26.9	54.7	15.5	21.7	13.4	15.0	22.1

Table 5.5 Average closing valuations by farm type, 1997/98 and 1998/99

£'000 per farm [1]

		Dairy		Cattle and sheep (LFA)		Mixed	
		1997/98	**1998/99**	**1997/98**	**1998/99**	**1997/98**	**1998/99**
	ASSETS						
	Total fixed assets	423.8	395.2	283.0	283.5	355.1	354.5
	of which:						
	land and buildings	369.7	344.7	245.5	247.9	318.2	320.9
	other fixed assets	54.1	50.5	37.5	35.5	37.0	33.6
	Total current assets	22.6	19.6	26.9	22.9	48.7	42.8
	of which:						
	trading livestock	17.8	14.6	20.3	16.4	43.0	37.2
	debtors/other short term lending	4.6	4.9	6.5	6.5	5.7	5.6
	cash in hand and at bank	0.2	0.1	0.1	-	-	-
A	**Total assets**	**446.4**	**414.8**	**309.8**	**306.3**	**403.9**	**397.3**
	LIABILITIES						
	Total long/medium term loans	14.3	14.9	4.0	3.8	7.2	8.0
	of which:						
	bank/other institutional	13.2	14.0	4.0	3.8	7.2	8.0
	Total short term loans	13.0	12.9	9.0	8.2	6.5	4.4
	of which:						
	bank overdraft	9.9	9.6	7.4	6.9	4.7	3.3
B	**Total external liabilities**	**27.3**	**27.8**	**13.0**	**12.0**	**13.7**	**12.4**
	NET WORTH (A-B)	**419.1**	**387.0**	**296.8**	**294.4**	**390.1**	**384.8**

1. Data are averages within each farm type.

APPENDIX

STATISTICAL AND METHODOLOGICAL NOTES

AGGREGATE AGRICULTURAL ACCOUNT - NEW SERIES

Major revisions were made in 1998 to the **Aggregate Agricultural Account (AAA)** from which agriculture's output, input, value added and income are obtained. These changes were necessary to bring the AAA into line with the new United Nations *System of National Accounts 1993,* the subsequent *European System of Accounts 1995* and the revised *EU Manual on the Economic Accounts for Agriculture 1997,* introduced throughout the UK in 1998.

The main changes to the AAA are as follows:

(i) Dropping the 'national farm' concept under which direct inter-farm sales and on-farm use of finished products such as cereals were excluded. Such transactions will now be included as both additional output and input, in most cases leaving gross and net product and TIFF unchanged.

(ii) Changing the AAA from a 'branch' towards a 'sector' basis. Previously, the AAA covered all agricultural products irrespective of the nature of the establishments in which they are produced and ignored other, non-agricultural activity taking place on farms. Now, agricultural activity will include other inseparable 'non-agricultural secondary activities', such as pony trekking, which are conducted on-farm and for which the inputs cannot be separated from farming inputs.

(iii) Changing the treatment of subsidy payments from a cash to an accruals basis, i.e. from 'as paid' to 'as due'. This means that subsidies such as the Suckler Cow Premium and Arable Area Payments will be counted in the year when they are due rather than in the year when they are paid. (The detailed allocation of subsidies is documented in footnotes to Table 2.1.)

(iv) Including rent paid on 'conacre' (short-term lettings) to non-farming persons. Conacre rent was previously omitted from the AAA because short-term renting was deemed to be a transfer within the agricultural branch.

(v) Including capital formation in, and depreciation of, breeding livestock. Previously only net volume changes were included.

Income indicators

The main indicator of the return to all of the factors of production, i.e. land, labour, capital and 'enterprise', is **net value added** (strictly, net value added at factor cost). This is defined as gross output less expenditure on material and service inputs purchased from outside the sector, less consumption of fixed capital (or depreciation) plus subsidies not paid on products. Hence:

Gross output – gross input = **gross value added**

Gross value added – consumption of fixed capital + subsidies not paid on products = **net value added** (at factor cost)

The income of farm families is given by **total income from farming (TIFF)**. This includes returns to farmers, their spouses and family workers for their labour and 'enterprise' and on their own capital invested; it therefore represents the income of all those with an entrepreneurial involvement in farming. It is the preferred income measure, conforming to national and international accounting practice and forming the basis of a Eurostat indicator used for income comparisons across the EU. The derivation of TIFF is:

Net value added (at factor cost)
less paid labour (also known as 'compensation of employees')
interest
net rent
= Total income from farming (TIFF)

Series showing net value added and TIFF are presented in Table 2.2 as indices in current prices and in ‘real’ terms, i.e. after allowing for inflation.

Cash flow

An estimate of **cash flow** is shown in Table 2.4; this omits the effects of stock changes, but takes into account receipts of capital grants, expenditure on capital investment and changes in borrowings. It is a useful indicator of cash available to farm families from farming, but should not be considered as an alternative measure of income.

Reliability of estimates

Since agricultural income measures are 'residuals' between two large aggregates, they are sensitive to quite small changes in either aggregate. For example, 1999 total income from farming would change by $\pm$25 per cent if there were one per cent changes (in opposing directions) in gross output and gross input.

Provisional estimates

‘Provisional' figures for 1999 presented in this *Review* are based on data available in December 1999/January 2000, in most cases covering the first 9-11 months of the year. However, for some items less information was available. For example, information on some input costs will be obtained only when Farm Business Survey results for 1999/2000 are produced. Provisional figures are therefore subject to revision when complete information becomes available. Revised figures will be published in next year’s *Review*.

Revisions to income series

The 1998 figures have been revised, as more complete information has become available. Net value added in 1998 is now estimated at £236 million (previously £226 million) while total income from farming is now estimated at £90.5 million (previously £81.9 million). Because of the methodological changes introduced last year (see above), the income figures for 1997 and earlier years have been revised substantially from those published in editions prior to 1998.

CENSUS

Statistics on employment on farms (Tables 2.14 and 2.15), crop areas and livestock numbers (Section 3) and farm structure (Section 4) are derived from the June agricultural census. This is an annual statistical survey which, in 1998 and 1999, was conducted by means of a sample survey in which forms were issued to all the larger businesses but to only half those classified as ‘Very Small’. Although strictly no longer a ‘census’, it will continue to be referred to as such because farmers are familiar with the term. Those selected for the sample were required to furnish information relating to the level of activity on their farm on the 1 June 1999.

The records which were aggregated to provide the published results include 1999 returns from the sampled farms and the previous year’s returns from those not in the sample for 1999. The latter were “trended” to reflect the changes between 1998 and 1999 as recorded by the sampled farms. For new farms from which a 1999 return was not obtained, estimates were based on the information available in the Integrated Administration and Control System (IACS) and other administrative systems.

Revised coverage

The statistical definition of a farm, which was changed in 1997, is based on separate business status as applied under the Integrated Administration and Control System (IACS), having previously been based on land ownership. The census now covers **all active farm businesses having one hectare or more of farmed land, whether owned, leased or taken in conacre, and those with under one hectare having any cattle, sheep or pigs or with significant poultry or horticultural activity.**

Over the past 50 years, the following criteria have been used to determine the coverage of the agricultural census in Northern Ireland:

Years	**Census methods and coverage**
Until 1954	Census information was collected by police enumerators who identified and visited all farms, including any under one acre (0.4 hectares), and recorded in special books information given to them orally by the farmer.
1954-1972	A postal census was introduced in 1954. This used the list of farmers which had been identified in the 1953 census, but included only those of **one acre or more.** From this time onwards a distinction was made between **‘main’** holdings which were included in the census and **‘minor’** holdings which were surveyed on a sample basis using simplified questions. Estimates were made for their total crop areas and livestock numbers but these holdings were not included in the count of farms.
1973-1980	n 1973, in conformity with a similar change in the rest of the United Kingdom, an alteration was made in the scope of the census in Northern Ireland. From then until 1980, the main census covered all holdings which had **at least 10 acres (4 hectares) of land** with the addition of any below that size which had any full-time agricultural workers or whose stock and cropping amounted to an annual estimated labour requirement of more than 40 man-days. This definition of a ‘main’ holding removed some 7,700 holdings from the old register but, at the same time, brought back a number of ‘minor’ holdings of less than one acre. The net reduction in the number of ‘main’ holdings arising from these adjustments was some 5,500.

1981-1996	A further change was made between 1980 and 1981 when, with the introduction of a new system of farm classification, and with changes to the minimum threshold in other parts of the UK, the threshold for inclusion in the 'main' census in Northern Ireland was raised. This new threshold restricted the census to holdings which had (a) a total land area (owned or taken on long-term lease) of 6 hectares or more or (b) any full-time workers other than the farmer or (c) a farm business size of 1,000 ECUs of Standard Gross Margin. This change resulted in the exclusion of a further 6,690 'minor' holdings from the main census between 1980 and 1981.
1997	The basis of the agricultural census was changed in 1997 from a 'census register' to a central register of all of the Department's 'clients'. The change was made possible as a result of the introduction of IACS and of work undertaken in DANI to streamline administrative functions. This resulted in a common means of identification across all schemes, with each farmer who is in contact with DANI being allocated a unique Client Reference Number and each "Client" being linked to a Business Identifier. The population surveyed in 1997 consisted of one 'Client' in each business for which a census return with crops and/or livestock was obtained in the preceding year or which had received a subsidy in respect of crops or livestock during the preceding 15 months. Also included were those with a milk quota and those known by DANI to be engaged in the production of pigs, poultry, potatoes or horticultural crops. The distinction between 'main' and 'minor' holdings was discontinued.
1998-1999	A further 166 pig farms with no owned land were added to the population in 1998 and sampling was introduced. Census forms were issued only to half the **'very small'** farms.

Revised data

From 1997 onwards all census data are based on the new register. Crop areas (Table 3.2), livestock numbers (Table 3.3) and the numbers of agricultural workers (Table 2.14), shown for years before 1997 were revised on a provisional basis. Proportional changes, between 1996 and 1997, for farms, which appeared on both the old and new registers, were used to establish a link to the previous series. Thus, the figures shown for 1994 to 1998 in Tables 2.14, 3.2 and 3.3 are, as far as possible, on a consistent basis. No revisions have been made to the numbers of farms for the years prior to 1997, either in total or with particular enterprises. Therefore, in Section 4, where numbers of farms are shown for 1995 and 1996, these are on the old basis and are not comparable with the figures shown for 1997 to 1999. They have been shown to give general indications of trends.

Farm business size

Farm business size is determined by calculating each farm's total Standard Gross Margin (SGM). The gross margin of an enterprise is its total output less the variable costs, which are directly attributable to it. Standards or norms have been calculated for all major enterprises. The total SGM for each farm is calculated by multiplying its crop areas and livestock numbers by the appropriate SGM coefficients and then summing the result for all enterprises on the farm.

To show year-to-year changes in business size, the enterprise SGM coefficients are held constant for a number of years. The current series (introduced in 1993) is based on the average prices during the period 1987-89. For a list of these values, see '*The Agricultural Census in Northern Ireland: Results for 1998*'. Because the system of classifying business size was developed for use within the EU statistical network, SGMs are measured in euros.

In UK agricultural statistics, business size is described in terms of five SGM size bands. These are:

Term	1987-1989 SGM (euro*)	European Size Units
Very small	<9,600	less than 8
Small	9,600-<48,000	8-<40
Medium	48,000-<120,000	40-<100
Large	120,000-<240,000	100-<200
Very large	240,000 or more	200 or more

*1 euro = 1 ECU (was = £0.68 in 1987-1989).

Since there are few farms in the **very large** size range in Northern Ireland, these are included in the **large** category.

In broad terms, **very small** farms are not big enough to provide full-time employment for one person, **small** farms are generally 1-2 person businesses, **medium** are 2-3 and **large** farms involve 3 or more persons.

Farm business type

The EU system of classifying farms according to farm type (on which the UK system is based) is set out in Commission Decision 85/377/EEC. Although 75 different types are recognised by the EU, for UK statistical purposes these are grouped into 9 robust categories, which have particular relevance to UK conditions. These are:

Type	Definition
Cereals	farms with more than 2/3 of their total SGM in cereals, oilseeds and set aside.
General cropping	farms which do not qualify as cereals farms but have more than 2/3 on their total SGM in arable (not horticultural) crops or in a mixture of arable and horticultural crops and where arable crops account for more than 1/3 of total SGM.
Horticulture	farms with more than 2/3 of their total SGM in horticultural crops (excluding specialist mushroom growers).
Pigs & poultry	farms with more than 2/3 of their total SGM in pigs and/or poultry.
Dairy	farms with more than 2/3 of their total SGM in dairying (including associated young stock).
Cattle & sheep (LFA)	farms wholly or mainly in the Less Favoured Areas which do not qualify as dairy farms but have more than 2/3 of their total SGM in cattle and sheep.
Cattle & sheep (lowland)	farms entirely or mainly outside the Less Favoured Areas, which do not qualify as dairy farms but have more than 2/3 their total SGM in cattle and sheep.
Mixed	farms which have no dominant enterprise and do not fit into the above types.

Other types farms which specialise in enterprises which do not fit in well with mainstream agriculture, such as specialist mushrooms, specialist goat and specialist horse farms; also farms which are unclassified because they have no crops or stock at June (but which made hay/silage or intended to restock at a later date).

A fuller description of the system is given in '*Farm Incomes in the United Kingdom'* 1991/92 Edition (HMSO, 1993) and in '*The Digest of Agricultural Census Statistics, UK 1993*' (HMSO, 1994).

Less Favoured Areas

The term **Less Favoured Areas (LFA)** is used to describe those parts of the country which, because of the relatively poor agricultural conditions which prevail there, have been so designated under EU legislation. This recognition allows those who farm in such areas to apply for special support, such as Hill Livestock Compensatory Allowances (HLCAs) and for additional benefits under various capital grant and forestry schemes.

The LFA is composed of a **Severely Disadvantaged Area (SDA)**, which is the original LFA as designated in 1975 (487,000 hectares), and the **Disadvantaged Area (DA)** which was designated following reviews in 1984 (335,000 hectares) and 1990 (3700 hectares). (The areas designated include some non-agricultural land).

For statistical purposes, farms are termed **LFA farms** if at least half the farmed land is in the LFA; otherwise they are classified as **lowland farms**. The LFA farms are then sub-classified into **SDA farms** and **DA farms** according to whichever area is the greater.

FARM BUSINESS SURVEY (FBS)

The annual FBS is based on a sample of about 400 individual farms which keep detailed financial records, enabling outputs, inputs and incomes on farms to be analysed by farming type and business size. Trends in farm incomes from the FBS are produced by comparing results from identical samples of farms participating in the survey in successive years. Indices showing trends in net farm incomes are derived by linking the results of identical samples from successive pairs of years (Table 5.1).

Although most farms in Northern Ireland are owner occupied, FBS results are analysed according to conventions used throughout the UK to determine **net farm income**. This measure of income represents the return to the farmer and spouse for their manual and managerial effort and on the tenant-type assets of the farm business. The latter include livestock, crops and machinery but not land and buildings. Hence, an imputed rent for owned land is included in fixed costs as well as the actual cost of any rented land. This enables the trends in net farm income for Northern Ireland farming types to be compared directly with similar data for other countries and regions of the UK.

Differences between FBS and AAA

The coverage and methodology of the FBS differ in several important respects from the Aggregate Agricultural Account (AAA) presented in Section 2. The FBS does not cover **very small** or **large** (including **very large**) farms or **horticultural** businesses; FBS account years end between October and May, with an average account ending date of mid-February, while the AAA relates to calendar years; net farm income is calculated before deduction of interest on farming loans, while total income from farming in the AAA is net of interest on borrowings; except in the case of breeding livestock appreciation, net farm income includes changes in both the volume and price of crops and livestock, whereas the AAA includes volume changes only; and net farm income is net of an imputed rent on all owner-occupied land, while in the AAA only actual rent paid to non-farming persons is deducted. For these reasons no direct comparison between the FBS and AAA income series can be made.

GENERAL NOTES TO TABLES

Symbols:

-	means nil, or an insignificant quantity.
...	means not available, or not collected.

Rounding:
Most figures have been rounded individually and the totals shown may therefore differ slightly from the sum of the constituent items.

Metric units:
Metric units are used throughout this publication. Conversion factors from metric to imperial units, correct to 4 significant figures, are given below:

1 hectare (ha)	=	2.471 acres
1 kilogram (kg)	=	2.205 pounds
1 tonne (t)	=	0.9842 tons
1 litre (l)	=	0.2200 gallons

Abbreviations:

dcw	-	dressed carcase weight
dwt	-	deadweight
lwt	-	liveweight

NORTHERN IRELAND CODE OF PRACTICE ON CONFIDENTIALITY

Practices followed by Government Statistical Service (GSS) in the handling of information obtained from statistical inquiries throughout Government departments are set out in the White Paper. *'The Government Statistical Service Code of Practice on the Handling of Data obtained from Statistical Inquiries'* (Cmnd 9270). Government departments in NI also subscribe to this code.

Under the Statistics of Trade and Employment (Northern Ireland) Order 1988, however, legislation relating to the disclosure of data obtained from statistical inquiries is now different in Northern Ireland, to the extent that information obtained under the provisions of this Order, or the Statistics of Trade Act (Northern Ireland) 1949, may be released to public bodies and consultants appointed by a Government department or public body under directions given by the Head of the Northern Ireland department in possession of the information. Since these disclosure provisions do not apply to corresponding legislation for Great Britain, the opportunity is being taken to supplement the GSS code of practice in relation to the handling of information obtained by Northern Ireland departments under the Order and the Act.

The code set out below also ensures that disclosure rules applied to voluntary inquiries by Government departments in Northern Ireland are at least as strict as those for statutory inquiries conducted under the Order or the Act.

The Agricultural Returns Act (Northern Ireland) 1939, which governs the conduct of the Agricultural Census in Northern Ireland, is even more restrictive than either the Statistics of Trade and Employment (Northern Ireland) Order 1988 or the Northern Ireland Code of Practice. Under it, no such disclosure of individual information is permitted.

The Northern Ireland Code of Practice which supplements the GSS code is as follows:

- Information about undertakings collected in inquiries by Northern Ireland departments under the Statistics of Trade and Employment (Northern Ireland) Order 1988 or under the Statistics of Trade Act (Northern Ireland) 1949 may, provided the Head of the department which obtained the information so directs, be made available under Article 7(1)(a) for statistical purposes to other Government departments, a Community institution or to public bodies or consultants appointed by Government departments or public bodies.

- Information on the name and address of individual undertakings, the nature of their business, opening date and the number of persons employed by them collected in inquiries under the Order or the Act may, subject to directions given by the Head of the department which obtained the information, be used for non-statistical purposes within the department. Such information, provided the Head of the department so directs, may also be made available under 7(1)(a) of the order to other Government departments and public bodies who require it for carrying out their functions and to consultants appointed by Government departments and public bodies.

- No other disclosure of information about individual undertakings obtained under the Order or the Act will take place without the prior written consent of the person carrying on the undertaking.

- Information about individual undertakings collected in voluntary statistical inquiries will not be used for non-statistical purposes by the Department which collected it, or made available to any other body for statistical or non-statistical purposes by the Department which collected it, or made available to any other body for statistical or non-statistical purposes unless the respondent was informed that this might happen when the information was requested or has subsequently given consent in writing.

- In the case of bona fide researchers outside Government departments, information about individual undertakings collected in voluntary statistical inquiries will not be released under any circumstances for non-statisitical purposes, and will only be released for statistical purposes if the respondent was informed of this when the information was requested or has subsequently given consent in writing.

- Further restrictions apply where specific commitments have been given to respondents to statutory and voluntary statistical inquiries, e.g. that access to the information will be restricted to those involved with processing the data.

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