Department of
Agriculture and
Rural Development
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POLICY AND ECONOMICS DIVISION

# Statistical Review of Northern Ireland Agriculture

*2005*

Agriculture, Fishing & Forestry

A National Statistics Publication

A National Statistics publication

# Statistical Review of Northern Ireland Agriculture 2005

*Department of Agriculture and Rural Development*
*Policy and Economics Division*

**A National Statistics publication**

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# PREFACE

The *Statistical Review of Northern Ireland Agriculture* is the primary source of statistics for the agricultural industry in Northern Ireland. It contains a wide range of statistics on the agricultural industry and is the main reference document for those involved in the agri-food sector.

This year a new Chapter has been added to the *Statistical Review*, which provides statistical indicators for agri-food sector performance, the rural economy, animal health and welfare, as well as the agri-environment. These are the themes covered by DARD's strategic objectives. We are keen to receive feedback on this new material and indeed on the layout, content and usefulness of the publication as a whole. Consequently, a reader's survey questionnaire (along with a prepaid envelope for its return) accompanies this year's *Statistical Review*. We would be grateful if readers would take the time to complete the one page survey form and play a part in helping us improve the usefulness of this publication.

The Single Farm Payment (SFP), which is a decoupled payment, was introduced in 2005 and replaces many of the direct payments that were payable on a per head or per hectare basis. The treatment of the SFP in the aggregate agriculture accounts is different from that of the direct payments, which it replaces, and this is explained in the text and footnotes that accompany the tables within the *Statistical Review*.

As with all DARD statistical publications, the *Statistical Review* is now available, free of charge, on the DARD website, at www.dardni.gov.uk. This website also contains long-term time series of a selection of *Statistical Review* tables. These may also be obtained in hard copy form, on request from Policy and Economics Division. Details of other publications and statistical releases available from Policy and Economics Division are given on page 77.

The *Statistical Review* is a National Statistics publication, indicating that its contents are produced to best professional standards. Queries or comments on its contents can be made to the Editor, Seamus McErlean, whose contact details are given below.

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**Director of Policy and Economics Division**
March 2006

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# KEY FACTS

| | NI | UK | ROI | EU15 |
|---|---|---|---|---|
| **GROSS VALUE ADDED (GVA)** | | | | |
| Agriculture as % of total GVA | 1.3[1] | 0.5[1] | 2.0[1] | ... |
| **EMPLOYMENT** | | | | |
| Agricultural employment ('000) | 31[1] | 351[1] | 112[2] | 6,537[3] |
| As % of total civil employment | 4.1[1] | 1.3[1] | 6.1[2] | 4.0[3] |
| **LAND USE** | | | | |
| Agricultural area ('000 ha) | 1,030[1] | 17,257[1] | 4,305[2] | 130,809[3] |
| As % of total area | 76.2[1] | 70.6[1] | 61.3[2] | 40.4[3] |
| **LESS FAVOURED AREAS (LFA)** | | | | |
| LFA as % of agricultural area | 70.0[1] | 44.6[1] | 63.1[4] | 54.7[4] |
| **FARMS** | | | | |
| Number ('000) | 27.1[1] | 311[1] | 135[3] | 6,771[4] |
| Average agricultural area (ha) | 38.0[1] | 55.4[1] | 31.9[3] | 19.3[3] |
| **ENTERPRISES** | | | | |
| Average enterprise size: | | | | |
| Dairy cows | 67[1] | 82[3] | 42[1] | 29[4] |
| Beef cows | 19[1] | 29[3] | 13[1] | 18[5] |
| Sheep | 243[1] | 404[3] | 158[5] | 144[5] |
| Pigs | 925[1] | 538[3] | 1,345[5] | 139[5] |
| Laying hens | 2,300[1] | 1,200[3] | 215[5] | 236[5] |
| Broilers | 40,000[1] | 40,000[3] | 12,000[5] | 825[5] |
| Cereals (ha) | 12.0[1] | 32.1[1] | 19.6[1] | 13.7[1] |
| Potatoes (ha) | 6.3[1] | 11.9[3] | 2.8[5] | 1.6[5] |

*1. 2005 2. 2004 3. 2003 4. 2001 5. 2000*

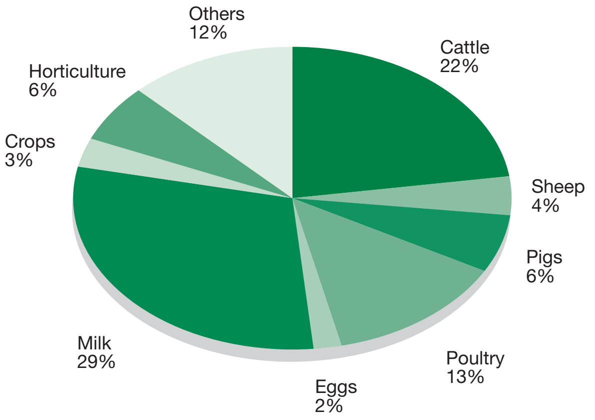
*Note 1. NI = Northern Ireland; UK = United Kingdom; ROI = Republic of Ireland; EU15 = Austria, Belgium, Denmark, Finland, France, Germany, Greece, Republic of Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and United Kingdom.*

*Note 2. Due to national accounting principles GVA figures do not include Single Farm Payment.*

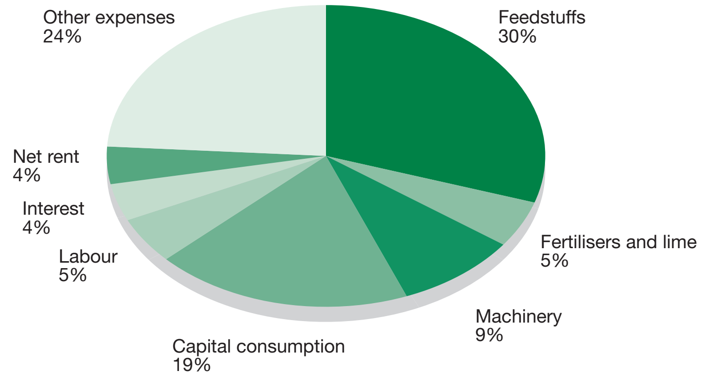
*Note 3. In general, figures relate to the latest year for which statistics are available.*

# COMPARISONS OF NI AND UK AGRICULTURE

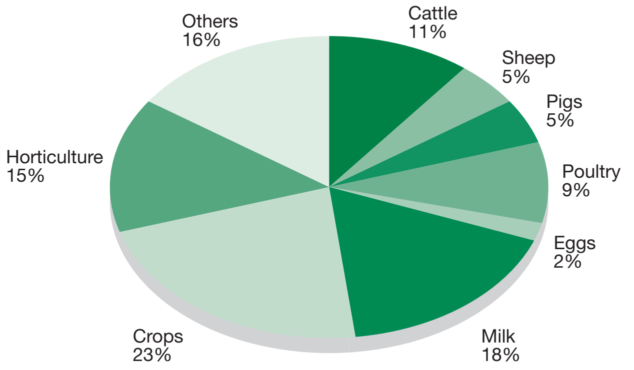
**Gross output of NI agriculture, 2005**



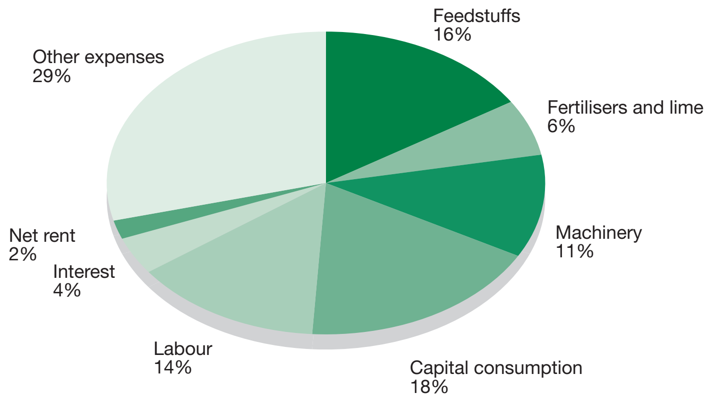

**Total expenses of NI agriculture, 2005**



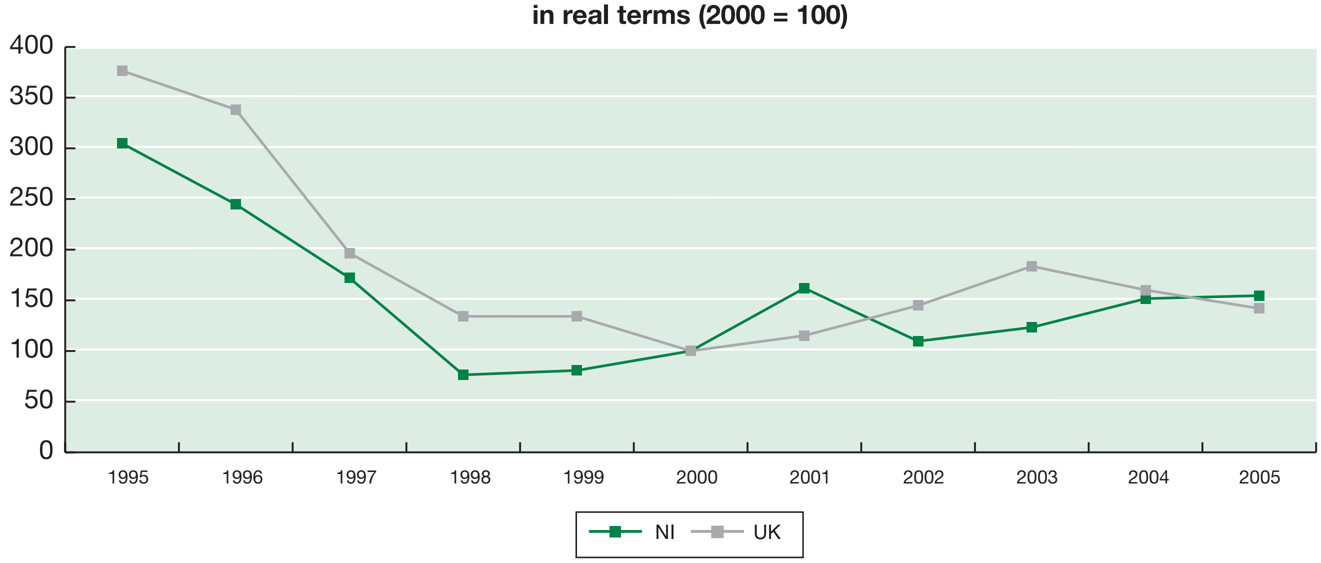

**Gross output of UK agriculture, 2005**



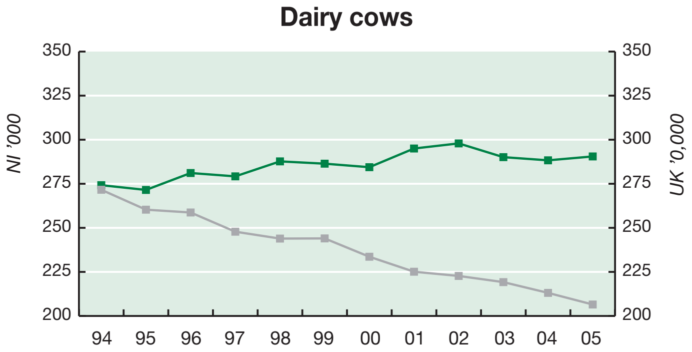

**Total expenses of UK agriculture, 2005**

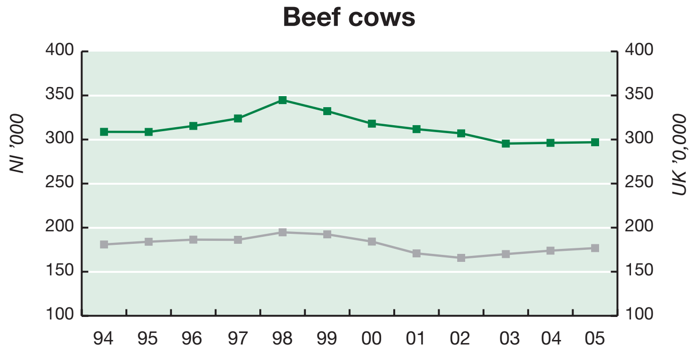


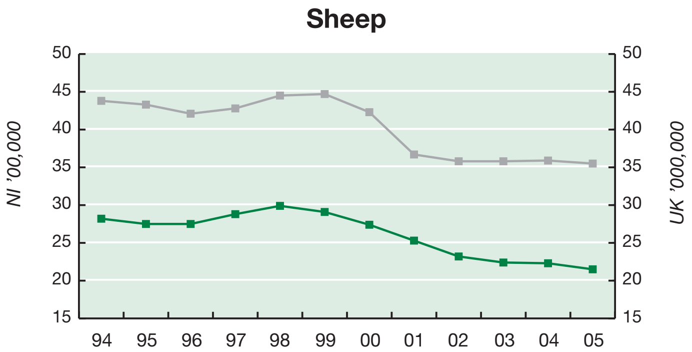

**NI and UK Total Income from Farming in real terms (2000 = 100)**

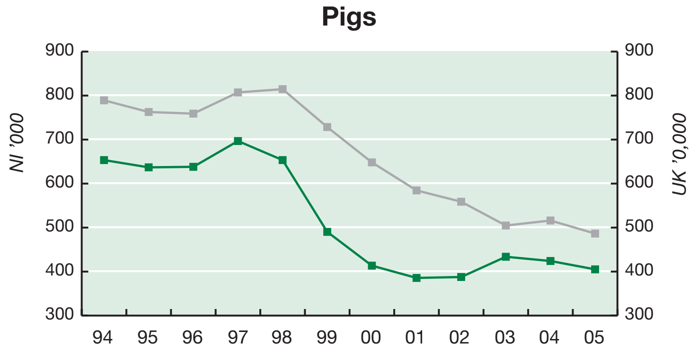


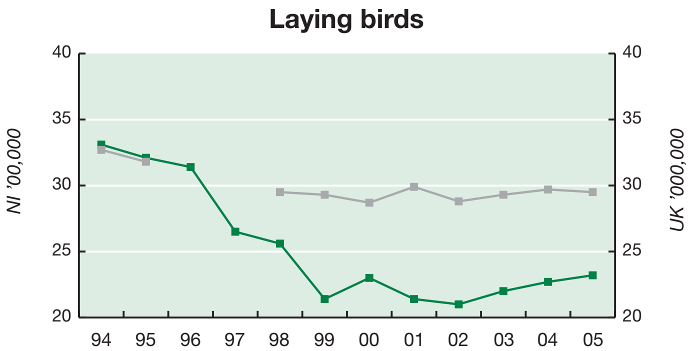
# TRENDS IN NI AND UK LIVESTOCK NUMBERS AND CROP AREAS

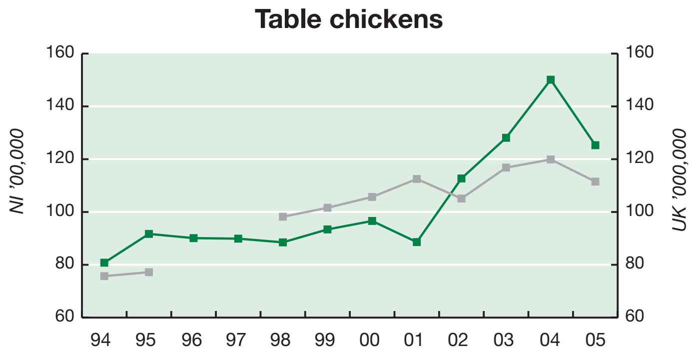


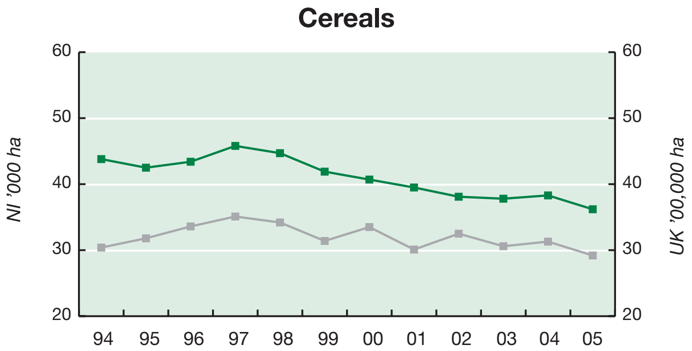



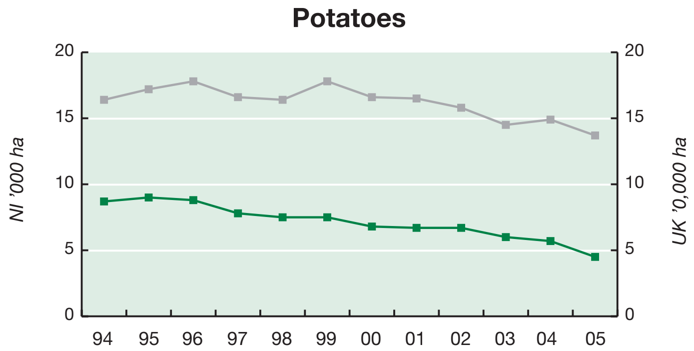




NI UK

# 1. EXECUTIVE SUMMARY

*Note: comparisons are with 2004 unless otherwise stated.*

**Aggregate income (Tables 2.1 - 2.3)**

- There was a small rise in the income of Northern Ireland agriculture in 2005 following more substantial increases in 2004 and 2003.
- **Total income from farming (TIFF)** – which measures the return to farmers and all members of their families working on farms – increased by 4.9 per cent (2 per cent in real terms) to £186 million, from £177 million in 2004.
- Despite the increases during the last three years, TIFF in 2005 is 10 per cent below the average of the last twenty years after accounting for inflation.
- The increase in income in 2005 can be attributed to three main factors; first, improved productivity; second, improvement in the price of finished cattle and in the output of milk; and, third, increases in subsidy receipts.
- At the United Kingdom level, TIFF fell by 8.9 per cent in money terms in 2005, to £2.52 billion, a fall of 11.4 per cent in real terms. Total Income from farming per full time person equivalent in the UK is estimated to have fallen by 8.2 per cent in current prices, or by 10.5 per cent in real terms, to £12,531. The main reason for income rising in Northern Ireland while falling in the UK is that the price of cereals has fallen, thereby reducing income in the arable areas of Great Britain but decreasing the cost of feed inputs in Northern Ireland.

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

- **Gross output** of Northern Ireland agriculture is estimated at £1,074 million. This figure is below the level calculated for 2004 but this is largely explained by a change in the treatment of farm subsidies within the aggregate agricultural accounts as a consequence of decoupling.
- **Gross input** (or 'intermediate consumption') decreased by 0.6 per cent, to £778 million, as a result of a 3 per cent increase in the unit cost and a 2 per cent decline in the volume used.
- **Gross value added** in 2005 is estimated at £295.6 million, while **net value added** – gross value added less consumption of fixed capital (or 'depreciation') – increased, by 1.4 per cent, to £327 million.

**Productivity (Table 2.3)**

- Changes in the volumes of outputs and inputs combined to produce a 2.9 per cent improvement in **total factor productivity** – the productivity of all resources in the industry. Output volume changes coupled with a 3.8 per cent fall in the volume of labour input generated a 9.3 per cent increase in **labour productivity** in 2005.

**Cash flow (Table 2.4)**

- **Cash available to farm families from farming** is estimated to have decreased in 2005 by 8 per cent, to £258 million. In this estimate, 'book' items such as stock changes as well as capital formation and consumption are removed and account is taken of the level of investment and change in borrowings, thereby more realistically portraying cash available from farming.

| | |
|---|---|
| **Farm level incomes** | • The average **net farm income** across all full time farms for the year ending mid February 2006 is expected to increase by 16% to £10,900 overall, largely as a result of a 27% improvement on dairy farms. Net farm income on all other farm types is forecast to show a small decline. **Cash income**, which is the difference between cash receipts and expenses, is expected to increase on dairy farms, but decline on cattle & sheep and mixed farm types and to average £26,700 per farm, a rise of just over £700 compared to the previous year. |
| **Subsidies (Table 2.10)** | • The value of all **direct payments** to farmers increased in 2005 by £4 million or 1.6 per cent, to £282 million of which the Single Farm Payment accounts for approximately 80 per cent. |
| **Labour (Table 2.14)** | • **The total agricultural labour force** decreased by 4.2 per cent in 2005, to 51,073 persons. This included a 2.2 per cent reduction in the number of farmers, to 32,526, with the number of full time farmers declining by 0.9 per cent while the number of part time farmers decreased by 3.8 per cent. The number of full time, part time and casual workers decreased by 9.6 per cent. |
| **Livestock numbers (Table 3.3)** | • The number of **cattle** recorded at 1.67 million in the June 2005 census has changed little since 2000. Compared with 2004, the number of dairy cows increased by 1 per cent, while there was a marginal increase in the beef cow herd. Total **sheep** numbers decreased to 2.15 million, while breeding ewe numbers declined by 6 per cent, to 1.03 million ewes. Ewe numbers are now at their lowest level since the 1980s.<br>• At June 2005, the number of **pigs** totalled 405,100, 4 per cent lower than in 2004, with the female breeding herd decreasing by 3 per cent, to 36,700 sows. The number of farms with pigs decreased again over the year by 9 per cent to 438. **Broilers** decreased by 17 per cent to 12.5 million birds in 2005, while the size of the **commercial laying flock** increased by 2 per cent to 2.3 million birds. |
| **Crops and grass** | • There was a 4.3 per cent decrease, to 48,500 hectares, in the total **cropped area** between June 2004 and 2005. The total area of **cereals** declined by 5.5 per cent, to 36,200 hectares, with oats, barley and wheat production areas all declining. |
| **Farms (Table 4.2)** | • There were 27,064 active **farm businesses** at June 2005 and this was 550 fewer than in 2004. The downward trend in the number of farms is 2 per cent per year over the past 5 years. |
| **Agri-Food Sector** | • **Gross Value Added per head** in Northern Ireland as a percentage of the UK figure improved in 2004 compared with 2003. The performance indicators for the food and drinks processing sector indicate steady growth with the exception of the **rate of return on capital employed**, where growth has stagnated in recent years. |

**Rural Economy**

- Over the years from 2000 to 2003, the average gross weekly earnings of people in rural areas were consistently below those of people living in urban areas. The number of net VAT registrations disaggregated by area for the years 1997 to 2003 indicates that the ‘less accessible rural’ areas demonstrate the strongest growth in number of firms. In 2004, 51 per cent of firms in ‘less accessible rural’ areas employed less than 5 people.

**Animal Health and Welfare**

- Since the first cases of BSE were reported in Northern Ireland during 1988, there have been a total of 2,148 cases from 1,479 farms. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. The number of cases in 2004 was 34

  During 2004, 9.2 per cent of herds in Northern Ireland were affected by bovine tuberculosis. However, the number of new reactor herds and new reactor animals has fallen by 17 per cent and 32 per cent, respectively, over the twelve-month period up to October 2005, compared with the equivalent period up to October 2004.

  The Veterinary Service (DARD) carried out 636 on-farm welfare inspections in 2004. Of those inspections carried out as a result of complaints 58 per cent were fully compliant with legislation, while for programmed visits 91 per cent were fully compliant with legislation.

**Agri-environment**

- In 2003, some 290,000 hectares or 27 per cent of farmland was registered in an agri-environmental scheme in Northern Ireland. There has been relatively little overall change in the proportion of rivers of good or fair quality in Northern Ireland since 2000, but the percentage of river length classified as being of good chemical quality has increased by 30 per cent since 1990. At 6.2 and 9.6 per cent respectively, Northern Ireland and the Republic of Ireland are the two least densely forested countries in the EU25.

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# 2. THE AGRICULTURAL ECONOMY

## A. AGGREGATE OUTPUT, INPUT AND INCOME

***Methodological note***

*A 25-year time series of the Aggregate Agricultural Account is available on the DARD website, at www.dardni.gov.uk. In the following commentary, comparisons are with 2004 unless otherwise stated. A change in the treatment of subsidy payments in 2005 (as a result of decoupling) means that some of the 2005 estimates within the AAA are not comparable with earlier years. Such figures are given in 'italics' within the statistical tables that follow.*

**Summary**

The estimated income of Northern Ireland agriculture increased slightly in 2005. **Total income from farming (TIFF)** – which measures the return to farmers and all members of their families working on farms – increased by 4.9 per cent (a 2.0 per cent increase in real terms) to £186 million, from £177 million in 2004 (see Tables 2.1-2.2).

**Output**

The value of **gross output** is estimated at £1,074 million in 2005. This figure is not directly comparable to the figure for 2004 because the treatment of the **Single Farm Payment (SFP)** in the aggregate account is different from that of the direct subsidies that it replaces. Direct payments such as Beef Special Premium and Suckler Cow Premium were included in the **gross output** figures because they were directly attributable to finished cattle and calf production (or coupled to production). The SFP is decoupled from production and is not attributable to any one sector. For this reason the SFP is not included in the **gross output** or **gross value added** figures, but is included under **other subsidies (not attributable to products)**. Therefore, SFP is included in **net value added** and **TIFF**, but not **gross output** or **gross value added**. Details of trends in individual outputs and inputs are given in Section 2B.

**Inputs** (or 'intermediate consumption')

The value of **gross input** decreased slightly in 2005, by 0.6 per cent, to £778 million. This was the result of a 3 per cent increase in the unit cost and a 2 per cent decline in the volume used. Although there has been little change in the total value of gross inputs there have been significant changes in some of the individual inputs. Expenditure on feedstuffs decreased by £6 million (2 per cent), to £358 million, mainly as a result of a 3 per cent increase in the unit cost of feed and a 6 per cent reduction in volume. Fuel expenditure increased by £9 million (29 per cent) to £41 million, mainly as a result of rising fuel prices. Expenditure on fertilisers and quota leasing both decreased. The volume of fertilisers and lime used decreased in 2005 as it did in 2004.

**Gross and net value added**

**Gross value added** – gross output less gross input – is estimated at £296 million in 2004. **Net value added** (at factor cost), i.e. gross value added minus capital consumption plus subsidies (less taxes) not paid on products, rose, by 1.4 per cent, to £327 million.

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 (also termed 'compensation of employees') decreased by 2.2 per cent, to £52.7 million, while increases in the average interest rate in 2005 caused interest payments to rise, by 3.8 per cent, to £43.2 million. Conacre rent paid to non-farmers fell by 8.9 per cent, to £45.5 million, mainly as a result of a reduction in the amount of land rented.

**Total income from farming**

The net result of these changes was that **total income from farming (TIFF)** increased in 2005, by 4.9 per cent to £186 million, a rise of 2.0 per cent after allowing for inflation. This followed increases in 2003 and 2004 of 12 and 23 per cent in real terms, respectively. However, despite these increases income in 2005 is 10 per cent *below* the average of the last 20 years, after allowing for inflation. Over the same 20-year period, the number of persons drawing an income from farming also declined steadily. From 1986 to 2005, the number of units of entrepreneurial labour decreased by 33 per cent with the result that, in real terms, TIFF per unit of entrepreneurial labour in 2005 was 13 per cent *above* the 20-year average.

**Cash flow**

TIFF measures the return to farmers, their spouses and other family workers, i.e. all those with an entrepreneurial interest in farming. It is calculated according to internationally agreed practices, which require the inclusion of 'book' items such as stock changes 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 the level 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 in 2005 by 8 per cent, to £258 million. This fall in available cash, as opposed to the increase in TIFF, results mainly because there was a much lower increase in borrowing during 2005 compared with 2004. The fall occurs despite the fact that the cash-flow figures include (as an addition) the swing from a small decrease in output stocks in 2004 to a larger decrease in the level of stocks in 2005.

**Subsidies**

**Total direct payments** to farmers increased in 2005 by £4 million or 1.6 per cent, to £282 million. The Single Farm Payment accounts for eighty per cent of the total. Direct payments exclude the value of market support such as intervention purchases and export refunds.

**Investment**

**Gross annual capital investment** decreased in 2005 by £1.8 million to £120 million. Within this total there was a decrease in investment in plant, machinery and vehicles of £5.9 million, while investment in buildings and works increased by £4.1 million to £46.8 million (of which £7.8 million was grant aided investment).

## Table 2.1 Aggregate Agricultural Account: estimated output, input, value added and income of agriculture[1]

*£ million*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **OUTPUT**[2] | | | | | | |
| **Livestock and livestock products**[3] | | | | | | |
| Finished cattle and calves[4] | 332.6 | 333.7 | 361.0 | 371.8 | 406.5 | *240.1* |
| Finished sheep and lambs[5] | 66.5 | 65.4 | 59.1 | 57.5 | 66.7 | *42.3* |
| Finished pigs[6] | 52.7 | 62.5 | 58.1 | 69.7 | 68.4 | 66.8 |
| Poultry[7] | 97.6 | 106.5 | 115.8 | 121.7 | 139.6 | 137.3 |
| Eggs[8] | 22.0 | 22.3 | 26.4 | 31.7 | 23.0 | 22.9 |
| Milk | 302.6 | 351.5 | 292.8 | 331.2 | 348.5 | *342.5* |
| Minor products[9] | 8.1 | 8.3 | 8.1 | 8.4 | 8.5 | 8.7 |
| **Total livestock and livestock products** | **882.2** | **950.3** | **921.4** | **991.9** | **1,061.3** | ***860.7*** |
| **Field crops** | | | | | | |
| Potatoes | 17.3 | 21.2 | 21.4 | 22.0 | 21.0 | 13.2 |
| Cereals[10] | 25.6 | 23.7 | 20.8 | 26.5 | 28.0 | *15.9* |
| of which: barley[10] | 19.8 | 19.2 | 14.3 | 18.2 | 18.0 | *9.8* |
| wheat[10] | 4.1 | 3.1 | 5.2 | 6.7 | 8.4 | *5.3* |
| oats[10] | 1.7 | 1.4 | 1.3 | 1.6 | 1.6 | *0.8* |
| Other crops[10,11] | 8.0 | 9.2 | 6.9 | 7.8 | 6.6 | *7.5* |
| **Total field crops** | **50.8** | **54.1** | **49.1** | **56.3** | **55.7** | ***36.7*** |
| **Horticultural products** | | | | | | |
| Fruit | 5.4 | 6.9 | 4.1 | 5.8 | 7.7 | 5.8 |
| Vegetables | 14.6 | 15.6 | 15.1 | 16.1 | 16.4 | 15.2 |
| Mushrooms | 27.6 | 28.8 | 27.1 | 25.1 | 23.5 | 24.2 |
| Ornamental and hardy nursery stock | 12.6 | 12.6 | 13.1 | 13.8 | 14.2 | 14.3 |
| **Total horticultural products** | **60.3** | **63.9** | **59.4** | **60.8** | **61.7** | **59.5** |
| Capital formation (breeding livestock) | 39.3 | 58.1 | 46.8 | 56.3 | 47.6 | 48.6 |
| Agricultural contract work[12] | 32.9 | 36.6 | 37.3 | 40.2 | 42.6 | 44.4 |
| Milk quota leasing | 1.4 | 0.8 | 3.7 | 4.3 | 7.1 | 0.9 |
| Inseparable non-agricultural activities[13] | 12.9 | 13.6 | 18.5 | 21.6 | 22.4 | 23.1 |
| **A Gross output** | **1,079.8** | **1,177.3** | **1,136.1** | **1,231.4** | **1,298.4** | ***1,073.8*** |
| of which: | | | | | | |
| subsidies (less taxes) on products[14] | 194.8 | 194.2 | 210.9 | 205.3 | 242.6 | *25.8* |

1. A description of the methodology relating to this series and the derivation of the main aggregates, is given in the Appendix. 2005 data for individual outputs excludes the Single Farm Payment, **therefore data in italics is not directly comparable with previous years**.
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, breeding and store animals exported to the Republic of Ireland and shipped to Great Britain. The value of imported animals has been deducted.
4. Includes Suckler Cow Premium, Hill Livestock Compensatory Allowance, Beef Special Premium, Extensification Supplement, Agrimoney Compensation, Slaughter Premium, receipts from the Over Thirty Months Scheme and Foot and Mouth Disease non-capital compensation payments. The LFA Compensatory Allowance, introduced in 2001, is included in 'other subsidies'.
5. Includes Sheep Annual Premium, Rural World (LFA) Supplement, Hill Livestock Compensatory Allowance, Agrimoney Compensation and Foot and Mouth Disease non-capital compensation payments. The LFA Compensatory Allowance, introduced in 2001, is included in 'other subsidies'.
6. Includes Foot and Mouth Disease non-capital compensation and Pig Industry Restructuring Scheme (Ongoers) payments.
7. Includes shipments and exports of breeding and non-breeding birds, and eggs for hatching.

## Table 2.1 contd.

| | | | | | | £ *million* |
|---|---|---|---|---|---|---|
| | **2000** | **2001** | **2002** | **2003** | **2004** | **2005** (provisional) |
| **A Gross output** | **1,079.8** | **1,177.3** | **1,136.1** | **1,231.4** | **1,298.4** | *1,073.8* |
| **INPUT (also known as 'intermediate consumption')** | | | | | | |
| **Expenditure** | | | | | | |
| Feedstuffs[15] | 261.0 | 287.2 | 301.2 | 353.1 | 364.1 | 357.8 |
| Seeds[16] | 7.2 | 7.6 | 8.7 | 10.1 | 8.3 | 7.3 |
| Marketing expenses[17] | 33.1 | 30.8 | 34.1 | 34.3 | 34.1 | 32.5 |
| Fertilisers and lime | 56.3 | 56.7 | 58.9 | 59.4 | 56.7 | 53.7 |
| Total machinery expenses (excl. depreciation) | 73.8 | 76.4 | 79.1 | 85.0 | 87.9 | 97.5 |
| Farm maintenance | 28.2 | 30.4 | 26.6 | 31.3 | 29.2 | 28.8 |
| Veterinary expenses and medicines | 27.2 | 28.4 | 31.5 | 31.7 | 33.6 | 34.7 |
| Miscellaneous expenses | 100.4 | 106.7 | 105.7 | 115.2 | 115.6 | 119.6 |
| Agricultural contract work | 32.9 | 36.6 | 37.3 | 40.2 | 42.6 | 44.4 |
| Milk quota leasing | 2.8 | 1.8 | 6.0 | 5.9 | 10.5 | 1.8 |
| **B Gross input** | **622.9** | **662.7** | **689.1** | **766.2** | **782.7** | **778.1** |
| **C Gross value added (A-B)** | **456.9** | **514.7** | **447.0** | **465.2** | **515.7** | *295.6* |
| Consumption of fixed capital | | | | | | |
| - livestock | 37.6 | 56.5 | 48.4 | 42.1 | 50.9 | 50.1 |
| - plant, machinery and vehicles | 78.3 | 79.2 | 80.7 | 79.1 | 79.4 | 77.6 |
| - buildings and works | 94.5 | 93.8 | 94.3 | 94.5 | 91.6 | 90.9 |
| **D Total consumption of fixed capital** | **210.4** | **229.5** | **223.3** | **215.7** | **221.9** | **218.6** |
| Other subsidies (not paid on products)[18] | 6.0 | 33.2 | 37.2 | 33.1 | 34.2 | *255.9* |
| Other taxes (not levied on products)[19] | 5.2 | 5.0 | 5.3 | 5.6 | 5.7 | 5.9 |
| **E Other subsidies (less taxes)** | 0.8 | 28.2 | 31.8 | 27.6 | 28.6 | *250.0* |
| **F Net value added (at factor cost) (C-D+E)** | **247.4** | **313.4** | **255.5** | **277.1** | **322.5** | **327.1** |
| **G** Paid labour | 48.3 | 48.0 | 48.6 | 52.1 | 53.9 | 52.7 |
| **H** Interest | 46.0 | 40.4 | 34.9 | 34.5 | 41.7 | 43.2 |
| **I** Net rent[20] | 46.6 | 49.4 | 51.3 | 50.6 | 49.9 | 45.5 |
| **J Total income from farming[21] (F-G-H-I)** | **106.4** | **175.6** | **120.8** | **139.8** | **177.0** | **185.6** |

8. Includes eggs for processing and duck eggs.
9. Includes 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. Hired transport charges, auction fees, slaughter charges and inter farm expenses.
18. Includes LFA Compensatory Allowance, set-aside payments, payments for the non-capital element of the Environmentally Sensitive Area Scheme and other minor grants and subsidies.
19. Farm rates and vehicle road tax.
20. Conacre payments to non-producing landowners.
21. 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 at current prices and in real terms

*Indices: 2000 = 100*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Index at current prices** | | | | | | |
| Net value added[1] | 100.0 | 126.7 | 103.3 | 112.0 | 130.4 | 132.2 |
| Total income from farming[1] | 100.0 | 165.0 | 113.5 | 131.3 | 166.3 | 174.4 |
| **Index in real terms**[2] | | | | | | |
| Net value added | 100.0 | 124.4 | 99.8 | 105.2 | 118.9 | 117.2 |
| Total income from farming | 100.0 | 162.0 | 109.6 | 123.3 | 151.7 | 154.7 |

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

## Table 2.3 Output and input volume and productivity indices

*Indices: 2000 = 100*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| Gross output at constant 2000 prices[1] | 100.0 | 105.3 | 105.7 | 108.6 | 110.6 | 110.8 |
| Gross input at constant 2000 prices[1] | 100.0 | 100.4 | 103.3 | 107.9 | 109.3 | 107.3 |
| Gross value added at constant 2000 prices[1] | 100.0 | 111.6 | 108.7 | 109.5 | 112.4 | 115.4 |
| Net value added at constant 2000 prices[1] | 100.0 | 121.1 | 115.9 | 119.6 | 123.7 | 131.4 |
| Total factor productivity[2] | 100.0 | 104.8 | 104.3 | 107.1 | 109.0 | 112.2 |
| Labour productivity[3] | 100.0 | 124.6 | 123.4 | 128.4 | 137.4 | 150.2 |

1. Calculated by applying 2000 output and input prices to the volume of each item of output and input in every year. The resulting series, therefore, represent volume changes.
2. Calculated as the ratio of output at constant prices to all inputs (including labour and capital) at constant prices.
3. Calculated as the ratio of net value added at constant prices to total labour input (in Annual Work Units).

## Table 2.4 Estimated cash flow for agriculture

*£ million*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Total income from farming** | **117.5** | **185.6** | **125.6** | **161.6** | **173.1** | **185.6** |
| Less: | | | | | | |
| output stock change | -8.3 | +3.2 | -13.4 | +6.3 | -1.2 | -11.6 |
| gross fixed capital formation (breeding livestock) | 39.2 | 58.1 | 46.6 | 59.5 | 48.8 | 48.6 |
| capital investment[1] | 89.9 | 109.4 | 104.3 | 125.2 | 118.4 | 111.8 |
| Plus: | | | | | | |
| input stock change | +0.1 | +0.9 | -0.8 | +1.7 | -0.4 | +0.2 |
| capital consumption | 209.7 | 228.5 | 223.0 | 217.4 | 224.5 | 218.6 |
| capital grants paid in year[2] | 1.5 | 1.6 | 0.4 | 0.1 | 0.2 | 1.8 |
| change in borrowings | 17.7 | -13.9 | 1.2 | 18.1 | 49.2 | 1.0 |
| **Cash available to farm families from farming** | **225.7** | **232.2** | **211.9** | **208.0** | **280.5** | **258.4** |

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 the Farm Business Survey (with an addition for non grant-aided investment) and are shown in that table as investment in the year in which work was undertaken. 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]

| Sector | Adjusted outputs[2] | Estimated specific costs[3] | | | | Sector gross margins[4] | |
|---|---|---|---|---|---|---|---|
| | | Feedstuffs | Fertilisers, seeds & sprays | Others | Total | | |
| | 2005 (Provisional) | | | | | | |
| | £m | £m | £m | £m | £m | £m | % |
| Dairy cows and followers | 382.1 | 80.6 | 16.8 | 10.5 | 107.9 | 274.3 | 56.8% |
| Beef cattle, rearing and fattening | 207.3 | 87.3 | 28.4 | 20.9 | 136.5 | 70.8 | 14.7% |
| Sheep and wool | 42.6 | 11.8 | 7.8 | 5.3 | 24.9 | 17.7 | 3.7% |
| **Total grazing livestock** | **632.1** | **179.6** | **53.0** | **36.7** | **269.3** | **362.8** | **75.1%** |
| Pigs | 66.8 | 41.0 | - | 1.6 | 42.6 | 24.2 | 5.0% |
| Poultry | 160.2 | 129.8 | - | 5.5 | 135.3 | 24.9 | 5.2% |
| **Total pigs and poultry** | **227.0** | **170.8** | **-** | **7.2** | **177.9** | **49.1** | **10.2%** |
| Cereals | 22.9 | - | 7.5 | - | 7.5 | 15.4 | 3.2% |
| Potatoes | 13.2 | - | 2.9 | - | 2.9 | 10.3 | 2.1% |
| **Total field crops** | **36.2** | **-** | **10.4** | **0.1** | **10.5** | **25.7** | **5.3%** |
| Horticulture[5] | 58.7 | - | 11.6 | 5.1 | 16.7 | 42.0 | 8.7% |
| Other items | 10.6 | 6.3 | 0.8 | 0.1 | 7.3 | 3.3 | 0.7% |
| **Total** | **964.5** | **356.7** | **75.8** | **49.1** | **481.7** | **482.9** | **100.0%** |

1. Owing to changes in methodology, these estimates are not comparable with those for years prior to 2005. Single Farm Payment has not been included.
2. The items making up total gross output (as shown in Table 2.1) have been regrouped into the above enterprises and Outputs have been adjusted for changes in volume. In the case for breeding livestock stock appreciation has been excluded;
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. Horticulture comprises fruit, vegetables, mushrooms, flowers and hardy nursery stock.

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

| | Units of quantity | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|---|
| **Livestock and livestock products** | | | | | | | |
| Cattle and calves[2] | tonnes dcw | 121,263 | 117,793 | 128,744 | 131,334 | 138,174 | 132,538 |
| Over Thirty Months Scheme[3] | tonnes carcase wt | 28,427 | 28,315 | 33,573 | 27,584 | 32,488 | 29,784 |
| Sheep and lambs[4] | tonnes dcw | 23,539 | 24,640 | 19,307 | 19,363 | 21,937 | 21,212 |
| Pigs[5] | ,, | 65,647 | 69,123 | 70,676 | 77,043 | 73,751 | 72,281 |
| Cattle and calves[2] | '000 head | 409 | 384 | 420 | 423 | 442 | 406 |
| Sheep and lambs[4] | ,, | 1,127 | 1,165 | 916 | 895 | 987 | 956 |
| Pigs[5] | ,, | 907 | 938 | 946 | 993 | 924 | 899 |
| Poultry[6] | '000 tonnes lwt | 158.5 | 161.7 | 183.3 | 199.5 | 222.0 | 228.6 |
| Eggs[7] | m. doz | 58.9 | 61.6 | 67.9 | 62.6 | 60.3 | 61.7 |
| Milk | m. litres | 1,634 | 1,799 | 1,780 | 1,786 | 1,788 | 1,868 |
| **Field crops** | | | | | | | |
| Wheat | '000 tonnes | 33.1 | 30.6 | 39.9 | 48.0 | 58.3 | 64.9 |
| Barley | ,, | 176.4 | 169.1 | 131.7 | 124.6 | 136.8 | 127.9 |
| Oats | ,, | 14.3 | 12.6 | 12.3 | 12.8 | 14.1 | 11.4 |
| Potatoes | ,, | 295.6 | 248.5 | 274.7 | 233.5 | 236.8 | 181.4 |
| **Horticultural crops** | | | | | | | |
| Fruit | '000 tonnes | 45.9 | 51.2 | 39.8 | 24.7 | 37.2 | 49.1 |
| Vegetables | ,, | 42.1 | 47.3 | 51.1 | 50.9 | 54.3 | 52.7 |
| Mushrooms | ,, | 22.2 | 25.0 | 22.0 | 20.7 | 19.4 | 19.6 |

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 under Foot and Mouth Disease control measures.
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. Excludes sheep slaughtered under Foot and Mouth Disease control measures.
5. Includes pigs slaughtered under the 2000 Pig Welfare Slaughter Scheme and exports of store pigs. Pigs slaughtered under Foot and Mouth Disease control measures are excluded.
6. Excludes shipments and exports of breeding and non-breeding birds and hatching eggs.
7. Includes eggs for processing and duck eggs.

## Table 2.7 Average producer prices[1] of agricultural products

*£ per unit*

| | Unit | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|---|
| Finished steers, heifers and young bulls[2] | head | 466 | 478 | 482 | 507 | 541 | 586 |
| Finished steers, heifers and young bulls[2] | kg dwt | 1.55 | 1.55 | 1.56 | 1.62 | 1.71 | 1.78 |
| Calves slaughtered or exported | head | 98 | 118 | 79 | 96 | 94 | 68 |
| Culled cows and bulls[2] | head | 246 | 270 | 267 | 253 | 234 | 233 |
| Culled cows and bulls[2] | kg dwt | 1.03 | 1.09 | 1.08 | 1.05 | 0.95 | 0.95 |
| Store cattle exported | head | 381 | 401 | 397 | 429 | 447 | 414 |
| Finished sheep and lambs | head | 39.06 | 50.41 | 46.22 | 49.54 | 51.84 | 50.71 |
| Finished sheep and lambs[3] | kg dwt | 1.92 | 2.47 | 2.27 | 2.40 | 2.42 | 2.36 |
| Finished clean pigs | head | 59.54 | 66.46 | 62.68 | 69.86 | 75.22 | 76.44 |
| Finished clean pigs | kg dwt | 0.83 | 0.92 | 0.85 | 0.91 | 0.96 | 0.96 |
| Culled sows and boars | head | 67 | 84 | 67 | 60 | 70 | 80 |
| Milk[4] | litre | 0.185 | 0.190 | 0.164 | 0.185 | 0.187 | 0.183 |
| Eggs for consumption | dozen | 0.374 | 0.362 | 0.389 | 0.506 | 0.382 | 0.372 |
| Broilers | kg lwt | 0.496 | 0.518 | 0.512 | 0.499 | 0.519 | 0.507 |
| Potatoes: | | | | | | | |
| Ware maincrop[5] | tonne | 72 | 97 | 97 | 100 | 103 | 88 |
| Seed | tonne | 66 | 87 | 158 | 126 | 111 | 98 |
| Barley | tonne | 77 | 78 | 76 | 87 | 90 | 83 |
| Wheat | tonne | 81 | 86 | 78 | 94 | 95 | 86 |
| Mushrooms | tonne | 1,243 | 1,150 | 1,232 | 1,210 | 1,210 | 1,232 |
| Apples | tonne | 111 | 112 | 120 | 265 | 148 | 129 |

1. Before deduction of marketing charges, commissions and levies, where applicable. Animals slaughtered under Foot and Mouth Disease control measures are not included.
2. Includes cattle slaughtered under the Over Thirty Months Scheme.
3. These prices are weighted rather than simple averages and for this reason will differ from the finished sheep and lambs prices given in Agriculture in the UK for Northern Ireland.
4. Before deduction of superlevy, if applicable.
5. 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: 2000 = 100*

| | Weights[2] | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|---|
| Finished steers and heifers[3] | 222 | 100 | 100 | 101 | 105 | 111 | 115 |
| Culled cows and bulls[3] | 32 | 100 | 105 | 105 | 102 | 92 | 92 |
| Store cattle exported | 3 | 100 | 105 | 104 | 112 | 117 | 109 |
| Finished sheep and lambs | 48 | 100 | 129 | 118 | 125 | 126 | 123 |
| Finished clean pigs | 63 | 100 | 111 | 103 | 110 | 115 | 116 |
| Culled sows and boars | 1 | 100 | 101 | 80 | 73 | 84 | 97 |
| Milk | 361 | 100 | 102 | 88 | 100 | 101 | 99 |
| Eggs for consumption | 29 | 100 | 97 | 104 | 135 | 102 | 99 |
| Broilers | 81 | 100 | 104 | 103 | 101 | 105 | 102 |
| Potatoes: | | | | | | | |
| Ware maincrop | 19 | 100 | 135 | 135 | 140 | 143 | 123 |
| Seed | 3 | 100 | 131 | 238 | 190 | 168 | 148 |
| Barley | 16 | 100 | 102 | 99 | 113 | 117 | 109 |
| Wheat | 3 | 100 | 106 | 96 | 116 | 117 | 106 |
| Mushrooms | 33 | 100 | 93 | 99 | 97 | 97 | 99 |
| Apples | 6 | 100 | 101 | 108 | 238 | 133 | 116 |
| **Total products index[2]** | **920** | **100** | **104** | **98** | **106** | **107** | **106** |

1. The indices relate to prices from which marketing expenses have not been deducted. Animals slaughtered under Foot and Mouth Disease control measures are not included.
2. The total products index is calculated by taking into account the significance of each item in the base period (2000). 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

| | 2000 | 2001[2] | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **CATTLE** | | | | | | |
| **Breeding cattle** | | | | | | |
| Dairy cows/heifers in milk | 559 | 761 | 623 | 690 | 626 | 664 |
| Dairy cows in calf | 438 | 617 | 488 | 535 | 478 | 477 |
| Dairy springing heifers | 477 | 693 | 483 | 421 | 517 | 440 |
| Beef cows/heifers with calf at foot | 471 | 521 | 538 | 597 | 616 | 529 |
| Beef cows in calf | 334 | 400 | 434 | 442 | 437 | 427 |
| Beef springing heifers | 395 | 469 | 490 | 518 | 570 | 502 |
| **Store cattle** | | | | | | |
| 150-300 kg steers | 280 | 314 | 342 | 349 | 365 | 309 |
| 300-400 kg steers | 358 | 385 | 403 | 425 | 451 | 399 |
| 400-500 kg steers | 421 | 445 | 470 | 505 | 528 | 471 |
| Over 500 kg steers | 492 | 515 | 555 | 594 | 618 | 564 |
| 150-300 kg heifers | 183 | 207 | 244 | 252 | 281 | 275 |
| 300-400 kg heifers | 279 | 297 | 325 | 347 | 369 | 355 |
| 400-500 kg heifers | 365 | 372 | 403 | 436 | 452 | 434 |
| Over 500 kg heifers | 447 | 448 | 480 | 512 | 532 | 515 |
| **Suckled calves** | | | | | | |
| Under 200 kg steers | 202 | 206 | 205 | 201 | 208 | 156 |
| Over 200 kg steers | 329 | 380 | 404 | 442 | 409 | 352 |
| Under 200 kg heifers | 115 | 143 | 150 | 162 | 170 | 166 |
| Over 200 kg heifers | 201 | 251 | 252 | 293 | 292 | 289 |
| **Dropped calves** | | | | | | |
| For rearing | 48 | 63 | 80 | 95 | 95 | 69 |
| **Cull cows** | 281 | 292 | 295 | 284 | 269 | 280 |
| **SHEEP** | | | | | | |
| **Breeding ewes/hoggets** | | | | | | |
| Blackface | 38.23 | 56.17 | 59.07 | 65.20 | 48.34 | 47.04 |
| Blackface Cross | 43.74 | - | 62.33 | 71.00 | 48.00 | 75.15 |
| Other breeds | 41.78 | 56.02 | 62.81 | 69.51 | 65.10 | 65.12 |
| **Breeding ewe lambs** | | | | | | |
| Blackface | 31.16 | 36.94 | 38.86 | 45.85 | 23.83 | 24.92 |
| Blackface Cross | 27.96 | 43.31 | 52.92 | 56.23 | 39.65 | 47.29 |
| Other breeds | 31.04 | 50.01 | 45.13 | 47.10 | 45.43 | 42.11 |
| **Breeding ewes/hoggets with lamb(s) at foot** | | | | | | |
| Blackface | 25.67 | - | 45.76 | 47.49 | 48.45 | 43.31 |
| Blackface Cross | - | - | - | - | 43.83 | 45.44 |
| Other breeds | 53.14 | 66.44 | 76.51 | 77.52 | 80.18 | 70.49 |
| **Cull ewes** | | | | | | |
| Blackface | 12.04 | 15.80 | 15.64 | 18.26 | 16.21 | 14.41 |
| Blackface Cross | 15.70 | 22.96 | 17.14 | 18.22 | 20.74 | 17.05 |
| Other breeds | 17.77 | 29.19 | 26.98 | 33.37 | 33.36 | 27.86 |
| **Cull rams** | 22.17 | 32.01 | 32.75 | 37.88 | 41.97 | 33.06 |
| **Store lambs** | 26.02 | 36.31 | 32.89 | 35.77 | 34.24 | 30.87 |
| **PIGS[3]** | | | | | | |
| **Breeding pigs** | | | | | | |
| Sows in pig | 110 | 134 | 104 | 127 | 92 | - |
| Springing gilts | 120 | - | 102 | 96 | - | - |
| **Weaner/store pigs** | | | | | | |
| Under 15kg | 15.75 | 21.17 | 13.98 | 16.07 | 15.40 | - |
| 15-30kg | 19.93 | 24.79 | 20.34 | 22.57 | 23.00 | - |
| 30-45kg | 26.74 | 34.82 | 31.32 | 30.10 | 31.02 | - |
| Over 45kg | 44.50 | 51.78 | 55.08 | 49.40 | 54.37 | - |
| **Cull sows** | 64.31 | 72.50 | 57.65 | 63.20 | 72.89 | - |
| **Cull boars** | 67.59 | 69.47 | 60.47 | 60.63 | 80.80 | - |

1. Average prices calculated from returns made by auction marts.
2. Due to Foot and Mouth Disease, livestock markets were closed for the following periods in 2001: cattle 22 February to 1 September; sheep 22 February to 1 October. Pig prices were unavailable from 22 February 2001 until 9 March 2002.
3. Pig prices have been unavailable since July 2004.

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

£ million[3]

| | 2000 | 2001[4] | 2002[4] | 2003[4] | 2004[4] | 2005[4] (provisional) |
|---|---|---|---|---|---|---|
| **DIRECT PAYMENTS[5]** | | | | | | |
| **Single farm payment** | - | - | - | - | - | **227.2** |
| **Cereals** | | | | | | |
| Arable Area Payments Scheme[6] | 8.0 | 7.4 | 7.7 | 8.6 | 8.4 | - |
| **Other crops[6]** | 0.2 | 0.4 | 0.6 | 0.6 | 0.7 | - |
| **Cattle** | | | | | | |
| Beef Special Premium[6] | 38.7 | 43.1 | 48.1 | 44.2 | 53.7 | - |
| Suckler Cow Premium[6] | 39.6 | 43.8 | 43.4 | 44.3 | 48.8 | - |
| Extensification Supplement[6] | 27.6 | 30.8 | 30.3 | 32.5 | 36.1 | - |
| Deseasonalisation Premium Agrimoney Compensation[6] | 0.2 | 0.1 | - | - | - | - |
| Hill Livestock Compensatory Allowance | 18.1 | - | - | - | - | - |
| Over Thirty Months Scheme[7] | 26.6 | 27.7 | 33.0 | 26.4 | 28.1 | 25.8 |
| Slaughter Premium | 10.2 | 17.3 | 28.8 | 29.0 | 32.9 | - |
| Foot and Mouth Disease compensation (non-capital) | - | 1.5 | - | - | - | - |
| **Total cattle** | **161.1** | **164.1** | **183.7** | **176.4** | **199.6** | **25.8** |
| **Sheep** | | | | | | |
| Sheep Annual Premium[6,8] | 19.9 | 11.7 | 18.3 | 19.0 | 20.9 | - |
| Hill Livestock Compensatory Allowance | 5.8 | - | - | - | - | - |
| Foot and Mouth Disease compensation (non-capital) | - | 1.2 | - | - | - | - |
| **Total sheep** | **25.7** | **12.9** | **18.3** | **19.0** | **20.9** | **-** |
| **Pigs** | | | | | | |
| Foot and Mouth Disease compensation (non-capital) | - | 0.2 | - | - | - | - |
| Pig Industry Restructuring Scheme (Ongoers) | - | - | 0.7 | 0.7 | - | - |
| **Total pigs** | **-** | **0.2** | **0.7** | **0.7** | **-** | **-** |
| **Milk** | | | | | | |
| Milk Agrimoney Compensation[6] | 2.4 | 9.2 | - | - | - | - |
| Dairy Premium Scheme | - | - | - | - | 13.6 | - |
| **Total milk** | **2.4** | **9.2** | **-** | **-** | **13.6** | **-** |
| **Other direct payments** | | | | | | |
| Set-aside (Arable Area Payments Scheme) | 0.5 | 0.6 | 0.6 | 0.7 | 0.6 | - |
| Environmentally Sensitive Areas (non-capital) | 4.9 | 6.6 | 5.0 | 5.2 | 5.7 | 3.5 |
| Weather Aid | - | - | 4.6 | - | - | - |
| LFA Compensatory Allowance | - | 24.6 | 23.5 | 23.7 | 22.1 | 21.9 |
| Countryside Management Scheme | - | 0.9 | 2.9 | 3.1 | 5.6 | 2.9 |
| Others[9] | 0.6 | 0.6 | 0.6 | 0.4 | 0.2 | 0.5 |
| **Total other direct payments** | **6.0** | **33.2** | **37.2** | **33.1** | **34.2** | **28.7** |
| **Total direct payments** | **203.4** | **227.5** | **248.1** | **238.5** | **277.4** | **281.7** |
| **LEVIES[10]** | | | | | | |
| **Milk** | | | | | | |
| Superlevy | 2.6 | - | - | - | 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. Payments after 'modulation' (i.e.reduction) of 2.5% in 2001, 3% in 2002, 3.5% in 2003 and 2004, and 3% in 2005 where applicable. Total modulation amounted to £3.6 million in 2001, £5.4 million in 2002, £6.5 million in 2003, £7.3 million in 2004 and £3.8 million after application of 5,000 euro franchise per farm in 2005.
5. Excludes expenditure on market regulation (such as intervention purchases and export refunds) by the UK Rural Payments Agency.
6. Includes Transitional, Definitive, Market Support and Premium Agrimoney Compensation, as applicable.
7. Gross producer receipts before marketing expenses.
8. Includes Rural World (LFA) Supplement.
9. Includes Sheep Compensation Scheme, Organic Farming Scheme and other miscellaneous payments.
10. Excludes non-government levies.

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

*£ million[2]*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **CAPITAL GRANTS** | | | | | | |
| Farm and Conservation Grant Scheme | 0.3 | 0.4 | 0.3 | 0.2 | - | - |
| Environmentally Sensitive Areas[3] | 1.1 | 0.8 | - | - | - | - |
| Investment in agricultural holdings | - | - | - | - | 0.3 | 1.1 |
| Organic Farming (Conversion of Animal Housing) Scheme | - | - | - | - | - | 2.1 |
| Farm Nutrient Management Scheme | - | - | - | - | - | 1.0 |
| **Total capital grants** | **1.3** | **1.3** | **0.3** | **0.2** | **0.3** | **4.2** |
| **OTHER DIRECT PAYMENTS** | | | | | | |
| Foot and Mouth Disease compensation (capital) | - | 4.4 | - | - | - | - |
| Other animal disease compensation[4] | 15.6 | 15.7 | 25.4 | 22.1 | 15.6 | 10.8 |
| **Total other direct payments[5]** | **15.6** | **20.1** | **25.4** | **22.2** | **15.6** | **10.8** |

1. These data relate to monies due rather than monies actually received (i.e. 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. Includes tuberculosis, brucellosis, and BSE reactor compensation payments.
5. Includes miscellaneous minor payments..

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

*£ million*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| Grant-aided investment[2] | 1.8 | 2.3 | 2.8 | 2.7 | 0.8 | 7.8 |
| Non-aided investment | 18.0 | 27.5 | 27.6 | 28.1 | 41.9 | 39.1 |
| **Total buildings and works[3]** | **19.7** | **29.9** | **30.4** | **30.7** | **42.7** | **46.8** |
| Plant and machinery | 46.3 | 66.3 | 57.9 | 66.1 | 60.6 | 55.6 |
| Vehicles[3,4] | 16.9 | 17.6 | 20.7 | 21.5 | 18.0 | 17.1 |
| **Total plant, machinery and vehicles** | **63.3** | **83.9** | **78.6** | **87.6** | **78.6** | **72.7** |
| **Total investment** | **83.0** | **113.8** | **109.0** | **118.3** | **121.3** | **119.6** |

1. Excluding investment in forestry and arterial drainage.
2. See Table 2.11 for details.
3. Estimated from the Farm Business Survey.
4. Vehicles shown at 'farm share'.

## Table 2.13 Total quotas and other subsidy ceilings

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Milk quota (million litres):** | | | | | | |
| Owned[1] | 1,597.3 | 1,621.5 | 1,651.7 | 1,670.2 | 1,763.1 | 1,770.0 |
| Leased[2] | -15.0 | 60.4 | 198.7 | 69.2 | 31.2 | 69.3 |
| Total | 1,582.3 | 1,681.9 | 1,850.4 | 1,739.4 | 1,794.3 | 1,839.3 |
| **Suckler Cow Premium:** | | | | | | |
| Quota (no. of units)[3] | 311,729 | 311,729 | 311,729 | 311,729 | 311,729 | - |
| Premia paid (no. of cows) | 305,887 | 304,634 | 306,680 | 305,108 | 300,708 | - |
| **Sheep Annual Premium:** | | | | | | |
| Quota (no. of units)[3] | 1,425,965 | 1,425,965 | 1,508,658 | 1,467,984 | 1,433,464 | - |
| Premia paid (no. of ewes) | 1,285,236 | 1,196,102 | 1,095,874 | 1,098,914 | 1,085,536 | - |
| **Beef Special Premium:** | | | | | | |
| Reference herd (no. of steers) | 234,683 | …[4] | …[4] | …[4] | …[4] | - |
| Premia paid (no. of animals) | | | | | | |
| steers: first age premium | 214,369 | 200,973 | 225,450 | 195,617 | 92,007 | - |
| second age premium | 219,136 | 198,495 | 215,883 | 212,715 | 178,391 | - |
| bulls | 42,705 | 58,930 | 68,115 | 71,776 | 177,845 | - |
| **Arable Area Payments:** | | | | | | |
| Base area (ha) | 52,900 | 52,900 | 52,900 | 52,900 | 52,900 | - |
| Area paid: crops (ha) | 38,867 | 39,376 | 40,386 | 44,728 | 46,252 | - |
| set-aside (ha) | 2,498 | 3,096 | 2,965 | 3,290 | 2,752 | - |

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. The Northern Ireland regional reference herd has been replaced by a UK wide ceiling.

## Table 2.14 Number of persons working on farms

*number of persons*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| **AGRICULTURAL LABOUR FORCE**[1] | | | | | | |
| **Farmers and partners** | | | | | | |
| Full time | 20,534 | 20,169 | 19,706 | 19,265 | 18,329 | 18,159 |
| Part time | 15,386 | 15,786 | 14,826 | 14,728 | 14,934 | 14,367 |
| **Total** | **35,920** | **35,955** | **34,532** | **33,993** | **33,263** | **32,526** |
| **Spouses of farmers** | **7,034** | **6,520** | **6,201** | **6,428** | **6,396** | **6,186** |
| **Other workers** | | | | | | |
| Full time | 3,005 | 2,797 | 2,720 | 2,794 | 2,741 | 2,553 |
| Part time | 3,062 | 2,782 | 2,773 | 2,848 | 2,785 | 2,514 |
| Casual/seasonal | 8,802 | 8,308 | 8,047 | 8,423 | 8,147 | 7,294 |
| **Total other workers** | **14,869** | **13,887** | **13,540** | **14,065** | **13,673** | **12,361** |
| **Total agricultural labour force** | **57,823** | **56,362** | **54,273** | **54,486** | **53,332** | **51,073** |
| **Annual Work Units (AWUs)**[2] | **33,987** | **33,019** | **31,925** | **31,641** | **30,595** | **29,740** |

1. Full-time work is defined as involving 30 hours per week or more and casual work as covering less than 20 weeks per year.
2. An Annual Work Unit is equivalent to the time worked by one person employed full-time in agricultural activities over a whole year.

## Table 2.15 Agricultural manpower[1]

*number of persons*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| **MANPOWER STATISTICS**[1] | | | | | | |
| **Self-employed** | | | | | | |
| Male | 19,247 | 18,768 | 18,393 | 18,069 | 17,249 | 17,106 |
| Female | 1,287 | 1,401 | 1,313 | 1,196 | 1,080 | 1,053 |
| **Total** | **20,534** | **20,169** | **19,706** | **19,265** | **18,329** | **18,159** |
| **Employees** | | | | | | |
| Male | 12,957 | 12,245 | 11,848 | 12,368 | 12,060 | 10,939 |
| Female | 1,912 | 1,551 | 1,692 | 1,697 | 1,613 | 1,422 |
| **Total** | **14,869** | **13,796** | **13,540** | **14,065** | **13,673** | **12,361** |
| **Total agricultural manpower** | **35,403** | **33,965** | **33,246** | **33,330** | **32,002** | **30,520** |

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 ; the count of employees includes all other workers except part-time farmers and partners and farmers' spouses.

## Table 2.16 Estimated employment in the food and drinks processing and input supply sectors

*full-time equivalents*

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 (provisional) |
|---|---|---|---|---|---|---|
| **Processing of products**[1] | | | | | | |
| Animal by-products | 277 | 264 | 270 | 255 | 216 | 220 |
| Bakeries | 3,324 | 3,331 | 3,416 | 3,500 | 3,365 | 3410 |
| Beef and sheepmeat | 2,501 | 2,803 | 2,770 | 2,810 | 2,700 | 2775 |
| Drinks | 1,820 | 1,763 | 1,780 | 1,542 | 1,563 | 1550 |
| Eggs | 221 | 192 | 205 | 193 | 197 | 180 |
| Fish | 948 | 992 | 996 | 1,000 | 915 | 925 |
| Fruit and vegetables | 1,369 | 1,433 | 1,499 | 1,538 | 1,618 | 1630 |
| Milk and milk products | 2,458 | 2,383 | 2,227 | 2,228 | 2,368 | 2315 |
| Pigmeat | 1,990 | 1,510 | 1,454 | 1,489 | 1,658 | 1655 |
| Poultrymeat | 3,915 | 4,205 | 4,160 | 4,178 | 4,408 | 4130 |
| **Total processing sector** | **18,822** | **18,875** | **18,774** | **18,733** | **19,006** | **18,790** |
| **Manufacture and supply of inputs**[2] | | | | | | |
| Animal feed | 790 | 820 | 800 | 810 | 800 | 780 |
| Fertilisers and lime | 490 | 500 | 500 | 500 | 300 | 230 |
| Other requisites (incl. medicines) | 820 | 830 | 830 | 830 | 830 | 830 |
| Farm machinery (incl. servicing) | 900 | 880 | 870 | 870 | 870 | 870 |
| Services[3] | 1,520 | 1,500 | 1,400 | 1,380 | 1,350 | 1,350 |
| **Total supply sector** | **4,520** | **4,530** | **4,400** | **4,390** | **4,150** | **4,060** |
| **Total ancillary employment** | **23,342** | **23,405** | **23,174** | **23,123** | **23,156** | **22,850** |

1. 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*", Department of Agriculture and Rural Development (DARD). Figures for 2004 have been estimated by adjusting the 2003 baseline, largely on the basis of information available within DARD.
2. Estimated from trade directory information and other (mainly DARD) sources.
3. Includes contractors, veterinary surgeons, workers in auction marts, employees of farming and marketing associations and artificial insemination workers.

## Table 2.17 External sales[1] of the food and drinks processing sector[2,3]

*£ million*

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 (provisional) |
|---|---|---|---|---|---|---|
| Animal by-products | 19 | 20 | 19 | 20 | 21 | 20 |
| Bakeries | 36 | 36 | 37 | 47 | 53 | 50 |
| Beef and sheepmeat | 222 | 250 | 277 | 291 | 306 | 310 |
| Drinks | 51 | 95 | 106 | 152 | 155 | 150 |
| Eggs | 23 | 26 | 26 | 25 | 27 | 25 |
| Fish | 59 | 61 | 61 | 64 | 59 | 60 |
| Fruit and vegetables | 69 | 75 | 67 | 80 | 90 | 90 |
| Milk and milk products | 344 | 336 | 345 | 349 | 343 | 345 |
| Pigmeat | 112 | 78 | 77 | 82 | 77 | 80 |
| Poultrymeat | 182 | 195 | 212 | 233 | 263 | 255 |
| **Total processing sector** | **1,118** | **1,170** | **1,227** | **1,342** | **1,393** | **1,385** |

1. The term 'external sales' refers to sales to Great Britain, RoI, foreign countries and intervention.
2. 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*", DARD. Figures for 2004 have been estimated by adjusting the 2003 baseline, largely on the basis of information available within DARD.
3. These figures are not comparable with the export statistics published in pre-1996 issues of the *Statistical Review of Northern Ireland Agriculture*.

## B. COMMODITIES AND INPUTS

The introduction of the Single Farm Payment has fundamentally altered the definition of commodity output. Up until 2004 direct subsidies are included in output in the tables where relevant. In 2005 the Single Farm Payment is **not** included in any equivalent output but as an aggregate figure (Table 2.10). These changes are required to conform to agreed national accounting principles but lead to a discontinuity in the output series of some products. A 'market value' has been estimated to assist in like for like comparison. The market value excludes subsidies and stock changes. An alternative comparator 'Output at Market Value' can be estimated by adding stock changes to market value but this measure is not shown separately.

As in other sections, data for 2005, which is not calculated on a comparable basis, is identified in italics.

**Cattle and calves**

The transition to the Single Farm Payment has been marked by a disruption to normal marketing patterns. In 2004 the ending of the Slaughter Premium Scheme encouraged marketings to be brought forward to avail of the subsidy and as a consequence fewer cattle were available in early 2005 and for the year as a whole. Thus, marketings of finished clean cattle decreased by 8.9 per cent in 2005 to 394,000 head.

In the last full year of the Over Thirty Months Scheme (OTMS) 2,900 clean cattle were destroyed.

The proportion of steers entering the food chain was static at 51 per cent. However the proportion of heifers fell from 36 per cent to 29 per cent and young bulls increased from 20 per cent to 13 per cent. The average dressed carcase weight was 15kg heavier at 330 kg compared with 2004. In total, the volume of clean beef output fell by 4.8 per cent to 130,000 tonnes. Despite marked swings in prices the average deadweight price increased by 6 pence per kilo from 2004 levels to 178 pence per kg. The overall result of these changes was a fall of 1.3 per cent in the sales value of finished clean cattle to £231 million.

Disposals of culled cows and bulls decreased by 5 per cent in 2005 to 114,000 head. The average carcase weight of these animals decreased by 1 per cent and the price realised per kilogram deadweight was unchanged from 2004 levels. Receipts from cull cattle disposals fell by 5.5 per cent to £26.5 million. Almost 96 per cent of cull cows and bulls were destroyed under the OTMS.

An estimated 2,000 calves were sold in 2005 and the revenue generated amounted to £0.1 million.

Overall, the market value of cattle and calves in 2005 (which deducts the value of imported cattle but includes breeding cattle exports, store exports and OTMS) increased by 2.8 per cent to £246 million.

**Milk**

After recent decline, the annual average dairy cow population has increased to 291,500 head. The average gross milk yield per cow increased by 4 per cent to 6,550 litres.

The increase in cow numbers and yields led to a total output of over 1.8 billion litres (up 4.5 per cent), which is the highest level yet attained in Northern Ireland.

Although milk prices (gross) in 2005 were 2 per cent lower than in 2004, the market value of milk was 2.3 per cent higher. The dairy premium shown separately in 2004 (Table 2.10) is now subsumed, together with planned increases, in the Single Farm Payment.

**Sheep and lambs**

Marketings of clean sheep and lambs fell by 1 per cent in 2005 to 828,000 head. Average dressed carcase weight was similar to 2004, at 21.5 kilograms per head, resulting in the volume of clean sheepmeat produced decreasing by 0.5 cent to 17,800 tonnes. Producer prices fell by 2.5 per cent to 236 pence per kilogram deadweight. The combined volume and price changes had the result that market value from clean sheep and lambs fell by 3 per cent, to £42.0 million.

Marketings of culled ewes and rams fell by 15.5 per cent to 128,500 head. There was a 22 per cent reduction in price, the overall value of market receipts decreasing by 34 per cent to £2.6 million.

Total market value from sheep production decreased by 5.4 per cent, to £42.9 million.

**Pigs**

The number of clean pigs marketed during 2005 was 2.7 per cent lower than in 2004, at 883,000 head. Average dressed carcase weight increased, by 1 per cent to 79.4 kg. These changes resulted in a fall of 2 per cent, to 70,100 tonnes, in the quantity of pigmeat produced. Producer prices increased by 1 per cent, to 96.3 pence per kilogram deadweight. Overall, output from clean pig production was 1.1 per cent lower, at £67.5 million.

Marketings of cull sows and boars decreased by 4.5 per cent, to 14,000 head. The average price per head increased, by 16 per cent, causing an increase of 10 per cent, to £1.1 million, in market returns from sales of cull sows and boars.

Overall, the value of pig output in 2005 declined by 2.3 per cent, to £66.8 million.

**Poultry**

The total volume of poultrymeat production in 2005 increased by 2.9 per cent, to 228,600 tonnes liveweight. This is a considerable reduction in the growth in production that was 11 per cent in the previous year. The production of broilers was up 4.1 per cent to 206,000 tonnes liveweight. However producer prices fell by 2.5 per cent giving an output of £104 million that is only slightly higher than 2004.

Turkey production decreased by 11.4 per cent to 12,800 tonnes liveweight.

The total value of poultry output (including the export of poultry and hatching eggs, net of imports, and a positive stock change) was 2.3 per cent lower than in 2004, at £137 million.

**Eggs**

Packing station throughput of graded eggs in 2005 increased by 2.2 per cent, to 60.1 million dozen eggs. The average producer price fell from 38.36 pence per dozen to 37.35 pence. The overall value of egg output decreased by 0.5 per cent, to £22.9 million (including eggs for processing, unrecorded sales for human consumption and duck eggs).

**Potatoes**

The recent decline in the area of potatoes has continued with a substantial 20 per cent fall, to 4,500 hectares, while the average yield decreased by 8.2 per cent, to 38.4 tonnes per hectare. Consequently, the total potential quantity of potatoes harvested was 26 per cent lower at 174,000 tonnes.

Marketings of ware potatoes in 2005 were 22 per cent lower at 140,000 tonnes. This comprised a year-on-year reduction in sales of 14 per cent during the first half of the year and a 27 per cent decrease during the second half of the year. Over the year, the volume of seed potato output (including home-saved seed) declined by 25 per cent to 20,800 tonnes. In total, the volume of potato output (including ware, seed and stockfeed potatoes) in 2005 decreased by 23 per cent, to 181,000 tonnes.

The average price of ware potatoes in 2005 was £92 per tonne, which was 14 per cent lower than in 2004. The average price of seed potatoes decreased by 12 per cent to £98 per tonne. The total value of potato output (including a negative stock change of £1.8 million) decreased by 37 per cent, to £13 million.

**Cereals**

The area of wheat in 2005 was 2.6 per cent down on 2004. Coupled with a 2.3 per cent decrease in yield, this resulted in a fall in production of 4.8 per cent, to 62,000 tonnes. Yields of spring barley were down 9.7 per cent while winter barley yields fell by 13 per cent. The area of spring barley declined by 3.4 per cent to 21,700 hectares and winter barley decreased by 11 per cent to 4,000 hectares. Therefore, production of spring barley decreased by 13 per cent while winter barley decreased by 22 per cent. Overall, there was a decrease in barley production of 15 per cent, to 118,000 tonnes.

In 2005, the volume of wheat output increased by 11 per cent and price was down by 10 per cent. These changes resulted in the market value being largely unchanged at £5.6 million.

The total volume of barley sold or used on-farm in 2005 decreased by 6.6 per cent compared with the previous year. Coupled with a fall in the average producer price of 7.2 per cent, this led to a decrease in total market value, to £10.6 million.

The area of oats fell markedly by 21 per cent to 1,900 hectares and the yield decreased by 12.5 per cent, leading to production at 9,800 tonnes. The average producer price was 3 per cent higher, resulting in total market returns of £0.9 million.

**Horticulture**

In 2005, the total value of horticultural output decreased by 3.6 per cent, to £59.5 million. Returns from sales of fruit (mainly apples) fell by 24 per cent to £5.8 million (including a negative stock change of £0.9 million). Apple production increased by 33 per cent to 49,000 tonnes; however, prices fell by 13 per cent and the value of output was 21 per cent lower than in 2004. The value of output of mushrooms increased by 3.0 per cent to £24.2 million while receipts from the sale of vegetables decreased by 7 per cent to £15.2 million.

**Feedstuffs**

The total volume of compound feedstuffs purchased during 2005 increased by 2.2 per cent to 1,700 thousand tonnes. Purchases of cattle and sheep compounds were up 3.0 per cent and down 6.0 per cent respectively. Purchases of pig compounds increased by 0.5 per cent while usage of poultry compounds increased by 2.7 per cent.

Inputs of straights (including home-fed cereals) increased by 1.9 per cent, to 382,000 tonnes. In total, the volume of feed purchased in 2005 was slightly higher than 2004 levels at 2,147 thousand tonnes.

The average price of feedstuffs (compounds and home-fed cereals) decreased in 2005 by 3.8 per cent, to £167 per tonne. Overall, the cost of purchased feedstuffs (including a small negative stock change) fell by 1.7 per cent, to £358 million.

**Fertilisers and lime**

The quantity of fertilisers purchased in 2005 decreased by 10 per cent to 352,000 tonnes product weight and the average price increased by 4.9 per cent to £148 per tonne. As a result, the total value of fertiliser purchases decreased by 5.4 per cent, to £52 million.

The total lime bill fell by 2 per cent to £1.4 million. The quantity purchased was similar but the price decreased slightly.

**Marketing expenses**

Despite increased transport costs, marketing expenses in 2005 were lower than in 2004, at £32.5 million. Those for cattle decreased to £18.6 million, while sheep expenses were up at £4.3 million. Marketing expenses for milk decreased slightly to £7.9 million while those for pigs decreased slightly.

**Machinery expenses**

In 2005 Machinery expenses rose by 11 per cent, to £97.5 million. Within this total, expenditure on repairs increased by 2.9 per cent and that on fuel and oil by 29 per cent. Other machinery expenses fell by 2.6 per cent.

**Interest**

Bank advances for current farming purposes were unchanged on 2004. The average cost of borrowing increased by 0.3 percentage points to 7.2 per cent. As a result, the total interest bill increased by 3.8 per cent, to £43.2 million.

**Labour**

In 2005, the volume of paid labour input was 3.8 per cent lower than the 2004 level, at 8.3 million hours, while the paid labour bill fell 2.2 per cent to £52.7 million.

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## Table 2.18 Output of cattle and calves

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Steers, heifers and young bulls**[1] | | | | | | |
| Sales (inc. to the OTMS) ('000 head) | 397.4 | 380.9 | 410.3 | 412.8 | 433.0 | 394.4 |
| Average producer price (p per kg dwt)[2] | 154.6 | 154.8 | 155.6 | 161.6 | 171.4 | 177.6 |
| Average dressed carcase weight (kg)[3] | 301.1 | 308.6 | 309.8 | 313.5 | 315.5 | 329.8 |
| Quantity of output ('000 tonnes)[3] | 119.7 | 117.5 | 127.1 | 129.4 | 136.6 | 130.1 |
| Value of output (inc. sales to OTMS) (£m) | 185.0 | 181.9 | 197.8 | 209.1 | 234.2 | 231.1 |
| **Cows and bulls**[1] | | | | | | |
| Sales (inc. to the OTMS) ('000 head) | 108.4 | 102.8 | 124.2 | 106.0 | 119.7 | 113.8 |
| Average producer price (p per kg dwt)[2] | 103.2 | 108.7 | 108.1 | 104.9 | 95.1 | 95.2 |
| Average dressed carcase weight (kg)[3] | 238.2 | 248.8 | 247.0 | 241.1 | 246.4 | 244.6 |
| Quantity of output ('000 tonnes)[3] | 25.8 | 25.6 | 30.7 | 25.6 | 29.5 | 27.8 |
| Value of output (inc. sales to OTMS) (£m) | 26.7 | 27.8 | 33.2 | 26.8 | 28.0 | 26.5 |
| **Calves** | | | | | | |
| Sales ('000 head) | 6.8 | 2.6 | 4.0 | 2.0 | 2.0 | 2.0 |
| Average producer price (£ per head)[2] | 98 | 118 | 79 | 96 | 94 | 68 |
| Value of output (£m) | 0.7 | 0.3 | 0.3 | 0.2 | 0.2 | 0.1 |
| **Store cattle sold outside Northern Ireland** | | | | | | |
| Marketings ('000 head) | 5.9 | 1.1 | 6.5 | 6.9 | 7.7 | 8.1 |
| Average producer price (£ per head)[2] | 381 | 401 | 397 | 429 | 447 | 414 |
| Value of output (£m) | 2.2 | 0.4 | 2.6 | 3.0 | 3.4 | 3.3 |
| **Breeding cattle sold outside Northern Ireland** | | | | | | |
| Marketings ('000 head) | 1.3 | 0.1 | 1.6 | 1.4 | 1.7 | 1.3 |
| Average producer price (£ per head) | 558 | 1222 | 631 | 678 | 622 | 555 |
| Value of output (£m) | 0.7 | 0.1 | 1.0 | 1.0 | 1.1 | 0.7 |
| ***less* Imported cattle** | | | | | | |
| Marketings ('000 head) | 22.8 | 37.2 | 37.6 | 43.7 | 50.1 | 30.0 |
| Average producer price (£ per head) | 498 | 458 | 485 | 531 | 551 | 526 |
| Value of output (£m) | 11.3 | 17.0 | 18.2 | 23.2 | 27.6 | 15.8 |
| **Total Market Value (£m)** | **203.9** | **193.5** | **216.6** | **216.8** | **239.3** | **246.0** |
| Other receipts (£m)[4] | 134.5 | 136.5 | 150.7 | 150.0 | 171.4 | - |
| Stock change due to volume (£m) | -5.8 | +4.3 | -6.2 | +5.0 | -4.2 | -5.9 |
| **Total value of output (£m)** | **332.6** | **333.7** | **361.0** | **371.8** | **406.5** | ***240.1*** |
| **Net receipts from non-food outlets (included above)** | | | | | | |
| Over Thirty Months Scheme (£m)[5] | 26.6 | 27.1 | 33.0 | 26.4 | 28.1 | 25.8 |

1. Excludes animals slaughtered under Foot and Mouth Disease control measures.
2. Average realised return gross of marketing expenses for cattle for human consumption and for destruction under the Over Thirty Months Scheme.
3. Including animals sold under the Over Thirty Months Scheme.
4. Includes Suckler Cow Premium, Hill Livestock Compensatory Allowance, Beef Special Premium, Extensification Supplement, Agrimoney Compensation, Slaughter Premium, and Foot and Mouth Disease Compensation (non-capital) payments. The LFA Compensatory Allowance is included with 'other subsidies'.
5. Excludes Slaughter Premium.

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

*per cent*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Cows and bulls** | 21 | 21 | 23 | 20 | 22 | 22 |
| **Steers and heifers originating from:** | | | | | | |
| - the dairy herd; | 27 | 30 | 33 | 36 | 34 | 34 |
| - the beef herd; | 50 | 47 | 38 | 38 | 37 | 36 |
| - calves and stores imported from the Republic of Ireland or shipped from Great Britain | 2 | 2 | 6 | 7 | 7 | 9 |
| **Total[2]** | **100** | **100** | **100** | **100** | **100** | **100** |
| **Total number marketed ('000 head)** | **506** | **482** | **535** | **519** | **565** | **508** |

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

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| Annual average number of dairy cows ('000 head) | 286.1 | 295.5 | 296.7 | 291.1 | 290.1 | 291.5 |
| Average gross yield per cow (to nearest 10 litres per annum)[1] | 5,840 | 6,210 | 6,120 | 6,260 | 6,320 | 6,550 |
| **Total output of milk for human consumption (million litres)** | 1,634 | 1,799 | 1,780 | 1,786 | 1,788 | 1,868 |
| of which: | | | | | | |
| sales off farms | 1,627 | 1,793 | 1,774 | 1,781 | 1,784 | 1,864 |
| used in farm households | 7 | 6 | 6 | 5 | 4 | 4 |
| **Average producer price (pence per litre)** | | | | | | |
| Gross price[2] | 18.37 | 18.95 | 16.39 | 18.46 | 18.67 | 18.28 |
| Net price[3] | 17.96 | 18.40 | 15.89 | 18.00 | 18.25 | 17.86 |
| **Market Value (£m)** | **300.2** | **342.3** | **292.8** | **331.2** | **334.9** | **342.5** |
| **Other receipts (£m)[4]** | 2.4 | 9.2 | - | - | 13.6 | - |
| **Value of output (£m)[2]** | **302.6** | **351.5** | **292.8** | **331.2** | **348.5** | ***342.5*** |

1. Comprising sales off farms, milk consumed in farm households and milk fed to other livestock.
2. After deduction of superlevy but not marketing expenses (transport costs).
3. After deduction of marketing expenses (transport costs) but not superlevy.
4. Comprising Milk Agrimoney Compensation, Dairy Premium Scheme and Additional Dairy Premium.

## Table 2.21 Output of sheep

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Marketings ('000 head)[1]** | | | | | | |
| Finished sheep and lambs | 1,019 | 1,056 | 823 | 756 | 835 | 828 |
| Culled ewes and rams | 108.2 | 109.4 | 92.7 | 139.4 | 152.0 | 128.5 |
| **Average price (p per kg deadweight)[2]** | | | | | | |
| Finished sheep and lambs | 192.4 | 247.4 | 226.7 | 239.7 | 242.0 | 235.9 |
| **Average dressed carcase weight (kg)** | | | | | | |
| Finished sheep and lambs | 20.3 | 20.4 | 20.4 | 20.7 | 21.4 | 21.5 |
| **Quantity of Output ('000 tonnes)** | | | | | | |
| Finished sheep and lambs | 20.7 | 21.5 | 16.8 | 15.6 | 17.9 | 17.8 |
| Culled ewes and rams | 2.9 | 3.1 | 2.5 | 3.8 | 4.1 | 3.4 |
| **Market value (£m)[3]** | **40.5** | **55.0** | **38.6** | **39.2** | **45.3** | **42.9** |
| Other receipts (£m)[4] | 25.7 | 12.9 | 18.3 | 19.0 | 20.9 | - |
| Stock change due to volume (£m) | +0.2 | -2.5 | +2.1 | -0.7 | +0.5 | -0.5 |
| **Value of output (£m)** | **66.5** | **65.4** | **59.1** | **57.5** | **66.7** | ***42.3*** |

1. Estimated home-produced marketings, including unrecorded exports but excluding animals slaughtered under Foot and Mouth Disease control measures.
2. Average realised return gross of marketing expenses. These prices are based on weighted averages and for this reason will differ from finished sheep and lambs prices for NI published in 'Agriculture in the UK'.
3. Includes breeding and store sheep exported less all sheep imported.
4. Comprising Hill Livestock Compensatory Allowance, Sheep Annual Premium, Rural World (LFA) Supplement, Agrimoney Compensation and Foot and Mouth Disease Compensation (non-capital) payments. The LFA Compensatory Allowance is included with 'other subsidies'.

## Table 2.22 Output of pigs

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Marketings ('000 head)[1]** | | | | | | |
| Finished clean pigs | 891.3 | 922.6 | 929.2 | 975.0 | 907.8 | 883.0 |
| Culled sows and boars | 14.0 | 15.5 | 14.8 | 16.2 | 14.6 | 14.0 |
| **Average price (p per kg deadweight)[2]** | | | | | | |
| Finished clean pigs | 83.05 | 91.81 | 85.16 | 91.37 | 95.50 | 96.25 |
| Culled sows and boars | 55.05 | 55.66 | 44.18 | 39.93 | 46.02 | 53.18 |
| **Average dressed carcase weight (kg)** | | | | | | |
| Finished clean pigs | 71.7 | 72.4 | 73.6 | 76.5 | 78.8 | 79.4 |
| **Quantity of output ('000 tonnes)** | | | | | | |
| Finished clean pigs | 63.9 | 66.8 | 68.4 | 74.5 | 71.5 | 70.1 |
| Culled sows and boars | 1.7 | 2.3 | 2.2 | 2.4 | 2.2 | 2.1 |
| **Market Value (£m)[3]** | **54.0** | **62.1** | **59.1** | **68.9** | **68.4** | **67.7** |
| Stock change due to volume (£m) | -1.2 | +0.4 | -1.0 | +0.7 | 0.0 | -0.9 |
| **Value of output (£m)** | **52.7** | **62.5** | **58.1** | **69.7** | **68.4** | **66.8** |

1. Estimated home-produced marketings, including unrecorded exports and pigs slaughtered under the 2000 Pig Welfare Slaughter Scheme. Excludes animals slaughtered under Foot and Mouth Disease control measures.
2. Average realised return gross of marketing expenses, including receipts from the 2000 Pig Welfare Slaughter Scheme.
3. Includes breeding and store pigs exported less all pigs imported. Also includes receipts from 2000 Pig Welfare Slaughter Scheme, Foot and Mouth Disease compensation (non-capital) payments and Pig Industry Restructuring Scheme (Ongoers).

## Table 2.23 Output of poultry

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Poultrymeat production ('000 tonnes liveweight)** | | | | | | |
| All poultrymeat (including broilers) | 158.5 | 161.7 | 183.3 | 199.5 | 222.0 | 228.6 |
| Broilers | 135.4 | 138.2 | 161.2 | 177.9 | 197.9 | 206.0 |
| **Average producer price (p per kg liveweight)** | | | | | | |
| All poultrymeat (including broilers) | 48.9 | 50.6 | 50.2 | 49.2 | 50.9 | 49.7 |
| Broilers | 49.6 | 51.8 | 51.2 | 49.9 | 51.9 | 50.7 |
| **Market value** | | | | | | |
| All poultry (£m) | 97.7 | 105.7 | 115.5 | 120.8 | 137.8 | 136.9 |
| of which broilers | 67.2 | 71.6 | 82.6 | 88.8 | 102.8 | 104.4 |
| Stock change due to volume (£m) | -0.1 | +0.8 | +0.3 | +0.9 | +1.8 | +0.4 |
| **Value of Output (£m)** | **97.6** | **106.5** | **115.8** | **121.7** | **139.6** | **137.3** |

1. Includes shipments and exports of breeding and non-breeding birds and eggs for hatching, less imports of birds and hatching eggs.

## Table 2.24 Output of eggs

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| Graded packing station throughput (million dozen) | 56.3 | 59.1 | 65.3 | 60.9 | 58.7 | 60.1 |
| Average producer price (p per dozen)[1] | 37.86 | 36.61 | 39.27 | 50.72 | 38.36 | 37.35 |
| **Value of output (£m)[2]** | **22.0** | **22.3** | **26.4** | **31.7** | **23.0** | **22.9** |

1. Relates to graded eggs sold through packing stations.
2. Includes eggs for processing, duck eggs and unrecorded sales.

## Table 2.25 Crop production

*harvest years*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **Potatoes**[1] | | | | | | |
| Area ('000 hectares) | 6.8 | 6.7 | 6.7 | 6.0 | 5.7 | 4.5 |
| Harvestable yield (tonnes per hectare) | 43.4 | 39.6 | 35.4 | 40.7 | 41.8 | 38.4 |
| Production ('000 tonnes) | 294.0 | 263.8 | 237.7 | 246.1 | 237.0 | 174.4 |
| of which: | | | | | | |
| saleable potatoes | 247.0 | 225.9 | 213.7 | 217.6 | 211.6 | 156.1 |
| chats[2] and waste | 46.9 | 38.0 | 24.0 | 28.5 | 25.4 | 18.3 |
| **Barley**[3,4] | | | | | | |
| Area ('000 hectares) | 32.6 | 32.8 | 28.5 | 27.8 | 27.0 | 25.7 |
| Yield (tonnes per hectare) | 5.49 | 5.12 | 3.92 | 4.93 | 5.12 | 4.57 |
| Production ('000 tonnes) | 179.1 | 167.9 | 111.7 | 136.8 | 138.4 | 117.6 |
| **Wheat**[4] | | | | | | |
| Area ('000 hectares) | 5.0 | 4.1 | 7.2 | 7.3 | 8.6 | 8.4 |
| Yield (tonnes per hectare) | 7.26 | 6.23 | 6.51 | 7.17 | 7.54 | 7.37 |
| Production ('000 tonnes) | 36.2 | 25.6 | 47.1 | 52.4 | 65.1 | 62.0 |
| **Oats**[3,4] | | | | | | |
| Area ('000 hectares) | 2.9 | 2.4 | 2.4 | 2.5 | 2.5 | 1.9 |
| Yield (tonnes per hectare) | 4.81 | 5.26 | 5.1 | 5.8 | 5.75 | 5.03 |
| Production ('000 tonnes) | 14.2 | 12.8 | 12.0 | 14.3 | 14.1 | 9.8 |
| **Oilseed rape**[5] | | | | | | |
| Area ('000 hectares) | 0.2 | 0.1 | 0.1 | 0.1 | 0.3 | 0.3 |
| Yield (tonnes per hectare) | 2.86 | 2.60 | 3.40 | 3.27 | 2.90 | 3.20 |
| Production ('000 tonnes) | 0.5 | 0.3 | 0.3 | 0.4 | 0.8 | 1.1 |
| **Hay** | | | | | | |
| Area ('000 hectares) | 25.7 | 22.2 | 13.8 | 16.9 | 13.2 | 14.6 |
| Yield (tonnes per hectare) | 6.77 | 8.43 | 6.24 | 7.19 | 7.80 | 6.86 |
| Production ('000 tonnes) | 174.4 | 186.8 | 86.3 | 121.7 | 103.0 | 99.9 |
| **Grass silage** | | | | | | |
| Area ('000 hectares) | 287.1 | 299.1 | 286.7 | 286.4 | 294.1 | 304.2 |
| Yield (tonnes per hectare) | 26.32 | 27.61 | 25.00 | 26.23 | 25.71 | 26.03 |
| Production ('000 tonnes) | 7,556.5 | 8,260.2 | 7,169.1 | 7,514.3 | 7,561.1 | 7920.1 |

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

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **POTATOES[2]** | | | | | | |
| **Quantity of output ('000 tonnes)** | | | | | | |
| Ware | 227.7 | 188.5 | 207.9 | 177.1 | 181.6 | 140.2 |
| Seed | 34.0 | 30.8 | 36.4 | 29.4 | 27.8 | 20.8 |
| Stockfeed | 33.8 | 29.2 | 30.4 | 26.9 | 27.4 | 20.4 |
| **Total** | **295.6** | **248.5** | **274.7** | **233.5** | **236.8** | **181.4** |
| **Average producer price (£ per tonne)** | | | | | | |
| Ware | 74.73 | 98.45 | 98.81 | 105.59 | 105.96 | 91.58 |
| Seed | 66.24 | 86.71 | 157.62 | 125.92 | 111.43 | 98.13 |
| **Market Value (£m)** | | | | | | |
| Ware | 17.0 | 18.6 | 20.5 | 18.7 | 19.2 | 12.8 |
| Seed | 2.3 | 2.7 | 5.7 | 3.7 | 3.1 | 2.0 |
| Stockfeed | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.2 |
| **Total[2]** | **19.5** | **21.4** | **26.5** | **22.6** | **22.5** | **15.0** |
| Stock change due to volume (£m) | -2.2 | -0.2 | -5.0 | -0.6 | -1.5 | -1.8 |
| **Value of output (£m)** | **17.3** | **21.2** | **21.4** | **22.0** | **21.0** | **13.2** |
| **BARLEY[3,4]** | | | | | | |
| Quantity of output ('000 tonnes) | 176.4 | 169.1 | 131.7 | 124.6 | 136.8 | 127.9 |
| Average producer price (£ per tonne) | 76.58 | 77.82 | 76.02 | 86.60 | 89.63 | 83.14 |
| Market Value (£m) | 13.5 | 13.2 | 10.0 | 10.8 | 12.3 | 10.6 |
| Other Receipts (£m)[5] | 6.1 | 6.1 | 5.7 | 6.3 | 5.7 | - |
| Stock change due to volume | +0.2 | -0.1 | -1.5 | +1.1 | +0.1 | -0.8 |
| **Value of output (£m)** | **19.8** | **19.2** | **14.3** | **18.2** | **18.0** | ***9.8*** |
| **WHEAT[3,4]** | | | | | | |
| Quantity of output ('000 tonnes) | 34.7 | 29.8 | 38.0 | 48.0 | 58.3 | 64.9 |
| Average producer price (£ per tonne) | 80.52 | 85.87 | 77.35 | 94.37 | 95.06 | 85.53 |
| Market Value (£m) | 2.7 | 2.6 | 3.1 | 4.5 | 5.5 | 5.6 |
| Other Receipts (£m)[5] | 1.2 | 0.9 | 1.5 | 1.8 | 2.3 | - |
| Stock change due to volume (£m) | +0.2 | -0.4 | +0.5 | +0.4 | +0.6 | -0.3 |
| **Value of output (£m)** | **4.1** | **3.1** | **5.2** | **6.7** | **8.4** | ***5.3*** |

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 but excludes in-store losses.
3. Includes cereals retained on the farm of origin or sold farm-to-farm.
4. Includes Arable Area Payments but excludes set-aside payments.

## Table 2.27 Output of apples and mushrooms

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **APPLES[1]** | | | | | | |
| Quantity of output ('000 tonnes) | 45.5 | 51.0 | 39.4 | 24.5 | 36.9 | 48.9 |
| Average producer price (£ per tonne) | 111 | 112 | 120 | 265 | 148 | 129 |
| Market Value (£m) | 5.1 | 5.7 | 4.7 | 6.5 | 5.5 | 6.3 |
| Stock change due to volume (£m) | -0.6 | +0.5 | -1.5 | -1.3 | +1.4 | -0.9 |
| **Value of output (£m)** | **4.5** | **6.2** | **3.2** | **5.2** | **6.8** | **5.4** |
| **MUSHROOMS** | | | | | | |
| Quantity of output ('000 tonnes) | 22.2 | 25.0 | 22.0 | 20.7 | 19.4 | 19.6 |
| Average producer price (£ per tonne) | 1,243 | 1,150 | 1,232 | 1,210 | 1,210 | 1,232 |
| **Value of output (£m)** | **27.6** | **28.8** | **27.1** | **25.1** | **23.5** | **24.2** |

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

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

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| **FEEDSTUFFS**[1] | | | | | | |
| Quantity purchased ('000 tonnes concentrate equivalent) | 1,715 | 1,822 | 1,961 | 2,139 | 2,101 | 2,147 |
| Average cost (£ per tonne concentrate equivalent) | 152 | 157 | 153 | 165 | 173 | 167 |
| **Value of feed consumed (£m)** | **261.0** | **287.2** | **301.2** | **353.1** | **364.1** | **357.8** |
| of which: | | | | | | |
| stock change due to volume | -0.2 | +0.5 | +0.5 | +1.3 | -0.1 | -0.1 |
| **FERTILISERS** | | | | | | |
| Quantity purchased ('000 tonnes product) | 445 | 414 | 427 | 427 | 391 | 352 |
| Nutrient content ('000 tonnes) | 162 | 147 | 152 | 157 | 141 | 125 |
| of which: | | | | | | |
| Nitrogen | 114 | 102 | 105 | 108 | 99 | 89 |
| Phosphate | 22 | 20 | 21 | 22 | 18 | 15 |
| Potash | 27 | 25 | 26 | 27 | 24 | 21 |
| Average cost (£ per tonne of nutrient) | 337 | 375 | 378 | 364 | 393 | 419 |
| **Value of purchases (£m)** | **54.6** | **55.2** | **57.5** | **57.1** | **55.3** | **52.3** |
| **LIME** | | | | | | |
| Quantity purchased ('000 tonnes) | 122 | 104 | 96 | 144 | 91 | 91 |
| Average cost (£ per tonne) | 14.00 | 14.00 | 14.00 | 15.60 | 15.60 | 15.25 |
| **Value of purchases (£m)** | **1.7** | **1.5** | **1.3** | **2.3** | **1.4** | **1.4** |
| **MARKETING EXPENSES**[2] | | | | | | |
| cattle | 18.4 | 14.5 | 18.5 | 19.3 | 20.2 | 18.6 |
| sheep | 3.8 | 3.9 | 4.1 | 4.1 | 4.1 | 4.3 |
| pigs | 1.4 | 2.6 | 2.5 | 2.6 | 1.8 | 1.7 |
| milk | 9.4 | 9.8 | 9.0 | 8.1 | 8.0 | 7.9 |
| **Total** | **33.1** | **30.8** | **34.1** | **34.3** | **34.1** | **32.5** |
| **INTEREST** | | | | | | |
| Bank base lending rate (%) | 6.0 | 5.1 | 4.0 | 3.7 | 4.4 | 4.7 |
| **Total interest charges (£m)**[3] | **46.0** | **40.4** | **34.9** | **34.5** | **41.7** | **43.2** |
| **LABOUR** | | | | | | |
| Average weekly hours of full-time paid male workers | 41.46 | 42.43 | 42.85 | 41.92 | 41.45 | 42.03 |
| Average earnings of full-time paid male workers (£ per hour)[4] | 5.17 | 5.27 | 5.33 | 5.56 | 5.99 | 6.17 |
| Average earnings of full-time paid male workers (£ per week)[4] | 214.35 | 223.61 | 228.39 | 233.08 | 248.29 | 259.33 |
| Volume of paid labour (million hours)[5] | 9.20 | 9.09 | 8.96 | 9.16 | 8.64 | 8.31 |
| **Value of paid labour (£m)**[5] | **48.3** | **48.0** | **48.6** | **52.1** | **53.9** | **52.7** |

1. Includes home-fed cereals, proteins and stockfeed potatoes.
2. Includes hired transport costs, auction fees, slaughter charges and interfarm expenses.
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**

Around 75 per cent of the total 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 (83,000 hectares) is managed by the Forest Service of the Department of Agriculture and Rural Development (see *Forest Service Annual Report, 2003/2004*[1]).

Most farmland is under grass. Only 4,250 farms (16 per cent) have arable or horticultural crops. These crops occupy 53,900 hectares and make up only 5 per cent of the area farmed. Barley (25,800 hectares) is the main crop grown followed by wheat with 8,400 hectares. In 2005, the cropped area also included 3,000 hectares of horticultural crops, mainly apple orchards (1,500 hectares) and vegetables (1,400 hectares). The area of cereals was 5 per cent lower in 2005 compared with 2004. Over the 10 year period since 1995 the cropped land area has decreased by 11 per cent, with 15 per cent less land in cereals and 50% less in potatoes.

**Grazing livestock**

All but 5 per cent of Northern Ireland farms have cattle or sheep. In 2005, cattle were present on 23,500 farms (87 per cent), sheep on 8,800 farms (33 per cent) and cattle and/or sheep on 26,000 farms (94 per cent).

The total number of cattle, recorded at 1.67 million in the June 2005 census, has changed little since 2000. At June 2005, there were 290,500 dairy cows, 1 per cent more than in 2004. There were 296,900 beef cows, representing a marginal increase. Although lower than in 2001 and 2002, the dairy cow herd is still larger than at any other time since the mid-1980s. Both beef cow and total cattle populations peaked in 1998 and are now below the levels in that year by 14 per cent and 6 per cent respectively.

In 2005, the sheep breeding flock was 6 per cent smaller than in 2004 with 1.03 million ewes. Ewe numbers are at their lowest level since the 1980's. Including lambs and other sheep the flock totalled 2.15 million.

**Intensive livestock**

Pigs and/or poultry are present on 8 per cent of Northern Ireland's farms. This proportion falls to 4 per cent if farms with fewer than 50 birds are excluded.

The number of pigs in Northern Ireland at June 2005 was estimated at 405,100, 4 per cent less than in the previous June, while the number of pig herds declined by 9 per cent to 438. The number of sows also decreased by 3% between 2004 and 2005.

The size of the Northern Ireland pig herd contracted significantly between 1997 and 2001 when pig numbers fell by 45 per cent. Rationalisation of the sector continues, with an average herd size of 925 in 2005 compared with 316 in 1997.

The past few years have seen the total poultry numbers at the highest ever recorded except for the wartime years. However, in June 2005, the Northern Ireland poultry flock was recorded at 17.6 million birds, 14 per cent lower than in 2004. The number of laying birds (2.3 million) was 2 per cent higher and there were 17 per cent fewer broilers (12.5 million) in 2005.

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1 Available on the DARD website at http://www.dardni.gov.uk/frames/forest06.htm.

**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**. Crops occupy 13 per cent of land on lowland farms compared with 2 per cent in the case of LFA farms. There are also significant differences in the patterns of livestock farming. Beef cows (237,000) predominate on **LFA farms**, where they are more important than dairy cows (142,000), whereas, on **lowland farms**, there were 60,000 beef cows and 149,000 dairy cows in 2005. **LFA farms** account for 44 and 59 per cent of the Province's pigs and poultry respectively.

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## Table 3.1 Land use, 2005

*thousand hectares*

| | Crops | Grass and rough grazing | Woodland | Other land | Total land area |
|---|---|---|---|---|---|
| Farms | 52 | 960 | 9 | 9 | **1,030** |
| Common grazing | - | 29 [1] | - | - | **29** |
| NI Forest Service[2] | - | - | 61 | 15 | **76** |
| Other areas | - | - | 14 | 203 | **217** |
| **All land[3]** | **52** | **989** | **83** | **227** | **1,351** |

1. 2004
2. Excludes 1,600 ha let to farmers; these areas are included in the area of agricultural holdings.
3. Land area, excluding significant areas of inland water.

## Table 3.2 Areas of crops, grass, rough grazing and other land, June 2000 - 2005

*thousand hectares*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Oats | 2.9 | 2.4 | 2.4 | 2.5 | 2.5 | 1.9 |
| Wheat | 5.0 | 4.1 | 7.2 | 7.3 | 8.6 | 8.4 |
| Barley: Winter | 5.2 | 2.8 | 3.9 | 4.1 | 4.5 | 4.0 |
| Spring | 27.4 | 30.0 | 24.5 | 23.6 | 22.5 | 21.7 |
| Mixed corn | 0.2 | 0.2 | 0.1 | 0.2 | 0.2 | 0.2 |
| Potatoes | 6.8 | 6.7 | 6.7 | 6.0 | 5.7 | 4.5 |
| Arable crop silage | 2.2 | 2.3 | 1.9 | 2.3 | 2.8 | 3.2 |
| Other field crops | 1.1 | 2.4 | 2.7 | 3.6 | 4.0 | 4.5 |
| **Total agricultural crops** | **50.8** | **50.9** | **49.5** | **49.8** | **50.7** | **48.5** |
| Fruit | 1.6 | 1.5 | 1.5 | 1.6 | 1.5 | 1.5 |
| Vegetables | 1.5 | 1.5 | 1.5 | 1.5 | 1.4 | 1.4 |
| Other horticultural crops | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.1 |
| **Total horticultural crops** | **3.3** | **3.1** | **3.2** | **3.3** | **3.1** | **3.0** |
| Grass: Under 5 years old | 141.6 | 140.2 | 136.4 | 138.0 | 141.8 | 135.6 |
| 5 years old and over | 687.9 | 699.9 | 707.3 | 710.3 | 696.7 | 675.8 |
| **Total grass** | **829.4** | **840.1** | **843.7** | **848.2** | **838.5** | **811.4** |
| **Total crops and grass** | **883.5** | **894.1** | **896.3** | **901.3** | **892.3** | **862.9** |
| Rough grazing[1] | 156.5 | 154.1 | 151.6 | 152.9 | 151.2 | 148.6 |
| Woods and plantations | 8.6 | 8.2 | 7.9 | 8.4 | 8.2 | 8.6 |
| Other land[2] | 11.8 | 11.8 | 11.3 | 11.2 | 11.0 | 9.4 |
| **Total area of farms** | **1,060.5** | **1,068.2** | **1,067.2** | **1,073.7** | **1,062.8** | **1,029.5** |

1. Excludes common rough grazing (29,400 ha - figure for 2004).
2. Includes set aside and land not used for agriculture.

## Table 3.3 Livestock numbers, June 2000 - 2005

*thousand head*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| **CATTLE** | | | | | | |
| **Dairy cows** | | | | | | |
| In milk | 265.7 | 275.4 | 276.2 | 268.7 | 265.9 | 268.3 |
| In calf | 18.6 | 19.6 | 21.7 | 21.5 | 22.4 | 22.3 |
| **Total dairy cows** | **284.4** | **295.0** | **297.9** | **290.1** | **288.3** | **290.5** |
| Dairy heifers in calf | 60.9 | 60.7 | 58.5 | 60.0 | 62.5 | 64.0 |
| **Beef cows** | | | | | | |
| In milk | 262.2 | 260.2 | 255.5 | 239.9 | 240.5 | 239.6 |
| In calf | 55.8 | 51.6 | 51.5 | 55.5 | 55.7 | 57.3 |
| **Total beef cows** | **318.0** | **311.8** | **307.0** | **295.4** | **296.2** | **296.9** |
| Beef heifers in calf | 31.5 | 33.1 | 33.0 | 33.3 | 34.3 | 30.1 |
| **Total cows** | **602.3** | **606.8** | **604.9** | **585.6** | **584.5** | **587.4** |
| **Total heifers in calf** | **92.4** | **93.7** | **91.5** | **93.3** | **96.7** | **94.1** |
| Bulls for service | 16.3 | 16.7 | 16.5 | 16.6 | 17.0 | 17.2 |
| **Other cattle** | | | | | | |
| Over 2 years | 106.8 | 110.3 | 111.4 | 114.8 | 115.4 | 120.8 |
| 1-2 years | 387.8 | 380.3 | 387.8 | 403.5 | 397.3 | 389.0 |
| Under 1 year | 470.9 | 471.3 | 472.4 | 471.5 | 466.7 | 457.1 |
| **Total cattle** | **1,676.5** | **1,679.1** | **1,684.5** | **1,685.3** | **1,677.6** | **1,665.6** |
| **SHEEP** | | | | | | |
| Breeding ewes | 1,332.6 | 1,232.3 | 1,128.6 | 1,105.6 | 1,100.5 | 1,027.3 |
| Other sheep | 1,408.0 | 1,293.3 | 1,195.5 | 1,135.5 | 1,124.9 | 1,117.8 |
| **Total sheep** | **2,740.6** | **2,525.6** | **2,324.2** | **2,241.1** | **2,225.4** | **2,145.1** |
| **PIGS** | | | | | | |
| Sows and gilts | 41.8 | 40.6 | 39.3 | 42.9 | 37.8 | 36.7 |
| Other pigs | 371.7 | 345.0 | 348.4 | 390.8 | 386.2 | 368.4 |
| **Total pigs** | **413.5** | **385.6** | **387.7** | **433.7** | **424.1** | **405.1** |
| **POULTRY** | | | | | | |
| Laying birds | 2,300.0 | 2,142.6 | 2,099.4 | 2,203.2 | 2,266.1 | 2,319.2 |
| Growing pullets | 798.3 | 735.1 | 534.1 | 552.9 | 509.8 | 669.5 |
| Breeding flock | 2,196.3 | 2,145.2 | 2,506.2 | 2,518.2 | 2,284.8 | 1,634.5 |
| Table chickens | 9,655.4 | 8,863.6 | 11,273.3 | 12,811.4 | 15,006.9 | 12,525.7 |
| **Total ordinary fowl** | **14,950.0** | **13,886.5** | **16,413.0** | **18,085.8** | **20,067.6** | **17,148.8** |
| Other poultry | 425.9 | 461.0 | 448.8 | 439.6 | 441.7 | 465.4 |
| **Total poultry** | **15,375.9** | **14,347.5** | **16,861.8** | **18,525.4** | **20,509.2** | **17,614.3** |
| **HORSES & PONIES** | **9.5** | **10.1** | **10.1** | **9.9** | **9.2** | **9.3** |
| **GOATS** | **3.4** | **3.4** | **3.3** | **2.9** | **2.7** | **2.3** |

## Table 3.4 Areas of crops, grass, rough grazing and other land by Less Favoured Area (LFA) category[1] of farm, June 2005

*thousand hectares*

| | Areas on farms wholly or mainly in: | | | | |
|---|---|---|---|---|---|
| | Severely Disadvantaged Area (SDA) | Disadvantaged Area (DA) | Total LFA | Non LFA | LFA as % of NI Total |
| Cereals | 2 | 5 | 7 | 29 | 20 |
| Potatoes | 0 | 1 | 1 | 3 | 30 |
| Other agricultural crops | 1 | 2 | 3 | 5 | 33 |
| Horticultural crops | 0 | 1 | 1 | 2 | 21 |
| **Total crops** | **3** | **9** | **12** | **40** | **23** |
| Grass: Under 5 years old | 44 | 38 | 82 | 53 | 61 |
| 5 years and over | 271 | 202 | 473 | 203 | 70 |
| **Total grass** | **316** | **240** | **555** | **256** | **68** |
| Rough grazing[2] | 131 | 12 | 143 | 6 | 96 |
| Woods/other land | 6 | 4 | 10 | 8 | 55 |
| **Total area** | **456** | **264** | **720** | **309** | **70** |

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 2005

*thousand head*

| | Numbers on farms wholly or mainly in: | | | | |
|---|---|---|---|---|---|
| | Severely Disadvantaged Area (SDA) | Disadvantaged Area (DA) | Total LFA | Non LFA | LFA as % of NI Total |
| **CATTLE** | | | | | |
| Dairy cows | 47 | 95 | 142 | 149 | 49 |
| Beef cows | 153 | 84 | 237 | 60 | 80 |
| Heifers in calf | 23 | 29 | 51 | 43 | 55 |
| Bulls for service | 7 | 5 | 12 | 5 | 70 |
| **Other cattle** | | | | | |
| Over 2 years | 23 | 41 | 64 | 56 | 53 |
| 1-2 years | 96 | 130 | 226 | 163 | 58 |
| Under 1 year | 162 | 140 | 302 | 155 | 66 |
| **Total cattle** | **512** | **524** | **1,035** | **631** | **62** |
| **SHEEP** | | | | | |
| Breeding ewes | 589 | 237 | 826 | 201 | 80 |
| Other sheep | 623 | 272 | 895 | 223 | 80 |
| **Total sheep** | **1,212** | **509** | **1,721** | **424** | **80** |
| **PIGS** | | | | | |
| Sows and gilts | 8 | 10 | 18 | 19 | 48 |
| Other pigs | 72 | 90 | 162 | 206 | 44 |
| **Total pigs** | **80** | **100** | **180** | **225** | **44** |
| **POULTRY** | | | | | |
| Laying birds | 1087 | 682 | 1,769 | 551 | 76 |
| Table fowl | 2413 | 4518 | 6,932 | 5594 | 55 |
| Other poultry | 663 | 1030 | 1,693 | 1076 | 61 |
| **Total poultry** | **4,163** | **6,230** | **10,393** | **7,221** | **59** |
| **HORSES AND PONIES** | **2** | **3** | **5** | **5** | **49** |
| **GOATS** | **1** | **1** | **2** | **1** | **76** |

1. See Note 1, Table 3.4.

# 4. FARM STRUCTURE

***Methodological notes***

*In the agricultural census, the statistical definition of a farm 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.***

**Farms**

The number of active farm businesses included in the June 2005 census, 27,064, was 550 fewer than in 2004. This is a net change, with some new businesses being created and others merging or ceasing to be active. The downward trend in the number of farms is 2.0% per year from 2000 to 2005 and 2.0% over the past 10 years.

Almost a quarter of all farms have less than 10 hectares of crops and grass while just over 1,300 farms (4 per cent) have 100 hectares or more; these latter occupy 21 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), and land quality is very variable, area alone does not accurately reflect the level of business activity on farms. To overcome this problem Standard Gross Margins (SGMs) have been used throughout the EU as the basis for measuring both farm business size and defining farm type. The concept was adapted in the UK where farms were categorised as belonging to a particular size band: **very small, small, medium** or **large**, depending on total farm SGM. However, it was felt that the results were difficult to interpret and that a size definition more clearly linked to labour requirements would be more meaningful. So, while farm business type will continue to be based on the SGM approach, from 2004 onwards, farm size will reflect Standard Labour Requirements (SLRs) on farms (see appendix, page 55). While the system applies across the UK it has been possible to adapt it to account for some regional variation. Smaller field sizes in Northern Ireland, compared with the rest of the UK, mean that additional labour inputs are required for grassland and cropping activities and this is reflected in higher SLR coefficients than apply for Great Britain. Farms will continue to be classed as **very small, small, medium** or **large** but based on their underlying total SLR.

The majority of farm businesses in Northern Ireland, 76 per cent in 2005, are classified as **very small**. In 2005 there were 20,468 farms in this category (Table 4.3), 290 less than in 2004. These farms are unlikely to provide full time employment or an adequate income solely from farming activities.[1] They contribute 27 per cent of the industry's total SGM but account for 47 per cent of the farmed area (Table 4.15). Their main activities are cattle rearing and fattening and they have 60 per cent of beef cows and 50 per cent of fattening

[1] For further information on the persons living and working on farms of different sizes, see "Farmers and Farm Families in Northern Ireland", DARD 2002.

cattle over one year old. Around 32,500 persons are engaged in the work of these farms (Table 4.13).

There are 3,823 **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 12 per cent of pigs to 29 per cent of sheep; they cover 24 per cent of the agricultural area and involve 22 per cent of the full time agricultural labour force (Table 4.15).

The 1,478 **medium** and 1,295 **large** farms (together representing 10 per cent of the total number) contribute 49 per cent of the total SGM from under a third (28%) of the land area (Table 4.15). They are particularly dominant in the dairy, pigs and poultry sectors with, respectively, 67, 82 and 59 per cent shares of the livestock numbers.

Seventy four per cent of **very small** and 65 per cent of **small** farms are mainly in the LFA whereas, for **medium** and **large** farms, the proportions are 53 and 41 per cent respectively (Table 4.5).

**Farm type**

Eighty-nine per cent of Northern Ireland farms derive two-thirds or more of their total SGM from cattle and/or sheep (Table 4.6), including 15 per cent classified as **dairy** farms and 74 per cent as **cattle and sheep**. Relatively few farms depend predominantly on cropping, 469 (2 per cent) being classed as **cereal** farms, 224 (1 per cent) as **general cropping** and 306 (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 (473). Specialist **pigs and poultry** farms (541) and **mixed** farms (944) make up 2 and 3 per cent of the total respectively.

**Farm tenure**

Most farms in Northern Ireland include some rented land, 7 per cent are entirely rented or leased, 45 per cent have a mixture of owned and rented land and the remaining 48 per cent are entirely owner-occupied (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**

In 2005, 4,368 farms (16 per cent) had dairy cows, 15,584 (58 per cent) had beef cows and 23,491 (87 per cent) had cattle of some type. The average number of dairy cows per herd, 67, was 4 more than in 2004. It compares with an average herd size for beef breeding herds of 19 cows. Forty-three per cent of dairy cows are in herds of 100 or more cows, compared with 9 per cent of beef cows.

Some 8,683 farms had breeding sheep, with an average of 118 ewes per flock. There are relatively few large flocks in Northern Ireland, only 35 having 1,000 ewes or more.

Pigs were present on 438 farms, 45 fewer than in 2004. Most of the pig herds (368 in 2005) had sows, averaging 100 sows per herd. Around a quarter, (94) had fewer than 5 sows and 107 had 100 or more.

Although 1,000 farms recorded laying hens on their June census return, for the most part these were very small flocks. Only 104 farms had 1,000 or more birds (Table 4.21). A similar situation occurs with broiler flocks, where over 90 per cent of the birds were in 197 farm businesses (Table 4.21).

In 2005 cereals were grown on 3,024 farms, which is 12 per cent of farms in Northern Ireland, and the average cereal enterprise consisted of 12 hectares. (Table 4.24) While over 40 per cent (1,233) of the farms with cereals had under 5 hectares, the 105 farms which grew 50 hectares or more accounted for more than a quarter of the cereals area.

Some 722 farms, 3 per cent of the total, grew potatoes in 2005; of these, 119 with 10 hectares or more of the crop contributed 70% of the total area (Table 4.25).

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## Table 4.1 Number and area of farms by area farmed[1], June 2005

| Size group (hectares) | By crops and grass area Farms | By crops and grass area Hectares | By total area Farms | By total area Hectares |
|---|---|---|---|---|
| Nil | 430 | - | 175 | - |
| 0.1 - 9.9 | 6,027 | 34,404 | 5,238 | 30,082 |
| 10.0 - 19.9 | 6,449 | 93,705 | 6,025 | 88,038 |
| 20.0 - 29.9 | 4,275 | 104,547 | 4,211 | 103,330 |
| 30.0 - 49.9 | 4,813 | 186,083 | 5,115 | 198,455 |
| 50.0 - 99.9 | 3,863 | 261,990 | 4,505 | 309,476 |
| 100.0 - 199.9 | 1,042 | 136,013 | 1,439 | 191,598 |
| 200.0 + | 165 | 46,160 | 356 | 108,541 |
| **Total** | **27,064** | **862,901** | **27,064** | **1,029,520** |

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 2000 - 2005

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| **Number of farms** | 29,891 | 29,818 | 28,513 | 28,281 | 27,614 | 27,064 |
| **Average area per farm (ha):** | | | | | | |
| Crops and grass | 29.6 | 30.0 | 31.4 | 31.9 | 32.3 | 31.9 |
| Total area | 35.5 | 35.8 | 37.4 | 38.0 | 38.5 | 38.0 |
| **Per cent of crops and grass area farmed in units of:** (hectares) | | | | | | |
| 0.1 - 9.9 | 4.7 | 4.6 | 4.2 | 4.1 | 4.0 | 4.0 |
| 10.0 - 19.9 | 11.7 | 11.4 | 10.8 | 10.5 | 10.4 | 10.9 |
| 20.0 - 29.9 | 12.9 | 12.7 | 12.1 | 11.8 | 11.8 | 12.1 |
| 30.0 - 49.9 | 22.5 | 22.4 | 21.6 | 21.3 | 21.2 | 21.6 |
| 50.0 - 99.9 | 30.8 | 30.8 | 30.5 | 30.4 | 30.6 | 30.4 |
| 100.0 + | 17.5 | 18.0 | 20.8 | 21.9 | 22.1 | 21.1 |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

## Table 4.3 Number of farms by business size and area farmed, June 2005

*number*

| Area of crops and grass farmed (hectares) | Business size[1] | | | | |
|---|---|---|---|---|---|
| | Very small | Small | Medium | Large | All sizes |
| Under 10 | 6,154 | 144 | 78 | 81 | 6,457 |
| 10.0 - 19.9 | 6,216 | 170 | 31 | 32 | 6,449 |
| 20.0 - 29.9 | 3,833 | 372 | 48 | 22 | 4,275 |
| 30.0 - 49.9 | 3,168 | 1,323 | 252 | 70 | 4,813 |
| 50.0 - 99.9 | 1,043 | 1,515 | 798 | 507 | 3,863 |
| 100.0 + | 54 | 299 | 271 | 583 | 1,207 |
| **Total** | **20,468** | **3,823** | **1,478** | **1,295** | **27,064** |

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

## Table 4.4 Number of farms by business size, June 2000 - 2005

*number*

| Business size[1] | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Very small | 15,535 | 16,153 | 15,295 | 15,206 | 20,758 | 20,468 |
| Small | 10,547 | 9,833 | 9,387 | 9,365 | 3,984 | 3,823 |
| Medium | 3,153 | 3,103 | 3,069 | 2,946 | 1,584 | 1,478 |
| Large | 656 | 729 | 762 | 764 | 1,288 | 1,295 |
| **Total** | **29,891** | **29,818** | **28,513** | **28,281** | **27,614** | **27,064** |

1. See Note 1, Table 4.3.

## Table 4.5 Number of farms by business size and Less Favoured Area (LFA) category[1], June 2005

*number*

| Business size[2] | Severely Disadvantaged Area (SDA) | Disadvantaged Area (DA) | Total LFA | Non LFA | LFA as % NI |
|---|---|---|---|---|---|
| Very small | 8,712 | 6,508 | 15,220 | 5,248 | 74 |
| Small | 1,307 | 1,182 | 2,489 | 1,334 | 65 |
| Medium | 336 | 446 | 782 | 696 | 53 |
| Large | 190 | 343 | 533 | 762 | 41 |
| **Total** | **10,545** | **8,479** | **19,024** | **8,040** | **70** |

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 2005

*number*

| Business type[1] | Business size[1] | | | | |
|---|---|---|---|---|---|
| | Very small | Small | Medium | Large | All sizes |
| Cereals | 408 | 41 | 13 | 7 | 469 |
| General cropping | 138 | 38 | 17 | 31 | 224 |
| Horticulture | 131 | 70 | 27 | 78 | 306 |
| Pigs & poultry | 271 | 136 | 56 | 78 | 541 |
| Dairy | 902 | 1,489 | 845 | 822 | 4,058 |
| Cattle & sheep (LFA)[2] | 13,752 | 1,297 | 264 | 117 | 15,430 |
| Cattle & sheep (lowland)[2] | 3,982 | 496 | 105 | 36 | 4,619 |
| Mixed | 554 | 212 | 93 | 85 | 944 |
| Others | 330 | 44 | 58 | 41 | 473 |
| **All types** | **20,468** | **3,823** | **1,478** | **1,295** | **27,064** |

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 2000 - 2005

*number*

| Business type[1] | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Cereals | 510 | 537 | 479 | 457 | 467 | 469 |
| General cropping | 322 | 311 | 305 | 295 | 314 | 224 |
| Horticulture | 346 | 331 | 338 | 322 | 312 | 306 |
| Pigs & poultry | 540 | 523 | 507 | 510 | 557 | 541 |
| Dairy | 4,855 | 4,741 | 4,596 | 4,425 | 4,201 | 4,058 |
| Cattle & sheep (LFA)[2] | 16,183 | 16,061 | 15,628 | 15,700 | 15,464 | 15,430 |
| Cattle & sheep (lowland)[2] | 4,709 | 4,850 | 4,680 | 4,589 | 4,565 | 4,619 |
| Mixed | 1,148 | 1,067 | 1,004 | 1,058 | 1,034 | 944 |
| Others | 1,278 | 1,397 | 976 | 925 | 700 | 473 |
| **All types** | **29,891** | **29,818** | **28,513** | **28,281** | **27,614** | **27,064** |

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

## Table 4.8 Number of farms by business type and Less Favoured Area (LFA) category[1], June 2005

*number*

| Business type[2] | Severely Disadvantaged Area (SDA) | Disadvantaged Area (DA) | Total LFA | Non LFA | LFA as % NI |
|---|---|---|---|---|---|
| Cereals | 16 | 75 | 91 | 378 | 19 |
| General cropping | 14 | 52 | 66 | 158 | 29 |
| Horticulture | 15 | 87 | 102 | 204 | 33 |
| Pigs & poultry | 142 | 186 | 328 | 213 | 61 |
| Dairy | 935 | 1,453 | 2,388 | 1,670 | 59 |
| Cattle & sheep | 9,232 | 6,198 | 15,430 | 4,619 | 77 |
| Mixed | 96 | 277 | 373 | 571 | 40 |
| Others | 95 | 151 | 246 | 227 | 52 |
| **All types** | **10,545** | **8,479** | **19,024** | **8,040** | **70** |

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 2005

*farms*

| Owned land as percentage of farmed area | Business size[1] | | | | |
|---|---|---|---|---|---|
| | Very small | Small | Medium | Large | All sizes |
| All owner occupied | 11,280 | 1,051 | 302 | 246 | 12,879 |
| 50-<100% | 4,756 | 1,789 | 757 | 668 | 7,970 |
| >0-<50% | 2,711 | 863 | 392 | 357 | 4,323 |
| None owner occupied | 1,721 | 120 | 27 | 24 | 1,892 |
| **All farms** | **20,468** | **3,823** | **1,478** | **1,295** | **27,064** |

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

## Table 4.10 Area of land by type of tenure, 2000 - 2005

*hectares*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Owner-occupied | 743,744 | 738,789 | 715,811 | 708,559 | 701,500 | 701,311 |
| Rented | 316,760 | 329,445 | 351,451 | 365,189 | 361,312 | 328,209 |
| **Total** | **1,060,504** | **1,068,234** | **1,067,262** | **1,073,748** | **1,062,812** | **1,029,520** |
| **Aver. percentage of owned land** | **70.1** | **69.2** | **67.1** | **66.0** | **66.0** | **68.1** |
| **Common grazing** | **37,400** | **40,900** | **41,000** | **35,500** | **29,400** | **29,400[1]** |

1. 2004

## Table 4.11 Average conacre rents by type of use, 1999 - 2004

*£/hectare*

| Use | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|---|---|---|---|---|---|
| Grass | 196 | 189 | 192 | 201 | 199 | 198 |
| Potatoes | 479 | 482 | 406 | 412 | 479 | 433 |
| Cereals | 211 | 213 | 233 | 246 | 208 | 247 |
| Rough grazing | 51 | 51 | 49 | 51 | 54 | 53 |
| **All uses** | **196** | **182** | **184** | **174** | **166** | **165** |

Source: Farm Business Survey.

## Table 4.12 Number of sales and average price of agricultural land by area sold, 1999 - 2004[1,2]

| | 1999 | 2000 | 2001[3] | 2002[4] | 2003[5] | 2004[5] |
|---|---|---|---|---|---|---|
| Number of sales | 163 | 174 | 67 | 55 | 44 | 40 |
| Area (hectares) | 1,672 | 1,614 | 597 | 550 | 520 | 562 |
| Value (£ '000) | 13,825 | 15,545 | 5,950 | 6,851 | 7,774 | 9,153 |
| Average price (£ per ha) by hectare size group | | | | | | |
| 2 - 9.9 | 9,397 | 11,749 | 13,209 | 14,793 | 16,376 | 18,830 |
| 10 - 19.9 | 9,104 | 7,380 | 8,665 | 10,681 | 12,696 | 15,082 |
| 20 and over | 6,165 | 8,722 | 6,026 | 10,449 | 14,871 | 12,668 |
| **All sizes** (unweighted) | 8,268 | 9,634 | 9,961 | 12,456 | 14,950 | 16,286 |

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 for 2001 and previous years.
4. Figures for 2002 are estimates due to lack of data.
5. Land sales of less than five hectares are not included for 2003 and 2004.

## Table 4.13 Distribution of the farm labour force by business size, June 2005

*number of persons*

| Labour item | Business size[1] | | | | |
|---|---|---|---|---|---|
| | Very small | Small | Medium | Large | All sizes |
| **Farmers and partners** | | | | | |
| Full time | 10,182 | 4,157 | 1,877 | 1,943 | 18,159 |
| Part time | 12,954 | 872 | 300 | 241 | 14,367 |
| **Total** | **23,136** | **5,029** | **2,177** | **2,184** | **32,526** |
| **Spouses of farmers** | **3,946** | **1,149** | **550** | **541** | **6,186** |
| **Other workers** | | | | | |
| Full time | 543 | 405 | 340 | 1,265 | 2,553 |
| Part time | 1,296 | 505 | 296 | 417 | 2,514 |
| Casual/seasonal | 3,801 | 1,567 | 772 | 1,154 | 7,294 |
| **Total other workers** | **5,640** | **2,477** | **1,408** | **2,836** | **12,361** |
| **Total agricultural labour force** | **32,722** | **8,655** | **4,135** | **5,561** | **51,073** |

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

## Table 4.14 Distribution of the farm labour force by Less Favoured Area (LFA) category[1], June 2005

*number of persons*

| Labour item | Severely Disadvantaged Area (SDA) | Disadvantaged Area (DA) | Total LFA | Non LFA | LFA as % NI |
|---|---|---|---|---|---|
| **Farmers and partners** | | | | | |
| Full time | 6,589 | 5,598 | 12,187 | 5,972 | 67 |
| Part time | 5,710 | 4,606 | 10,316 | 4,051 | 72 |
| **Total** | **12,299** | **10,204** | **22,503** | **10,023** | **69** |
| **Spouses of farmers** | **2,190** | **1,875** | **4,065** | **2,121** | **66** |
| **Other workers** | | | | | |
| Full time | 664 | 625 | 1,289 | 1,264 | 50 |
| Part time | 806 | 712 | 1,518 | 996 | 60 |
| Casual/seasonal | 2,358 | 2,197 | 4,555 | 2,739 | 62 |
| **Total other workers** | **3,828** | **3,534** | **7,362** | **4,999** | **60** |
| **Total agricultural labour force** | **18,317** | **15,613** | **33,930** | **17,143** | **66** |

1. See Note 1, Table 4.5 .

## Table 4.15 Distribution of numbers of livestock, hectares of crops, full-time labour and output by business size, June 2005

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

| Item | Business size[1] | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Very small | | | Small | | | Medium | | | Large | | | All farms | | |
| | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C |
| **Cattle** | | | | | | | | | | | | | | | |
| Total | 17,459 | 665 | *40* | 3,547 | 415 | *25* | 1,338 | 242 | *15* | 1,147 | 343 | *21* | 23,491 | 1,666 | *100* |
| Dairy cows | 1,001 | 20 | *7* | 1,581 | 75 | *26* | 897 | 71 | *24* | 889 | 125 | *43* | 4,368 | 291 | *100* |
| Beef cows | 12,658 | 179 | *60* | 2,040 | 72 | *24* | 552 | 25 | *8* | 334 | 20 | *7* | 15,584 | 297 | *100* |
| Slaughter cattle >1year | 11,882 | 215 | *50* | 2,608 | 110 | *26* | 948 | 51 | *12* | 743 | 52 | *12* | 16 | 429 | *100* |
| **Sheep** | | | | | | | | | | | | | | | |
| Total | 6,384 | 1,006 | *47* | 1,628 | 627 | *29* | 473 | 263 | *12* | 337 | 249 | *12* | 8,822 | 2,145 | *100* |
| Ewes | 6,271 | 490 | *48* | 1,613 | 296 | *29* | 465 | 125 | *12* | 334 | 116 | *11* | 8,683 | 1,027 | *100* |
| **Pigs** | | | | | | | | | | | | | | | |
| Total | 194 | 26 | *6* | 92 | 49 | *12* | 60 | 59 | *15* | 92 | 272 | *67* | 438 | 405 | *100* |
| Sows | 150 | 2 | *6* | 80 | 4 | *12* | 54 | 6 | *15* | 84 | 25 | *67* | 368 | 37 | *100* |
| Other pigs over 20 kg | 130 | 17 | *7* | 82 | 29 | *12* | 58 | 35 | *15* | 85 | 157 | *66* | 355 | 238 | *100* |
| **Poultry** | | | | | | | | | | | | | | | |
| Total | 1,163 | 2,551 | *14* | 363 | 4,652 | *26* | 132 | 3,068 | *17* | 151 | 7,343 | *42* | 1,809 | 17,614 | *100* |
| Layers | 776 | 197 | *8* | 142 | 348 | *15* | 39 | 177 | *8* | 44 | 1,598 | *69* | 1,001 | 2,319 | *100* |
| **Crops** | | | | | | | | | | | | | | | |
| Oats | 195 | 1 | *35* | 81 | 0 | *23* | 41 | 0 | *19* | 38 | 0 | *23* | 355 | 2 | *100* |
| Wheat | 210 | 1 | *17* | 152 | 2 | *19* | 110 | 1 | *15* | 214 | 4 | *49* | 686 | 8 | *100* |
| Barley | 1,273 | 8 | *33* | 656 | 7 | *26* | 312 | 4 | *16* | 335 | 7 | *25* | 2,576 | 26 | *100* |
| Potatoes | 394 | 1 | *16* | 172 | 1 | *18* | 75 | 1 | *14* | 81 | 2 | *52* | 722 | 5 | *100* |
| Crops & grass | 20,138 | 408 | *47* | 3,780 | 208 | *24* | 1,451 | 107 | *12* | 1,265 | 139 | *16* | 26,634 | 863 | *100* |
| Rough grazing | 5,093 | 73 | *49* | 1,112 | 40 | *27* | 417 | 21 | *14* | 268 | 15 | *10* | 6,890 | 149 | *100* |
| **Total area** | 20,468 | 489 | *47* | 3,823 | 252 | *24* | 1,478 | 130 | *13* | 1,295 | 158 | *15* | 27,064 | 1,030 | *100* |
| **Labour** | | | | | | | | | | | | | | | |
| Full-time labour force[2] | 9,776 | 12 | *51* | 3,567 | 5 | *22* | 1,436 | 2 | *11* | 1 | 4 | *15* | 16,045 | 23 | *100* |
| **Output** | | | | | | | | | | | | | | | |
| SGM[3] | 20,468 | 206 | *27* | 3,823 | 183 | *24* | 1,478 | 127 | *17* | 1,295 | 244 | *32* | 27,064 | 760 | *100* |

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 2005**

| | 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** | 34 | 49 | 0.8 | 0.0 | 1,394 | 2,142 | 8.9 | 0.7 |
| **3 - 4** | 25 | 91 | 0.6 | 0.0 | 1,310 | 4,625 | 8.4 | 1.6 |
| **5 - 9** | 88 | 625 | 2.0 | 0.2 | 3,318 | 23,007 | 21.3 | 7.8 |
| **10 - 14** | 159 | 1,874 | 3.6 | 0.6 | 2,623 | 31,095 | 16.8 | 10.5 |
| **15 - 19** | 198 | 3,373 | 4.5 | 1.2 | 1,785 | 29,896 | 11.5 | 10.1 |
| **20 - 29** | 467 | 11,353 | 10.7 | 3.9 | 2,296 | 54,464 | 14.7 | 18.3 |
| **30 - 39** | 494 | 16,841 | 11.3 | 5.8 | 1,132 | 38,234 | 7.3 | 12.9 |
| **40 - 49** | 507 | 22,379 | 11.6 | 7.7 | 635 | 27,758 | 4.1 | 9.4 |
| **50 - 59** | 441 | 23,798 | 10.1 | 8.2 | 368 | 19,647 | 2.4 | 6.6 |
| **60 - 69** | 336 | 21,482 | 7.7 | 7.4 | 229 | 14,432 | 1.5 | 4.9 |
| **70 - 99** | 771 | 63,597 | 17.7 | 21.9 | 298 | 24,074 | 1.9 | 8.1 |
| **100 - 199** | 743 | 98,576 | 17.0 | 33.9 | 173 | 21,560 | 1.1 | 7.3 |
| **200 & over** | 105 | 26,492 | 2.4 | 9.1 | 23 | 5,924 | 0.1 | 2.0 |
| **Total 2005** | **4,368** | **290,530** | **100.0** | **100.0** | **15,584** | **296,858** | **100.0** | **100.0** |
| ***Total 2004*** | *4,577* | *288,296* | | | *15,546* | *296,169* | | |
| **Average 2005** | | **66.5** | | | | **19.0** | | |
| ***Average 2004*** | | *63.0* | | | | *19.1* | | |

**Table 4.17 Distribution of (a) slaughter cattle one year-old and over and (b) total cattle by herd size, June 2005**

| | 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** | 3,136 | 7,183 | 19.4 | 1.7 | 853 | 2,416 | 3.6 | 0.1 |
| **5 - 9** | 2,655 | 18,312 | 16.4 | 4.3 | 1,555 | 10,956 | 6.6 | 0.7 |
| **10 - 19** | 3,604 | 50,193 | 22.3 | 11.7 | 3,390 | 49,106 | 14.4 | 2.9 |
| **20 - 29** | 2,291 | 54,703 | 14.2 | 12.8 | 2,979 | 72,453 | 12.7 | 4.3 |
| **30 - 39** | 1,287 | 43,563 | 8.0 | 10.2 | 2,309 | 79,170 | 9.8 | 4.8 |
| **40 - 49** | 865 | 37,939 | 5.3 | 8.8 | 1,869 | 82,841 | 8.0 | 5.0 |
| **50 - 69** | 1,005 | 58,258 | 6.2 | 13.6 | 2,724 | 159,886 | 11.6 | 9.6 |
| **70 - 99** | 694 | 56,878 | 4.3 | 13.3 | 2,558 | 212,478 | 10.9 | 12.8 |
| **100 - 199** | 538 | 71,380 | 3.3 | 16.6 | 3,606 | 498,608 | 15.4 | 29.9 |
| **200 - 299** | 72 | 16,782 | 0.4 | 3.9 | 1,082 | 260,515 | 4.6 | 15.6 |
| **300 & over** | 34 | 13,806 | 0.2 | 3.2 | 566 | 237,181 | 2.4 | 14.2 |
| **Total 2005** | **16,181** | **428,997** | **100.0** | **100.0** | **23,491** | **1,665,608** | **100.0** | **100.0** |
| ***Total 2004*** | *16,411* | *427,695* | | | *23,776* | *1,677,583* | | |
| **Average 2005** | | **26.5** | | | | **70.9** | | |
| ***Average 2004*** | | *26.1* | | | | *70.6* | | |

**Table 4.18 Distribution of (a) ewes and (b) total sheep by flock size, June 2005**

| | Ewes | | | | Total sheep | | | |
|---|---|---|---|---|---|---|---|---|
| Number | Numbers of | | Percentages of | | Numbers of | | Percentages of | |
| per farm | Farms | Ewes | Farms | Ewes | Farms | Sheep | Farms | Sheep |
| **1 - 24** | 1,292 | 18,934 | 14.9 | 1.8 | 637 | 8,566 | 7.2 | 0.4 |
| **25 - 49** | 1,637 | 59,684 | 18.9 | 5.8 | 925 | 34,457 | 10.5 | 1.6 |
| **50 - 99** | 2,337 | 165,820 | 26.9 | 16.1 | 1,585 | 116,578 | 18.0 | 5.4 |
| **100 - 199** | 2,053 | 281,165 | 23.6 | 27.4 | 2,226 | 319,014 | 25.2 | 14.9 |
| **200 - 299** | 687 | 164,642 | 7.9 | 16.0 | 1,290 | 315,855 | 14.6 | 14.7 |
| **300 - 399** | 311 | 104,502 | 3.6 | 10.2 | 680 | 233,252 | 7.7 | 10.9 |
| **400 - 499** | 151 | 66,107 | 1.7 | 6.4 | 444 | 198,374 | 5.0 | 9.2 |
| **500 - 699** | 115 | 66,490 | 1.3 | 6.5 | 494 | 288,977 | 5.6 | 13.5 |
| **700 - 999** | 65 | 51,609 | 0.7 | 5.0 | 291 | 237,070 | 3.3 | 11.1 |
| **1,000 - 1,499** | 28 | 33,400 | 0.3 | 3.3 | 154 | 186,759 | 1.7 | 8.7 |
| **1,500 & over** | 7 | 14,978 | 0.1 | 1.5 | 96 | 206,181 | 1.1 | 9.6 |
| **Total 2005** | **8,683** | **1,027,331** | **100.0** | **100.0** | **8,822** | **2,145,084** | **100.0** | **100.0** |
| ***Total 2004*** | *8,734* | *1,100,505* | | | *8,869* | *2,225,407* | | |
| **Average 2005** | | **118.3** | | | | **243.2** | | |
| ***Average 2004*** | | *126.0* | | | | *250.9* | | |

**Table 4.19 Distribution of breeding sows by herd size, June 2005**

| | Sows (including gilts) | | | |
|---|---|---|---|---|
| Number | Numbers of | | Percentages of | |
| per farm | Farms | Sows | Farms | Sows |
| **1 - 4** | 94 | 212 | 25.5 | 0.6 |
| **5 - 9** | 23 | 160 | 6.3 | 0.4 |
| **10 - 19** | 31 | 484 | 8.4 | 1.3 |
| **20 - 29** | 21 | 541 | 5.7 | 1.5 |
| **30 - 49** | 32 | 1,287 | 8.7 | 3.5 |
| **50 - 99** | 60 | 4,501 | 16.3 | 12.3 |
| **100 - 199** | 60 | 8,379 | 16.3 | 22.8 |
| **200 - 299** | 18 | 4,305 | 4.9 | 11.7 |
| **300 & over** | 29 | 16,867 | 7.9 | 45.9 |
| **Total 2005** | **368** | **36,736** | **100.0** | **100.0** |
| ***Total 2004*** | *401* | *37,833* | | |
| **Average 2005** | | **99.8** | | |
| ***Average 2004*** | | *94.3* | | |

**Table 4.20 Distribution of (a) fattening pigs 20kg and over and (b) total pigs by herd size, June 2005**

| | 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** | 39 | 145 | 11.0 | 0.1 | 64 | 196 | 14.6 | 0.0 |
| **10 - 19** | 25 | 341 | 7.0 | 0.1 | 34 | 496 | 7.8 | 0.1 |
| **20 - 49** | 26 | 831 | 7.3 | 0.3 | 37 | 1,206 | 8.4 | 0.3 |
| **50 - 99** | 17 | 1,279 | 4.8 | 0.5 | 27 | 1,871 | 6.2 | 0.5 |
| **100 - 199** | 43 | 5,734 | 12.1 | 2.4 | 35 | 5,116 | 8.0 | 1.3 |
| **200 - 399** | 59 | 16,941 | 16.6 | 7.1 | 41 | 11,437 | 9.4 | 2.8 |
| **400 - 999** | 77 | 48,343 | 21.7 | 20.3 | 87 | 57,105 | 19.9 | 14.1 |
| **1,000 - 1,999** | 45 | 59,860 | 12.7 | 25.2 | 61 | 83,811 | 13.9 | 20.7 |
| **2,000 & over** | 10 | 24,551 | 2.8 | 10.3 | 23 | 55,994 | 5.3 | 13.8 |
| **Total 2005** | **355** | **237,936** | **100.0** | **100.0** | **438** | **405,093** | **100.0** | **100.0** |
| ***Total 2004*** | *437* | *276,537* | | | *483* | *424,058* | | |
| **Average 2005** | | **670.2** | | | | **924.9** | | |
| ***Average 2004*** | | *632.8* | | | | *878.0* | | |

**Table 4.21 Distribution of (a) laying hens and (b) broilers by flock size, June 2005**

| | Laying Hens | | | | Broilers | | | |
|---|---|---|---|---|---|---|---|---|
| | Numbers of | | Percentages of | | Numbers of | | Percentages of | |
| Number per farm | Farms | Hens ('000) | Farms | Hens | Farms | Broilers ('000) | Farms | Broilers |
| **1 - 999** | 897 | 17 | 89.6 | 0.7 | 29 | 9 | 9 | 0.1 |
| **1,000 - 4,999** | 24 | 77 | 2.4 | 3.3 | | | | |
| **5,000 - 9,999** | 31 | 209 | 3.1 | 9.0 | 24 | 194 | 7.6 | 1.5 |
| **10,000 - 19,999** | 24 | 337 | 2.4 | 14.5 | 66 | 1,021 | 20.9 | 8.2 |
| **20,000 - 29,999** | 6 | 134 | 0.6 | 5.8 | 44 | 961 | 13.9 | 7.7 |
| **30,000 - 49,999** | 9 | 349 | 0.9 | 15.0 | 81 | 3,121 | 25.6 | 24.9 |
| **50,000 & over** | 10 | 1,197 | 1.0 | 51.6 | 72 | 7,220 | 22.8 | 57.6 |
| **Total 2005** | **1,001** | **2,319** | **100.0** | **100.0** | **316** | **12,526** | **100.0** | **100.0** |
| ***Total 2004*** | *1,005* | *2,266* | | | *328* | *15,007* | | |
| **Average 2005** | | **2,317** | | | | **39,638** | | |
| ***Average 2004*** | | *2,255* | | | | *45,753* | | |

**Table 4.22 Distribution of total poultry by flock size, June 2005**

| | Total poultry | | | |
|---|---|---|---|---|
| | Numbers of | | Percentages of | |
| Number per farm | Farms | Birds ('000) | Farms | Birds |
| **1 - 999** | 1,206 | 34 | 50.7 | 0.2 |
| **1,000 - 4,999** | 76 | 235 | 3.2 | 1.5 |
| **5,000 - 9,999** | 119 | 840 | 5.0 | 5.4 |
| **10,000 - 19,999** | 159 | 2,309 | 6.7 | 14.8 |
| **20,000 - 29,999** | 62 | 1,387 | 2.6 | 8.9 |
| **30,000 - 49,999** | 98 | 3,767 | 4.1 | 24.1 |
| **50,000 & over** | 89 | 9,043 | 3.7 | 57.9 |
| **Total 2005** | **1,809** | **17,614** | **100.0** | **100.0** |
| ***Total 2004*** | *1,823* | *20,509* | | |
| **Average 2005** | | **9,737** | | |
| ***Average 2004*** | | *11,250* | | |

**Table 4.23 Distribution of (a) barley and (b) wheat by area of crop, June 2005**

| | Barley | | | | Wheat | | | |
|---|---|---|---|---|---|---|---|---|
| Area per farm (ha) | 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** | 44 | 31 | 1.7 | 0.1 | 8 | 6 | 1.2 | 0.1 |
| **1 - 4.9** | 1,086 | 3,139 | 42.2 | 12.2 | 234 | 698 | 34.1 | 8.3 |
| **5 - 9.9** | 677 | 4,759 | 26.3 | 18.5 | 209 | 1,491 | 30.5 | 17.7 |
| **10 - 19.9** | 485 | 6,626 | 18.8 | 25.7 | 140 | 1,909 | 20.4 | 22.7 |
| **20 - 29.9** | 133 | 3,116 | 5.2 | 12.1 | 39 | 912 | 5.7 | 10.8 |
| **30 - 39.9** | 50 | 1,728 | 1.9 | 6.7 | 25 | 863 | 3.6 | 10.3 |
| **40 - 49.9** | 38 | 1,688 | 1.5 | 6.6 | 7 | 310 | 1.0 | 3.7 |
| **50 & over** | 63 | 4,655 | 2.4 | 18.1 | 24 | 2,220 | 3.5 | 26.4 |
| **Total 2005** | **2,576** | **25,740** | **100.0** | **100.0** | **686** | **8,407** | **100.0** | **100.0** |
| ***Total 2004*** | *2,806* | *27,011* | | | *768* | *8,634* | | |
| **Average 2005** | | **10.0** | | | | **12.3** | | |
| ***Average 2004*** | | *9.6* | | | | *11.2* | | |

**Table 4.24 Distribution of total cereals by area of crop, June 2005**

| | Total cereals | | | |
|---|---|---|---|---|
| Area per farm (ha) | Number of Farms | Area of Cereals (ha) | Percentages of Farms | Percentages of Cereals |
| **under 1** | 47 | 32 | 1.6 | 0.1 |
| **1 - 4.9** | 1,186 | 3,417 | 39.2 | 9.4 |
| **5 - 9.9** | 781 | 5,531 | 25.8 | 15.3 |
| **10 - 19.9** | 615 | 8,588 | 20.3 | 23.7 |
| **20 - 29.9** | 156 | 3,718 | 5.2 | 10.3 |
| **30 - 39.9** | 80 | 2,740 | 2.6 | 7.6 |
| **40 - 49.9** | 54 | 2,377 | 1.8 | 6.6 |
| **50 & over** | 105 | 9,845 | 3.5 | 27.2 |
| **Total 2005** | **3,024** | **36,248** | **100.0** | **100.0** |
| ***Total 2004*** | *3,326* | *38,285* | | |
| **Average 2005** | | **12.0** | | |
| ***Average 2004*** | | *11.5* | | |

**Table 4.25 Distribution of potatoes by area of crop, June 2005**

| | Potatoes | | | |
|---|---|---|---|---|
| Area per farm (ha) | Number of Farms | Area of Potatoes (ha) | Percentages of Farms | Percentages of Potatoes |
| **under 1** | 230 | 100 | 31.9 | 2.2 |
| **1 - 4.9** | 287 | 672 | 39.8 | 14.8 |
| **5 - 9.9** | 86 | 598 | 11.9 | 13.2 |
| **10 - 19.9** | 66 | 907 | 9.1 | 20.0 |
| **20 - 29.9** | 20 | 458 | 2.8 | 10.1 |
| **30 - 39.9** | 18 | 629 | 2.5 | 13.9 |
| **40 - 49.9**<br>**50 & over** | 15 | 1,178 | 2 | 26 |
| **Total 2005** | **722** | **4,541** | **100.0** | **100.0** |
| ***Total 2004*** | *916* | *5,665* | | |
| **Average 2005** | | **6.3** | | |
| ***Average 2004*** | | *6.2* | | |

# 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 full time farm businesses in Northern Ireland. A detailed analysis of FBS results is published in 'Farm Incomes in Northern Ireland 2004/05'.*

*Farms in the FBS are classified by type and size. A brief description of the typology system can be found in the Appendix to this publication.*

*The accounting concepts and practices used in compiling FBS income data differ from those on which the Aggregate Agricultural Account, presented in Section 2, is 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 results are available is 2004/05. However, provisional income estimates are also presented below for the 2005/06 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. However, given that virtually all Northern Ireland farms are owner occupied, Net Farm Income is not a particularly good indicator of the level of farm income perceived by farmers. **Cash Income**, which measures the difference between total farm receipts and total farm expenses, is probably the income measure with which farmers can most readily identify.

Trends in Cash Income since 2000/2001 are presented in Table 5.1. The Cash Income presented in Table 5.3 and the Net Farm Incomes presented in Table 5.4 are for farms, which were in the FBS sample in both the 2003/04 and 2004/05 account years. These constitute an identical sample of 270 farm businesses with a standard labour requirement of at least 0.5; they are representative of 98 per cent of the farms of this size in Northern Ireland. The only significant type of farm business excluded from the FBS is horticulture.

**Income changes by farm type in 2004/05**

Cash Income and Net Farm Income in the years ending mid February 2004 and 2005 are presented in Tables 5.3 and 5.4 respectively. In the year ending mid February 2005, Cash Income increased on **Dairy, Cattle & Sheep** and **Mixed** farms but declined on **Cereals** and **General Cropping** farms. The average Cash Income per farm rose by £3,300 (15 per cent) to £26,000 per farm. Net Farm Income also increased on **Dairy** and **Cattle & Sheep** farm types. Declines were recorded on **Cereal, General Cropping** and **Mixed** farm types. The average Net Farm Income rose by £1,100 to £9,400 per farm.

**Provisional estimates of incomes for 2005/06**

Provisional estimates of incomes for full time farm businesses for the year ending mid February 2006 indicate a modest improvement in average Cash Income and Net Farm Income across all farm types. Cash Income is expected to increase on **Dairy** farms, but decline on **Cattle & Sheep** and **Mixed** farm types and to average £26,700 per farm, a rise of just over £700. Net Farm Income is expected to increase by 16% to £10,900 overall, largely as a result of a 27% improvement on **Dairy** farms. Net Farm Income on all other farm types is forecast to show a small decline.

The provisional income estimates described above were prepared in mid-January 2006 and relate to an account year ending in mid February 2006. 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 2005/06, as a small change between the expected and actual out-turn values of either output or input can lead to a large change in income.

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## Table 5.1 Indices of average cash income in real terms by farm type, 2000/2001 to 2005/06[1]

*Indices: 1994/95 - 1996/97 = 100*

| Business type | 2000/01 | 2001/02 | 2002/03 | 2003/04 | 2004/05 | 2005/06 (provisional) |
|---|---|---|---|---|---|---|
| Cereals | 45 | 51 | 22 | 100 | 47 | … |
| General cropping | 136 | 60 | 120 | 124 | 87 | … |
| Pigs and poultry | 5 | 7 | 21 | 46 | . . . | . . . |
| Dairy | 74 | 84 | 65 | 87 | 90 | 96 |
| Cattle and sheep (LFA) | 63 | 79 | 75 | 80 | 91 | 86 |
| Cattle and sheep (lowland) | 137 | 40 | 119 | 97 | 137 | 128 |
| Mixed | 75 | 62 | 61 | 69 | 69 | 63 |
| All types | 70 | 74 | 68 | 82 | 88 | 88 |

1. Where there are less than 3 farms in any particular cell, income figures are not published. However, where available, such income data are used to compile average 'all sizes' incomes.

## Table 5.2 Distribution of farms by cash income (CI), net farm income (NFI) and by farm type, 2004/05

*per cent*

| | Dairy | | Cattle and sheep (LFA) | | All types | |
|---|---|---|---|---|---|---|
| **Income (£'s)** | **CI** | **NFI** | **CI** | **NFI** | **CI** | **NFI** |
| Less than 0 | 1 | 20 | 1 | 28 | 3 | 29 |
| 1 - 4,999 | 3 | 8 | 11 | 19 | 7 | 15 |
| 5,000 - 9,999 | 6 | 13 | 17 | 21 | 13 | 17 |
| 10,000 - 14,999 | 9 | 12 | 22 | 17 | 17 | 12 |
| 15,000 - 19,999 | 13 | 8 | 17 | 5 | 15 | 5 |
| 20,000 - 29,999 | 17 | 17 | 15 | 6 | 14 | 11 |
| 30,000 - 49,999 | 25 | 16 | 11 | 3 | 17 | 8 |
| > 50,000 | 26 | 6 | 6 | 1 | 14 | 3 |
| **Total** | **100** | **100** | **100** | **100** | **100** | **100** |
| Number of farms in sample | 117 | | 117 | | 270 | |

## Table 5.3 Cash income by business size and farm type, 2003/04 and 2004/05

£'000 per farm[1]

| Business type | 0.5 < 1 SLR | | 1 < 2 SLR | | 2 < 3 SLR | | > 3 SLR | | > 0.5 SLR | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 |
| Cereals | 13.9 | 16.6 | ... | ... | ... | ... | ... | ... | 32.4 | 15.7 |
| General cropping | … | … | ... | ... | ... | ... | ... | ... | 41.0 | 30.0 |
| Dairy | 17.3 | 17.1 | 20.4 | 22.1 | 51.9 | 52.7 | 58.8 | 74.4 | 34.2 | 38.0 |
| Cattle and sheep (LFA) | 10.5 | 11.7 | 20.0 | 24.5 | 28.2 | 30.1 | 44.6 | 73.8 | 15.3 | 18.2 |
| Cattle and sheep (lowland) | 6.1 | 9.3 | 18.9 | 28.5 | ... | ... | ... | ... | 12.5 | 19.6 |
| Mixed | 4.6 | 2.1 | 21.4 | 24.1 | ... | ... | ... | ... | 19.5 | 22.1 |
| All types | 10.8 | 11.8 | 20.7 | 23.9 | 45.2 | 47.3 | 54.9 | 71.0 | 22.7 | 26.0 |

1. Where there are less than 3 farms in any particular cell, income figures are not published. However, where available, such income data are used to compile average 'all sizes' incomes.

## Table 5.4 Net farm income by business size and farm type, 2003/04 and 2004/05

£'000 per farm[1]

| Business type | 0.5 < 1 SLR | | 1 < 2 SLR | | 2 < 3 SLR | | > 3 SLR | | > 0.5 SLR | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 |
| Cereals | -2.2 | 1.8 | … | … | … | … | … | … | 5.3 | -2.7 |
| General cropping | … | … | … | … | … | … | … | … | 11.2 | 4.8 |
| Dairy | 8.1 | 6.6 | 7.5 | 7.5 | 27.6 | 30.5 | 25.4 | 31.7 | 15.5 | 17.1 |
| Cattle and sheep (LFA) | 0.7 | 2.7 | 10.7 | 10.2 | 11.0 | 9.6 | 33.4 | 37.4 | 5.1 | 6.2 |
| Cattle and sheep (lowland) | -3.6 | -1.5 | 2.7 | 6.4 | … | … | … | … | -0.3 | 2.3 |
| Mixed | -7.0 | -6.4 | 6.0 | 2.3 | … | … | … | … | 5.5 | 4.7 |
| All types | 0.5 | 1.9 | 8.2 | 7.5 | 22.8 | 23.5 | 25.8 | 32.5 | 8.3 | 9.4 |

1. Where there are less than 3 farms in any particular cell, income figures are not published. However, where available, such income data are used to compile average 'all sizes' incomes.

## Table 5.5 Average tenant's capital by farm type, 2004/05

*£'000 per farm*

| | Cereals | General cropping | Dairy | Cattle and sheep (LFA) | Cattle and sheep (lowland) | Mixed | All Types |
|---|---|---|---|---|---|---|---|
| **Farm size (ESU)** | 35.1 | 59.9 | 62.0 | 21.2 | 19.1 | 29.0 | 37.0 |
| **Total farm area (ha)** | 89.8 | 129.3 | 61.1 | 94.8 | 69.1 | 65.9 | 78.2 |
| **Net farm income** | -2.7 | 4.8 | 17.1 | 6.2 | 2.3 | 4.7 | 9.4 |
| **Total tenant's capital** | **66.6** | **158.9** | **96.8** | **62.6** | **77.0** | **82.4** | **79.8** |
| of which: | | | | | | | |
| **Short term (working) capital** | | | | | | | |
| trading livestock | 16.7 | 34.3 | 17.6 | 22.6 | 44.8 | 31.0 | 24.3 |
| crops | 7.9 | 26.8 | 6.4 | 3.9 | 4.3 | 5.3 | 5.4 |
| other | 1.0 | 2.5 | 0.8 | 0.4 | 0.6 | 0.9 | 0.7 |
| **Medium term capital** | | | | | | | |
| breeding livestock | 0.4 | 18.1 | 43.5 | 18.0 | 12.0 | 19.0 | 26.3 |
| machinery | 40.7 | 77.2 | 28.6 | 17.7 | 15.3 | 26.2 | 23.2 |

## Table 5.6 Average closing valuations by farm type, 2003/04 and 2004/05

*£'000 per farm[1]*

| | Dairy | | Cattle and sheep (LFA) | | All types | |
|---|---|---|---|---|---|---|
| | 2003/04 | 2004/05 | 2003/04 | 2004/05 | 2003/04 | 2004/05 |
| **ASSETS** | | | | | | |
| **Total fixed assets** | 489.7 | 501.1 | 319.0 | 319.8 | 401.5 | 405.6 |
| of which: | | | | | | |
| land and buildings | 418.8 | 427.8 | 278.4 | 278.9 | 349.7 | 353.5 |
| other fixed assets | 71.0 | 73.3 | 40.6 | 40.9 | 51.7 | 52.1 |
| **Total current assets** | 31.2 | 32.0 | 28.3 | 28.6 | 34.0 | 34.0 |
| of which: | | | | | | |
| trading livestock, crops and stores | 25.0 | 24.6 | 27.4 | 26.5 | 30.9 | 29.8 |
| debtors/other short term lending | 6.2 | 7.0 | 0.9 | 2.1 | 3.0 | 4.1 |
| cash in hand and at bank | - | 0.5 | - | - | - | 0.2 |
| **A Total assets** | **520.9** | **533.1** | **347.3** | **348.4** | **435.5** | **439.6** |
| **LIABILITIES** | | | | | | |
| **Total long/medium term loans** | 24.2 | 23.5 | 6.5 | 5.1 | 13.1 | 12.2 |
| of which: | | | | | | |
| bank/other institutional | 24.1 | 23.5 | 6.3 | 4.9 | 13.0 | 12.0 |
| **Total short term loans** | 20.7 | 18.5 | 9.6 | 7.7 | 14.2 | 12.8 |
| of which: | | | | | | |
| bank overdraft | 13.2 | 12.1 | 7.7 | 6.1 | 10.1 | 9.4 |
| **B Total external liabilities** | **44.9** | **42.0** | **16.1** | **12.8** | **27.3** | **25.0** |
| **NET WORTH (A-B)** | **476.0** | **491.1** | **331.2** | **335.6** | **408.2** | **414.6** |

1. Data are averages within each farm type.

# 6. STATISTICAL INDICATORS FOR AGRI-FOOD SECTOR PERFORMANCE, THE RURAL ECONOMY, ANIMAL HEALTH AND WELFARE AND THE AGRI-ENVIRONMENT

## A. AGRI-FOOD SECTOR PERFORMANCE

**Agricultural productivity**

**Total factor productivity (TFP)** is a volume based productivity measure, which takes account of all factors/resources used in production and is calculated on an annual basis for the agricultural sector. Agricultural TFP growth in Northern Ireland, appears to have been faster than in the UK as a whole over the last five years. **Labour productivity** is another widely used measure of productivity, which is a partial measure because all inputs other than labour are ignored. Agricultural labour productivity has grown rapidly in the last five years.

**GVA per work unit**

Gross Value Added (GVA) per head for agriculture fluctuates considerably between years in both the UK and Northern Ireland. This occurs mainly because of the influence of market price changes on GVA. Nonetheless it is clear that GVA per head for the UK is considerably larger than that for Northern Ireland. Reasons for the higher GVA in the UK compared with Northern Ireland are related to the differences in the mix of farming enterprises due to land quality and economies of scale. Returns for some enterprises are higher than others. For instance, field crop enterprises have higher GVA per hectare than grassland based enterprises. Each enterprise requires specific conditions and these are not equally distributed throughout the UK. In general, most of the land area in Northern Ireland is characterised by conditions that are less than ideal for cropping. In Northern Ireland the average farm size is 38 hectares and only 5 per cent of land is cropped, while in the UK the average farm size is 57 hectares and 26 per cent of land is used to grow crops.

**Food sector Performance**

The performance indicators for the food and drinks processing sector indicate steady growth with the exception of the rate of return on capital employed (ROCE), where growth has stagnated in recent years. The ROCE for the food and drinks processing sector is lower in comparison with other sectors of the economy.

## Table 6.1 Agricultural productivity indices

*Indices: 2000 = 100*

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 (provisional) |
|---|---|---|---|---|---|---|
| Total factor productivity in NI[1] | 100.0 | 104.8 | 104.3 | 107.1 | 109.0 | 112.2 |
| Total factor productivity in UK[2] | 100.0 | 97.0 | 103.4 | 104.5 | 104.7 | 106.0 |
| Labour productivity in NI[3] | 100.0 | 124.6 | 123.4 | 128.4 | 137.4 | 150.2 |

1. Calculated as the ratio of output at constant prices to all inputs (including labour and capital) at constant prices.
2. Source: Agriculture in the United Kingdom, DEFRA
3. Calculated as the ratio of net value added at constant prices to total labour input (in Annual Work Units).

## Table 6.2 Comparison of Agricultural Gross Value Added (GVA) per annual work unit between UK and Northern Ireland

| GVA per annual work unit | | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|---|---|---|---|---|---|---|
| UK | £/head | 19,978 | 20,026 | 20,501 | 22,677 | 26,417 | 26,262 |
| Northern Ireland | £/head | 12,836 | 13,801 | 15,861 | 14,283 | 15,451 | 16,857 |
| NI as % of UK | % | 64 | 69 | 77 | 63 | 58 | 64 |

## Table 6.3 Performance indicators for the food and drinks processing sector in Northern Ireland

| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|---|---|---|---|---|---|---|
| Sales per employee (£) | 111,303 | 113,283 | 113,870 | 116,852 | 120,136 | 125,010 |
| Value added per employee (£) | 20,217 | 21,912 | 22,164 | 23,457 | 24,075 | 24,798 |
| Rate of return on capital employed (%) | 7.15 | 9.02 | 9.28 | 9.88 | 10.03 | 9.1 |

## B. RURAL ECONOMY

***Methodological notes***

*There are many definitions of the rural population. The definition used here is based on Local Government Districts (LGD). There are undoubtedly better definitions of the rural population available, but this definition is preferred because most of the geographical data that is available annually in Northern Ireland is only available at the LGD level. The definition used defines urban as the LGDs of Belfast, Carrickfergus, Castlereagh, Newtownabbey, North Down and Derry while the other LGDs are treated as rural.*

*Analysis by NISRA of the 2001 Census by the Office of National Statistics (ONS) has shown clear differences between the more accessible east and the less accessible west of Northern Ireland, and so data for accessible rural and less accessible rural are comparable also. The definition of more accessible and less accessible areas is based on LGDs and the split is as follows. The accessible rural LGDs are Antrim, Ballymena, Banbridge, Craigavon, Down, Larne, Lisburn and Newtownards. The less accessible rural LGDs are Armagh, Ballymoney, Coleraine, Cookstown, Dungannon, Fermanagh, Limavady, Magherafelt, Moyle, Newry & Mourne and Omagh.*

**Rural Population**

In 2001, using the LGD based definition of the rural population, 32 per cent of the total population are less accessible rural, 30 per cent are accessible rural and overall 62 percent are rural. A census of the population takes place every ten years and estimates for the years in-between are produced at the LGD level only. The trends in Figure 6.1 indicate that the urban population is expected to remain close to current levels over the projection period, while the accessible rural and less accessible rural populations are expected to increase.

**Earnings**

The average gross weekly earnings of people in rural areas were consistently below those of people living in urban areas over the years from 2000 to 2003. There is no evidence to indicate that the gap between rural and urban weekly earnings is narrowing (or widening).

**Rural Businesses**

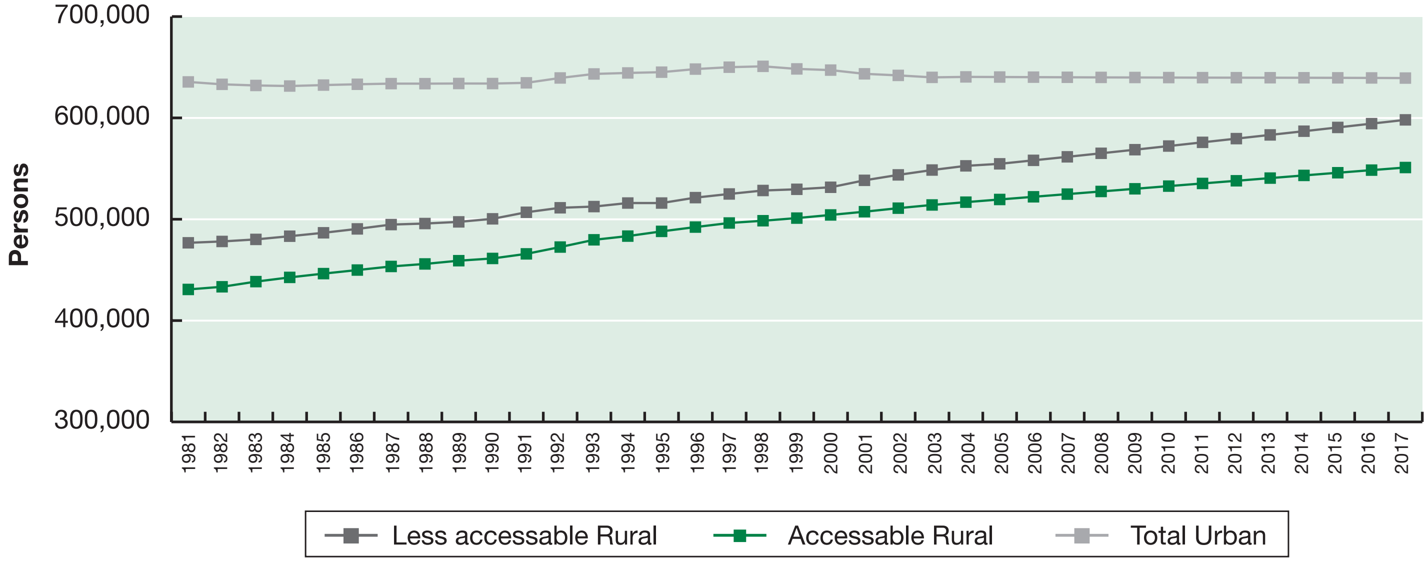
In 2004, there were around 53,830 businesses in Northern Ireland that were registered for VAT. Businesses are legally obliged to register for VAT once their turnover exceeds £58,000. Approximately 24 per cent of businesses are located, or have their head offices, in urban areas. Agriculture dominates the Accessible Rural and Less Accessible Rural areas, accounting for 30 and 44 per cent of total VAT registered businesses in these zones respectively. Construction has a slightly higher than average concentration in rural areas. Finance is heavily skewed to the urban zone, but this to some extent reflects the location of head offices in Belfast and takes no account of branch networks across the region.

The number of net VAT registrations disaggregated by area for the years 1997 to 2003 indicates that the Less Accessible Rural areas demonstrate the strongest growth in net registrations, while the Urban area saw a net fall in the number of registered businesses.

**Rural Employment**

Northern Ireland is a small business economy, with micro businesses (those with less than 10 employees) accounting for 88 per cent of the total number of firms. Given the importance of agriculture in rural areas (normally farmers are sole traders with few or no PAYE employees), it is a little surprising that the distribution of micro business is not more skewed. In fact while around 90 per cent of rural businesses have fewer than 10 employees, the number of micro businesses, as a share of total businesses in the urban zone, is also very high at 80 per cent. An inverse relationship can be seen to exist between firm size (by number of employees) and location in or near an urban area, however care should be taken in the interpretation of this because of the head office effect noted previously.

**Figure 6.1.** **Population Trends and Projections in NI[1]**




1. The changes in the rural and urban populations from 1981 to 2004 are actual while those for 2005 to 2017 are estimates.
Source: NISRA (NINIS website: http://www.ninis.nisra.gov.uk/)

**Table 6.4 Average Gross Weekly Earnings per Person[1]**

*£ per week*

| | 2000 | 2001 | 2002 | 2003 |
|---|---|---|---|---|
| Urban | 359.58 | 372.80 | 385.58 | 396.27 |
| Accessible Rural | 331.16 | 350.14 | 356.48 | 364.65 |
| Less Accessible Rural | 321.78 | 322.81 | 346.68 | 360.58 |

1. LGD based definition of Rural Areas is used. Source: NISRA (NINIS website: http://www.ninis.nisra.gov.uk/)

**Table 6.5 VAT registered enterprises in Northern Ireland by industrial group, Urban – Rural classification, 2004[1,2,3]**

| | Urban | Accessible Rural | Less Accessible Rural | Total |
|---|---|---|---|---|
| | % | % | % | Number |
| Agriculture (incl. Fishing) | 4 | 29 | 66 | 16,605 |
| Production | 26 | 32 | 43 | 3,905 |
| Construction | 19 | 34 | 47 | 7,640 |
| Motor Trades | 23 | 34 | 44 | 2,260 |
| Wholesale | 34 | 32 | 34 | 3,140 |
| Retail | 34 | 29 | 37 | 5,975 |
| Hotel & Catering | 34 | 29 | 37 | 2,990 |
| Transport | 21 | 32 | 47 | 1,975 |
| Post & Telecom | 39 | 35 | 26 | 230 |
| Finance | 67 | 21 | 13 | 120 |
| Property & Business Services | 49 | 26 | 26 | 6,835 |
| Education | 48 | 37 | 15 | 135 |
| Health | 33 | 28 | 39 | 255 |
| Public Admin & Other Serv. | 42 | 31 | 27 | 1,730 |
| **All Categories** | **24** | **30** | **47** | **53,830** |

1. Many smaller farm businesses voluntarily register for VAT, as farmers do not charge VAT on most sales and benefit by reclaiming VAT on input costs. In contrast many smaller businesses in other sectors of the economy will not voluntarily register.
2. It should be noted that firms operating from more than one site, are normally only recorded in the area where their head office is located. Coverage includes both companies and the self-employed.
3. Source: Derived from UK Business: Activity, Size and Location, 2004 (DETI website: http://www.detini.gov.uk/)

## Table 6.6 Northern Ireland Net VAT Registrations, 1997 – 2003[1,2]

| Year | Urban No. | Urban % of total VAT registered | Accessible Rural No. | Accessible Rural % of total VAT registered | Less Accessible Rural No. | Less Accessible Rural % of total VAT registered | NI Annual Net Change No. | NI Annual Net Change % of total VAT registered |
|---|---|---|---|---|---|---|---|---|
| 1997 | -235 | -1.8 | +105 | +0.7 | +370 | +1.5 | +240 | +0.4 |
| 1998 | +115 | +0.9 | +220 | +1.4 | +520 | +2.1 | +855 | +1.6 |
| 1999 | -335 | -2.6 | -5 | 0 | +285 | +1.1 | -55 | 0 |
| 2000 | -75 | -0.6 | +65 | +0.4 | +350 | +1.4 | +340 | +0.6 |
| 2001 | -225 | -1.8 | +90 | +0.6 | +365 | +1.4 | +230 | +0.4 |
| 2002 | +430 | +3.5 | -245 | -1.5 | -1520 | -5.8 | -1355 | -2.4 |
| 2003 | -70 | -0.6 | +20 | 0 | +110 | +0.4 | +60 | 0 |
| 1997-2003 | -395 | -3.0 | +250 | +1.6 | +480 | +2.0 | +340 | 0 |

1. Source: Derived from UK Business: Activity, Size and Location (various years) (DETI website: http://www.detini.gov.uk/)
2. Registration rates provide an indicator of the level of entrepreneurship and of the health of the business population. It should be noted that VAT registrations are not synonymous with business start-ups, as some registrations are the result of changes in ownership. In most cases businesses de-register for VAT because of closure. Closure does not necessarily involve bankruptcy or insolvency proceedings, which make up only around one in four closures throughout the UK.

## Table 6.7 VAT registered enterprises by employee size-band, Urban – Rural Classification, 2004[1]

| Employee Size Band | Urban Number | Urban % | Accessible Rural Number | Accessible Rural % | Less Accessible Rural Number | Less Accessible Rural % | Total Number | Total % |
|---|---|---|---|---|---|---|---|---|
| 0-4 | 7,650 | 19 | 11,975 | 30 | 20,185 | 51 | 39,815 | 100 |
| 5-9 | 2,440 | 33 | 2,295 | 31 | 2,735 | 37 | 7,465 | 100 |
| 10-49 | 2,060 | 38 | 1,605 | 29 | 1,820 | 33 | 5,485 | 100 |
| 50-99 | 230 | 45 | 145 | 28 | 140 | 28 | 510 | 100 |
| 100-249 | 130 | 46 | 80 | 29 | 75 | 27 | 280 | 100 |
| 250+ | 90 | 55 | 35 | 21 | 30 | 18 | 165 | 100 |
| **Total** | **12,605** | **24** | **16,120** | **30** | **24,985** | **47** | **53,720** | **100** |

1. Source: Derived from UK Business: Activity, Size and Location, 2004 (DETI website: http://www.detini.gov.uk/)

## C. ANIMAL HEALTH AND WELFARE

**Northern Ireland Strategy**

An Animal Health and Welfare Strategy for Northern Ireland is currently being developed to respond to the need for a comprehensive and strategic approach to animal health and welfare. The new strategy will provide a vision of a sustainable future for animal health and welfare along with a suitable framework to help meet this vision.

The Strategy when published will reflect Northern Ireland's geographical position within the island of Ireland and the corresponding work on seeking an agreed strategic approach to animal health and welfare across the island. The Strategy will also address the Department of Agriculture and Rural Development's (DARD) commitment to produce a strategy that is consistent, in terms of its principles and outcomes, with the GB Strategy published in 2004. The Strategy will be published in early 2006.

**Disease**

DARD has on-going programmes of disease management and eradication, and also undertakes animal welfare surveillance activity. Recent diseases of high importance are Bovine Tuberculosis and Bovine Spongiform Encephalopathy (BSE). Since the first cases of BSE were reported in Northern Ireland during 1988, there have been a total of 2,148 cases from 1,479 farms. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. The number of BSE cases in 2004 was 34.

There has also been a steady increase in the age profile of cases since 1999 with only 6 cattle under 6 years of age confirmed with BSE in 2003, only 2 in 2004 and only 2 confirmed up to end of September in 2005. Active surveillance through the over thirty months casualty slaughter animals continues to be the main source of confirmed cases of BSE (69% of cases in 2003; 62% of cases during 2004; and, 63% of cases in 2005 up to end of September.

During 2004, 9.2 per cent of herds in Northern Ireland were affected by bovine tuberculosis. However, the number of new reactor herds and new reactor animals has fallen by 17 per cent and 32 per cent, respectively, when the twelve-month period up to October 2005 is compared with the equivalent period up to October 2004.

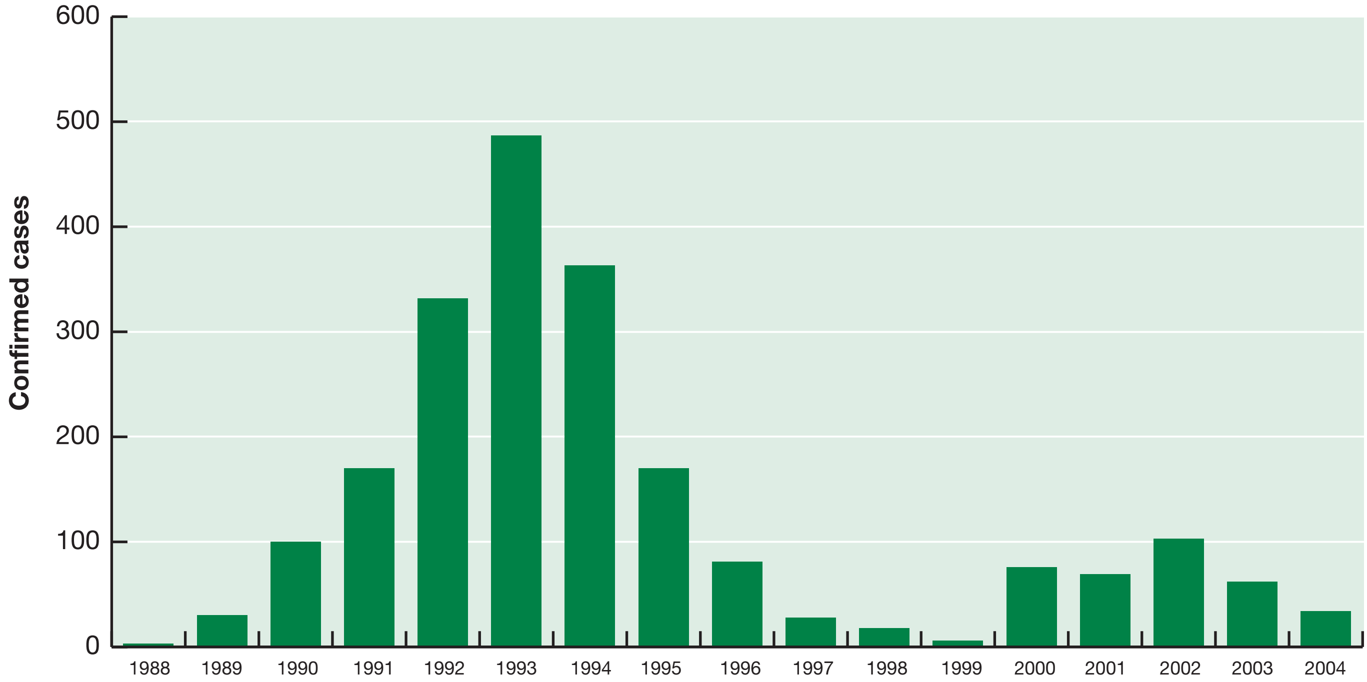
**Animal welfare**

DARD plays an important and active role in educating livestock keepers in standards of welfare and carries out a programme of animal welfare surveillance. Farm premises, farming practices, animal transportation, markets and slaughter are all assessed against legal requirements, and enforcement used where necessary. The responsibility for many of these routine and targeted checks falls to the Veterinary Service (VS).

The VS carried out 636 on-farm welfare inspections in 2004. Inspections take place as a result of complaints or are programmed as part of the statutory surveillance requirement to assess whether on-farm welfare meets the standards laid down in legislation and welfare codes. Some of these inspections, particularly in the complaint category, will represent repeated visits to the same farm where an on-farm welfare problem has been identified. Some visits will involve more than one category of stock inspection. Of those inspections carried out as a result of complaints 58 per cent were fully compliant with legislation, while for programmed visits 91 per cent were fully compliant with legislation.

All complaints and allegations of poor welfare on specific farms are treated as a matter of urgency. DARD also co-operate closely with other organisations such as local authorities and the RSPCA.

**Figure 6.2** **Bovine Spongiform Encephalopathy (BSE) Confirmed cases in N.I including reported and active surveillance**




1. Source: http://www.dardni.gov.uk/econs/stats.htm

**Table 6.8** **Confirmed cases of BSE: 2003 – September 2005[1]**

*cases*

| Type | Category | 2003 | 2004 | 2005 (Jan-Sept) |
|---|---|---|---|---|
| Passive Surveillance | On farm suspects | 8 | 8 | 1 |
| | Abattoir suspects | 3 | 0 | 0 |
| Active Surveillance | Fallen animals | 4 | 1 | 3 |
| | OTM Casualty animals | 43 | 21 | 10 |
| | OTM Random animals | 2 | 1 | 0 |
| | OTM Ante-Mortem Failure animals | 2 | 2 | 0 |
| | Over 42 months survey (including 1996/97 cohort) | 0 | 1 | 0 |
| | Cohorts of BSE Cases | 0 | 0 | 2 |
| **Total** | | **62** | **34** | **16** |

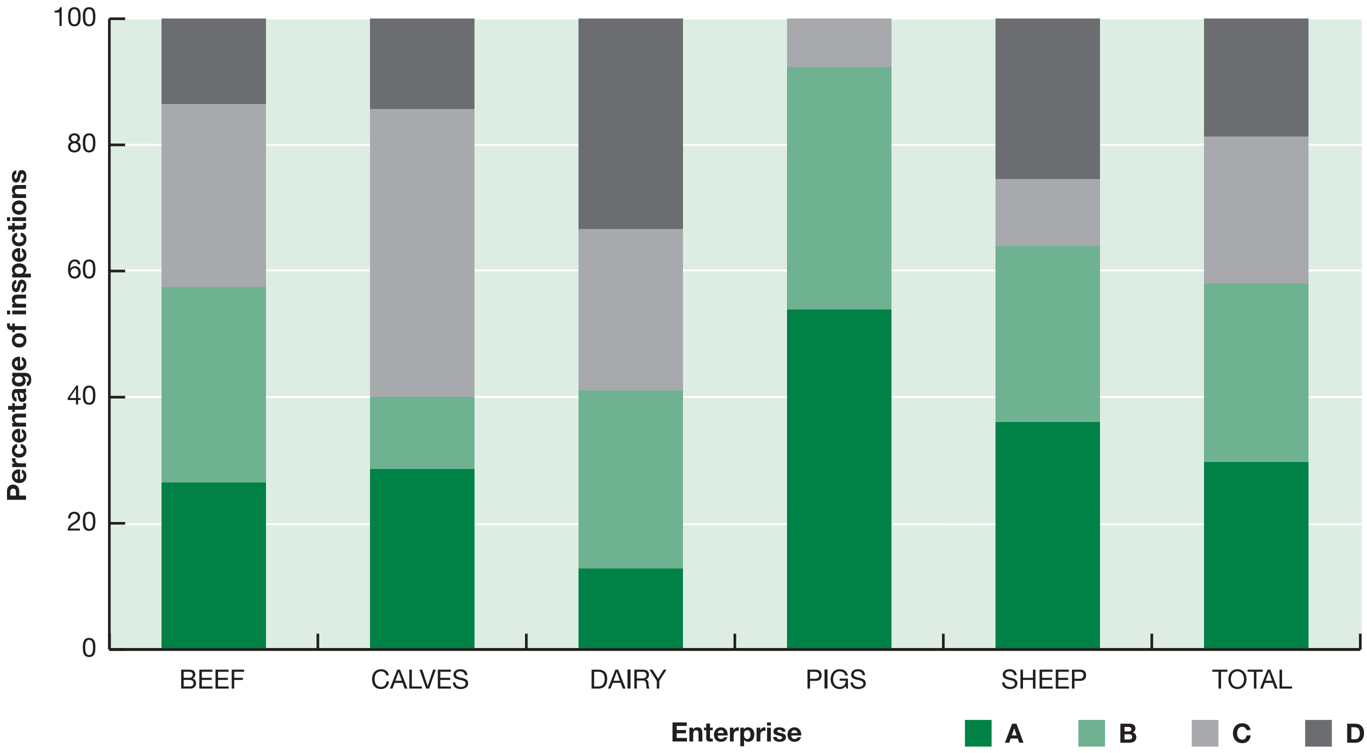
1. Source: http://www.dardni.gov.uk/econs/stats.htm

**Table 6.9 Bovine Tuberculosis (TB) statistics for the UK in 2004**

| | England | Wales | Scotland | N. Ireland |
|---|---|---|---|---|
| No. cattle herds eligible for TB testing | 62,597 | 15,721 | 14,827 | 28,472 |
| Herds with a TB restriction during 2004 | 4,073 | 1,072 | 118 | 3,070 |
| No. herds with herd test during 2004 | 32,261 | 8,335 | 4,124 | 25,349 |
| No. animals TB tested in 2004 | 3,512,382 | 824,878 | 299,795 | 1,865,671 |
| Total new herd TB incidents | 2,610 | 647 | 82 | 2,324 |
| TB reactors slaughtered | 15,072 | 4,668 | 198 | 15,082 |
| No. slaughtered as direct 'in contacts' | 1,859 | 691 | 26 | 673 |
| TB lesions found at routine slaughter (confirmed) | 334 (175) | 31 (14) | 26 (5) | 1,054 (756) |

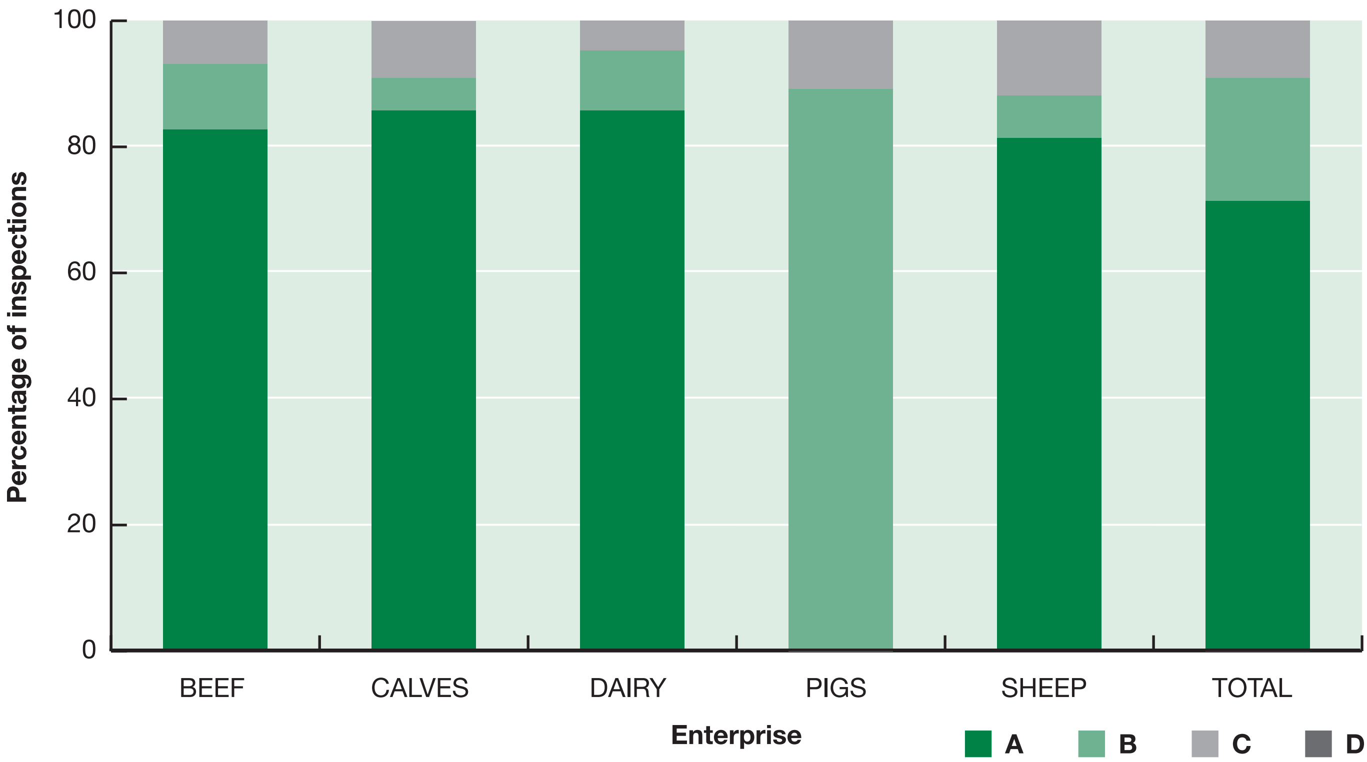
**Figure 6.3 and 6.4** **Outcomes of on-farm welfare inspections completed on NI farms in 2004[1,2]**

**Complaint and Target Visits**




A = Full compliance with legislation and code
B = Compliance with legislation
C = Non-compliance with legislation
D = Unnecessary pain, unnecessary stress

**Programmed and Elected Visits**




1. The figures for sheep also include goats
2. The welfare code for pigs has not yet been finalised.

## D. AGRI-ENVIRONMENT

**Agri-Environmental Schemes**

The land–based agri-environmental schemes are managed in the UK under the Rural Development Programme (RDP). Five schemes, or composites, were operational in Northern Ireland by 2003: the Environmentally Sensitive Area scheme, Countryside Management Scheme, organic farming schemes, woodland schemes, and areas of Special Scientific Interest. In 2003, some 290,000 hectares or 27 per cent of farmland was registered in an agri-environmental scheme in Northern Ireland. As a proportion of total farmland, this closely mirrors the UK average.

**Organic farming**

Organic farming involves holistic production management systems for crops and livestock, based on ecological principles that impose strict limitations on farm inputs, especially purchased inputs, in order to minimise damage to the environment and wildlife. Farming is only considered to be 'organic' at EU-level if it complies with Council Regulation (EEC) No. 2092/91. In 2002, Austria had the highest proportion of farmland under organic management amongst the EU-15, while the Republic of Ireland, Northern Ireland and Greece had the lowest.

**Water quality**

Water quality is assessed in terms of its chemical and biological status. In the UK it is estimated that about 95 per cent of rivers were of good or fair chemical quality in 2003, and about 73 per cent of rivers in 2003 were of good chemical quality. These estimates are approximate because the classification scheme in Scotland differs from that in England, Wales and Northern Ireland.

There has been relatively little overall change in the proportion of rivers of good or fair quality in the UK since 2000, but there has been an improvement since 1990. In Northern Ireland the percentage of river length classified as being of good chemical quality has increased by 30 per cent. This improvement is mirrored by a decrease in the proportion of river length with fair chemical quality.

In the UK, about 96 per cent of rivers were assessed as being of good or fair biological quality in 2003. In Northern Ireland during the period 1990 to 2003 there has been a fall in the biological quality of rivers measured, however it should be noted that the river length monitored more than doubled between 1995 and 2000. Rivers of good biological quality have fallen by 26 per cent while those classed as being of fair biological quality have increased by 74 per cent. In England the converse of this is true, rivers of good biological quality have increased by 16 per cent with those being classified as fair decreasing by 14 per cent. A similar pattern is evident in Scotland, with river quality in Wales remaining virtually unchanged over the period.

**Forestry**

In Northern Ireland the state owned forest area has remained relatively constant since 1995, having only increased slightly in 2003-04. The area of privately owned forest has increased by 26 per cent over the same time period. The volume of timber produced by state forests has increased by 90 per cent but the value of this output has only increased by 8 per cent since 1995.

The area of woodland in the UK has increased over the past century. Approximately 5 per cent of the UK was covered by woodland in 1924; in 2004 almost 12 per cent of the UK was wooded. Around 700,000 hectares of new woodland have been created in the UK in the last 30 years. In 2004, woodland covered 17 per cent of Scotland, 14 per cent of Wales, 9 per cent of England and 6 per cent of Northern Ireland.

The level of forest cover within the EU25 countries varies considerably. At 6.2 and 9.6 per cent respectively, Northern Ireland and the Republic of Ireland are the two least densely forested countries in the EU25. The two most densely forested countries are Finland and Sweden with 72 and 66 per cent of the total land area with forest cover.

### Table 6.10 Proportion of UK Farmland in Agri-Environmental Schemes (1993-2003)[1,2]

*% of area farmed*

| Country | Average of 1993-1995 | 2000 | 2003 |
|---|---|---|---|
| England | 4.9 | 10.7 | 17.8 |
| Wales | 2.8 | 14.9 | 31.1 |
| Scotland | 3.9 | 32.6 | 43.7 |
| Northern Ireland | 9.5 | 19.9 | 27.0 |
| UK | 4.7 | 18.7 | 27.8 |

1. The results are for cumulative land area, i.e. all the land receiving payments in each time period, not just new agreements. Source: DEFRA and Scottish Executive website.
2. Area farmed excludes common grazing.

### Table 6.11 Organic and in-conversion area (ha) as a percentage of UAA: 1998 – 2004[1,2]

| | 1998 | | 2000 | | 2002 | | 2004 | |
|---|---|---|---|---|---|---|---|---|
| Country | Hectares | %UAA | Hectares | %UAA | Hectares | %UAA | Hectares | %UAA |
| N. Ireland | 215 | 0.02 | 3,257 | 0.31 | 5,038 | 0.48 | 6,483 | 0.62 |
| UK | 78,833 | 0.50 | 578,803 | 3.70 | 741,174 | 4.80 | 695,619 | 4.25 |
| ROI | 24,411 | 0.60 | 27,231 | 0.60 | 29,850 | 0.70 | 30,670 | 0.70 |
| Austria | 287,899 | 8.20 | 256,443 | 8.00 | 296,154 | 8.70 | n.a[3] | n.a |
| Greece | 15,402 | 0.50 | 26,707 | 0.70 | 77,120 | 0.70 | n.a | n.a |
| EU-15 | 2.287 m | 1.70 | 3.808 m | 2.90 | 4.888 m | 3.70 | n.a | n.a |

1. Source: DG Agri, DARD,Eurostat, DEFRA and Dept. of Agriculture and food, ROI
2. UAA – Utilised Agricultural Area

## Table 6.12 Chemical river quality: 1990 – 2003[1]

| | England | | Wales | | Northern Ireland[2] | | Scotland[3] | | |
|---|---|---|---|---|---|---|---|---|---|
| Class | Good | Fair | Good | Fair | Good | Fair | Unpolluted | Good | Fair |
| 1990[4] | 43.5 | 40.1 | 86.3 | 11.3 | 44.2 | 50.8 | 97.0 | … | … |
| 1995 | 55.4 | 34.6 | 93.2 | 5.3 | 44.7 | 43.2 | 97.3 | … | … |
| 2000[5] | 64.4 | 29.3 | 93.4 | 5.2 | 58.8 | 36.9 | … | 91.3 | 6.8 |
| 2000[6] | … | … | … | … | … | … | … | 86.7 | 9.6 |
| 2001 | 66.1 | 28.1 | 92.5 | 6.0 | 58.4 | 37.1 | … | 86.9 | 9.2 |
| 2002 | 65.5 | 28.3 | 92.2 | 6.1 | 55.4 | 41.7 | … | 86.2 | 10.1 |
| 2003 | 61.6 | 31.4 | 92.5 | 5.7 | 57.6 | 35.4 | … | 87.5 | 9.3 |

1. Source: Environment Agency, Scottish Environmental Protection Agency, Environmental Heritage Service.
2. The length of rivers chemically classified in Northern Ireland increased by about 40 per cent between 1991 and 1994, and by a further 100 per cent (compared with the 1991 network) between 2001 and 2002.
3. The classification system for Scotland was revised in 1996 to an overall classification combining chemical, biological, nutrient and aesthetic quality. In 2000 a new Digitised River Network (DRN) was introduced – data are shown on both old and new networks for 2000.
4. 1991 in Northern Ireland.
5. Data for Scotland relate to the old river network as used.
6. Data for Scotland relate to the new DRN and are consistent for years 2000 onwards.

## Table 6.13 Biological river quality: 1990 – 2003[1]

| | England | | Wales | | Northern Ireland[2] | | Scotland[3] | | |
|---|---|---|---|---|---|---|---|---|---|
| Class | Good | Fair | Good | Fair | Good | Fair | Good | Moderate | Fair |
| 1990[4] | 59.7 | 29.7 | 78.5 | 19.8 | 76.1 | 23.5 | 78.5 | 18.0 | … |
| 1995 | 66.3 | 27.2 | 87.0 | 12.8 | 75.4 | 24.1 | 89.5 | 8.1 | … |
| 2000[5] | 67.3 | 27.1 | 78.3 | 20.4 | 66.1 | 33.4 | 78.9 | … | 16.2 |
| 2000[6] | … | … | … | … | 61.5 | 35.9 | … | … | … |
| 2001 | … | … | … | … | 49.9 | 46.6 | 78.6 | … | 15.8 |
| 2002 | 68.0 | 26.6 | 78.5 | 20.7 | 57.3 | 39.8 | 86.1 | … | 11.4 |
| 2003 | 69.2 | 25.6 | 79.3 | 19.9 | 56.6 | 40.8 | 89.5 | … | 8.6 |

1. Source: Environment Agency, Scottish Environmental Protection Agency, Environmental Heritage Service.
2. The river length monitored in Northern Ireland more than doubled between 1995 and 2000. Results for 2000 are shown on both bases for comparison.
3. Data for Scotland are normally presented as a combined measure of chemical, biological, nutrient and aesthetic quality, but the biological component only is shown here to enable comparison with other countries. Data from 2000 relate to the new Digitised River network, although the lengths on which biological monitoring is carried out have varied over the period.
4. 1991 in Northern Ireland.
5. Figures for Northern Ireland relate to the shorter monitored river length (<2,500 km).
6. Figures for Northern Ireland relate to the longer monitored river length (>5,000 km).

**Table 6.14 Forestry area, production and employment in Northern Ireland, 1995/96-2003/04**

| | 1995 - 96 | 2000 - 01 | 2003 - 04 |
|---|---|---|---|
| **Forested area (000ha)** | | | |
| State | 61 | 61 | 62 |
| Private | 19 | 22 | 24 |
| All forested areas | 80 | 83 | 86 |
| **Annual planting area (ha)** | | | |
| State | 774 | 999 | 1069 |
| Private | 836 | 783 | 414 |
| All planted areas | 1,610 | 1,782 | 1,483 |
| **Timber production from state forests** | | | |
| Volume (000 cubic metres) | 223 | 359 | 423 |
| Value (£000) | 5,000 | 4,006 | 5,394 |
| **Employees (number) Forest service** | 460 | 360 | 323 |

Source: Forest Service, DARD

**Table 6.15 Forest cover, 2000 – international comparisons**

| Country | Forest area (000 ha) | Total land area (000 ha) | Forest as a % of land area |
|---|---|---|---|
| Northern Ireland | 83 | 1,345 | 6.2 |
| UK | 2,794 | 24,160 | 11.6 |
| ROI | 659 | 6,889 | 9.6 |
| Finland | 21,935 | 30,459 | 72.0 |
| Sweden | 27,134 | 41,162 | 65.9 |
| EU15 | 115,685 | 313,188 | 36.9 |
| EU25 | 139,637 | 385,059 | 36.3 |

Source: Forestry website – www.forestry.gov.uk/statistics

# APPENDIX

## STATISTICAL AND METHODOLOGICAL NOTES

**AGGREGATE AGRICULTURAL ACCOUNT (AAA)**

The AAA, from which agriculture's output, input, value added and income are obtained, is conducted according to the rules and conventions of the United Nations *System of National Accounts 1993*, the subsequent *European System of Accounts 1995* and Regulation (EC) No. 138/2004 (which incorporates the revised European Union's *Manual on the Economic Accounts for Agriculture 1997*, introduced throughout the UK in 1998).

The main features of the AAA are as follows:

(i) The AAA is conducted on a 'sector' basis. This means that agricultural activity includes 'inseparable non-agricultural secondary activities', such as pony trekking, which are carried out on-farm and for which the inputs cannot be separated from farming inputs. (Previously, when it was conducted on a 'branch' basis, agricultural activity covered all agricultural products irrespective of the nature of the establishments in which they were produced and excluded other, non-agricultural activity taking place on farms.)

(ii) The AAA is calculated on an accruals basis, i.e. 'as due' rather than 'as paid'. This means that subsidies such as the Single Farm Payment are counted in the year in which 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. (Previously, subsidy payments were dealt with on a cash, or 'as paid', basis.)

(iii) Rent paid on 'conacre' (short-term lettings) to non-farming persons is included as an expense. (All conacre rent was previously omitted because short-term renting was deemed to be a transfer within the agricultural branch.)

(iv) Capital formation in, and depreciation of, breeding livestock is included. (Previously, only net volume changes were included.)

(v) Direct inter-farm sales and on-farm use of finished products such as cereals are included as both outputs and inputs thereby, in most cases, leaving gross and net product and total income from farming unchanged. (Such transactions were previously excluded when the AAA was conducted on a 'national farm' basis.)

**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 (also known as 'intermediate consumption')
= **gross value added**

Gross value added – consumption of fixed capital + subsidies not paid on products (such as the Single Farm Payment)
= **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 (the EU Statistical Office) 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)**

**Cash flow**

A **cash flow** series is shown in Table 2.4. Cash flow 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.

**Sensitivity of estimates**

Since agricultural income measures are 'residuals' between two large aggregates, they are sensitive to quite small changes in either aggregate. For example, total income from farming in 2005 would change by ±10 per cent if there were one per cent changes (in opposite directions) in gross output and gross input. The degree of sensitivity rises as the level of income falls.

**Provisional estimates**

'Provisional' figures for 2005 presented in this *Review* are based on data available in December 2005-January 2006, 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 2005/06 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 2004 figures have been revised as more complete information has available. Net value added in 2004 is now estimated at £322.5 million (previously £317.7 million) while total income from farming for 2004 is now estimated at £177.0 million (previously £173.1 million). A 25-year consistent series of the AAA is available on the DARD website at www.dardni.gov.uk/econs/statdata.htm.

**Single Farm Payment**

The **Single Farm Payment (SFP)** was introduced in 2005 and replaces many of the direct payments that were attributable to particular sectors and payable on a per head or per hectare basis. The treatment of the **SFP** in the aggregate agriculture accounts is different from that of the direct payments because it is not attributable to any one sector. Direct payments such as Beef Special Premium and Suckler Cow Premium were included in the **gross output** figures because they were attributable to finished cattle and calf production. Thus, they appear in the **gross value added** figures whereas SFP does not. However, SFP is added to **gross value added** as part of the **net value added** calculation. As a consequence **gross value added** figures for 2005 are much lower than the 2004 figures and they are not strictly comparable. The **net value added** and **total income from farming** figures are comparable between 2004 and 2005.

**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 and Horticultural Census. This is an annual statistical survey which is based on a large sample survey, though in 2000 a full census of every farm was conducted. In 2005 forms were issued to all the larger businesses but to only half those classified as 'Very Small' unless they had pigs, significant numbers of poultry or mushrooms.

The records which were aggregated to provide the published results include 2005 returns from those which returned their forms. For those who did not do so, estimates were included, based on the latest available returns and on information available in the Integrated Administration and Control System (IACS). For new farms from which a 2005 return was not obtained, estimates were based on the IACS and other administrative systems. Owners of pig herds, mushroom enterprises and the major poultry flocks who failed to make a return in 2005 were contacted by telephone in order that up to date information could be obtained.

**Census 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 | In 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 to streamline administrative functions. This resulted in a common means of identification across all schemes, with each farmer who was/is in contact with the Department 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 the Department 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 of the '**very small**' farms. |
| 2000 | A full census was conducted. Mushroom production was targeted and around 100 mushroom businesses which had not previously been surveyed were identified and added to the list of businesses covered. |
| 2001-2005 | A sample survey was carried out on the same basis as that conducted in 1999. |

**Farm business size**

Farm business size is determined by calculating each farm's total Standard Labour Requirement (SLR). Standards or norms have been calculated for all major enterprises. The total SLR for each farm is calculated by multiplying its crop areas and livestock numbers by the appropriate SLR coefficients and then summing the result for all enterprises on the farm. A standard labour unit is equivalent to 1,900 hours of work per year.

Prior to 2004, the farm business size had been determined by calculating each farm's Standard Gross Margin (SGM). However, it was felt that using SLR's was a more appropriate and accurate method to size farm businesses in the UK.

To show year-to-year changes in business size, the enterprise SLR coefficients are held constant for a number of years. The current series (introduced in 2004) is based on the average labour requirements during the period 1999-2001. For a list of these values, see table below.

**STANDARD LABOUR REQUIREMENTS**

The following factors have been used to classify farms in N.I.

| Enterprise | Item | Unit | Standard Labour Requirement (hours) |
|---|---|---|---|
| Crops | Cereals | ha | 30 |
|  | Oilseeds | ha | 22.5 |
|  | Potatoes | ha | 135 |
|  | Outdoor vegetables | ha | 150 |
|  | Set-aside | ha | 1.5 |
| Fruit and Ornamentals | Fruit | ha | 450 |
|  | Ornamentals | ha | 1,500 |
| Indoor Crops | Glasshouse vegetables | ha | 5,000 |
|  | Other glasshouse | ha | 25,000 |
|  | Mushrooms | house | 1,050 |

| | | | |
|---|---|---|---|
| Forage | Forage crops | ha | 9 |
| | Grass | ha | 6 |
| | Rough grazing | ha | 2.25 |
| Cattle | Dairy Cows | head | 39 |
| | Beef cows | head | 12 |
| | Other cattle | head | 9 |
| Sheep | Ewes and rams: Lowland | head | 5.2 |
| | Ewes and rams: LFA | head | 4.2 |
| | Other sheep: Lowland | head | 3.3 |
| | Other sheep: LFA | head | 2.6 |
| Pigs | Sows and gilts | head | 16 |
| | Piglets | head | 1.0 |
| | Other pigs | head | 1.3 |
| Poultry | Laying hens | head | 0.17 |
| | Pullets | head | 0.12 |
| | Broilers | head | 0.04 |
| | Turkeys, Ducks etc. | head | 0.045 |
| Other Livestock | Horses | head | 150 |
| | Goats | head | 20 |
| | Deer | head | 15 |

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

| Size | Standard Labour Requirement |
|---|---|
| Very small | Less than 1 |
| Small | 1-<2 |
| Medium | 2-<3 |
| Large | 3-<5 |
| Very large | 5 or more |

* 1 standard labour unit = 1900 hours.

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

**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 72 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. |
| **Other types** | Farms which specialise in enterprises which do not fit in 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 LFA Compensatory Allowance (LFACA) and for additional benefits under various capital grant and forestry schemes.

The LFA consists 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 (3,700 hectares). (The areas designated include some non-agricultural land).

**FARM BUSINESS SURVEY (FBS)**

The annual FBS is based on a sample of about 330 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 Cash Income 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** 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 |

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Economics and Statistics Unit produce a range of publications and statistical series, which are now available free of charge on the DARD website at www.dardni.gov.uk. The following publications are also available in hard copy on request using the order form below. The year of issue is given in brackets.

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The Agricultural Census in Northern Ireland: Results for June 2005 (2006) £10.00

Farm Business Data 2006. (2005) £7.50

Size and Performance of the Northern Ireland Food and Drinks sector 2003, with provisional estimates for 2004. (2006) £6.00

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