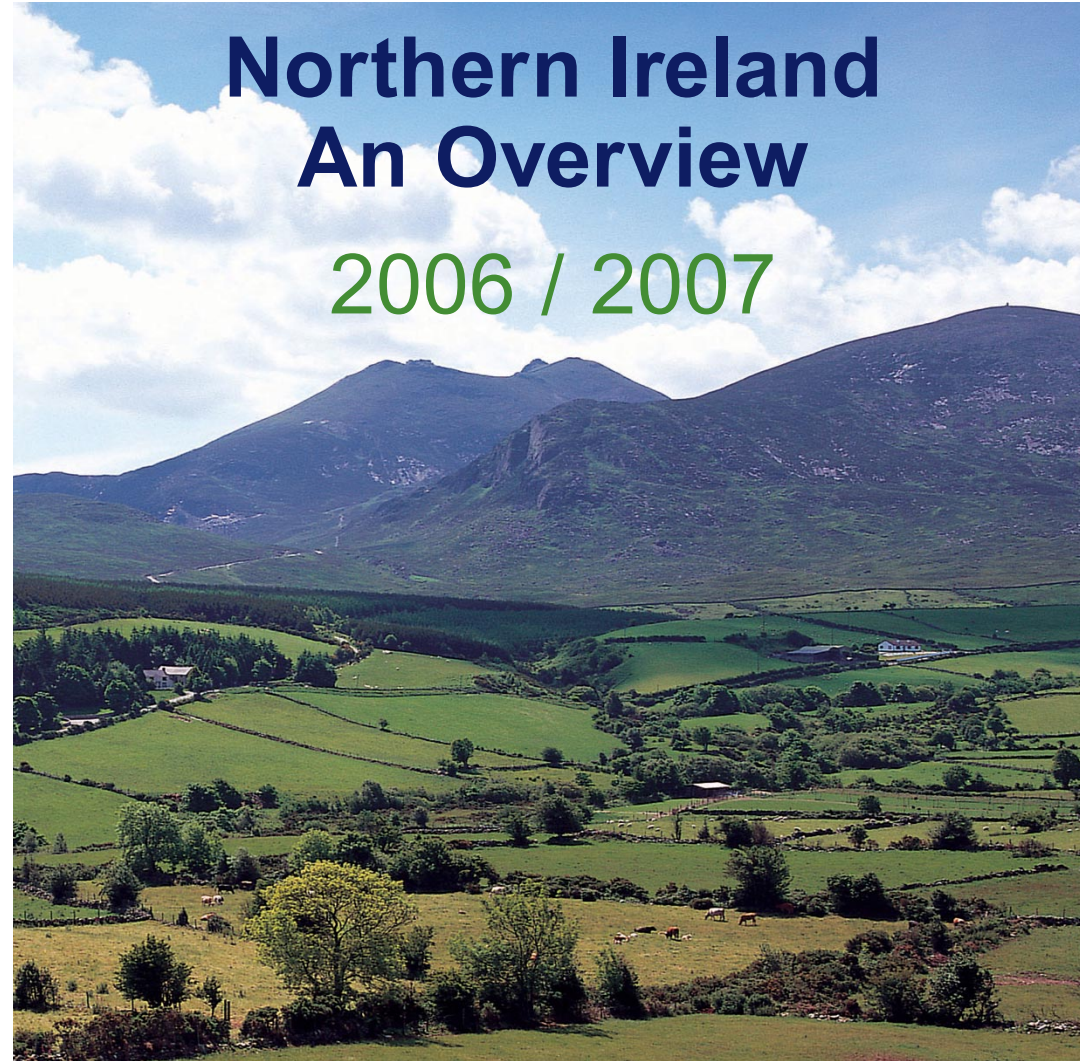


Northern Ireland An Overview

2006 / 2007



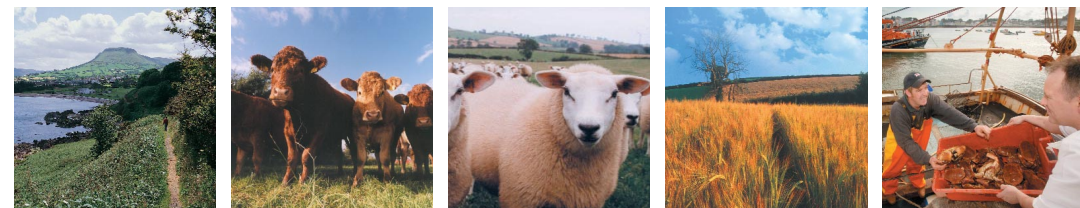
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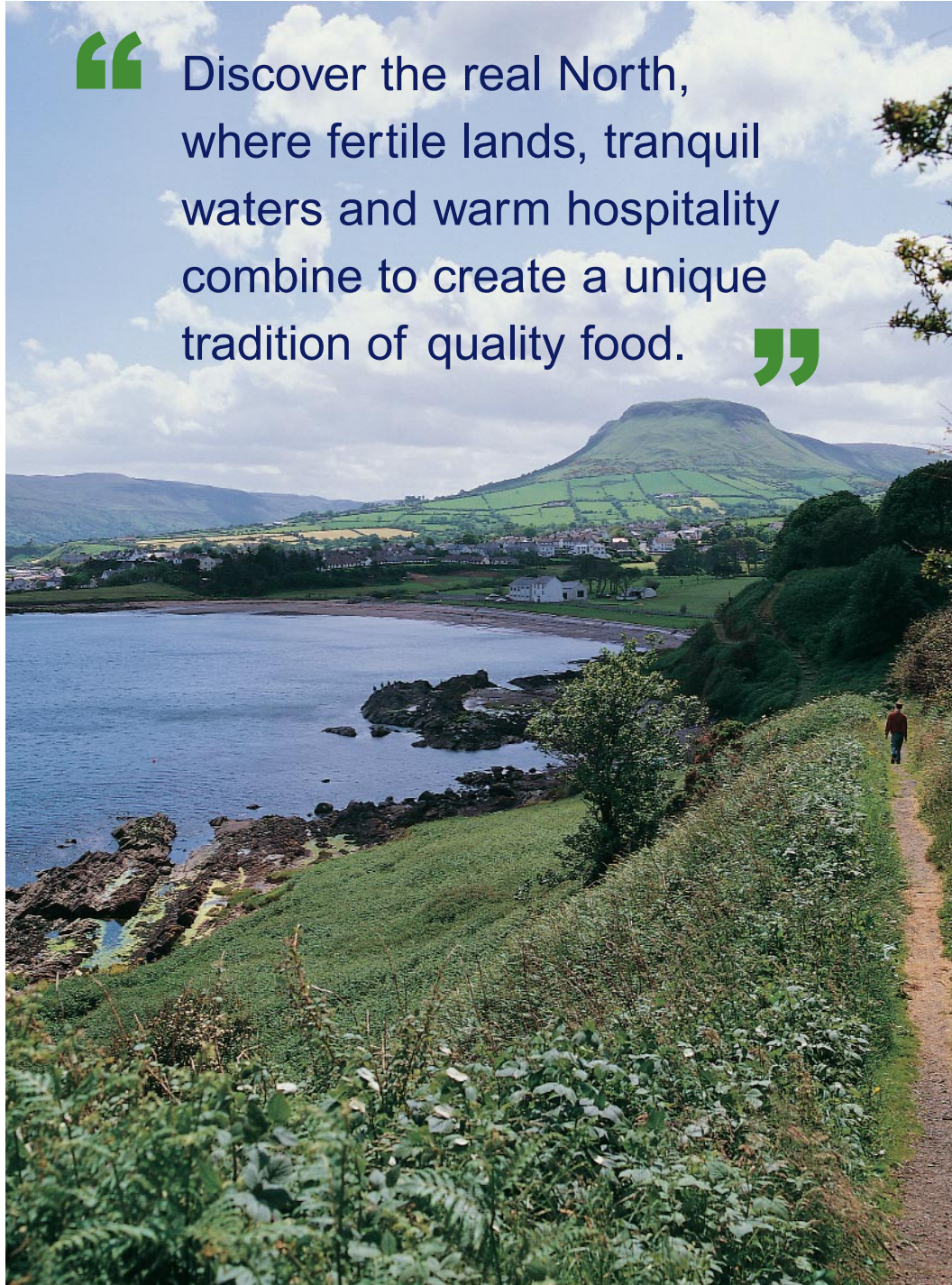
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Northern Ireland

- Population 1.7 million
- 627,000 households
- 66% of population live within 50km radius of Belfast
- The capital, Belfast, is the second largest city in Ireland
- 36% of the population are under the age of 25, compared with 38% in the Republic of Ireland and 29% in the European Union



The Northern Ireland Agri-food Industry

- Contributes to 3.5% of Northern Ireland Gross Value Added
 - Agriculture (2005) £296m (€432m)
 - Food processing (2003) £471m (€687m)
- Employs 70,000 people - 51,100 on-farm workers and 18,900 in further processing industries
- 27,100 farms
- 400 food and drink processing businesses
- Total processed sales worth £2.4bn (€3.5bn) and farm-gate sales worth £1.29bn (€1.88bn)
- 58% of food sales are to external markets

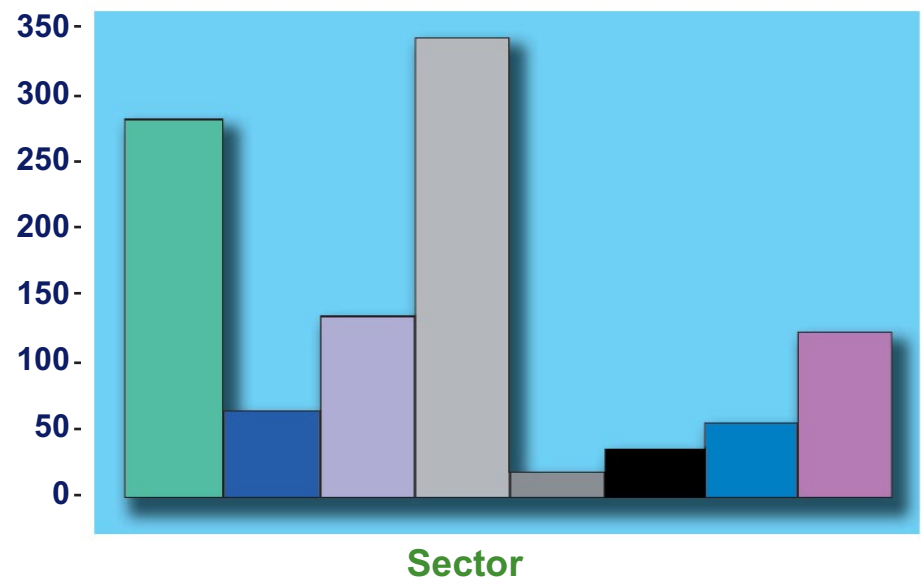


Farm Structure 2005

- 1.03 million hectares (ha) farmed in total
- Average farm size of 38ha
- 68% of land is owner farmed
- Total on-farm employment of 51,100 people (full and part-time)
- 6,600 farms are large enough to provide full-time work for one or more people

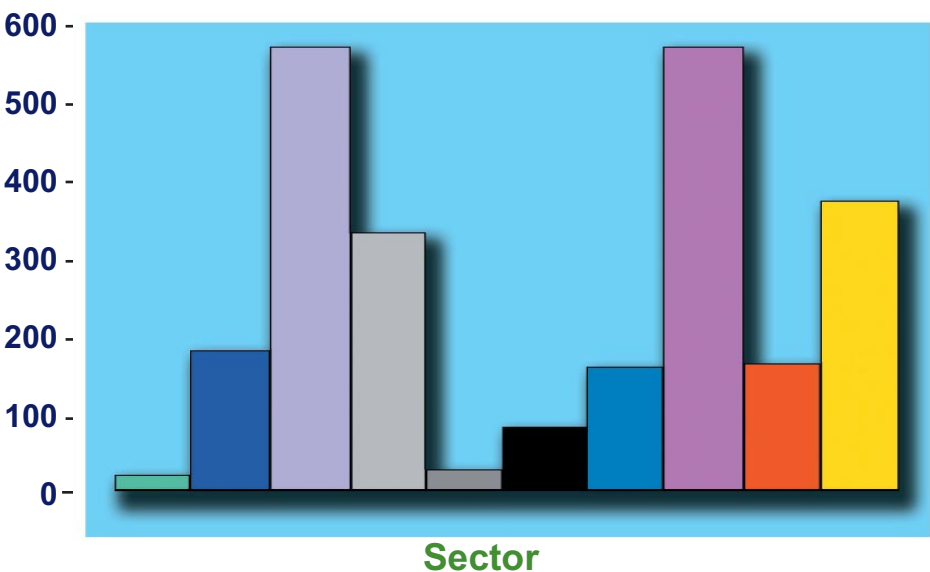


Northern Ireland Farm Sector Output



Beef and Sheep	£282m	(€411m)
Pigs	£ 67m	(€97m)
Poultry	£137m	(€200m)
Milk	£343m	(€500m)
Eggs	£ 23m	(€3m)
Crops	£ 37m	(€54m)
Horticultural	£ 60m	(€87m)
Other	£126m	(€183m)

Northern Ireland Food Processing Sector Sales



Animal by-products	£282m	(€411m)
Bakeries	£175m	(€255.5m)
Beef & Sheepmeat	£550m	(€803m)
Drinks	£320m	(€467.2m)
Eggs	£ 30m	(€43.8m)
Fish	£ 80m	(€116.8m)
Fruit & Vegetables	£155m	(€266.3m)
Milk & Milk Products	£550m	(€803m)
Pigmeat	£160m	(€233.6m)
Poultry Meat	£360m	(€525.6m)

Beef and Sheep Sectors 2005

- 20,000 beef and sheep farms of which 97% are classed as small or very small
- Gross output of £282m (€411.7m), equivalent to 26% of Northern Ireland gross agricultural output

Beef Sector

- Beef herd of 297,000 cows
- 5,600 producers in 2005
- Average herd size of 19 beef cows

Sheep Sector

- Breeding flock of 1.0 million ewes
- 8,800 producers in 2005
- Average flock size of 243 sheep and lambs





Dairy Sector

- Dairy herd of 291,000 cows
- 4,100 specialist dairy farms, of which 41% are classed as medium or large
- Average herd size of 67 cows has been increasing by approximately 1-3 cows per year
- Average milk yield per cow is presently 6,600 litres and has increased by 2-3% per annum over the last five years
- Gross output of £343m (€500.8m), equivalent to 32% of Northern Ireland gross agricultural output

Crop Sector - Cereals

- Cereals area of 36,000ha in 2005
- Just over 469 cereal farms, of which 96% are classed as small or very small
- Average cereals enterprise size of 12ha
- Gross output of £16m (€23.36m), equivalent to 1.5% of Northern Ireland gross agricultural output



Crop Sector - Potatoes

- Potato area of 4,500ha in 2005
 - Potatoes grown on 722 farms, of which 84% grow less than 10ha
 - Average potato enterprise size of 6.3ha
 - Gross output of £13m (€18.9m), equivalent to 1.2% of Northern Ireland gross agricultural output
- Output of 140,000 tonnes of ware and 21,000 tonnes of seed in 2005



Fisheries Sector

Sea Fisheries

- 133 fishing vessels over 10m in length and 196 under 10m in length (2005)
- Fish landings valued at £25m (€36m) in 2005 (approximately 4.5% of the United Kingdom total)
- Sales of 80% nephrops (prawns) and 20% white fish and other shellfish
- Sector employment of 1,668 full and part-time in 2004
- Processing sector sales of £85m (€121m) in 2003
- Main market outlet is Great Britain

Aquaculture

- Value of trout and salmon production £1.56m (€2.2m) in 2004
- Value of shellfish of £2.98m (€4.35m) in 2004
- Sector employment of 148 full and part-time in 2004

