



ECONOMICS AND STATISTICS UNIT

Northern Ireland Agri-Food Sector

Key Statistics June 2005



Agriculture, Fishing & Forestry



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Table 1: General economic data

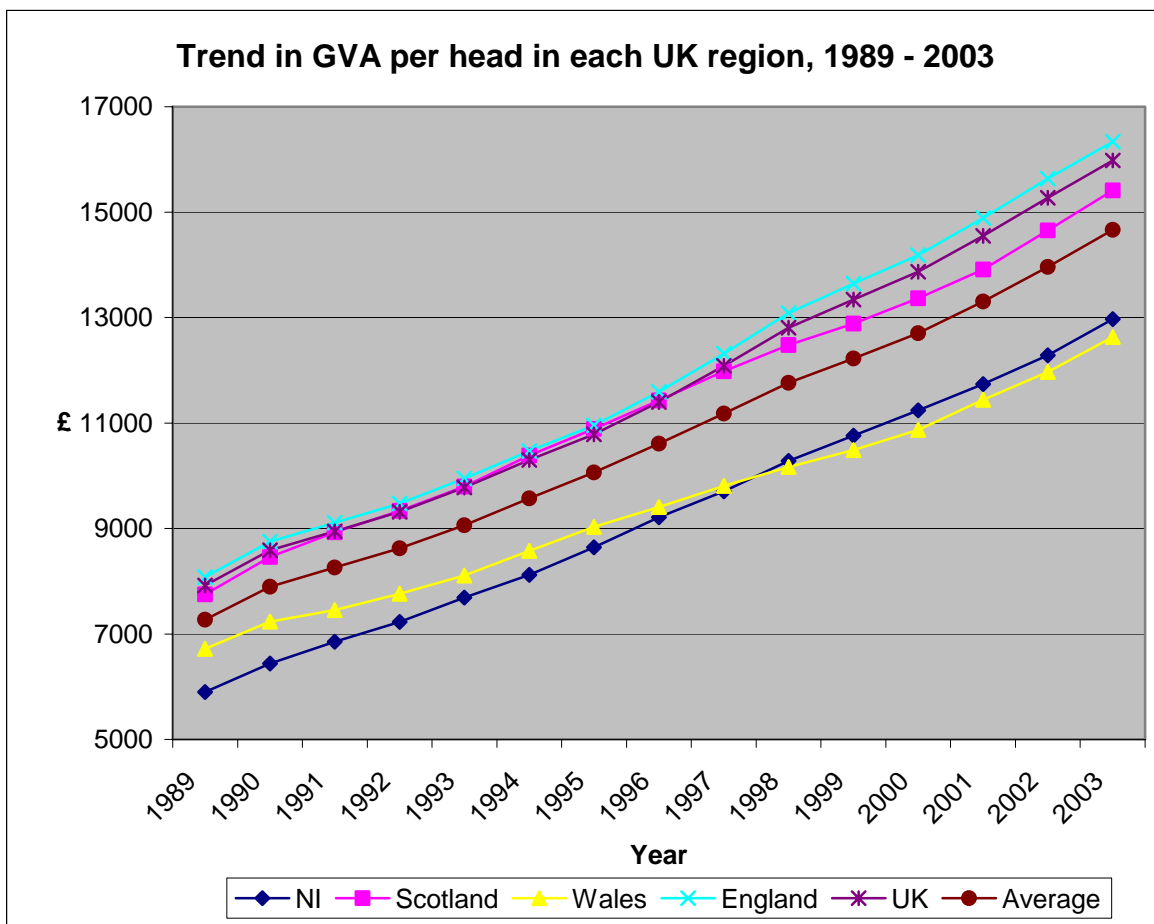
	NI	Scotland	Wales	England	UK
GVA per head (2003)(£)	12,971	15,409	12,629	16,339	15,980
Population ('000) (2003)	1,703	5,057	2,938	49,856	59,554
Area (sq km)	13,576	77,925	20,732	130,281	242,514
Population Density (per sq. km.)	125	65	142	383	246
Bank Base interest rate (% May 2005)					4.75
RPI (% change May 2004 - May 2005)					3.2
Unemployment rate (%) (winter 2004/05)	4.7	5.4	4.2	4.6	4.7

Note: Unemployment rates are unadjusted and taken from the Labour Force Survey (LFS).

GVA - Gross Value Added (at basic prices)

RPI - Retail Price Index

Figure 1 - Trend in GVA per head in each UK region, 1989 - 2003



Note: GVA is in basic prices

Table 2: Agriculture: general data, 2004

	NI	Scot	Wales	Eng	UK	ROI
Share of total GVA (%) (2004)	2.2	1.3 ⁴	1.1 ⁴	0.7 ⁴	0.8	2.7
No. employed in agriculture, forestry & fishing 2004 ('000) ¹	33	38	32	284	387	113 ²
Share of employment 2004 (%)	4.5	1.6	2.4	1.2	1.4	5.9 ²
Number of farms ('000) June 2004	27.6	51	35.5	193	307	137 ³
Average farm size (ha) June 2004	38.5	109.6 ⁴	41	53	56.5 ⁴	32 ³
LFA % agricultural area June 2004	70	84 ⁴	79 ⁴	15	42 ³	63

Note: 1. Source for UK employment data - Labour force survey (winter 2004/05)

2. ROI National Household Survey, Quarter 4, 2004

3. 2002

4. 2003

Table 3: Agriculture in NI: structural adjustment, 1984, 1994 and 2002-2004

	1984	1994	2002	2003	2004
Number of farms	38,868	33,645	28,513	28,281	27,614
Average farm size (ha)	27.89	31.85	37.43	37.97	38.49
Total farmers and workers	63,124	59,607	54,273	54,486	53,332

Table 4: Agri - food sector GVA and employment

	NI		UK	
	£m	% of GVA	£m	% of GVA
Gross value added ¹				
Agriculture (2004)	516	2.2	7,905	0.8
Food processing (2002)	456	2.4	19,966	2.2
Employment	000 persons	% of total employment	000 persons	% of total employment
Agriculture, forestry and fishing	33 ³	4.5 ³	387	1.4
Food processing (2003 prov. figures)	19.3 ²	2.7 ²	368 ³	1.3 ³
Input supply (2003 prov. figures) to agriculture	4.2	0.6	n.a.	n.a.

1. GVA figures are at basic prices

2. 2003 figures. % of total LFS employment (726,000 in NI at winter 2003/04).

3. 2003 figures. % of total LFS employment (742,000 in NI at winter 2004/05).

Table 5: NI food processing sector - gross turnover, value added and employment by subsector, 2003 (provisional figures)

Subsector	Gross turnover	Value added		Employees
		(2002)		
	£m	£m	Full-time equivalents	
Animal by-products	25	8		265
Bakeries	170	61		3,520
Beef and sheepmeat	540	73		2,810
Drinks	300	75		1,660
Eggs	35	4		215
Fish	80	20		1,000
Fruit and vegetables	150	32		1,615
Milk and milk products	555	76		2,310
Pigmeat	165	29		1,515
Poultrymeat	345	78		4,385
Total	2,365	456		19,295

Figure 2 - Gross turnover and full time equivalent (FTE) workforce by subsector, NI, 2003

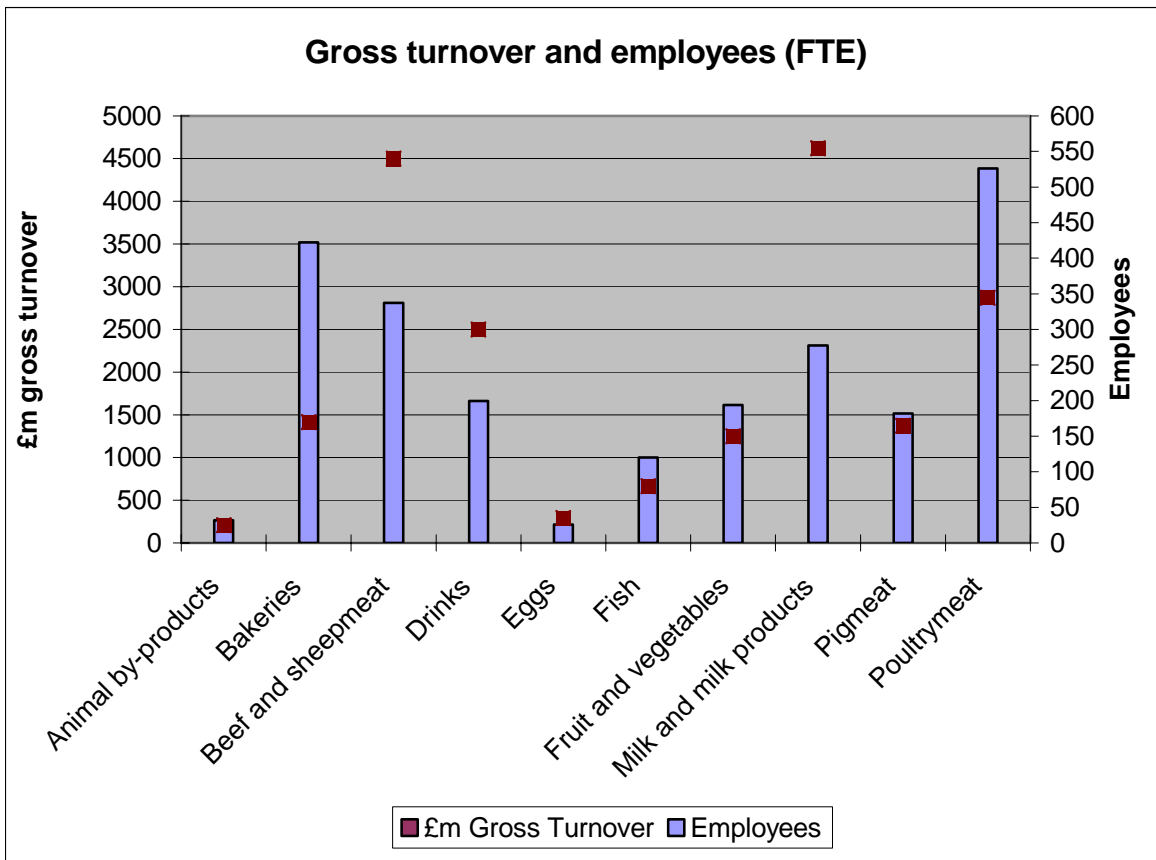


Figure 3 - Proportion of gross turnover by subsector, NI (Provisional 2003)

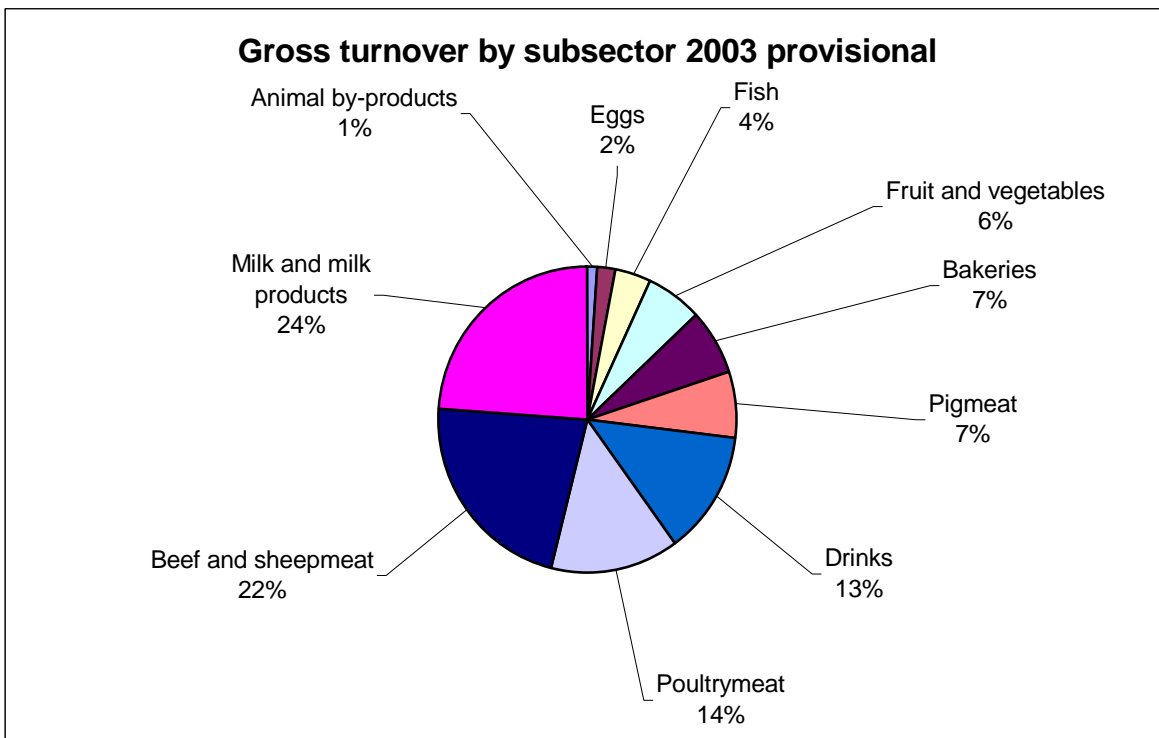


Table 6: Distribution of farm outputs in NI and share of UK totals, 2004

	% of NI total		NI output as % of UK output	
	Gross output	Gross Margin	On farm employment	
Enterprise	%	%	%	
Dairy	27.0	40.7	23	12.7
Cattle	31.4	35.3	52	17.9
Sheep & wool	5.0	5.3	12	6.4
Pigs	5.1	3.3	}	4
Poultry & eggs	12.2	3.3		9.5
Cereals & oilseed rape	2.2	3.7	}	1.0
Potatoes	1.7	2.4		9
Horticulture	4.8	5.9		3.0
Others	10.6	0.1		4.5
Total	100.0	100.0	100	7.6

Table 7: Total income from farming, NI and UK, 2004

	NI	UK
Total income from farming (£)	£173m	£3,014m
% change on previous year :		
Current prices	7%	-5%
Real terms	4%	-8%

Table 8: Average income ¹ by type of farm, NI, 2002/03 and 2003/04

	Net farm income (£'000) ²		Cash income (£'000) ³	
	2002/03	2003/04	2002/03	2003/04
Type of farm:				
Cereals	-4,183	8,251	4,876	22,434
General cropping	-17,538	12,166	15,733	38,267
Pigs and poultry	-3,566	6,571	6,590	11,486
Dairy	6,227	14,578	26,265	34,081
Cattle & sheep (LFA)	4,671	4,891	13,754	14,786
Cattle & sheep (Lowland)	-1,897	477	9,066	12,217
Mixed	4,442	6,003	28,826	24,595

Source: Farm Business Survey in Northern Ireland 2003/04

1. Based on information gathered from farms over 8 esu's

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

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

Table 9: Net farm and cash income for dairy, LFA cattle & sheep and mixed farms throughout the UK, 2002/03 and 2003/04

	Dairy		LFA Cattle & Sheep		Mixed	
	2002/03	2003/04	2002/03	2003/04	2002/03	2003/04
Net farm income						
(£'000 per farm)						
England	16,449	25,089	17,724	14,902	11,356	25,091
Wales	18,200	18,100	13,400	15,900	14,000	15,800
Scotland	8,762	23,507	13,994	20,912	9,150	20,290
NI	6,227	14,578	4,671	4,891	4,442	6,003
Cash income						
(£'000 per farm)						
England	31,304	43,267	23,539	25,865	25,477	45,967
Wales	30,200	34,500	20,400	33,200	22,200	32,500
Scotland	45,671	55,136	28,762	32,722	28,606	32,752
NI	26,265	34,081	13,754	14,786	28,826	24,595

Source: Farm Business Survey 2002/03 and 2003/04

Table 10: Number of farms in the UK by size & country - June 2004

	Business size ¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms ('000s)					
NI	20,758	3,984	1,584	1,288	27,614
England	143,336	22,478	11,403	15,607	192,824
Scotland	39,363	4,187	2,513	4,736	50,799
Wales	25,229	4,049	2,553	4,024	35,855
Total	228,686	34,698	18,053	25,655	307,092

¹ Based on Standard Labour Requirements (SLR)

Table 11: Percentage distribution of farms in the UK by size & country - June 2004

	Business size ¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms (%)					
NI	75.2	14.4	5.7	4.7	100.0
England	74.3	11.7	5.9	8.1	100.0
Scotland	77.5	8.2	5.0	9.3	100.0
Wales	70.4	11.3	7.1	11.2	100.0
Total	74.5	11.3	5.9	8.3	100.0

¹ Based on Standard Labour Requirements (SLR)

Table 12: Number of farms in NI by size and type - June 2004

Business type	Business size (SLR)					All sizes
	Very small	Small	Medium	Large		
Cereals	404	42	12	9		467
General cropping	183	59	34	38		314
Horticulture	138	64	40	70		312
Pigs and poultry	288	134	57	78		557
Dairy	1,003	1,553	873	772		4,201
Cattle and sheep (LFA)	13,648	1,376	302	138		15,464
Cattle and sheep (Lowland)	3,956	474	100	35		4,565
Mixed	613	224	95	102		1,034
Others	525	58	71	46		700
All types	20,758	3,984	1,584	1,288		27,614

Source: June 2004 agricultural census

Table 13: Crop areas and livestock numbers, NI, 1984, 1994 and 2002 - 2004

	1984	1994	2002	2003	2004
Livestock ('000 head)					
Cattle					
Dairy cows	298.5	274.2	297.9	290.1	288.3
Beef cows	222.2	308.7	307.0	295.4	296.2
Total cattle	1,624.6	1,687.5	1,684.5	1,685.3	1,677.6
Sheep					
Breeding ewes	830.4	1,382.1	1,128.6	1,105.6	1,100.5
Total sheep	1,632.8	2,820.9	2,324.2	2,241.1	2,225.4
Pigs					
Female Breeding pigs	76.2	69.8	39.3	42.9	37.8
Total pigs	715.6	653.4	387.7	433.7	424.1
Poultry					
Laying flock	3,548.6	3,309.7	2,099.4	2,203.2	2,266.1
Broilers	5,857.0	8,082.0	11,273.3	12,811.4	15,006.9
Crops ('000 hectares)					
Cereals	52.9	43.8	38.1	37.8	38.3
Potatoes	14.1	8.7	6.7	6.0	5.7
Horticultural crops	3.5	3.3	3.2	3.2	3.1

Source: June Agricultural Census

Figure 4 - Trend in dairy and beef cow numbers, NI, 1990 - 2004

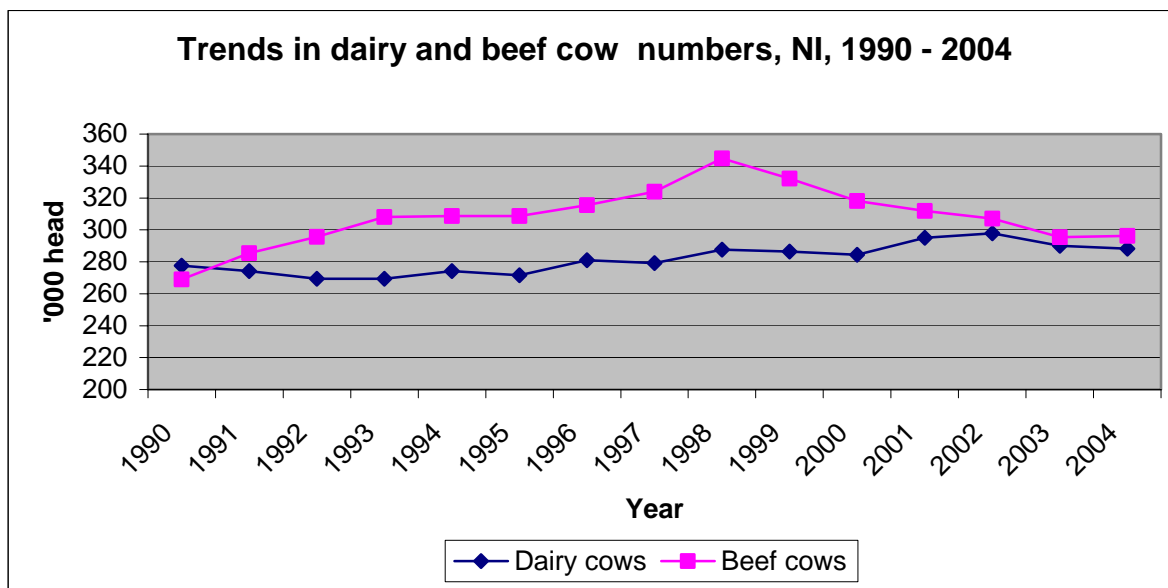


Table 14: Average size of enterprise, NI, 1984, 1994 and 2002 - 2004

	1984	1994	2002	2003	2004
Average livestock numbers (per herd/flock)					
Dairy cows	36.8	44.2	60.4	61.2	63.0
Beef cows	11.3	16.7	19.3	18.7	19.1
Total cattle	47.0	59.1	69.1	69.3	70.6
Ewes	82.2	111.1	120.7	126.3	126.0
Total sheep	153.4	219.1	245.7	252.4	250.9
Sows	13.3	29.1	77.6	90.8	94.3
Total pigs	116.9	251.9	652.7	794.3	878.0
Total poultry (farms with more than 500 birds)	18,957	22,851	29,112	29,491	33,460
Average cropping areas (ha)					
Cereals	6.5	9.4	11.1	11.0	11.5
Potatoes	2.3	4.4	6.7	6.2	6.2

Source: June Agricultural Census

Figure 5 - Average size of selected livestock enterprises, NI, 1990 - 2004

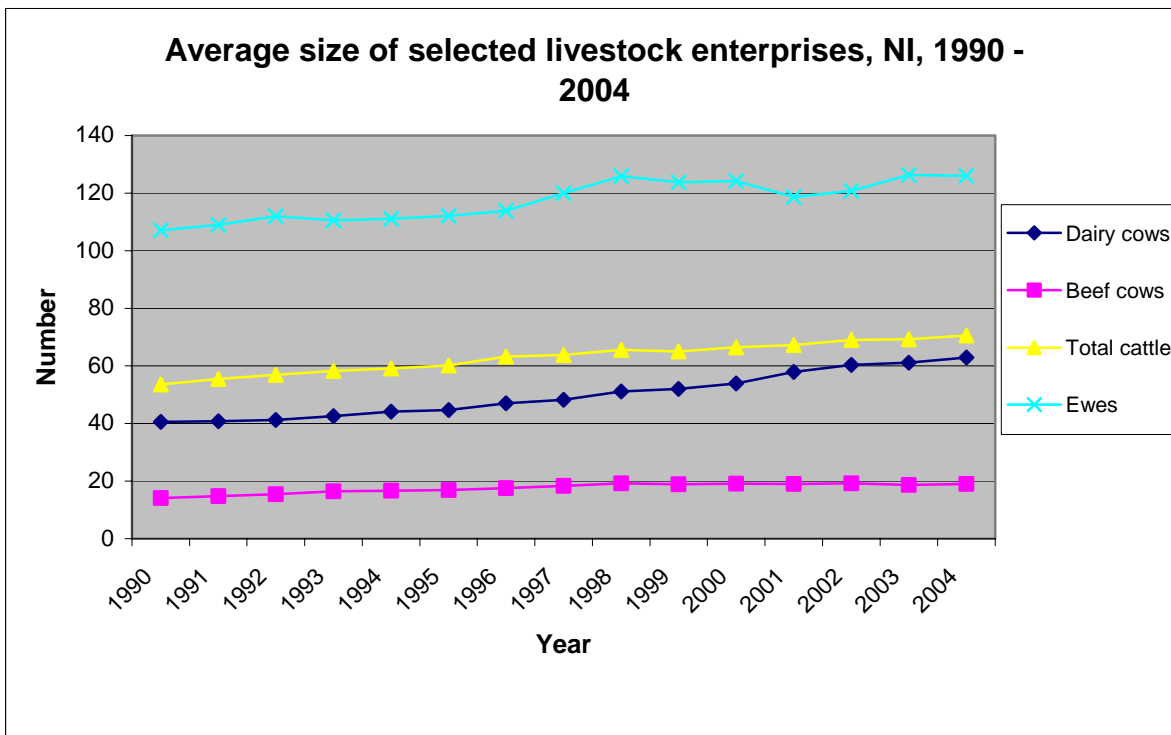


Table 15: Liveweight and estimated value of recorded landings of fish into NI, 1999 - 2002

	1999		2000		2001		2002	
	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)
Total wet fish	16,934	10,483	15,762	7,862	16,916	8,937	12,977	8,491
Total shell fish	7,499	12,118	7,881	9,990	7,120	10,381	7,164	9,706
Total fish	24,433	22,601	23,644	17,852	24,036	19,318	20,141	18,197

Source: Fisheries division, DARD

Figure 6 - Estimated value of recorded landings of fish into NI 1999 - 2002

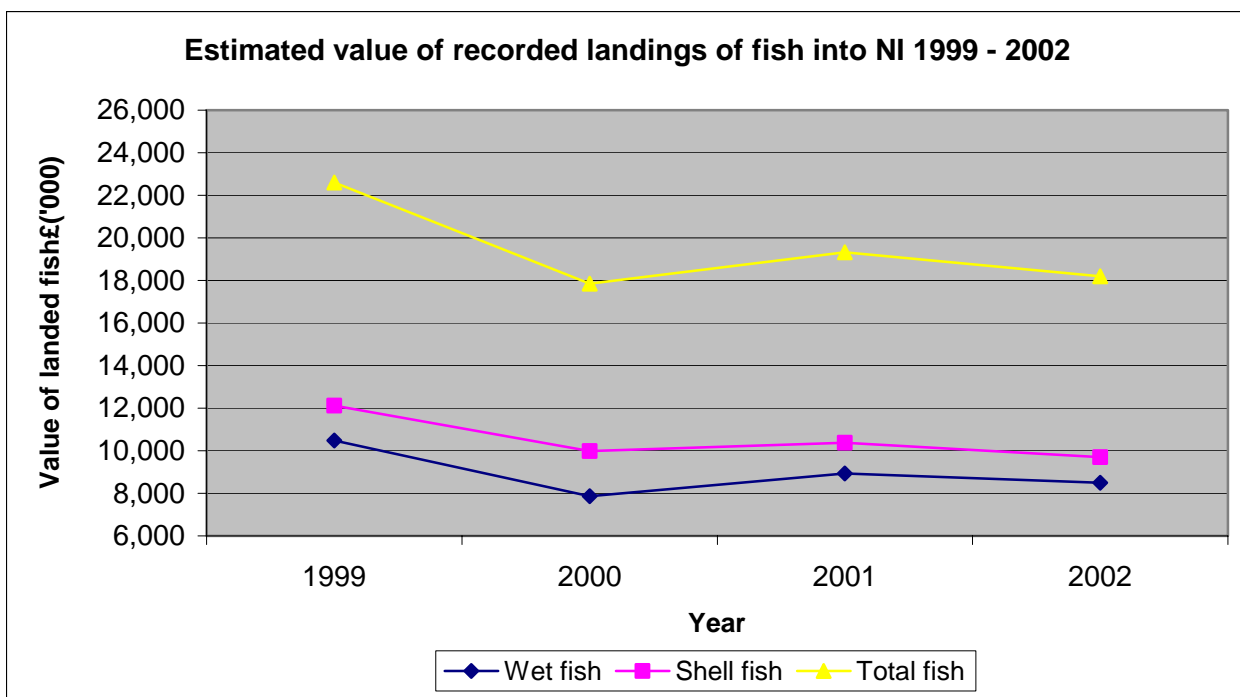


Table 16: Employment in NI fishing industry 2002 - 2004

	2002		2003		2004	
	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time
Catching	568	43	458	40	535	84
Processing and marketing	701	211	720	159	762	120
Others	200	40	147	29	136	23
Total	1,469	294	1,325	228	1433	227

Source: Fisheries division, DARD

Table 17: Area of woodland throughout the U.K. by forest type, 2004

	(thousands of hectares)			% of total land area ¹ in forestry
	Conifers	Broadleaves	Total	
United Kingdom	1,651	1,166	2,817	16.4%
England	370	745	1,115	12.3%
Scotland	1,051	280	1,330	24.0%
Wales	162	123	286	19.7%
Northern Ireland	68	18	86	8.1%

Source: NI Forest Service

¹ Total land area used in calculation is area from June census, 2003

Table 18: Estimates of average household food and drink consumption and expenditure, NI, 2002/03

Expenditure and Food Survey^(a)		April 2002 to March 2003	
HOUSEHOLD FOOD AND DRINK CONSUMPTION AND EXPENDITURE		Grams per person per week, except where otherwise specified.	Pence per person per week
Milk and cream	(ml or eq.ml)	2,107	152
Cheese		70	39
Fats		179	36
Eggs	(number)	2	16
Carcase meat		246	129
of which,	beef and veal	174	94
	mutton and lamb	20	11
	pork	52	24
Other meat and meat products		785	398
of which,	poultry (primary)	237	96
Fish		105	63
Fresh potatoes		1,059	47
Fresh green vegetables		114	20
of which,	cabbages	29	3
	cauliflowers	39	5
	leafy salads	29	9
Other fresh vegetables		342	53
of which,	carrots	81	6
	onions, leeks, shallots	79	10
	tomatoes	61	12
Processed vegetables		600	133
of which,	processed potatoes	269	83
Fresh fruit		538	78
of which,	apples	144	19
	bananas	145	15
Processed fruit and nuts (inc. fruit juices)		348	39
Sugar and preserves		115	14
Bread		836	102
Cakes and biscuits		356	123
Flour		22	1
Other cereals or cereal products		450	154
Beverages	(ml)	46	33
Ice cream and ice cream products		134	18
Other food			103
Soft drinks^(b)	(ml)	1,681	86
Alcoholic drinks	(ml)	500	203
Confectionery		135	76
TOTAL HOUSEHOLD EXPENDITURE			
Expenditure on food and beverages			£20.95
Expenditure on soft and alcoholic drinks and confectionery			£3.65

(a) Consumption includes purchases plus 'free' supplies.

Source: Expenditure and Food Survey, DARD

(b) Quantity converted to unconcentrated equivalent.

Sources of more detailed information

(1) Agricultural census in N.I.- DARD website -
<https://www.dardni.gov.uk/econs/spub0010.htm>

(2) Fisheries Statistics - DARD website -
<https://www.dardni.gov.uk/econs/econ0021.htm>

(3) Statistical review of N.I. Agriculture - DARD website -
<https://www.dardni.gov.uk/econs/spub0011.htm>

(4) Farm incomes in N.I. - DARD website -
<https://www.dardni.gov.uk/econs/spub0012.htm>

(5) Forestry Statistics - DARD website -
<https://www.dardni.gov.uk/frames/forest06.htm>

(6) Agriculture in the U.K. - DEFRA website -
<http://statistics.defra.gov.uk/esg/publications/auk/default.asp>

(7) Food consumption and expenditure - DARD website -
<http://www.dardni.gov.uk/econs/econ0035.htm>

(8) Size and performance of the Northern Ireland food and drinks processing sector -DARD website -
<http://www.dardni.gov.uk/econs/spub0013.htm>

(9) R.O.I. Agricultural data
<http://www.cso.ie/statistics/AgricultureandFishing.htm>