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POLICY AND ECONOMICS DIVISION

Northern Ireland Agri-Food Sector

Key Statistics June 2013



Agriculture, Fishing & Forestry



**Northern Ireland Agri-Food Sector
Key Statistics
June 2013**

**Key Facts on
Agriculture,
Fishing,
and Forestry**

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DARD**

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Table 1: General economic data

	NI	Scotland	Wales	England	UK	EU 27
GVA per head (£, 2011)	16,531	20,571	15,696	21,349	21,368	N/A
Population ('000, 2011)	1,811	5,295	3,063	53,012	63,182	502,369
Area (sq. km, 2011)	13,562	77,933	20,735	130,278	242,509	4,454,237 ¹
Population Density (per sq. km, 2011)	134	68	148	407	261	113
Bank Base interest rate (% , June 2013)					0.5	
RPI (% change, April 2012 - April 2013)					2.9	
Unemployment rate (% , Quarter 1 2013)	8.0	7.2	8.1	7.8	7.8	10.9

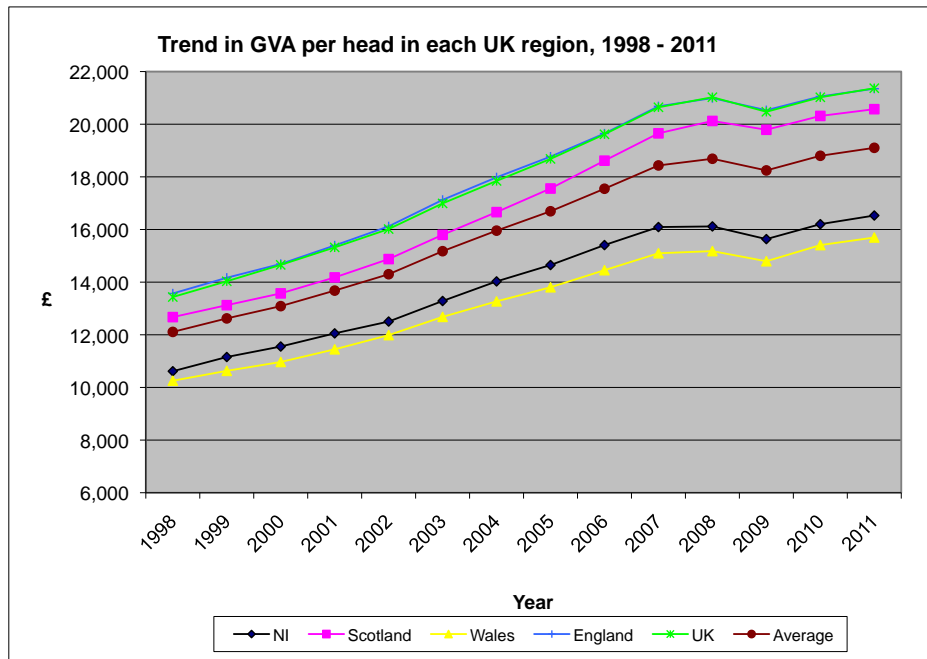
Unemployment rates are not seasonally adjusted and taken from the Labour Force Survey (LFS). EU27 figure from Eurostat, January 2013.

GVA - Gross Value Added (at basic prices)

RPI - Retail Price Index

1. 2009 data

Figure 1 - Trend in GVA per head in each UK region, 1998 - 2011



Note: GVA is in basic prices

Figure 2 - Population per 100 ha of Utilised Agricultural Area (UAA), 2011

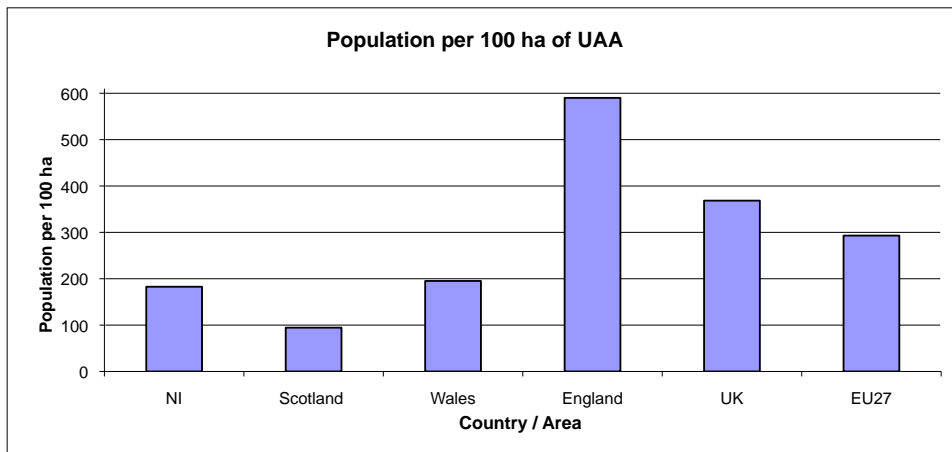


Table 2: Agriculture: general data, 2012

	NI	Scot	Wales	Eng	UK	ROI	EU27
Share of total GVA (%)	1.1	0.8 ¹	0.6 ¹	0.6 ¹	0.7 ¹	2.7 ¹	1.7
No. employed in agriculture forestry & fishing ('000)	28	40	25	210	303	90 ⁴	10,024 ²
Share of employment (%)	3.5	1.6	1.9	0.8	1.0	4.9 ⁴	4.7 ²
Number of farms ('000)	24	53	41	104	222	140 ²	13,700 ³
Average farm size (Ha)	41	118	38	87	77	33 ²	13 ³
LFA (% Agricultural area)	70	86	81	16	49	75 ³	51 ³

1. 2011, 2. 2010, 3. 2007

4. CSO Quarterly National Household Survey, 4th quarter, 2012

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

Source for UK employment data (SIC 2007, main job) - Labour force survey (Quarter 1, 2013)

Table 3: Agriculture in NI: structural adjustment, 1992, 2002 and 2010-2012

	1992	2002	2010	2011	2012
Number of farms	34,464	28,513	24,471	24,436	24,285
Average farm size (Ha)		31.1	37.4	40.6	40.8
Total farmers and workers	59,129	54,273	46,948	46,848	47,464

Table 4: Agri - food sector GVA and employment, 2012

	NI		UK	
	£m	% of GVA	£m	% of GVA
Gross value added¹				
Agriculture	321	1.1	8,605	0.7
Food and drink processing	692 ²	2.4 ²	23,591 ³	1.8 ³
Employment	'000 persons	% of total employment	'000 persons	% of total employment
Agriculture, forestry and fishing	28 ⁴	3.5 ⁴	303 ⁵	1.0 ⁵
Food and drink processing ⁶	21 ⁴	2.7 ⁴	361 ⁵	1.2 ⁵

1. GVA figures are at basic prices

2. DARD Size and Performance of the NI Food and Drinks Processing Sector, Subsector Statistics, 2011 Provisional estimate. This includes an estimate of the value added of those food and drinks processing businesses with a turnover of less than £250,000.

3. UK 2010 figures

4. % of total LFS employment (803,000 in NI at Q1, 2013)

5. % of total LFS employment (29,756,000 in UK at Q1 2013).

6. SIC 2007 10.11 - 11.07 (includes animal feed)

Table 5: Distribution of farm outputs in NI and share of UK totals, 2012

Enterprise	% of NI total		NI output as % of UK output	
	Gross output	Gross Margin	On farm employment	
	%	%	%	%
Dairy	29.7	52.3	20	13.6
Cattle	23.8	15.5	53	14.7
Sheep & wool	3.5	2.8	14	5.8
Pigs	6.8	3.4	} 4	10.3
Poultry & eggs	17.8	9.3		
Cereals & oilseed rape	3.0	5.6	} 9	1.0
Potatoes	1.0	1.6		
Horticulture	3.4	6.0		
Others	11.0	3.6		5.0
Total	100.0	100.0	100	7.2

Source: Aggregate Agricultural Account. Employment data from June 2012 Agricultural Survey.

Table 6: NI food and drink processing sector - gross turnover, value added, employment by subsector, external and export sales, (Provisional 2011)

Subsector	Gross turnover	Value added	Employees ¹	External ² Sales	Export Sales ³
	£m	£m		£m	£m
Animal by-products	24	9	113	22	4
Bakeries	261	89	3,396	105	61
Beef and sheepmeat	1,031	125	3,915	803	207
Drinks	350	78	1,188	207	184
Eggs	92	14	256	57	16
Fish	71	15	529	56	30
Fruit and vegetables	239	60	2,016	140	56
Milk and milk products	987	112	2,068	700	391
Pigmeat	249	37	1,227	152	49
Poultrymeat	691	144	5,240	564	140
Total	3,994	683	19,945	2,805	1,137

1. Full - time equivalents This may be an underestimation of total employment in the sector, as some workers provided by employment agencies may not be recorded in these figures. This issue is being investigated and where available, further details will be presented in the July 2013 DARD Size and Performance publication.

2. Sales outside NI.

3. Sales outside UK.

Source: DARD Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics, 2011 provisional estimates. These figures exclude an estimate of those food and drinks processing businesses with a turnover of less than £250,000. Provisional estimates for 2011 have been estimated by adjusting the 2010 baseline largely on the basis of information available within DARD. Provisional estimates for 2011 will be updated in the next version of the publication 'Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics', which will be published in July 2013.

Figure 3 - Gross turnover and full time equivalent (FTE) workforce by food processing subsector, NI (Provisional 2011)

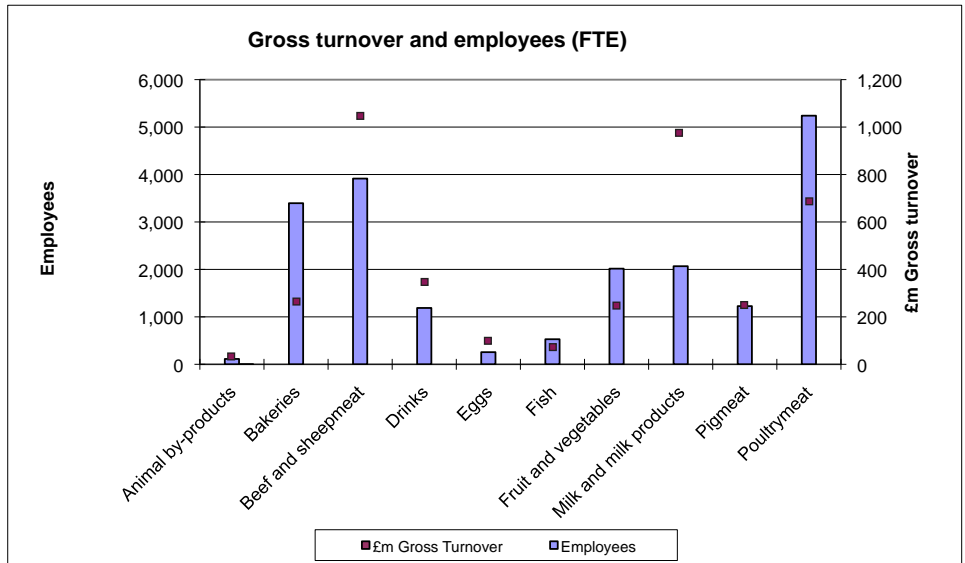


Figure 4 - Proportion of gross turnover by subsector, NI (Provisional 2011)

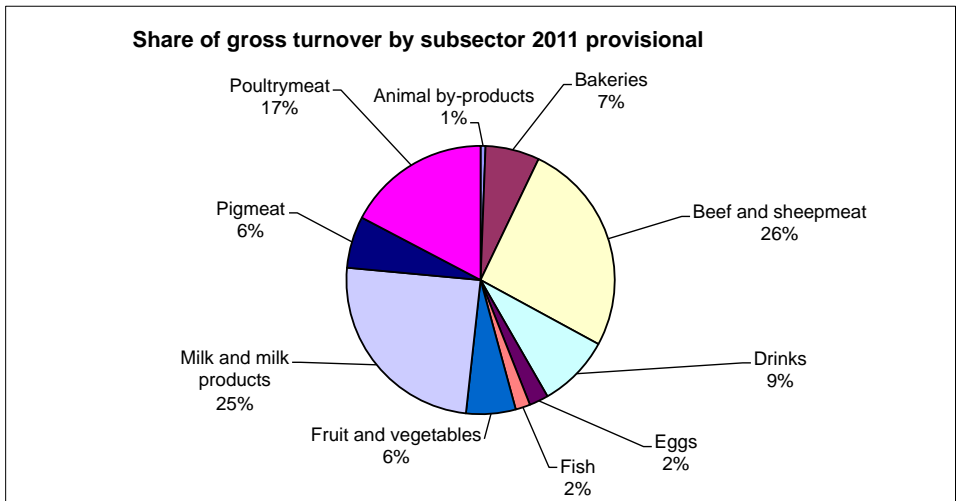


Figure 5 - Proportion of employee jobs by Industry section, December 2012

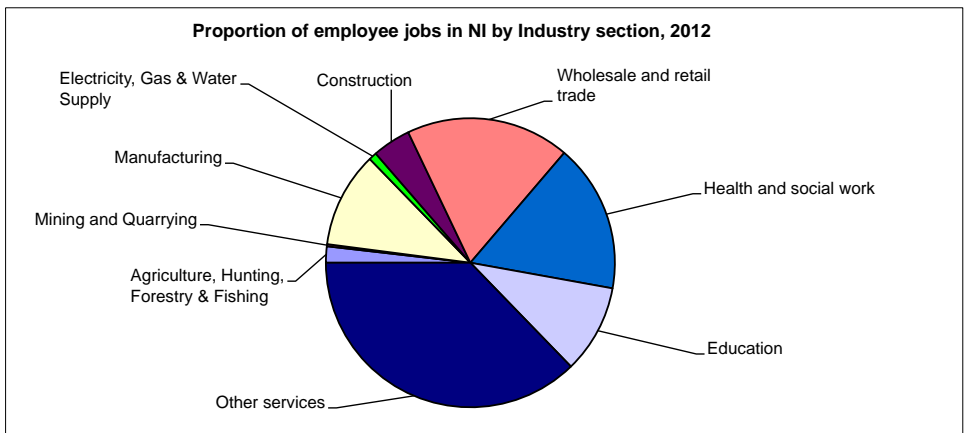


Table 7: Total income from farming, NI and UK, 2012

	NI	UK
Total income from farming (£)	£143m	£4,704m
% change on previous year :		
Current prices	-51%	-11%
Real terms	-52%	-14%

Source: Aggregate Agricultural Account.

Note: For an explanation of the change in TIFF in NI and UK see Chapter 1 of the Statistical Review of NI Agriculture 2012 and UK TIFF Press Release 31/01/13.

Table 8: Average income¹ by type of farm, NI, 2010/11 and 2011/12

Type of farm:	Net farm income ²		Farm Business Income ³		Cash income ⁴	
	2010/11	2011/12	2010/11	2011/12	2010/11	2011/12
Cereals	30,077	18,091	38,540	26,856	65,686	47,588
Dairy	50,166	55,364	52,971	58,124	78,401	82,500
Cattle & sheep (LFA)	9,743	14,462	18,668	23,091	27,959	30,630
Cattle & sheep (Lowland)	832	9,944	9,457	18,762	17,896	27,264
Mixed	28,069	39,185	40,676	52,301	59,044	72,924

Source: Farm Business Survey in Northern Ireland 2010/11 and 2011/12

1. Based on information gathered from farms over 0.5 Standard Labour Requirements
2. The calculation of net farm income assumes that all farms are tenanted: net farm income therefore represents the return to the principal farmer and spouse for their manual and managerial labour and on the tenant-style capital of the business.
3. Farm Business income is the return to all unpaid labour and to their capital invested (inc land and buildings) in the business
4. Cash income is the difference between total receipts and total expenditure.

Note: Farm typing methodology has changed from 2011 and is now based on Standard Outputs. Further information can be found in the farm income publication. www.dardni.gov.uk/statistical-reports

Table 9: Net farm Income, Farm Business Income and Cash Income for dairy, LFA cattle & sheep, and mixed farms throughout the UK, 2010/11 and 2011/12

	Dairy		LFA Cattle & Sheep		Mixed	
	2010/11	2011/12	2010/11	2011/12	2010/11	2011/12
Net farm income						
England	49,500	69,800	13,300	21,300	37,300	50,700
Wales	44,554	54,335	18,567	23,832	-	-
Scotland	58,958	73,611	33,389	36,099	34,107	36,386
NI	50,166	55,364	9,743	14,462	28,069	39,185
Farm Business Income						
England	66,200	86,700	21,300	29,200	50,900	66,200
Wales	56,826	66,121	29,836	34,644	-	-
Scotland	72,554	80,205	41,833	45,159	47,381	47,948
NI	52,971	58,124	18,668	23,091	40,676	52,301
Cash income						
England	91,300	105,700	31,300	34,400	68,800	72,000
Wales	72,168	83,879	38,238	41,554	-	-
Scotland	75,754	94,012	46,273	54,972	54,998	63,580
NI	78,401	82,500	27,959	30,630	59,044	72,924

Source: Farm Business Survey 2010/11 and 2011/12

Note: Scotland define farm types using Standard Gross Margin co-efficients. Other regions define farm types using Standard Outputs values.

Table 10: Number of farms in the UK by size & country - June 2012

	Business size (SLR)				Total
	Very small	Small	Medium	Large / Very Large	
Farms					
NI	18,441	3,076	1,210	1,558	24,285
England ²	64,556	16,239	8,569	16,085	105,449
Scotland	42,820	3,402	2,025	4,378	52,625
Wales ³	25,334	3,580	2,108	3,384	34,406
Total	151,151	26,297	13,912	25,405	216,765

1. Standard Labour Requirements

2. 2010 figures which relate to commercial holdings only as defined by EU regulation.

3. Excludes holdings with a SLR of zero

Table 11: Percentage distribution of farms in the UK by size & country - June 2012

	Business size (SLR)				Total
	Very small	Small	Medium	Large / Very Large	
Farms (%)					
NI	76	13	5	6	100
England	61	15	8	15	100
Scotland	81	6	4	8	100
Wales	74	10	6	10	100
Total	70	12	6	12	100

Table 12: Number of farms in NI by size and type - June 2012

Business type	Business size (SLR)				All sizes
	Very small	Small	Medium	Large	
Cereals	229	49	7	7	292
General cropping	278	34	29	44	385
Horticulture	117	48	37	84	286
Pigs	55	33	26	62	176
Poultry	224	194	75	78	571
Dairy	327	785	578	972	2,662
Cattle and sheep (LFA)	12,623	1,224	247	127	14,221
Cattle and sheep (Lowland)	3,850	528	114	73	4,565
Mixed	366	116	63	90	635
Others	372	65	34	21	492
All types	18,441	3,076	1,210	1,558	24,285

Source: June 2012 Agricultural Survey

Note: Farm Business type methodology has changed from 2011 and is now based on Standard Outputs. Further information can be found in the Census publication. www.dardni.gov.uk/statistical-reports

Table 13: Crop areas and livestock numbers, NI, 1992, 2002 and 2010 - 2012

	1992	2002	2010	2011	2012
Livestock ('000 head)					
Cattle					
Dairy cows	269.4	297.9	281.0	282.5	285.4
Beef cows	295.7	307.0	257.6	269.5	279.2
Total cattle	1,681.5	1,684.5	1,604.4	1,590.5	1,625.4
Sheep					
Breeding ewes	1,428.3	1,128.6	875.9	895.2	937.5
Total sheep	2,961.0	2,324.2	1,847.7	1,887.6	1,968.9
Pigs					
Female Breeding pigs	71.2	39.3	38.5	38.0	38.3
Total pigs	683.3	387.7	424.6	425.3	426.9
Poultry					
Laying flock	3,243.5	2,099.4	2,099.4	2,429.7	2,556.7
Broilers	7,414.0	11,273.3	11,915.1	14,069.4	13,459.4
Crops ('000 hectares)					
Cereals	47.8	38.1	37.8	37.9	37.1
Potatoes	11.1	6.7	4.9	4.8	4.2
Horticultural crops	3.6	3.2	2.9	3.0	2.9

Source: June Agricultural Survey

Notes: From 2005 onwards, cattle figures were derived from APHIS

From 2007 onwards, poultry figures were taken from the Northern Ireland Bird Register Update.

Figure 6 - Trend in dairy and beef cow numbers, NI, 1997 - 2012

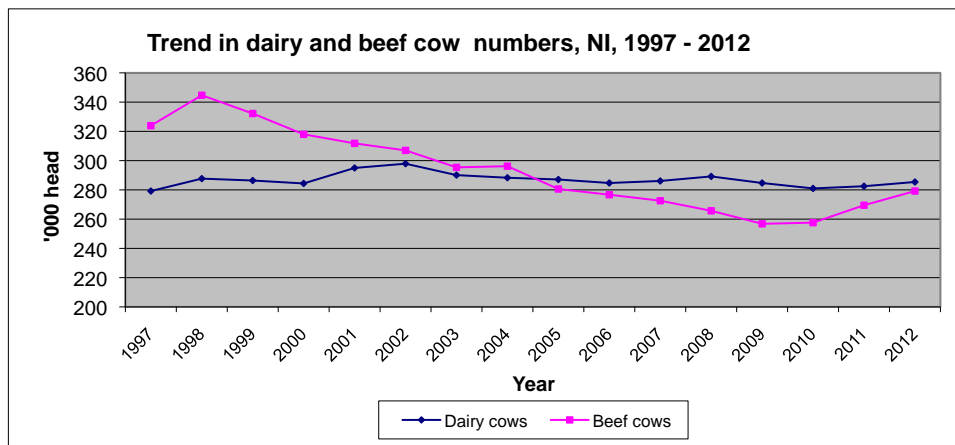


Table 14: Average size of enterprise, NI, 1992, 2002 and 2010 - 2012

	1992	2002	2010	2011	2012
Average livestock numbers (per herd/flock)					
Dairy cows	41	60	77	80	81
Beef cows	15	19	17	18	18
Total cattle	57	69	79	78	80
Ewes	112	121	105	106	109
Total sheep	221	246	216	218	224
Sows	25	78	92	90	91
Total pigs	219	653	757	750	781
Total poultry (farms with more than 500 birds)	21,557	29,112	29,829	28,928	28,207
Average cropping areas (ha)					
Cereals	9	11	13	13	14
Potatoes	4	7	7	7	7

Source: June Agricultural Survey

Notes: From 2005 onwards, cattle figures were derived from APHIS

From 2007 onwards, poultry figures were taken from the Northern Ireland Bird Register Update.

Figure 7 - Average size of selected livestock enterprises, NI, 1997 - 2012

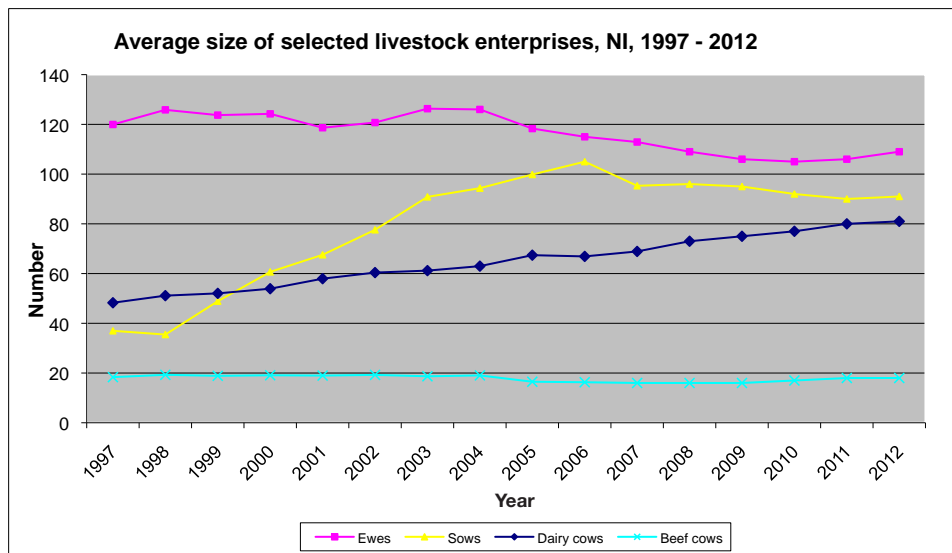


Table 15: Number of farmers and workers, NI, 1992, 2002 and 2010 - 2012

	1992	2002	2010	2011	2012
Farmers, partners & directors:					
Full-time	22,215	19,706	15,965	15,823	15,886
Part-time	14,009	14,826	13,596	13,320	13,171
Total	36,224	34,532	29,561	29,143	29,057
Spouses	3,908	6,201	6,206	6,263	6,293
Other workers					
Full-time	4,598	2,720	3,109	3,249	3,422
Part-time	5,891	2,773	3,187	3,436	3,754
Casual/Seasonal	8,508	8,047	4,885	4,757	4,938
Total other workers	18,997	13,540	11,181	11,442	12,114
Total agricultural labour force	59,129	54,273	46,948	46,848	47,464

Source: June Agricultural Survey

Figure 8 - Full - time labour on NI farms, 1992, 2002 and 2010 - 2012

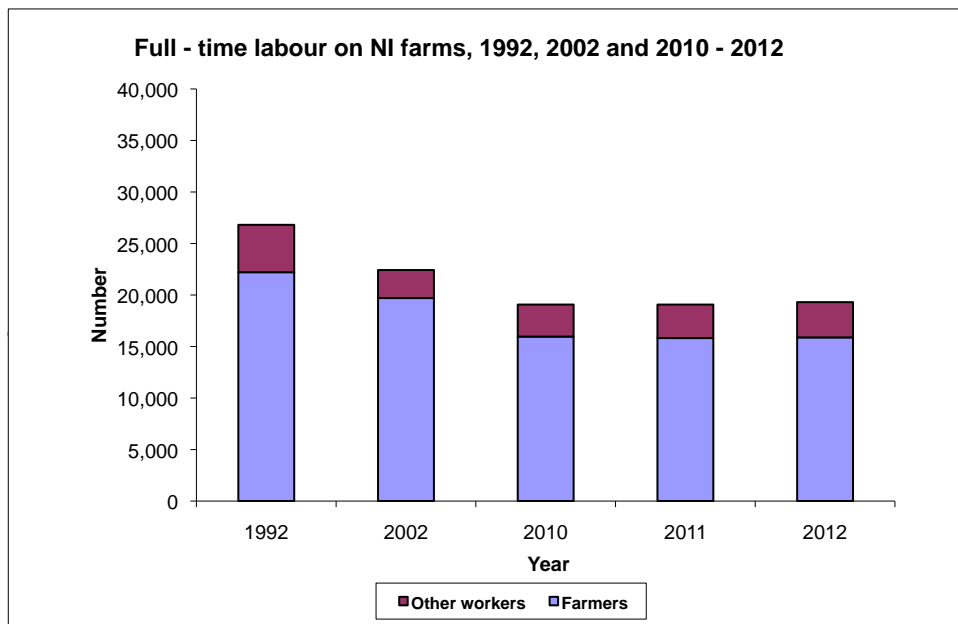


Table 16: Liveweight and estimated value of recorded landings of fish into NI, 2009 - 2012

	2009		2010		2011		2012	
	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)
Total wet fish	10,406	6,426	9,572	5,881	8,663	6,472	10,683	8,259
Total shell fish	9,758	17,025	11,776	14,704	11,950	19,593	12,974	23,550
Total fish	20,164	23,451	21,348	20,585	20,613	26,065	23,657	31,809

Source: Fisheries Division, DARD

Figure 9 - Estimated value of recorded landings of fish into NI, 2003 - 2012

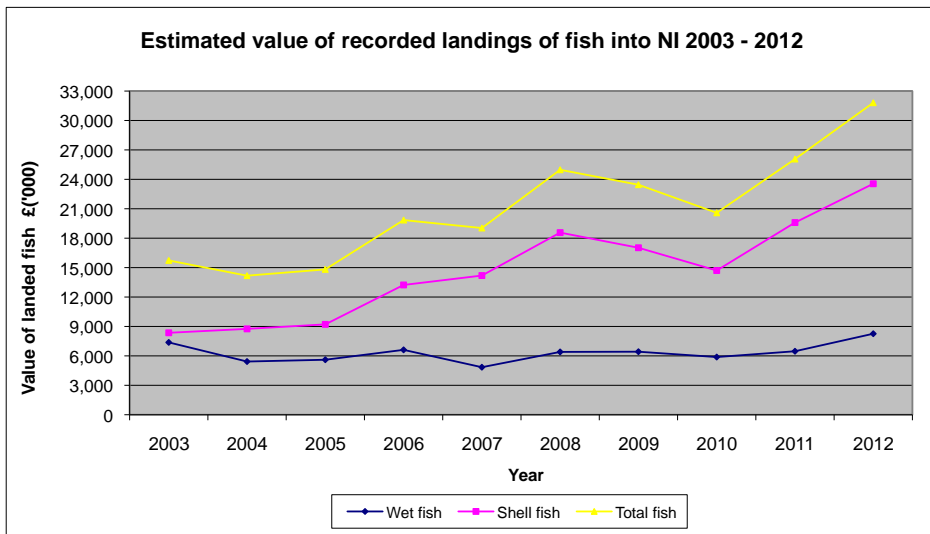


Table 17: Employment in NI fishing industry, 2009 - 2012

	2009		2010		2011		2012	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Catching	541	113	535	113	578	110	654	154
Processing and marketing	485	157	404	121	412	127	445	163
Others	166	39	110	41	110	30	108	32
Total	1,192	309	1,049	275	1,100	267	1,207	349

Source: Fisheries Division, DARD

Table 18: Area of woodland throughout the U.K. by forest type, 2012

	Conifers ('000 HA)	Broadleaves ('000 HA)	Total ('000 HA)	% of total farmed area in forestry
United Kingdom	1,610	1,487	3,097	12.8%
England	334	961	1,295	9.9%
Scotland	1,058	335	1,392	17.9%
Wales	151	153	304	14.7%
Northern Ireland	66	39	105	7.7%

Source: Forestry Commission

Table 19: Number of farms using agricultural contractors in 2010

	Very Small	Small	Med/Large	All
Hay/Silage Making	7,117	6,543	3,127	16,787
Crop Harvesting	380	761	791	1,932
Spreading slurry/fertilisers etc	3,549	4,368	2,340	10,257
Other field work	1,082	1,461	1,070	3,613
Milking	5	58	380	443
Sheep shearing	1,481	1,852	544	3,877
Other livestock work	415	508	255	1,178
Hedge cutting	5,725	5,494	2,686	13,905

Source: EU Farm Structure Survey 2010, NI

Table 20: Percentage of farms using agricultural contractors by business size in 2010

	Very Small	Small	Med/Large	All
Hay/Silage Making	60	76	78	69
Crop Harvesting	3	9	20	8
Spreading slurry/fertilisers etc	30	51	59	42
Other field work	9	17	27	15
Milking	0	1	10	2
Sheep shearing	12	22	14	16
Other livestock work	3	6	6	5
Hedge cutting	48	64	67	57

Source: EU Farm Structure Survey 2010, NI

Table 21: Number of farms using agricultural contractors from 2003-2010

	2003	2005	2007	2010
Hay/Silage Making	19,028	18,849	18,015	16,787
Crop Harvesting	2,398	2,300	1,979	1,932
Spreading slurry/fertilisers etc	11,623	11,004	10,500	10,257
Other field work	4,228	3,953	3,749	3,613
Milking	635	653	599	443
Sheep shearing	4,679	4,551	4,432	3,877
Other livestock work	1,701	1,554	1,474	1,178
Hedge cutting	14,874	14,840	14,705	13,905

Source: EU Farm Structure Survey 2010, NI

Further information

1. Northern Ireland

Department of Agriculture and Rural Development (DARD), www.dardni.gov.uk or DARD library

<http://www.dardni.gov.uk/index/statistics>

Agricultural Census in N.I. 2012 publication (ISBN no. 978-1-84807-366-1)

Statistical Review of N.I. Agriculture 2012 publication (ISBN no. 978-1-84807-365-4)

Size and performance of the N.I. Food and Drinks Processing Sector publication 2010 (ISBN no. 978-1-84807-320-3)

EU Farm Structure Survey 2010 (ISBN no. 978-1-84807-212-1)

Farm Incomes in N.I. publication

Food consumption and expenditure information

Fisheries statistics

Forestry statistics

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Department of Environment, Food and Rural Affairs (DEFRA), www.gov.uk/defra
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